

1016 FAMILY PROGRESS REVIEW OVERVIEW

Work Services Providers will hold Family Progress Reviews (FPR) using form [TA15](#) at each 12-month anniversary of benefits used in an ATAP household. In a two-parent household, the adult who has used the most months of assistance establishes the household months used count. FPRs serve multiple benefits:

1. They help the client make decisions about the future of their case,
2. They reinforce the urgency of the 60-month lifetime limit on ATAP by reminding the client how many months they have used and have remaining on assistance,
3. They review the progress made over the most recent 12 months of assistance,
4. They support decisions to continue with FSSP activities or to move in a new direction to assist the client in closing their ATAP case by exploring new self-sufficiency options,
5. They encourage the client to close their ATAP case as soon as possible to preserve months for future needs.

Note:

Some clients may want to reserve ATAP months for the future, and use options such as Refused Cash ([ATAP Manual Section 780-17](#)). In this case, the FPR is still due at each 12-month increment of TA months used.

The FPR is completed at each 12-month anniversary of assistance. The process may be completed early if the need arises or seems valuable to move past a challenge. If completed within 2 months prior of the due date, it does not need to be repeated at the 12-month cycle.

If the client does not respond to the invitation to complete the FPR, the case manager should complete Sections I and II and document their attempts to bring the client in for the rest of the review. The FPR should be completed at the next appointment even if it is past due.

1016-1 SCHEDULING THE FAMILY PROGRESS REVIEW

The client(s) should be involved in selecting the date and time of their FPR.

- Discuss appointment options with client during FSSP or activity debriefing appointments

1016-1 A TIME LIMIT EXEMPT ALASKA NATIVE VILLAGES

The months in which a family lives in an [Exempt Alaska Native Village](#), do not count towards the household's ATAP 60-month lifetime limit. FPRs must be conducted annually. Follow the schedule below based on the PI's last name:

- A-D will be conducted in January-February

- E-I will be conducted in March-April
- J-M will be conducted in May-June
- N-Q will be conducted in July-August
- R-T will be conducted in September–October
- U-Z will be conducted November - December

FPRs may be conducted a month prior to the schedule listed above in Exempt Native Villages.

1016-5 EVALUATING THE FSSP FOLLOWING THE FPR

If the client is not engaged in work activities, which are consistent with their self-sufficiency goals, case managers use the content of the FPR to work with the client to strategize alternative approaches to successfully exit ATAP. The FSSP will be updated based on FPR Summary and Recommendations within 10 business days unless the FPR indicates that all activities on the current FSSP are valid and timely.

- 1) A new FSSP will be developed if:
 - a. The FSSP is not SMART (WSPM 1008-1),
 - b. The FPR indicated a change in circumstances that require changes to assigned activities,
 - c. The client cannot or will not do the assigned activities, or;
 - d. The FSSP activities have been completed.

- 2) The existing FSSP is continued if:
 - a. The client is making clear progress toward self-sufficiency,
 - b. ATAP closure is expected within the next 2-3 months based on current FSSP activities,
 - c. Changing the FSSP would create new complications for the household, or;
 - d. Maintaining the current FSSP is a temporary situation to resolve a specific element.

Document in CMS CLNOs why it is in the best interest of the client to continue with the existing FSSP or why the changes are being made.

1016-6 USING THE FAMILY PROGRESS REVIEW TO CONDUCT AN EXTENSION REVIEW

Use the TA 15, Family Progress Review for the family's Extension Staffing. See [ATAP MS 701-4](#) for Extension Criteria and [701-8](#) for Extension Staffing Procedures. Use the [TA 16](#) and [TA 20](#) in addition to the TA 15 to document the Extension Review. Enter a CLNO and CANO (Administrative Procedures Manual 109-10) with the Extension decision.

1016-7 FAMILY PROGRESS REVIEW FORM DIRECTIONS

The FPR is a tool used to generate and document a conversation about the family's prior 12 months on assistance and to plan for activities that will move the client towards self-sufficiency. Some sections of the form, as indicated below, may be completed prior to meeting with the client; other sections are directly based on interaction with the client.

Note:

Double click on the yellow highlight to enter information. The text boxes will expand as more space is needed.

Section I Household Information:

- Gather the Household Information data from CMS and confirm its accuracy with the client.
- Enter the date of the last FPR found in CLNOs. If this is the first FPR, (12 months of assistance used) enter "N/A" in the section "Date of last Family Progress Review".
- If the family needs an interpreter, make appropriate arrangements through a qualified interpreter and note the name and contact information for the interpreter. See the [Alaska Administrative Procedures Manual 100-6](#) for Interpreter guidelines. While Work Services Providers may use the same interpreter services as DPA, the services must be paid by the Work Services Provider. Please contact your local leadership for guidance.
- Note all meeting attendees in the FPR appointment by name and role in the family's life. (I.e. Jane Doe, counselor; Sally Helper, Infant Learning.)

Section II – Summary of Prior Progress Reviews:

This section may be completed prior to meeting with the client. If so, briefly review the summary and findings with the client prior to moving forward. Make adjustments to the findings if the client provides clarity. Adjustments or differences in perception must be noted in CLNO.

If this section is completed with the client, confirm progress on activities and use their words as often as possible as you complete the section.

If this is the first FPR, and they not previously had a (now discontinued) Family Quarterly Progress Review, note "N/A" in question 3. If they had prior Family Quarterly Progress Reviews, refer to the Findings and Recommendations section of those documents or CLNOs from those events to complete this item.

Section III through V:

Complete these sections with the client. Use the client's words as much as possible in the documentation. If you paraphrase the client's reply, confirm that your words are an accurate representation of the client's thoughts. If someone other than the client offers a reply to a question, check with the client to confirm and ask the client to put the statement in his or her own words for the FPR documentation.

If the client discloses new medical information, make a plan to gather appropriate documentation to be summarized in Section VII – Summary and Recommendations.

If the client does not address an issue identified or suspected in the prior 12 months of Work Services, bring it up and ask whether it is a current issue. If the client identifies that the issue has been resolved, describe the resolution.

Section VI – Household Budget and Expenses:

When you click into the budget form, an embedded Excel document will open. The Excel document will add the figures entered into the form.

Income:

Enter the client’s benefit amounts for each program through which they receive resources. If a client indicates that they do not receive program benefits for which they may be eligible, consider whether a referral is appropriate in the new FSSP.

Expenses:

Clients will likely provide estimates for most of the expense categories. A client may not have all of the expenses, (i.e. their rent may include water/sewer, heat and/or electricity). List the expense even if it is currently being partially or fully paid by supportive services (transportation/gas etc.)

Note:

If the client is interested in a more accurate budget, provide a separate copy of this form and encourage them to enter their actual expenses over a month. Refer the client for budgeting assistance through an appropriate financial institution if this they express interest in further exploring this issue. As an example, consider providing the “Behind on Bills” curriculum at: <https://www.consumerfinance.gov/your-money-your-goals/> or the free app and website “Mint” provided by TurboTax at <https://www.mint.com> for self-guided budgeting assistance.

Questions 1-4 are a critical part of helping the client understand that they are able to make some changes to improve their financial situation. While you may offer some broad examples to increase income or decrease expenses, remember that specific budget decisions must fit within the client’s priorities and values.

Section VII – Summary and Recommendations:

Use this section to highlight the critical issues brought forward during the discussion. You may note successes, challenges, new information, new opportunities etc. Provide a brief description of the changes that will be made to the FSSP based on the FPR. Copy the summary and recommendation into CLNO.

If this is an Extension Staffing copy the Summary and Recommendations with the extension decision into CLNO and CANO.