
**ORANGE COUNTY SOCIAL SERVICES AGENCY
CFS OPERATIONS MANUAL**

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Adoption Matching Procedure

Purpose To provide guidelines for matching a dependent child with an adoptive family, including newborns prior to detention.

Approved This policy was approved by Mike Ryan, Director of CFS, on September 4, 2008. *Signature on file.*

Background This is a revision of CFS P&P Adoption Matching Procedure, and incorporates information regarding the matching database and Concurrent Planning Holds.

Matching a dependent child with an adoptive family is a complex procedure, which has a profound impact on the child's and adoptive families' lives.

In order to orchestrate this procedure properly, and ensure that each task is completed, there must be compliance with regulations and a clear delineation of the responsibilities of each social worker involved.

Children and Family Services' (CFS) operative standard for foster or adoptive placements is to make placement decisions for a child based on the child's best interests, while adhering to all applicable laws.

- Legal Mandates**
- [Multiethnic Placement Act \(MEPA\) of 1994; as amended by the Interethnic Adoption Provisions \(IEP\) of 1996](#)
 - [Welfare and Institution Code \(WIC\) Section \(§\) 16013 \(a\) and \(b\)](#)
 - [Welfare and Institution Code \(WIC\) § 361.3](#)

- [The Public Health and Welfare \(42 U.S.C. Chapter 21, Subchapter V, §2000d\)](#)
- [Civil Code, § 51](#)
- [CDSS Regulations, Division 21, § 21-109](#)
- [Manual of Policies and Procedures \(MPP\), Title 22, Division 2, Chapter 3, Adoption Program Regulations, §§ 35177, 35180, 35183.1, and 35197](#)
- [MPP, Title 22, Division 6, Chapter 9, Adoption Agencies, §§ 89179 and 89182](#)
- [All County Information Notice \(ACIN\) I-41-05](#)
- [Family Code § 8704, 8708, 8709](#)
- [Family Code § 9201](#)
- [Indian Child Welfare Act \(25 U.S.C. § 1901\)](#)

POLICY

Adoption Referrals

Children are referred to CFS's Adoption Program when:

- No Family Reunification (FR) services are offered, or
- A Permanency Planning Assessment (PPA) has been completed and it is determined that the child is adoptable, or
- The Investigations Senior Social Worker (SSW) has determined that the prognosis for reunification for the family is poor

Placement Preference

Foster and adoptive placement preference is given to the child's adult relatives and non-related extended family members (NREFMs), provided they are suitable and meet all relevant child protection standards (WIC 361.3). Consideration also must be given to the child's current caregiver. The assessment for permanent placement with the current caregiver includes the length of time the child has been in the home and the depth of the child's attachment. If the child's relatives, NREFMs, and/or current caregiver have been assessed and it is determined that they are not an option for a permanent placement, the child may be referred to the Adoption Program.

Concurrent Planning

In an effort to reduce the number of potential out-of-home placements for the child, the Concurrent Planning SSW/Adoption SSW will match and place the child with a family that has an approved Adoptive Assessment. Concurrent Planning families assist in the implementation of the child's case plan by facilitating FR services while preparing to provide the child with legal permanence should FR services fail.

Adoption Matching Factors

There are many factors to be considered when matching the child with a prospective adoptive family including, but not limited to, the child's:

- Age
- Gender
- Religious preference
- Educational needs
- Linguistic and cultural needs
- Physical and health conditions and needs
- Emotional and psychological conditions and needs
- Developmental needs
- Prospective adoptive family's ability to maintain contact between the child's biological relatives, if appropriate

Adoption Matching Criteria

Matching the child with a prospective adoptive family will be conducted in a manner consistent with all applicable laws. The Multiethnic Placement Act (MEPA) of 1996 prohibits:

- The use of the child's or the prospective adoptive parent's race, color, or national origin to delay or deny the child's placement
- Prohibits denying any individual the opportunity to become a foster parent or adoptive parent on the basis of their or the child's race, color, or national origin

MEPA requires diligent efforts to expand the number of racially and ethnically diverse foster and adoptive parents.

WIC Section 16013 (a) states that all persons engaged in and providing services to foster children will have fair and equal access to all available programs, benefits, services, and licensing processes, and will not be subjected to discrimination or harassment on the basis of:

- Race
- Ethnic group identification
- Ancestry
- National origin
- Color
- Age
- Religion
- Sex
- Sexual orientation
- Gender identity

- Mental or physical disability
- HIV status

Title IV of the Civil Rights Act prohibits discrimination based on race, color, or national origin in all federally funded programs.

Under California Civil Code Section 51, welfare agencies may not discriminate based on political affiliation or marital status.

Family Code 8708 (a) (3) states that placement of a child for adoption cannot be delayed or denied solely because the prospective, approved adoptive family resides outside the jurisdiction of the department or licensed adoption agency.

**SSW
Communication**

Communication between SSWs is critical to facilitating a positive outcome for the child. The following case information must be communicated from the Investigations/ Dependency SSW to the Concurrent Planning/Adoptions SSW:

- Prognosis for reunification for the case
- Child's special needs
- Birth parent(s) information that is relevant to matching the child (i.e., substance abuse, mental illness, etc.)
- Birth parent(s) criminal history
- Current visitation schedule for the child, including: who, how often, where, and the monitored status
- All information related to the child's sibling(s)
- ICWA issues
- Current recommendation (i.e., no FR services, etc.)
- Relatives and NREFMs have been assessed and ruled out as a permanent placement resource
- Current caregiver has been assessed and ruled out as a permanent placement resource

Any significant changes regarding any of the above mentioned information also must be communicated immediately to the Concurrent Planning SSW/Adoption SSW.

**Child
Assessment**

The child will be assessed by the Concurrent Planning/Adoption SSW within 30 days of assignment of the case. The SSW must:

- Identify any specific needs
- Obtain copies of any records or information that are available
- Review psychological or developmental evaluation or request an evaluation if none has been completed
- Reaffirm that all relatives and NREFMs have been ruled out and

the child's current caregiver is not interested in consideration as a permanent placement

Any exception requires Senior Social Services Supervisor (SSSS) approval.

Adoptive Family Selection

When more than one family can equally meet the needs of a child, the primary factor to be considered when selecting the adoptive family would be the length of time that a prospective adoptive family has had an approved Home Study.

Home Study Reviews

Home Study Reviews are completed by the Adoption SSW (Concurrent Planning SSW or Child Worker) for each Adoptive Assessment received, including the selected prospective adoptive family and the families that were not selected.

The Concurrent Planning SSW/Adoption SSW has up to seven days from the date they receive the Adoptive Assessments to complete the Home Study Reviews and submit the reviews **concurrently** to their SSSS. Their SSSS must be in agreement and forward them to the Matching Coordinator and Applicant SSWs prior to distribution of additional Adoptive Assessments.

All feedback on the Home Study Reviews must be in accordance with MEPA, WIC Section 16013, and Title IV of the Civil Rights Act.

SSWs cannot proceed with a match until all Home Study Reviews are received and approved by their SSSS.

The Concurrent Planning SSW/Adoption SSW and the Applicant SSW will communicate during the matching process in order to answer questions and to inform the Applicant SSW when a family is or is not selected. If the Applicant Worker is not in agreement with the Concurrent Planning SSW/Adoption SSW's decision not to select a particular family, the Applicant SSW will discuss the concerns with the Applicant SSSS. The applicant SSSS may staff the concerns with the Matching Coordinator SSSS and the Concurrent Planning SSSS/Adoption SSSS. The concerns may also be presented and discussed at the Matching Committee Meeting.

If a family is not selected as a match for a child due to reasons that are not in accordance with MEPA or the Civil Rights Act, or are not based on clinical concerns (e.g., family dynamics), the Matching Coordinator will forward the Adoptive Assessment and Home Study Reviews to the Matching Coordinator SSSS. The Matching

Coordinator SSSS will discuss the concerns with the Concurrent Planning SSSS/Adoption SSSS.

If the Matching Coordinator receives three or more Home Study Reviews which indicate concerns regarding a family, the Matching Coordinator will forward the Adoptive Assessment and Home Study Reviews to the Matching Coordinator SSSS. The Matching Coordinator SSSS will discuss the concerns with the Applicant SSSS and the concerns may be presented and discussed at the Matching Committee Meeting. For further information related to a Matching Committee Meeting, refer to the respective policy section in this P&P.

Matching Database

The Matching Coordinator or clerical support will input data from the *Family Available* forms, *Child Available* forms, and any information from home studies provided by private agencies into the matching database; however, the Matching Coordinator also uses clinical judgment to select potential matches.

Matching Status

The matching status of a prospective adoptive family will be maintained in the matching database and will reflect one of the following:

- **Available** – The prospective adoptive family is approved and available to be matched with a child for the purposes of adoption/concurrent planning
- **Closed** – The prospective adoptive family is no longer available for the purposes of adoption/concurrent planning, as the Home Study worker is closing the applicant’s case
- **Hold** – The prospective adoptive family cannot be matched with a child due to a Concurrent Planning Hold (for further information, refer to the policy section entitled “Concurrent Planning Holds”)
- **Match Pending** – The match between the identified prospective adoptive family and a child was approved by the supervisor of the Concurrent Planning/Child Worker and the family will proceed with the Child Presentation
- **Matched** – After receiving a Child Presentation, the prospective adoptive family would like to proceed with pre-placement steps and/or placement of the child
- **Placed** – The matched child was placed with the prospective adoptive family

Concurrent Planning Holds

- A. **Concurrent Planning (CP) Hold Designation**
A prospective adoptive family that has completed an adoptive Home Study, facilitated and approved by the Adoption

Program, may be designated with a Concurrent Planning (CP) Hold in the matching database.

The following will apply when a prospective adoptive family is designated with a CP Hold in the matching database:

- No dependent children will be matched with the prospective adoptive family for the purposes of adoption/concurrent planning by the Matching Coordinator while the CP Hold remains in effect
- The prospective adoptive family will be precluded from participating in any CFS-sponsored matching events

Note: A CP Hold is not considered a decision to deny an adoption application or to withdraw a previously approved adoption application. For information related to these circumstances, refer to [CFS P&P Adoption Application – Denial and Grievance \(C-0101\)](#).

B. Circumstances Requiring a CP Hold

A prospective adoptive family will be designated with a CP Hold by the Adoption Program under any of the following circumstances:

- The prospective adoptive family has voluntarily requested that they be placed on CP Hold
- The prospective adoptive family has been identified as having an ongoing/chronic issue which may impact a child's placement stability, health, safety, and/or permanency
- The prospective adoptive family demonstrates clinical concerns regarding family dynamics and/or a lack of counseling/education/training which may impact the suitability of adoptive matching
- The prospective adoptive family has been given or is pending a licensing administrative action
- The prospective adoptive family has an uncorrected licensing deficiency or violation
- The prospective adoptive family has a significantly remodeled residence or has relocated, pending modification of the existing license or issuance of a new license or certification by the Foster Care Licensing worker

C. Initiating a CP Hold

When circumstances warrant that a prospective adoptive family be designated with a CP Hold, staff will complete the

Concurrent Planning Hold Notification (F063-25-561). This form will be immediately submitted to the Matching Coordinator so that the matching database can be updated to reflect the prospective adoptive family's CP Hold status.

Any of the following staff may designate a prospective adoptive family with a CP Hold:

- Assigned Applicant SSW or their SSSS
- Matching Coordinator or their SSSS
- Adoption Program Manager

D. **CP Hold Notification**

1. **CFS Staff**—The assigned Applicant SSW will provide immediate email notification to appropriate staff when a prospective adoptive family has been designated with a CP Hold and following the removal of the CP Hold. The following staff will be notified:

- Adoption SSSS of assigned Applicant SSW
- Assigned Foster Care Licensing worker
- Assigned SSW of any dependent child currently placed with the prospective adoptive family

2. **Prospective Adoptive Family**—The assigned Applicant SSW will provide verbal notification to the prospective adoptive family within five business days of a CP Hold designation or removal of a CP Hold. Verbal notification will be documented by the Applicant SSW in the case notes.

E. **Review of CP Hold**

The assigned Applicant SSW will follow-up with any prospective adoptive family designated with a CP Hold to assist the family in addressing the circumstances necessitating the CP Hold. Additionally, prospective adoptive families may be presented for review at a Case Staffing or Matching Committee Meeting. For further information related to a Case Staffing or Matching Committee Meeting, refer to the respective policy sections in this P&P.

F. **Removing CP Hold**

A CP Hold designated to a prospective adoptive family will remain in effect indefinitely, pending resolution of circumstances originally necessitating the CP Hold.

When circumstances warrant that a CP Hold be removed, the assigned Applicant SSW or their SSSS, will complete the *Concurrent Planning Hold Notification*. This will be immediately submitted to the Matching Coordinator, who will update to the matching status of the prospective adoptive family to Available in the matching database.

When a CP Hold remains in effect for a period exceeding three months, the Applicant SSW will complete an updated Home Study and *Family Available (F063-18-309)* form prior to the matching status being updated to Available by the Matching Coordinator in the matching database.

Note: An updated Home Study may also be required under other circumstances (e.g., within three months of a CP Hold), to be determined by Applicant SSW in consultation with the Applicant SSSS.

Private Adoption Agencies Matches

The child may be matched with a prospective adoptive family that has an approved Adoptive Assessment with, and is represented by, a private adoption agency.

The Adoption Program's Matching Coordinator maintains ongoing communication with private adoption agencies to clarify information and respond to inquiries from agencies regarding pending matches.

The Matching Coordinator contacts the private adoption agency if the Concurrent Planning SSW/Adoption SSW or SSSS has any questions about a prospective adoptive family. The information received is communicated to the Concurrent Planning SSW/Adoption SSW.

If match approval is obtained, the Matching Coordinator contacts the private adoption agency to inform them of the approved match and refer them to the Concurrent Planning SSW/Adoption SSW to discuss the Child Presentation meeting. The Matching Coordinator also notifies the Concurrent Planning SSW/Adoption SSW via email and includes the name and telephone number of the contact person from the private adoption agency.

For Concurrent Planning cases, after a placement is completed with a private adoption agency, the Concurrent Planning SSW informs the Matching Coordinator the placement has been made and completes a PPA to request assignment of an Adoption Liaison.

Case Staffing A Case Staffing will be facilitated, as needed, when Adoption Program staff are not in agreement with a pending match, how to utilize a prospective adoptive home, or when it is determined that further clarification and discussion between all involved parties is necessary. Additionally, a staffing may be conducted to make a determination as to the need for or removal of a CP Hold regarding a prospective adoptive family. The staffing will include the assigned Applicant SSW, Adoption SSSS, Matching Coordinator, and Matching Coordinator SSSS.

Placement of Newborns Prior to Detention It is the policy of the adoption program that placement of a newborn into a Concurrent Planning home prior to detention will occur only when it has been determined by a Concurrent Planning SSW/Adoption SSW that there is no relative or parent available for placement, and there is sufficient medical information available about the child's current health status.

Child Presentation The Concurrent Planning/Adoption SSW collects comprehensive information about the child including, but not limited to:

- Medical history
- Developmental history
- Educational history
- Placement history
- Birth family history
- Past and present behavioral issues
- Child's personality

The Concurrent Planning/Adoption SSW prepares a Child Presentation document for the Child Presentation meeting.

The Child Presentation meeting includes, but is not limited to, the Investigations/Dependency SSW and the Applicant SSW. If the match is with a private adoption agency, the family's agency representative is included. If the child has special medical needs, the SSW may invite the Public Health Nurse (PHN) and/or other appropriate service providers to attend.

The discussion in the Child Presentation meeting will focus on the child's needs and the prospective adoptive family's willingness to meet those needs. A copy of the written Child Presentation document is provided to the prospective adoptive family, and is signed by the prospective adoptive family.

The prospective adoptive family must take at least 24 hours to decide if they want to proceed with the placement.

**Additional
Matching
Responsibilities**

The Matching Coordinator will utilize available resources including, but not limited to, Kids Connection, matching events, Cooperative Placement Meetings, and specific child recruitment to find permanent homes for waiting children. Consideration will not be given to prospective adoptive parents designated with a CP Hold Status in the matching database.

**Matching
Committee
Meetings**

A Matching Committee Meeting will be facilitated as needed to discuss concerns regarding applicant prospective adoptive families, including those designated with a CP Hold, to review the longest-waiting children and families and to discuss other matching issues that may arise. The meetings will include the Adoption Program Manager, Matching Coordinator SSSS, Concurrent Planning SSSS, Adoption SSSS, and other adoption staff as necessary.

REFERENCES

Hyperlinks

Staff accessing this document by computer may create a direct connection to the following references by clicking on them.

CFS P&P [Adoption Application—Denial and Grievance \(C-0101\)](#)

Other Sources

Other printed references include the following:

None.

REQUIRED FORMS

Online Forms Required forms that may be printed out and completed, or completed online, are listed below and may be accessed by clicking on the link provided.

Form Name	Form Number
Child Available	F063-18-79
Concurrent Planning Hold Notification	F063-25-561
Family Available	F063-18-309
Home Study Review	F063-18-315

Hard Copy Forms Forms listed below must be completed in hard copy (including multi-copy NCR forms). *For reference purposes only*, links are provided to view these hard copy forms, where available.

Form Name	Form Number
Case Recording Sheet	F063-103

CWS/CMS Forms The following required forms may **only** be obtained in CWS/CMS. *For reference purposes only*, links are provided to view these CWS/CMS forms, where available.

Form Name	Form Number
Permanent Planning Assessment (PPA)	F063-18-242

Brochures Brochures to distribute in conjunction with this procedure include:

Brochure Name	Brochure Number
Your Rights	PUB 13
Your Rights (available in 13 other languages)	PUB 13

PROCEDURE

Required Actions— Matching		The following actions must be completed when matching a child with a prospective adoptive family.	
Staff Responsible	Step	Required Action	
Concurrent Planning SSW/ Adoption SSW	1.	Obtain case information from the Investigations/ Dependency SSW.	
	2.	Conduct a visit with the child and the child's caregiver to assess the child's adoptability.	
Concurrent Planning SSW	3.	Complete a PPA on all cases and submit to SSSS for approval.	
Concurrent Planning SSW/ Adoption SSW	4.	a.	Complete a <i>Child Available</i> form. The Adoption SSW will also complete an Essence Statement and take digital pictures of the child.
		b.	Submit the <i>Child Available</i> form, Essence Statement, and digital pictures to SSSS for approval.
		c.	If a child is to be placed "on hold" status in Matching, email Matching Coordinator with the reason for the hold.
		d.	Complete updated <i>Child Available</i> form if the child is returning from "hold" status and/or if there have been significant changes in the child's situation.
Concurrent Planning/ Adoption Worker SSSS	5.	Once approved, submit <i>Child Available</i> form or updated <i>Child Available</i> form, Essence Statement, and digital pictures to the Matching Coordinator.	
Applicant SSW	6.	a.	Send completed Concurrent Planning Adoptive Assessment or update and <i>Family Available</i> form to SSSS for approval.

- b. If the Home Study case has previously been closed, complete an updated Home Study and *Family Available* form and submit to Applicant SSSS.
 - c. If a family is making slight changes to their child desired information, complete an updated *Family Available* form and submit to Applicant SSSS.
- Applicant SSSS**
- 7. a. Email approved Concurrent Planning Adoptive Assessment or update and *Family Available* form to the Matching Coordinator.
 - b. Email a copy to the Applicant SSW.
- Matching Coordinator**
- 8. a. Review *Child Available* forms and Essence Statements received from Concurrent Planning/Adoption SSSS.
 - b. Return if additional information is needed, i.e., a development or psychological evaluation.
 - 9. a. Review Adoptive Assessments and *Family Available* forms received from Applicant SSWs and private adoption agencies.
 - b. Clarify any questions or discrepancies with Applicant SSW or private agency.
- Matching Coordinator or Clerical Support**
- 10. Enter data from *Family Available* forms and *Child Available* forms received from SSSSs into the matching database.
- Note:** If Clerical Support will enter data, the Matching Coordinator will notify the designated clerical staff that the Concurrent Planning Adoptive Assessment or update has been approved for data entry into the matching database.
- Matching Coordinator**
- 11. Generate matches using the matching database. Review the matches generated to ensure the match is appropriate (i.e., the family is still available, etc.).
 - 12. a. Email up to two Adoptive Assessments to the Concurrent Planning SSW/Adoption SSW for

children newborn to twelve months, and up to four Adoptive Assessments to the Concurrent Planning SSW/Adoption SSW for children one year of age and older.

- b. Copy email to Applicant SSW and the SSSS.
- c. Distribute up to four additional Adoptive Assessments, with SSSS approval, if the Concurrent Planning SSW/Adoption SSW does not select any of the applicants.
- d. Repeat this process until a match is made.

**Concurrent
Planning SSW/
Adoption SSW**

- 13.
 - a. Review all information available on the child.
 - b. Determine the needs of the child and the attributes of a family that could best meet those needs.
- 14.
 - a. Read all Adoptive Assessments received.
 - b. Consult with the Applicant SSW(s) for each of the potential families for additional information and to clarify any questions.
 - c. Discuss questions about families from private agencies with the Matching Coordinator.
- 15. Select a prospective adoptive family that can best meet the needs of the child.
- 16.
 - a. After reviewing all Adoptive Assessments, complete a Home Study Review for each of the Adoptive Assessments received.
 - b. Document any concerns regarding a family's inability to meet the child's needs.
- 17. Within seven calendar days, email all of the Home Study Reviews to SSSS.

**Concurrent
Planning/
Adoption SSSS**

- 18. Review the *Child Available*, the Adoptive Assessment of the selected prospective adoptive family, and all Home Study Reviews provided.

- Complete SSSS section of the Home Study Review for the family selected and forward to the Matching Coordinator and Applicant SSW indicating the match is approved
- For the Home Study Reviews of families not selected, if in agreement with reasons the Concurrent Planning SSW/Adoption SSW did not select the family, forward to the Matching Coordinator and Applicant SSW
- If not in agreement with the reasons the Concurrent Planning SSW/Adoptions SSW did not select the family, consult the Concurrent Planning SSW/Adoptions SSW and reconsider the reasons for not selecting the family.

19. a. If the match is not approved, complete a Home Study Review indicating concerns regarding the inability of the family to meet the child's needs.
- b. Instruct the SSW to reconsider remaining Adoptive Assessments.
- c. If the SSSS concurs with concerns noted on the remaining reviews, request additional Adoptive Assessments from the Matching Coordinator.

Applicant SSW

20. Upon notification of a match, consult with the Concurrent Planning SSW/Adoption SSW for the child.

21. a. If the match is approved by the Concurrent Planning SSWs/Adoption SSWs SSSS, contact the prospective adoptive family to discuss the child and the Child Presentation meeting.
- b. Inform the prospective adoptive family of the date and time of the Child Presentation meeting.

Concurrent Planning SSW/Adoption SSW

22. a. Inform the Investigations/Dependency SSW of the match.
- b. If the Investigations/Dependency SSW does not agree with the match or has concerns, schedule a case staffing as soon as possible with both SSWs and their SSSSs.

23. Collect comprehensive information about the child including, but not limited to: medical history, developmental history, educational history, placement history, birth family history, past and present behavioral issues, child's personality, etc.
 24. Prepare a Child Presentation document.
 25. Schedule a Child Presentation meeting and invite participants.
 26. Conduct the Child Presentation meeting.
- Applicant SSW**
27. Attend the Child Presentation meeting and advocate on behalf of the prospective adoptive family in regard to the information presented.
 28.
 - a. Meet privately with the prospective adoptive family at the conclusion of the Child Presentation meeting to ensure they do not have additional questions or require additional information to make their decision.
 - b. Request that the prospective adoptive family take at least 24 hours to decide if they want to proceed with the placement.
- If the prospective adoptive family decides to proceed with the placement:**
29. Inform the Matching Coordinator and SSSS via email on the status of the match.
- Concurrent Planning SSW/ Adoption SSW**
30. Submit proposed placement steps to SSSS.
- Concurrent Planning/ Adoption SSSS**
31. Review and approve proposed placement.
- Concurrent Planning/ Adoption SSW**
32. Coordinate and implement the placement steps with the Investigations/Dependency SSW, the Applicant SSW or private agency social worker, the prospective adoptive family, and the child's current caregiver.

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|---|------------|---|
| Applicant SSW | 33. | Assist with the coordination and implementation of the placement steps. |
| | 34. | Throughout the placement steps, after the placement has been completed, and up to the adoption finalization, advocate for and provide ongoing support to the prospective adoptive family. |
| Concurrent Planning SSW/
Adoption SSW/
Applicant SSW | 35. | Provide an update on the status of the match, via email, to the Matching Coordinator and SSSS. |
| Concurrent Planning SSW/
Adoption SSW | 36. | Request and facilitate the signing of all foster/adoptive placement paperwork. |
| | | Note: The remaining steps apply only if the prospective adoptive family decides <u>not</u> to proceed with the placement: |
| Applicant SSW | 37. | Email the Concurrent Planning SSW/Adoption SSW, the Matching Coordinator, and SSSS to inform them that the family has declined and the reason they declined. |
| Concurrent Planning SSW/
Adoption SSW | 38. | Email the Matching Coordinator and SSSS on the status of the match. |
| | 39. | Request the previously reviewed and/or additional Adoptive Assessments from the Matching Coordinator. |
| Applicant SSW | 40. | Document clearly in the applicant's file the reason they decided not to proceed with the placement. |
| Matching Coordinator | 41. | Follow up on all placement outcomes and update the matching database to ensure it is accurate. |
| | 42. | Email monthly child statistics in Matching to the Adoption staff so that corrections and updates can be made and returned to the Matching Coordinator. |
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**Required Actions—
Initiating a
Concurrent
Planning Hold** The following tasks will be completed when a prospective adoptive family is designated with a Concurrent Planning (CP) Hold in the matching database.

<u>Staff Responsible</u>	<u>Step</u>	<u>Required Action</u>
Appropriate Adoptions Staff	1.	Complete the CP Hold Status section of the <i>Concurrent Planning Hold Notification (F063-25-561)</i> and submit to the Matching Coordinator via email.
Matching Coordinator	2.	Update matching database status regarding prospective adoptive family to indicate Hold .
Applicant SSW	3.	Forward copy of <i>Concurrent Planning Hold Notification</i> to the following CFS staff, via email: <ul style="list-style-type: none"> • Adoption SSSS of assigned Applicant SSW • Assigned Foster Care Licensing worker • Assigned SSW of any dependent child currently placed with the prospective adoptive family
	4.	Provide verbal notification of the CP Hold status to prospective adoptive family applicant(s) within five business days and document contact on <i>Case Recording Sheet (F063-103)</i> .

**Required Actions—
Removing a
Concurrent
Planning Hold** The following tasks will be completed when circumstances resulting in a prospective adoptive family being designated with a Concurrent Planning (CP) Hold have been resolved.

<u>Staff Responsible</u>	<u>Step</u>	<u>Required Action</u>
Applicant SSW/ Applicant SSSS	1.	Update <i>Concurrent Planning Hold Notification (F063-25-561)</i> by completing the CP Hold Removal section and submit to the Matching Coordinator via email.
	2.	If the CP Hold has remained in effect for more than three months, complete updated Home Study and <i>Family Available (F063-18-309)</i> form.

Note: An updated Home Study may be required under other circumstances, to be determined by Applicant SSW in consultation with Applicant SSSS.

Matching Coordinator

3. Update matching database status regarding prospective adoptive family to indicate **Available**.

Note: Verify completion of updated Home Study (approved by Applicant SSSS) and *Family Available* form, if applicable.

Applicant SSW

4. Forward copy of updated *Concurrent Planning Hold Notification* to the following CFS staff via email:
 - Adoption SSSS of assigned Applicant SSW
 - Assigned Foster Care Licensing worker
 - Assigned SSW of any dependent child currently placed with the prospective adoptive family
5. Provide verbal notification of the Available status to prospective adoptive family applicant(s) within five business days and document contact on *Case Recording Sheet (F063-103)*.

**Required Actions—
Newborns**

The following tasks will be completed when there is a request for placement prior to detention for newborns, such as a safely surrendered or abandoned infant.

<u>Staff Responsible</u>	<u>Step</u>	<u>Required Action</u>
Diversion SSW	1.	Email daily recap/information to Matching Coordinator, Matching Coordinator SSSS, and Concurrent Planning SSSSs.
	2.	Contact Matching Coordinator within 24 hours of being informed that a child was safely surrendered when a Safely Surrendered baby has been detained.
Matching Coordinator	3.	Review recap/information from Diversion.

**Matching
Coordinator
SSSS/
Concurrent
Planning SSSS**

4. Review recap/information and determine if the child may require a prospective adoptive placement.

**Concurrent
Planning SSSS**

5. Assign a Concurrent Planning SSW, if appropriate, from the Concurrent Planning rotation list.

**Concurrent
Planning SSW**

6. Communicate with the ER/Intake/Investigations SSW to confirm the child is appropriate for early placement in a Concurrent Planning home, i.e., there is no relative or parent available for placement and no medical issues that require further evaluation.

7. Obtain all available information about the child and share this information with the Matching Coordinator.

**Matching
Coordinator**

8. Select a Concurrent Planning family for the child and discuss the potential match with the Adoption Applicant SSW.

9. Submit the Adoptive Assessment to the Concurrent Planning SSW for review.

**Concurrent
Planning SSW**

10. Review the Adoptive Assessment (potential match) utilizing the Home Study Review, and indicate one of the following recommendations on the form:

- Family Selected
- Family Not Selected

11. Submit the Adoptive Assessment and completed Home Study Review to the Concurrent Planning SSSS.

**Concurrent
Planning SSSS**

12. Review Adoptive Assessment and Home Study Review received from the Concurrent Planning SSW and:

- If in agreement with the match, send email notification of the match with the Home Study Reviews of the family selected to the Matching Coordinator and the Applicant SSW(s)
- If not in agreement with the family selected, complete a Home Study Review indicating concerns, forward to Matching Coordinator and Applicant SSW, and request another Adoptive

Assessment

- If in agreement that the prospective match should not be selected, forward Home Study Review to Matching Coordinator and Applicant SSW, and request another Adoptive Assessment

**Concurrent
Planning SSW**

- 13.** Proceed with the match and follow Steps 23-29 outlined above in the “Required Actions—Matching” section of this P&P.

**Matching
Coordinator**

- 14.** Upon receipt of Home Study Reviews from SSSS, input the information into the matching database.