**REGION 2 ADOPTION CHECKLIST**

Community Based Care

**Purpose:** Use this form to ensure all tasks associated with a child's adoption (pre- and post-termination of parental rights) are completed.

**Directions:** This checklist contains the rules, policy, and best practice steps that must be completed when a child’s goal becomes adoption. Included in this checklist are the required tasks to meet federal law and licensing minimum standards for adoption. Minimum Standards and CPS Policy should be reviewed for complete details of specific tasks.

This checklist reflects Region 2 protocols as per Community Based Care.

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| --- | --- | --- | --- | --- |
| **Case Name:** Click here to enter text. | **Date of Removal:** Click here to enter a date. | | | |
| **PRE-TERMINATION** |  | | **DATE(S) COMPLETED** | |
| Change child plan of service permanency plan to Adoption.  *Texas Administration Code (TAC) 700.1205.* | | | Click here to enter a date. | |
| Indicate in IMPACT whether or not child is in intended to be permanent placement in the placement detail window. | | | Click here to enter a date. | |
| These need to be ongoing activities while the child is in out-of-home care:   * Life book preparation * Obtain pictures of birth family * Ensure caregiver has a Lifebook | | | Click here to enter a date. | |
| * Discuss adoption with current placement family. * Document the family's desire to adopt or not adopt in IMPACT. * If child not in intended to be permanent placement, ensure all possible relatives, kinship, or homes with siblings adopted previously have been evaluated. * Request possible Legal Risk Placement, if applicable. | | | Click here to enter a date. | |
| If child is in a 2INgage relative/kinship home, inform the kinship worker that  the child’s plan has changed to adoption. **If the family is interested in**  **adopting,** they can either choose to work with Texas Family Initiative’s Child  Placing Agency or choose to work with a private CPA who has a contract with  2INgage. If placement is out of region, the family should be referred to a CPA  who has a contract with 2INgage or who is willing to develop a contract with  2INgage. | | | Click here to enter a date. | |
| Update/complete Medical & Developmental History in IMPACT. | | | Click here to enter a date. | |
| Confirm all birth (hospital), medical and school records are in the case file. *Family Code (FC) 162.005* | | | Click here to enter a date. | |
| Confirm compliance with Indian Child Welfare Act ICWA P.L 95-608; Indicate in person detail. | | | Click here to enter a date. | |
| Discuss the change of the goal to adoption and pending termination with the  child when appropriate; involve a therapist in the discussions, when possible | | | Click here to enter a date. | |
| If not already on file, birth verification is obtained before a termination trial.   |  | | --- | | *This is needed to verify the child's accurate name, citizenship and parents. Need to ensure terminating on the correct child and that the child is actually registered with vital statistics. Need to ensure the termination decree has the child's accurate name, citizenship, and appropriate parent listed before the Judge signs off.* If decree/orders not correct, request or file a nun pro tunc, per protocol. | | | |  | |
| **POST-TERMINATION**  *TPR (Termination of Parental Rights)* | | | **DATE(S) COMPLETED** | |
| A discussion is held with the child about the termination of his/her parent’s rights. Involve the therapist to ensure processing of grief and loss for the child. | | | Click here to enter a date. | |
| Set up and conduct a goodbye visit with the child and his/her birth parents, when appropriate. | | | Click here to enter a date. | |
| Request certified copy of birth certificate. *CPS Handbook Policy 1521. Hospital birth certificate does not qualify as an official document.* | | | Click here to enter a date. | |
| Ensure current compliance with IMPACT narratives, service plans, and medical/dental information. | | | Click here to enter a date. | |
| No later than 45 days from the date of termination, complete the HSEGH (Form 2649). (There are some exceptions if child being adopted by specific relatives – see policy). HSEGH will need to be redacted in order to be shared with a potential adoptive family.  ARS to be completed within 3 months prior to adoptive placement. | | | Click here to enter a date. | |
| For adoption preparation, a minimum of 3 adoption preparation visits must take place with the child/youth (at least 1 visit for child 0-18 months).  Meaningful discussion must occur during visits per guidelines/standards.  Lifebook work is included in visits.  *TAC 749.3341, 749.3343, 749.3345* | | | Click here to enter a date. | |
| Check the court records to ensure an appeal did not occur. | | | Click here to enter a date. | |
| Request record redaction; follow instructions provided by the records redaction program | | |  | |
| **CHILD IN INTENDED TO BE PERMANENT PLACEMENT** | | | **DATE(S) COMPLETED** | |
| |  |  | | --- | --- | | If home is a foster only home, request the home’s agency to update home to  adoption if the agency has an adoption contract. If they do not have an  adoption contract with 2INgage, refer to the 2INgage Permanency Support  Supervisor (Adoptions) to request and follow up on a contract.  If it is a 2INgage relative/kinship home, touch base with the kinship worker  re: the plan of adoption. If the family has not already initiated an adoption  home study, they can either choose to work with Texas Family Initiative’s  Child Placing Agency or choose to work with a private CPA who has a contract  with 2Ingage.  If it is relative/kinship home that has not yet been assigned a kinship worker, refer  the home to the 2INgage kinship/licensing unit. | | |  | | | |  | |
| If the home is out of region, refer the home to a CPA in that region with  whom 2INgage has a contract or can develop a contract. | | |  | |
| Foster/adoptive homes: No update required. (Home study must be current  within a year, so an update/addendum could be needed.)  Allow adoptive parent(s) to review the redacted case record, including the  HSEGH/ARS. | | |  | |
| Ensure child has psychological or developmental evaluation:  • 0-18 months: within 30 days of ado placement  •18 months - 4 yrs. old: within 3 months of ado. placement (ECI)  • Age 5 and older: within 6 months    TAC 749.3349 | | |  | |
| **CHILD NOT INTENDED TO BE PERMANENT PLACEMENT** | | | **DATE(S) COMPLETED** | |
| Regional recruitment efforts can be used to target and identify prospective adoptive home matches for a child during the first 60 days following Termination of Parental Rights; statewide broadcasts to CPS and CPA’s, etc. | | |  | |
| If no placement is identified within 60 days of Termination, then complete the TARE Registration Form, No. 2228. In an e-mail referral (outline provided to each unit supervisor), send the form along with a large, good quality photo to the adoption mailbox: [adoption@2ingage.org](mailto:adoption@2ingage.org). (Photos can only be saved in the following formats: \*.jpg, \*gif, or \*bmp.) | | | Click here to enter a date. | |
| Update/supplement HSEGH/ARS: annually and within 3 months before adoptive placement. | | |  | |
| **SELECTION PROCESS** | | | **DATE(S) COMPLETED** | |
| Using the information provided by the Permanency Case Manager, an adoption specialist will register and maintain the child on the TARE, including screening inquiries and home studies, facilitating inquiry screening calls and conducting special recruitment. With input from the PCM, the adoption specialist will determine the families to include in a selection staffing. | | | Click here to enter a date. | |
| Prior to scheduling a selection staffing, the adoption specialist will ensure  that the home studies to be considered are approved and current. | | | Click here to enter a date. | |
| An adoption specialist will schedule and facilitate selection staffing, invite  necessary parties, and afterward inform all parties of the family selected. | | | Click here to enter a date. | |
| The permanency case manager will provide the redacted case record to the  selected family’s case worker/family. | | | Click here to enter a date. | |
| The permanency case manager will initiate ICPC process if family lives out of  state: complete ICPC Placement Request Packet per CPS policy 9311 and 9314 | | |  | |
| **PRESENTATION** | | | **DATE(S) COMPLETED** | |
| After the selected family has read the redacted case record, and their worker  has informed the adoption specialist that they wish to proceed, the adoption  specialist will schedule and facilitate the presentation staffing, inviting all  necessary parties. | | | Click here to enter a date. | |
| During the presentation staffing:   * Discuss with prospective adoptive family information regarding the child, the case record and answer any questions. Allow family to speak to the therapist and foster parents. *TAC 749.3395* * Discuss Adoption Assistance with the family; and * Provide family with information about Post Adoption Services * Discuss pre-placement and placement plan   *TAC 749.3461* | | | Click here to enter a date. | |
| Inform all parties that there must be a fully executed contract with the  adoptive family’s agency in place before any pre-placement activities can  begin. | | | Click here to enter a date. | |
| Following the presentation staffing, the adoptive parents are given additional time to discuss and determine if they wish to proceed with pre-placement activities. IMPORTANT: The child(ren) should NOT be told about the family until AFTER the family has informed us that they wish to proceed with placement of the child. | | |  | |
| Ensure child has Psychological or Developmental Evaluation:   * 0-18 months: within 30 days of ado placement * 18months - 4 yrs old: within 3 months of ado. Placement (ECI) * Age 5 and older: within 6 months   *TAC 749.3349* | | | Click here to enter a date. | |
| The Permanency Case Manager will ensure a discussion with the  child(ren) is held about prospective family for their input,  thoughts, feelings. | | | Click here to enter a date. | |
| **PRE-ADOPTIVE PLACEMENT** | | | **DATE(S) COMPLETED** | |
| 3 weeks prior to submitting adoption assistance packet to adoption assistance eligibility unit, the Permanency Case Manager will:   * Obtain necessary documentation to complete Level of Care   (LOC) review; and   * Complete LOC review with YFT. | | | Click here to enter a date. | |
| The Permanency Case Manager will prepare a complete subsidy packet for each child using the Adoption Assistance Checklist/Guide – From 2368 (found on Smiley/CPS/Post-Adopt). The checklist requires the Permanency Case Manager’s original signature and date for each child.  Original signatures and dates are required on the family’s forms (Adoption Assistance Request/Form 2250, Adoption Assistance Worksheet/Form 2253A, and Adoptive Family Resources/Form 2253B, found on Smiley/CPS/Post-Adopt). If a sibling group, a complete set of forms is required for each child. Scans or faxes are NOT accepted. | | | Click here to enter a date. | |
| • Gather source documentation needed for each child’s packet (reference  Adoption Assistance Checklist/Guide).  • The PCA/AA negotiator will receive the required information from the  eligibility specialist to create the FAD stage and will also request a Vendor ID  Number. The PCA/AA negotiator will assign the FAD stage to the 2INgage  supervisor once the FAD stage is created.  • Ensure the Authorized Level of Care (ALOC) listed on IMPACT is correct  and accurate for child.  • 2INgage Supervisor will open an ADO stage.  • In the ADO stage, complete an adoption assistance application for each child  on IMPACT and submit to assigned eligibility specialist assigned to that county.  (Refer to Foster Care Eligibility Coverage Map).  • Mail original packet(s) at least 30 days prior to ADO placement to the  eligibility specialist assigned to that county (Refer to Foster Care Eligibility  Coverage Map) Subsidy Tasks to Complete  * The subsidy staff will review each packet for completeness. If complete,   the eligibility specialist will email a Preliminary Determination notification  to you, your supervisor and the regional negotiators. CPS Negotiator Tasks to Complete  * The negotiator will contact the family and negotiate subsidy benefits and will fill out the adoption assistance agreement. Do NOT proceed with the adoption until subsidy benefits have been negotiated. * The regional negotiator will mail the agreement to the Permanency Case Manager, who will have the family sign the agreement at the time of the adoptive placement. Then, following the adoptive placement, the ORIGINAL Adoptive Assistance Agreement needs to be sent to the eligibility specialist.   **If the child does not qualify for subsidy:** At least 10 days before the planned adoptive placement, send an email to Amy Elizondo, adoption assistance negotiator requesting a RID number for the placement. Include a copy of the adoptive family’s home study and provide the date of the planned adoptive placement. You will be sent a RID number to use for the adoptive placement. A RID# IS REQUIRED. Issues that cause a delay with presentation staffing/adoptive placement  * Packet does not have original signatures from family or your supervisor. * AA checklist not fully completed. * Packet not being dated and having a termination order not signed by the   judge   * Child’s name or date of birth does not match what is on the birth certificate * Source documentation missing. * Home study update/addendum not included (current within 1 year of placement). * Vendor ID not obtained prior to placement. * ADO stage not opened. * Online AA application not submitted. * ALOC issues where family is disputing Basic ALOC for child at negotiation. * Both parents' signatures and/or dates in all areas that are required. * The segments that ask what the ado parent thinks it will cost monthly to raise this child until the age of 18. A brief description of the needs and the monthly cost. Basic level is up to $400 per month – this amount or more will be needed for those segments. Moderate and above levels is up to $545 per month.   SEND THE COMPLETED PACKET TO [ADOPTION@2INgage.org](mailto:ADOPTION@2INgage.org) TO CONSULT  ADOPTION SPECIALIST PRIOR TO SUBMITTING SUBSITY PACKET  AND PROCEEDING WITH PLACEMENT. AN ADOPTION SPECIALIST WILL BE  ABLE TO HELP ENSURE PACKET IS READY, YOU ARE READY TO PROCEED  WITH PLACEMENT, AND CAN HELP DIRECT YOU IN WHAT IS NEEDED TO  COMPLETE THE ADOPTIVE PLACEMENT.    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_  Adoption Specialist Date | | |  | |
| **PLACEMENT/POST-PLACEMENT** | | | **DATE(S) COMPLETED** | |
| **Authorization of Adoption Services** 2INgage Permanency Case Manager will:   * Complete the [service authorization (form 2054)](http://intranet.dfps.state.tx.us/application/forms/showFile.aspx?Name=2054.doc) for the identified adoption service to 2INgage in IMPACT:   + In the comments section of the 2054, add the following:     - The licensing agency (CPA) name.     - Whether the 2054 is for a sibling set; if so, how many siblings.     - The type of adoption (e.g. Foster-to-adopt/kinship/matched).     - The Youth for Tomorrow (YFT) Level of Care (LOC) Determination for the child. * At the time of placement, the following are given to the CPA provider:   + Completed and approved [Service Authorization (Form 2054)](http://intranet.dfps.state.tx.us/application/forms/showFile.aspx?Name=2054.doc).   + Completed and signed [Adoption Placement Agreement (Form 2226](http://intranet.dfps.txnet.state.tx.us/application/Forms/showFile.aspx?NAME=K-902-2226.pdf)). | | |  | |
| Placement Packet:  The Permanency Case Manager will discuss each item on the following documents with the adoptive parents and have them sign:   * Adoptive Placement Agreement ([Form 2226](http://www.dfps.state.tx.us/Application/Forms/showFile.aspx?NAME=2226.doc)) * Adoptive Assistance Agreement (form 2253c)   Placement Forms to complete: *\*Use child’s new adoptive name on all*  *forms*  Adoptive Placement Agreement (2226)– Be sure ALL boxes are initialed and  CPA signs the agreement (give copy to family)  Attachment A  Medical Consenter (Form 2085b) (give copy to family)  Education Decision Maker (only school aged kids) (give copy to family)  Discipline Notification (give copy to family)  Child’s Rights (give copy)  Region 02 Placement Change Form **If new or subsequent placement,**  **such as a matched adoption. (in lieu of Form 2279)** | | | Click here to enter a date. | |
| Give the family all medical and education records | | |  | |
| Permanency Case Manager will notify eligibility specialist that the adoptive placement is complete & the foster care eligibility needs to end. Send copy  of Adoptive Placement Agreement | | | Click here to enter a date. | |
| Send notification via email to end daycare. | | | Click here to enter a date. | |
| PCM sends adoptive placement paperwork to Data, including the Notice of  Permanency Move Form. Data staff will end the placement in the SUB stage  and enter the adoptive placement in the ADO stage, using the RID number  provided.  **DO NOT close the SUB stage until legal consummation of the adoption** | | |  | |
| Ensure monthly home visits with child/youth and adoptive family.  *TAC 749.3421, 749.3425* | | | Click here to enter a date. | |
| Provide support to adoptive family: therapy/specialist referrals, referrals to local adoptive parent support groups, etc.  *TAC 749.3423* | | | Click here to enter a date. | |
| Provide the family with information about post-adopt services (included in  Attachment A) | | |  | |
| **CONSUMMATION** | | | **DATE(S) COMPLETED** | |
| PCM will ensure the family is advised to retain an attorney for the consummation.  PCM will send the family’s attorney/ensure family’s attorney has:   * Termination order * Family’s home screening(s) * child’s birth certificate * HSEGH, * Court Report, * Waiver of Consent * Affidavit Concerning Interstate Compact   **What to file with Court for Adoption Consummation *\*File Prior to***  ***Adoption Hearing***   * Waiver and Consent (usually sent by the ADO attorney) * Home Study (approved within 1 year) * FBI backgrounds * Central Registry * HSEGH (signed and each page initialed by family) * Post Placement Adoption report – \**Should be completed by the CPA, unless it is a TFI/2INgage home – then PCM to complete* * Termination Order * Copy of Birth Certificate   **Attend consummation hearing**  **Following Adoption Consummation**   * Send Copy of Adoption Decree to the eligibility specialist * Update Legal in ADO and SUB stage * Within 24 hours of consummation, in ADO change Legal Status to Adoption Consummated   Legal County = County of Adoption  Cause Number = ADO cause   * In SUB stage add Legal Action   Action = CVS Hearing  Subtype = Other  Outcome = Adoption Consummation | | |  | |
| **Closing ADO Stage:**   * Eligibility Specialist will complete their procedures in IMPACT to start Subsidy.   *\*Rule of thumb, once child’s name is changed to adoptive name in ADO*  *stage eligibility is completed and case can be closed, provided all correct*  *information has been entered.*   * Complete Closing Summary *\*IN EACH CHILD’S STAGE* * When the ADO stage closure is approved, it will open the PAD stage, and PAD stage should be assigned to the appropriate DFPS eligibility specialist   **Closing SUB Stage**   * Ensure eligibility and Billing level has been ended – *This is done by Eligibility Specialist* * Request Dismissal of original cause through CPS attorney - *\*Taylor County requires an affidavit in support of dismissal* * Once dismissal has been received document in contact narrative * Complete Closing Summary *\*IN EACH CHILD’S STAGE*   **Additional task**  Provide the family the redacted case record and have family sign: Acknowledgement (Form 2221) | | | Click here to enter a date. | |