

5101:2-48-16

~~Pre-adoptive staffing, matching and placement procedures~~  
Adoption preplacement and placement procedures.

- (A) ~~Not later than forty five days after the execution of the permanent surrender or of the file stamp date of the permanent custody order, the agency shall assign an assessor to work with the child on adoption planning issues and adoption placement. The assessor may also serve as the child's caseworker. The PCSA or PCPA that holds permanent custody of the child shall begin services to prepare for the child for adoptive placement no later than the date of the permanent custody. The date of permanent custody shall be either:~~
- (1) The date of the court's filing of its order of permanent commitment of the child to the PCSA or PCPA pursuant to section 2151.353, 2151.354, 2151.355 or 2151.414 of the Revised Code.
  - (2) The date of proper execution on the JFS 01666, "Permanent Surrender of Child" (rev. 6/2006) pursuant to section 5103.15 of the Revised Code.
- (B) ~~The custodial public children services agency (PCSA) or private child placing agency (PCPA) shall assign an assessor to work with the child on adoption planning issues and adoptive placement no later than forty-five days after the execution of the permanent surrender or the file stamp date of the permanent custody order. The assessor may also serve as the child's caseworker. shall conduct a pre-adoptive staffing:~~
- ~~(1) No earlier than the date of the filing for termination of parental rights (TPR) or the birth of the child if the child is being adopted as an infant less than six months of age.~~
  - ~~(2) No later than forty five days after the execution of the permanent surrender or of the file stamp date of the permanent custody order of a child.~~
- (C) ~~For the purpose of this rule, a pre-adoptive staffing is the process of identifying, planning and coordinating services for a child after the execution of the permanent surrender or the file stamp date of the permanent custody order.~~
- (C) The assessor shall review and help the child explore the following adoption issues during the monthly visits required by rule 5101:2-42-65 of the Administrative Code.
- (1) Biological and social information.
  - (2) Substitute care placement history.
  - (3) Self-esteem issues.

- (4) Separation and attachment issues.
  - (5) Feelings concerning adoption.
  - (6) Lifebook materials prepared pursuant to rule 5101:2-42-67 of the Administrative Code.
  - (7) Terms and conditions of an open adoption, if applicable.
- (D) The PCSA or PCPA shall document the services provided to prepare the child for adoption in the case record.
- (E) For the purpose of this rule, "pre-adoptive staffing" is the process of identifying, planning and coordinating services for a child after the execution of the permanent surrender or the file stamp date of the permanent custody order.
- (F) The PCSA or PCPA shall conduct a pre-adoptive staffing according to the following:
- (1) No earlier than the date of the filing for termination of parental rights (TPR) or the birth of the child if the child is being adopted as an infant less than six months of age.
  - (2) No later than forty-five days after the execution of the permanent surrender or of the file stamp date of the permanent custody order.
- ~~(D)~~(G) The following individuals shall be invited to attend the pre-adoptive staffing:
- (1) The child's caseworker.
  - (2) The child's caseworker's supervisor.
  - (3) The assessor ~~who will be~~ assigned to work with the child on adoption issues and the adoption placement, if different from the child's ongoing caseworker.
  - (4) The assessor's supervisor, if different from the ongoing caseworker's supervisor.
  - (5) Any agency staff who has the specific assignment of recruiting families for children who are awaiting adoption.
  - (6) Any assessor who has or is in the process of conducting a homestudy for a kinship family or a foster family who has indicated an interest in the child.
  - (7) The guardian ad-litem, (GAL) if one has been assigned to the case.

- (8) The court appointed special advocates (CASA) worker, if one has been assigned to the case.
- ~~(8)~~(9) Key professionals working specifically with the child who have knowledge about the child's history and current needs that will be helpful to determine the child's placement needs.
- ~~(9)~~(10) The child's current caregiver, if deemed appropriate by the ~~agency~~ PCSA or PCPA.
- ~~(10)~~(11) The child, if in the best interests of the child and deemed appropriate by the ~~agency~~ PCSA or PCPA.
- ~~(11)~~(12) The birth family, if in the best interest of the child and deemed appropriate by the ~~agency~~ PCSA or PCPA.
- ~~(12)~~(13) The ~~agency's~~ PCSA or PCPA Multiethnic Placement Act (MEPA) monitor.
- ~~(E)~~(H) During the pre-adoptive staffing, the following information shall be discussed, as relevant to the child.
- (1) The child's social, developmental and medical history.
  - (2) Previous placements.
  - (3) Specific recruitment efforts to find a permanent home for the child.
  - (4) Current strengths and limitations and other special needs, including previous or current relationships with siblings or other birth relatives.
  - (5) Current therapeutic assessments and needs to be considered in determining the child's adoptive placement.
  - (6) Planning for transition of the case planning from a focus on foster care to adoption.
  - (7) Planning for good-bye visits.
  - (8) Assessing the child's understanding and readiness for adoption.

- (9) Status of child's lifebook.
- (10) ~~Other preparation for adoption. The JFS 01530 "Multiple Children/Large Family Assessment" (rev. 12/2006) as outlined in rule 5101:2-48-12 of the Administrative Code.~~
- (11) Any families who may be interested in adopting the child.
- (12) ~~The JFS 01530 "Multiple Children/Large Family Assessment" (12/2006) as outlined in rule 5101:2-48-12 of the Administrative Code. Other preparation for adoption.~~
- ~~(F)~~(I) ~~Documentation pertaining to the~~ The PCSA or PCPA shall document the pre-adoptive staffing shall be documented on the JFS 01690 "Documentation of the Pre-adoptive Staffing and Updates" (rev. 12/2006) and ~~maintained in~~ maintain the form in the child's adoptive case record. ~~The JFS 01690 shall be distributed within~~ Within fifteen days after the ~~date of the~~ pre-adoptive staffing, ~~to assessors in the PCSA or PCPA shall also distribute the JFS 01690 to assessors in the agency who complete adoption homestudies.~~
- ~~(G)~~(J) For purposes of this rule, a "matching conference" is the process of determining the most appropriate family to adopt a child based on the child's individual needs and the ability of the prospective adoptive parent to meet those needs. ~~At a minimum, the matching decision shall be based on the consideration of the placement of siblings together, information contained in the JFS 01685 "Child Study Inventory" (rev. 09/2003), the JFS 01689 "Documentation of the Placement Decision Making Process" (rev. 02/2005) and the JFS 01688 "Individualized Child Assessment" (rev. 02/2005), if applicable. A matching conference shall be conducted to match a child with a family for the purpose of adoption. The matching conference shall be held prior to the placement of the child for adoption and as outlined in rule 5101:2-48-05 of the Administrative Code.~~
- ~~(H)~~ ~~A matching conference must be conducted to match a child with a family for the purposes of adoption. The matching conference must be held prior to the placement of the child for adoption.~~
- ~~(I)~~(K) During the matching conference, the multiple family assessment JFS 01530 as outlined in rule 5101:2-48-12 of the Administrative Code shall be discussed, if applicable.
- ~~(J)~~(L) ~~The~~ A ~~eustodial agency~~ PCSA or PCPA shall hold the initial matching conference within ninety days of the execution of the permanent surrender or the file stamp

date of the permanent custody order, unless the order is under appeal. If the order is under appeal, the agency ~~shall~~ may hold a matching conference ~~within forty-five days of~~ prior to the issuance of the final decision.

~~(K)~~(M) The following individuals ~~must~~ shall be invited to the matching conferences:

- (1) For the first matching conference only, the child's previous caseworker if the individual is different than the assessor assigned to work on adoption issues and placement.
- (2) For the first matching conference only, the child's previous caseworker's supervisor, if applicable.
- (3) The assessor assigned to work with the child on adoption issues and placement.
- (4) The assessor's supervisor.
- (5) The child's caseworker, if different from the assessor above.
- (6) Any ~~custodial agency~~ PCSA or PCPA staff who has the specific assignment of recruiting families for children who are awaiting adoption if there are no families identified for the child being presented in the matching conference.
- (7) Any adoption caseworker who has responsibility for an approved adoptive family where the JFS 01673 "Assessment for Child Placement (Homestudy)" ~~(rev. 08/2005)~~ (rev. 12/2006) and the JFS 01673-A "Child Characteristics Checklist for Foster Care and/or Adoption" ~~(rev. 08/2005)~~ (rev. 12/2006) indicates acceptance of the ~~general characteristics and~~ special needs of the child and the family is interested in being considered for the child.
- (8) Any assessor from any agency who is responsible for an approved adoptive applicant being presented at the matching conference.
- (9) The ~~guardian ad litem~~, GAL, if one has been assigned to the case.
- (10) The CASA, if one has been assigned to the case.
- ~~(10)~~(11) Any other professional who may have knowledge of the child's history and current needs that will be helpful to determine the child's placement needs.
- ~~(11)~~(12) The PCSA or PCPA MEPA monitor.

~~(12)(13) Ohio department of job and family services (ODJFS) external MEPA monitor. The external MEPA monitor shall be notified via e-mail transmission at: [matchingconference@odjfs.state.oh.us](mailto:matchingconference@odjfs.state.oh.us) The PCSA or PCPA shall e-mail the external MEPA monitor at [Matching\\_Conference@jfs.ohio.gov](mailto:Matching_Conference@jfs.ohio.gov).~~

~~(L) The minimum number of individuals who must be in attendance at the matching conference to make any matching decision include: the adoption caseworker for the child, the caseworker for the adoptive family, and a member of the administrative or supervisory staff of the custodial agency's adoption program. These individuals must attend the matching conference and be included in the placement decision-making process. If the adoption caseworker and family caseworker are the same individual, another adoption program staff member shall participate in the matching conference to assure that at least three individuals participate in the matching decision.~~

~~In situations where the custodial agency does not have the number of adoption program staff employed to include in the matching conference, it is permissible for a professional or para-professional who is employed with the custodial agency to participate in the matching conference. This person shall, however, be an employee of the custodial agency and shall have at minimum basic knowledge related to special needs adoption and permanency planning to participate in the placement decision-making process.~~

~~(N) The following individuals shall attend the matching conference and be included in the placement decision-making process:~~

~~(1) The adoption caseworker for the child.~~

~~(2) The caseworker for the adoptive family.~~

~~(3) A member of the administrative or supervisory staff of the PCSA or PCPA adoption program.~~

~~(O) If the adoption caseworker and family caseworker are the same individual, another adoption program staff member shall participate in the matching conference to assure that at least three individuals participate in the matching decision.~~

~~(P) If the PCSA or PCPA does not have at least three adoption program staff employers to participate in the matching conference, a professional or para-professional who is employed by the PCSA or PCPA shall participate in the matching conference. This person shall have, at a minimum, basic knowledge related to special needs adoption and permanency planning.~~

~~(M)(Q) If When more than one PCSA, PCPA or PNA private non-custodial agency~~

(PNA) is involved in an adoptive matching decision, a representative from each agency shall participate in the matching conference. Participation by teleconference is acceptable. The PCSA, PCPA, or PNA shall provide relevant information that may impact the safety and well being of the child being placed with the prospective adoptive family which shall include at minimum; ~~but not limited to:~~

- (1) Past or present functioning of the prospective adoptive parent.
- (2) Rule violation involving foster and pre-adoptive child.
- (3) Third party investigations.
- (4) Information relating to previous adoption applications.
- (5) Previous disruptions from the prospective adoptive family home.

~~(N)~~(R) The ~~custodial agency~~ PCSA or PCPA shall document each matching conference on the JFS 01689 during the matching conference.

~~(O)~~(S) The ~~custodial agency~~ PCSA or PCPA shall document each matching conference for each child on the JFS 01610 "Child Permanency Data Summary" (02/2005) JFS 01610 "Child Permanency Planning Data Summary" (rev. 2/2005).

(T) The matching decision shall be based on the following, at a minimum:

- (1) Consideration of the placement of sibling together.
- (2) The JFS 01690.
- (3) Information contained in the JFS 01685 "Child Study Inventory (CSI) Facesheet" (rev. 9/2003).
- (4) The JFS 01689 "Documentation of the Placement Decision-Making Process" (rev. 12/2006).
- (5) The JFS 01688 "Individualized Child Assessment" (rev. 5/2007), if applicable.

~~(P)~~(U) Regardless of the geographic location, the following preferential order shall be given when considering families in the matching process:

- (1) All adult relatives of the child; This includes a relative or non-relative that who the birth mother has indicated by name as a potential resource to adopt her child. The identified relative or non-relative must have, at a minimum, a

~~signed JFS 01691 "Application for Child Placement" (rev. 12/2006) or other signed adoption application on file with another state, five days prior to the matching conference. The resource must meet all relevant state child protection standards unless the agency determines that the placement is not in the best interest of the child.~~

(a) The identified relative or non-relative shall have, at a minimum, a signed JFS 01691 "Application for Child Placement" (rev.12/2006) or other signed adoption application on file with another state at least five working days prior to the matching conference.

(b) The identified relative or non-relative shall meet all relevant state child protection standards unless the PCSA or PCPA determines that the placement is not in the best interest of the child.

(2) The child's foster caregiver who is approved to adopt or who has completed the JFS 01691 at least five working days prior to the matching conference unless the agency determines that the placement is not in the best interest of the child.

(3) Other suitable approved prospective adoptive families.

~~(Q)~~(V) Subsequent matching conferences shall be held for ~~each~~ the child, except as referenced in paragraph ~~(S)~~ (X) of this rule, at least once every ninety days following the initial matching conference. Thirty days prior to each matching conference, the JFS 01690 shall be updated and made available to all adoption assessors responsible for the completion of adoptive homestudies, and on the statewide automated child welfare information system as available.

~~(R) The agency shall conduct a search for prospective families in the statewide automated child welfare information system if there are no families identified to be presented at any matching conference.~~

(W) If approved adoptive families have not been identified for the child, the PCSA or PCPA may conduct a search for approved adoptive families in SACWIS as outlined in rule 5101:2-48-05 of the Administrative Code. If the agency elects to not use SACWIS to search for approved adoptive families, the agency shall demonstrate and document how it engages in diligent recruitment efforts to find suitable approved families. Examples of diligent recruitment efforts may include:

(1) Engaging in recruitment activities for the child that demonstrate a good faith effort to recruit approved adoptive families for the child. The agency shall document the steps taken as related to the specific recruitment efforts made for the child on the JFS 01689.



(2) Contracting for recruitment activities for the specified child.

(3) Transferring a child's case to a specific unit within the agency which is specialized in child-specific recruitment services for children for whom no identified approved adoptive families are available. In such cases, the agency shall actively recruit approved adoptive families who can meet the child's individual needs.

(4) Engaging in diligent recruitment efforts by forwarding information on the child to other agencies in attempts to find approved adoptive families who are interested in adopting the child.

~~(S)~~(X) Subsequent matching conferences are not required when:

(1) ~~Signatures of the adoptive parent(s) and applicable agencies have been completed on the JFS 01654 "Adoptive Placement Agreement" (rev. 10/2001). The child has been matched with an adoptive family in a matching conference.~~

(2) The child ~~reaches~~ is age eighteen years old or older.

(3) The child's custody changes to a status other than permanent custody.

~~(T)~~(Y) If the child's adoptive placement disrupts and there is a permanent surrender or if the child is placed in the permanent custody of the PCSA or PCPA, the PCSA or PCPA shall ~~child is required to~~ begin the cycle of ninety day matching conferences again with the first one due ninety days from the date of disruption.

~~(U)~~(Z) ~~For any~~ A PCSA, PCPA or PNA that has not fully implemented SACWIS (as defined in rule 5101:2-33-05 of the Administrative Code) which has not transitioned to the statewide automated child welfare information system, the eustodial agency shall provide information necessary for the completion of the JFS 01609 "Family Permanency Planning Data Summary" ~~(rev. 02/2005)~~ (rev. 2/2005) to the Ohio PCSA ~~which~~ that had a family presented at the matching conference. The agency responsible for each prospective adoptive family presented at the matching conference shall document the outcome of the matching conference for the family on the JFS 01609.

~~(V)~~(AA) ~~The PCSA or PCPA shall make an adoptive placement only when it has permanent custody of the child, whether custody is obtained by permanent surrender or commitment. A child shall only be placed into an adoptive home which meets the best interests and special needs of the child.~~

~~(W)(BB)~~ No PCSA or PCPA shall place a child in an Ohio home for the purpose of adoption unless a homestudy has been completed and approved by an Ohio PCSA, PCPA or PNA pursuant to rule 5101:2-48-11 or 5101:2-48-11.1 or 5101:2-48-12 of the Administrative Code, as applicable. The homestudy shall be completed by a PCSA, PCPA or PNA with authority recognized by ODJFS to complete adoptive homestudies. The PCSA or PCPA may place a child in an adoptive home in another state pursuant to rules governing the interstate placement of children pursuant to Chapter 5101:2-42 of the Administrative Code.

(CC) The PCSA or PCPA may place a child in an adoptive home in another state pursuant to rules governing the interstate placement of children pursuant to Chapter 5101:2-42 of the Administrative Code.

~~(X)(DD)~~ Prior to the date of adoptive placement, the PCSA or PCPA shall provide the prospective adoptive parent with: the JFS 01685 "Child Study Inventory (CSI) Facesheet" (rev. 09/2003) in accordance with rule 5101:2-48-21 of the Administrative Code.

(1) The JFS 01685 in accordance with rule 5101:2-48-21 of the Administrative Code.

(2) The completed and signed JFS 01667 "Adoption Information Disclosure" (rev. 9/2003) in accordance with rule 5101:2-48-15 of the Administrative Code.

(EE) The JFS 01654 "Adoptive Placement Agreement" (rev. 10/2001) shall explain the responsibilities and authority of those who sign it. The following shall sign the JFS 01654 on or before the date of the adoptive placement:

(1) PCSA or PCPA.

(2) Adoptive parent(s).

(3) Any other PCSA, PCPA, or PNA providing adoption services, if applicable on or before the date of adoptive placement.

~~(Y)~~ Prior to the date of the adoptive placement, the PCSA or PCPA shall provide the adoptive family with the completed and signed JFS 01667 "Adoption Information Disclosure" (rev. 09/2003) in accordance with rule 5101:2-48-15 of the Administrative Code.

~~(Z)(FF)~~ The JFS 01654 shall be signed by the PCSA or PCPA having permanent custody of the child, by the adoptive parent and, if applicable, by any other PCSA, PCPA or PNA providing adoption services, on or before the date of adoptive placement. A copy of the signed JFS 01654 signed agreement shall be given to the adoptive

parent and any other signer of the agreement. The agreement shall explain the responsibilities and authority of all signers of the agreement.

~~(AA)~~(GG) ~~No~~ A PCSA shall not refuse to provide or arrange for services within its county to another PCSA on behalf of a special needs child when such services, if not provided, would cause a delay in the adoptive placement of a special needs child. Services shall include, but are not limited to: homestudy services; prefinalization and postfinalization services; and services needed to provide the court with information required for adoption finalization.

~~(BB)~~(HH) ~~When~~ If a child is placed with an Ohio adoptive family by an Ohio agency, the PCSA in the county in which the child is to be placed shall be notified, in writing, of the impending placement by the placing agency no later than ten days prior to the placement. In the case of an infant placement, the notification may be made prior to the birth of the child.

~~(CC)~~(II) ~~When~~ If a child from outside Ohio is placed with an Ohio adoptive family, the Ohio agency recommending the adoptive family, or approving the adoptive family homestudy, shall notify, in writing, the PCSA in the county where the adoptive family resides of the impending placement no later than ten days prior to the placement. In the case of an infant placement, the notification may be made prior to the birth of the child.

~~(DD)~~(JJ) ~~When~~ If the permanent custody of a child is under appeal through a court of appropriate jurisdiction or awaiting journalization of a court order, the PCSA or PCPA may place the child in a substitute care placement certified as a foster home pursuant to Chapter 5101:2-7 of the Administrative Code that is also approved as an adoptive placement.

~~(EE)~~(KK) ~~When~~ If an applicant knowingly makes a false statement in the application or homestudy process, the custodial agency shall not present that family at the matching conference if the outcome of the agency review results in a reassessment of the homestudy.

~~(FF)~~(LL) All placement activities shall be in compliance with rules 5101:2-42-18.1 and 5101:2-48-13 of the Administrative Code and with the Multiethnic Placement Act of 1994 as amended by Section 1808 of the Small Business Job Protection Act of 1996, 42 U.S.C. 622(b)(9), 671(a)(18), 674(d) and 1996(b) ~~(MEPA)~~ and Title VI of the Civil Rights Act of 1964, 42 U.S.C. 2000d, et seq, as they apply to the foster care and adoption process (Title VI).

~~(GG)~~ The PCSA, if different from the PCSA in the county in which the adoptive applicant(s) resides, the PCPA or PNA shall provide notification letter which shall

~~include a description of the special needs and the age of the prospective adoptive child and the name of the prospective adoptive parent and the number of children that will reside in the prospective adoptive home when the prospective adoptive child is placed in the prospective adoptive home. This does not apply to stepparent adoption.~~

(MM) If a PCSA intends to place a child for adoption with an adoptive family from another county, it shall notify the PCSA in the county in which the applicant resides. This requirement does not apply to an adoption by a step-parent whose spouse is a biological or adoptive parent of the minor to be adopted.

(NN) If a PCPA or PNA intends to place a child for adoption with an adoptive family, it shall notify the PCSA in the county in which the applicant resides. This requirement does not apply to:

(1) An adoption by a step-parent whose spouse is a biological or adoptive parent of the minor to be adopted.

(2) An adoption where the PCSA in the county in which the adoptive applicant resides has contracted with the PCPA or PNA to complete the adoptive applicant's homestudy.

(OO) The PCSA, PCPA, or PNA shall send the written notification at least ten days prior to placement of a child. In the case of an infant placement, the notification may be made prior to the birth of the child.

(PP) The PCSA, PCPA, or PNA shall include the following information in the written notification required in paragraphs (JJ) and (KK) of this rule:

(1) The prospective adoptive child's age.

(2) A description of the prospective adoptive child's special needs.

(3) The name(s) of the prospective adoptive parents.

(4) The number of children that will reside in the prospective adoptive home if the prospective adoptive child is placed in the home.

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Certification

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Date

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