

Adoption Tellings

(Revised 05/06/22)

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Forms

This following forms are referenced in this file:

- 02-1 Medical Records Request for Adoptions
- 02-11 Telling Template – English
- 02-11sp Telling Template – Spanish
- 02-12 Adoptive Telling/Social History Addendum
- 02-12sp Adoptive Telling/Social History Addendum (Spanish)
- 02-13 Telling Checklist
- 02-14 Telling Cover Letter
- 02-30 Staffing Letter
- [AD 67](#) Information about the Birth Mother
- [AD 67A](#) Information about the Birth Father
- AD 512 Psychosocial and Medical History of Child (*CMS Adoptions Report*)
- [PUB 511](#) Finding Competent Therapist

Introduction

An Adoptive Telling is a complete report of all current and historical information known to the County of San Diego Child Welfare Services about a child who is in need of an adoptive home or in the process of being adopted by an approved resource family.

Adoptive Tellings are used when matching a child with an adoptive family for the purpose of providing comprehensive information about the child. All approved adoptive families are given this document prior to signing adoptive placement papers and the finalization of an adoption.

Policy

The Adoption Social Worker (SW) will complete a full draft Telling prior to the first status review hearing after the termination of parental rights.

A full draft Telling:

- Is an electronic copy of the Telling 02-11 template, which includes case file information that the SW has obtained to date as outlined in the Telling Checklist, form 02-13.
- Will include all copies of AD67 and AD67A forms. One copy of these forms should be completed by the birth parents. The SW is responsible for filling out a separate AD67 and AD67A to fill in any information known to the Agency but not provided by the birth parent.
- Will have all sections of the Telling Template (02-11) completed. Sections that are not complete will contain an explanation as to why the information is not included. This should include a status on obtaining the information and when the section will be completed. (i.e. if birth records have not been received, have they been ordered? Are there barriers to obtaining those records?)

For Telling approvals:

- The Telling status moves from a full draft Telling to an approved Telling when it has been approved and signed by the PSS.
- Tellings should only be signed by a PSS when there is a plan to present a Telling to a potential adoptive family.
- All Tellings and addendums must be reviewed and signed by a PSS before they are considered complete and authorized to be released or read to a third party.

Additional Information:

- Tellings are updated as needed throughout the life of the case until the agency and family are ready to move forward with adoptive placement.
 - Any addendum to the Telling will be written with all significant information that was not available at the time of the signing of adoptive placement papers.
 - Addendums should only be written after a Telling has been signed by the PSS. Prior to full approval status, any new information should be included in the body of the Telling.
 - If a child's draft, unsigned Telling is transferred to a new SW, it is the new SW's responsibility to read and verify that the information presented in the document is accurate and complete.
 - All Adoptive Tellings are kept in the child's adoption file and retained indefinitely.
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Prioritization of Tellings

The SW will actively work to prioritize completion of Tellings in this order:

1	Child(ren) is in a temporary placement and needs an adoptive placement. NOTE: Tellings in this category must be completed by SW immediately upon receiving the case.
2	Children with parental rights terminated and placed with a family that has been fully approved as a resource family and has completed all adoption requirements.
3	Children in cases where parental rights are terminated and all appeals exhausted and the adoption could finalize prior to the child being a dependent for two years, regardless of the status of the Resource Family Approval (RFA).
4	Children with parental rights terminated and all appeals exhausted but resource family has not completed the RFA process.
5	Children with extenuating circumstances where a finalized adoption may help improve their quality of life. (i.e., medical coverage with the adoptive family, increased funding in adoptions, etc.)
6	Parental rights have not yet been terminated but the child is in a home that has expressed a willingness to provide long-term care for the child through adoption.

NOTE: One Telling must be written for each child, unless a sibling set are being placed together in the same adoptive home, in which case, you may combine the telling information. The prioritization of Telling writing and completion should be discussed regularly in individual supervision.

Telling Writer

Telling writers are available to create a draft Telling for a children's worker. When requesting a Telling writer, complete the following steps:

Step	Action
1	The Adoptions SW will discuss the case with their PSS.
2	PSS will send an email request to the Lead Telling Writer PSS requesting a Telling writer, which includes the child's name and the assigned Children's SW name and contact information. PSS should also note any special circumstances of the case (i.e. child needs placement, post .26, resource family RFA approved, etc.).

**Telling Writer
(cont.)**

Telling writers are available to create a draft Telling for a children’s worker. When requesting a Telling writer, complete the following steps:

Step	Action
3	Lead PSS for Telling Writers will send an email response to requesting PSS indicating which worker that the Telling is assigned to.
4	Adoptions SW will discuss case with the Telling writer and inform them of any missing information or documentation that may need to be obtained in order to complete the Telling.

**SW/Telling
Writer
Procedures for
Completing a
Telling**

When an Adoptions SW or a Telling Writer is assigned a case that needs a Telling, they will complete the following steps:

Step	Action	
	Adoption SW	Telling Writer
1	Review the dependency case file(s) of the child, siblings and parents in their entirety, including delivered service logs.	
2	<p>Order:</p> <ul style="list-style-type: none"> • Birth records using form 02-1. • Closed case files for parents or siblings, if applicable. • A developmental or psychological evaluation, if one is needed. <p>NOTE: All adoptive parents should be given the most current developmental and psychological information on any child being adopted. Please refer to the policy on Developmental/Psychological Assessment Policy for Children being Adopted for specific procedures.</p>	<ul style="list-style-type: none"> • Verify that birth records and closed case files have been ordered and are available to incorporate into the Telling. • Review all previous case files and verify that all previous closed cases have been ordered. • Verify that a developmental or psychological evaluation has been completed, if necessary.

**SW/Telling
Writer
Procedures for
Completing a
Telling (cont.)**

Step	Action	
	Adoption SW	Telling Writer
3	<p>Give a blank AD67 and AD67A to the birth parents to complete. Review the form with the birth parents and let them know that the first two pages will be confidential (as indicated on the form) unless they wish to sign a release to allow the adoptive parents to have a copy of those pages. If the parents want to consent to the release of the first two pages, they may make a note with their signature directly on the AD67/ AD67A.</p> <p>Document who filled out the information in the Telling template 02-11 under each parents section. Enter a contact in CWS/CMS to indicate that you have given the forms to the birth parents and reviewed the confidentiality/consent of the first two pages with them.</p> <p>Complete a separate AD67 and AD67A to fill in any information that was not provided by the birth parents and/or relatives.</p>	<p>Verify that both AD67 and AD67A have been completed and are available to incorporate into the Telling.</p>

**SW/Telling
Writer
Procedures for
Completing a
Telling (cont.)**

Step	Action	
	Adoption SW	Telling Writer
3 (cont.)	<p>NOTE: The two forms can be completed by the birth parents, relatives, and/or the Adoption SW. When possible, information should be obtained directly from the birth family and not only from CWS/CMS record. The SW should not add information on the forms filled out by the birth parents. Applicants should be given both the forms filled out by the parents as well as the separate form providing any information known to the agency but not provided by the birth parents. Pages 1 and 2 are only to be released with consent of the parent and page 3 is only for independent adoptions.</p>	<p>Verify that both AD67 and AD67A have been completed and are available to incorporate into the Telling.</p>
4	<p>Add applicable information into the 02-11 if available when receiving the case.</p>	<p>Not Applicable.</p>
5	<p>Add additional information within 2 weeks of receipt (i.e. birth records, new developmental evaluations, termination of parental rights orders, etc.).</p>	<p>Not Applicable.</p>
6	<p>Complete and sign the 02-13 and 02-11 forms.</p>	<p>Submit Telling to an adoptions PSS for review and approval.</p>
7	<p>Submit the 02-11 and 02-13 forms to the unit PSS for approval.</p>	<p>Once all edits are completed and the Telling writer PSS has reviewed the full draft Telling, complete and email the 02-11 and 02-13 forms to the assigned Children’s worker PSS and the Children’s SW indicating if there are any missing pieces of information or follow up items.</p>

**SW/Telling
Writer
Procedures for
Completing a
Telling (cont.)**

Step	Action	
	Adoption SW	Telling Writer
8	<p>Adoption SW and PSS review the full draft Telling from the Telling writer and determine if any information needs to be added or edited.</p> <p>All information must be reviewed before the Adoptions SW and PSS sign the approved Telling document.</p>	Not Applicable.
9	<p>Submit the 02-11 to the Adoptions Supervising Office Assistant at: CWSAdoptionsClerical.HHSA@sdcounty.ca.gov</p> <p>NOTE: When a case is transferred before the Telling is completed, Children’s SW (or Supervising Office Assistant) must submit the working Telling to clerical as a Word document.</p>	Not Applicable.
10	<p>Follow the staffing procedures when the case is ready to be matched.</p> <p>NOTE: The staffing procedure is required only for children who are not already placed in the adoptive home.</p>	Not Applicable.

NOTE: The assigned children’s SW is expected to provide all supporting documents to the Telling Writer once one is assigned. In the event that documents are missing or need to be obtained, the children’s SW will submit a list to the Telling Writer of all missing documents. The Telling Writer will attempt to obtain all necessary documents in order to complete a thorough Telling document.

Addendums to Tellings

Telling addendums are written to document any information obtained by the Adoptions program after the original Telling was approved and signed by all parties, using the 02-12 form. Addendums must also be sent to the Adoption Supervising Office Assistant, once approved, as both a Word and PDF document.

Addendums should only be added to a Telling if placement papers have already been signed. If placement papers have not been signed, any new information should be added to the existing Telling. The Telling should then be approved and signed with the new information.

NOTE: The SW signing the Telling addendum is verifying that the information is accurate and complete.

PPS Procedures

When a new case is assigned to the unit, the PSS will:

Step	Action
1	Track the cases assigned to each worker by the date of assignment to the Adoptions program.
2	Monitor the work flow of the assigned SW in order to help prioritize the completion of Tellings.
3	Once a Telling has been submitted for approval, review the 02-13 form for completion and sign or return to the SW for follow-up.
4	Conduct a thorough review of the 02-11 before approving the document to ensure accuracy. Sign and date before returning it to the SW.
5	Submit the Telling to the Supervising Office Assistant to be saved as an electronic copy.
6	Return the 02-11 and 02-13 to the SW within 1 week.
7	Adoption Supervising Office Assistant will enter the date the Telling was approved on the Special Project Code page in CWS/CMS.

NOTE: A Telling cannot be released for matching or adoptive placement papers without the signature of a PSS.

**Developmental/
Psychological
Evaluations/
Waivers**

The Adoption SW is responsible for providing all current developmental and psychological information that is known to the agency to the adoptive family. Please reference the adoption developmental/psychological evaluation policy (see Adoptability Screening) for specific requirements.

**Preparing for a
Telling Meeting
with an
adoptive family
when the child
is already
placed in the
home**

When preparing for a Telling meeting with an adoptive family in which the child is already placed in the home, the SW will:

Step	Action
1	Verify that the case has been staffed, if necessary. If a child is already placed with the prospective adoptive family, consult with PSS about moving forward with the adoptive placement and document that consultation in CWS/CMS. NOTE: The staffing procedure is required only for children who are not already placed in the adoptive home.
2	Determine if this is a Telling meeting with a Co-op or Outsourced family. If yes, review the policy on Adoptive Placement Papers and Finalization with Outsourced Home Studies If it is not, proceed to step 3.
3	Make copies of the signed 02-11 document for each Telling meeting participant.
4	Fill out the AD 512 and make 2 copies for the meeting.
5	Copy all needed AD 512 attachments and keep originals in the AD file.
6	Redact confidential information in the AD 512 attachments. Confidential information includes but is not limited to: Birth family's: <ul style="list-style-type: none">• Last name• Contact information including address and phone number• Medical record numbers• Birth dates/Year of birth Resource Family's: <ul style="list-style-type: none">• Last name• Address (The phone number is permitted).
7	Prepare a folder with the 02-11, AD 512, PUB 511, and attachments.

Preparing for a Telling Meeting with a family that is approved for adoption and the child is not placed in the home

When preparing a Telling for a family that is approved for and waiting for an adoptive match, but the child is not yet placed in the home. The SW will:

Step	Action
1	Verify that the case has been staffed if needed.
2	<p>Make a copy of the Telling and redact all confidential information in the 02-11, including:</p> <ul style="list-style-type: none"> Names of caregivers and relatives. For example, instead of "Grandfather John" it will only say "grandfather" in the redacted version. It is not necessary to redact the first names of the biological parents. Previous caregivers should be referred to by their relationship to the child (i.e. caregiver, foster parent, aunt, uncle, etc). <p>NOTE: The abovementioned information can be shared with the adoptive family on the 02-11 Adoption Telling during the signing of adoption placement papers.</p>
3	Make copies of the signed 02-11 for all Telling meeting participants to view.
4	Obtain photographs for the child(ren) needing placement.
5	Prepare a folder with any contact numbers (i.e. providers listed on AD512) that the family may need when making the placement decision. Place photographs in a separate envelope.

Attending a Telling Meeting

This table displays who should attend a Telling:

Title/Relationship	Attendance at Telling
Adoption SW Prospective Adoptive Parent(s)	Required
Adoption PSS, Private Agency SW, if appropriate	Optional

**Attending a
Telling Meeting
(cont.)**

This table displays who should attend a Telling:

Title/Relationship	Attendance at Telling
Support staff (CASAs, therapists, etc.)	Not allowed
Family Support/Network, (community members, tribal representatives etc.)	

**Presenting a
Telling**

When presenting a Telling, the SW will:

Step	Action
1	Bring signed copies of the 02-11 for all participants to the Telling meeting.
2	Bring the AD 512 and all redacted attachments if signing placement papers at this meeting.
3	Read the 02-11 aloud and in the appropriate language for the family allowing opportunities for questions throughout the reading. Allow time for adoptive parents to review documents during the telling presentation.
4	Correct information, if needed, during the reading of the Telling. If corrected information changes dates or important information and is not only typographical errors, make new copies for all participants before signing.
5	Ask the prospective adoptive family to sign the 02-11. If also signing placement papers proceed to Steps 6-7. NOTE: If not signing placement papers, collect the 02-11 after it is read and signed, explaining that they may view it again in the office. Then proceed to Step 8.
6	Review the AD 512 and attachments with the family and ask that they sign both copies of the AD 512.

Presenting a Telling (cont.)

When presenting a Telling, the SW will:

Step	Action
7	Give the family: <ul style="list-style-type: none">• a signed copy of the 02-11• one copy of the AD 512 and all redacted attachments. After the forms are signed, the SW will begin signing placement papers.
8	Ask for any additional questions before showing the family the photographs. Collect the photographs at the end of the Telling meeting.
9	Explain that the family must wait at least 24 hours before moving forward with the match (if the child is not currently placed in the home) and ask that they contact the SW with their decision.

Viewing the Telling After the Meeting

If a prospective adoptive family asks to review the 02-11 prior to the signing of Adoption Placement Papers, the SW will:

- Reserve a room in the CWS office for the review.
- Ensure a staff member is present for the review and that no copies are given or pictures are taken of the Telling material.

Emergency Placements

At times, children are in need of an adoptive home within a matter of hours or days. Typically, this occurs when a child is removed from an adoptive home and the program is attempting to avoid an unnecessary placement in foster care or PCC.

During emergency placements, it is permitted to give the potential adoptive parent information verbally in order to help the family assess if they are equipped to provide a permanent home for the child. This verbal information can be at the time of placement or after the child is placed in the home. If the family decides to move forward with a permanent plan of adoption, a telling should be prioritized as described in the “Presenting a Telling” section of this policy.

Access to Tellings

Information in the Adoption Record is confidential and should not be disclosed. Therefore, Tellings cannot be disclosed in their entirety to anyone except for adoptive parents or adoptees who are at least 18 years old.

However, Tellings mainly contain information gathered from CWS case files, and at times, it is permitted to share the following from the Telling with CWS staff or contracted programs (CASA's, therapists, wrap-around providers, psychologists for evaluations):

- Child(ren)'s past developmental screenings or evaluations
- Child(ren)'s background information obtained through CWS/CMS

It is not permitted to share information obtained from:

- AD 67 or AD 67A forms
- Birth parents' medical records
- Closed Adoption files.

If sharing information with CWS staff:

Step	Action
1	Complete the 02-14.
2	Scan the 02-14 and 02-11 in order to combine the documents and create a PDF.
3	Send the 02-11 with cover letter as a PDF document through county email only.
4	Enter in a CWS/CMS contact what information was given and to whom.

If sharing information with non-CWS staff:

Step	Action
1	Determine what type of information is being requested. If it is confidential information noted in this section, explain to the provider that the information will not be shared. Consult CWS Confidentiality Guide. If it is CWS information, proceed to Step 2.
2	Relay the information in verbal form only.
3	Enter in a CWS/CMS contact what information was given and to whom.

References

Adoption program state regulations 35049, 35127.1, & 35195.

Alignment with SET

This policy supports [SET Value 2](#) and the guiding principle to have consistent communication and information sharing with resource families who will provide ongoing care and support of a child. It also supports [SET Value 3](#) and the guiding principle to hold a sense of urgency when seeking permanency for children.
