

# Placement Paperwork and Finalization

(Revised 03/26/21)

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## Forms

This file references the following forms:

- 02-4 Placement Paper Worksheet
- 02-5 Post Placement Narrative
- 02-7 Post Adoption Contact Agreement
- 02-7sp Post Adoption Contact Agreement (Spanish)
- 02-28 Adoptions Finalization Checklist
- 02-30 Staffing Letter
- 02-85 Adoption Grievance Review Procedures
- 02-101 Adoption Tax Credit Letter
- 02-120 Adoption Nonrecurring Expenses Reimbursement
- 02-120a Reimbursement Documentation Worksheet
- 02-120b Claim Form for Reimbursement
- 02-150 Adoption Fee Agreement
- AD 512 *(CWS/CMS adoption report)*
- AD 558 Notice of Placement (To Be Sent Within 15 Days of Placement)
- AD 904B Waiver of Rights to Confidentiality for Siblings - Under the Age of 18
- ICWA - Indian Child Inquiry Attachment (CWS/CMS Template)  
010(A)
- Information San Diego Youth Services Adoption Services Information Page  
Flyer

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**Policy**

The Children's SW will process the Adoptive Placement paperwork and prepare the case for finalization. In order for the case to move forward with finalization the following must be complete:

- Resource Family is RFA approved
- Resource family has completed all additional elements in order to be Adoption ready.
- The telling is complete, current and approved by Adoption PSS.

**NOTE:** An adoption may not finalize if there is a pending appeal by either parent or the legal time limit to file an appeal has not expired.

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**Adoptive Placement Paper Procedures**

When parental rights have been terminated the Children's SW will take the following steps toward adoption finalization.

| Step | Who      | Action  |
|------|----------|---|
| 1    | SW       | Prepare the final Telling report with all attachments.  |
| 2    | SW       | Prepare a Staffing Letter by filling out all sections. The SW will fill out both the child's and applicant's information.   |
| 3    | SW       | Attach the approved Telling and the Staffing Letter and submit to the assigned PSS for review.  |
| 4    | PSS      | Review the Staffing Letter and attachments, and sign the Staffing Letter. Return the packet to the SW within 3 working days.<br><br><b>NOTE:</b> The SW and PSS signatures are required signatures on the Staffing Letter. The Adoptions SW and their respective PSS's must sign the staffing letter.   |
| 5    | SW       | Submit the following forms to Adoptions Clerical for the Adoptive Placement Papers to be created: <ul style="list-style-type: none"><li>• Staffing Letter</li><li>• 02-4 Placement Paper Worksheet</li><li>• A copy of the Birth Certificate</li></ul>  |
| 6    | Clerical | Process the Adoptive Placement Paper request and create the paperwork within 1 week. The paperwork will include: <ul style="list-style-type: none"><li>• Notice of placement</li><li>• Grievance form</li><li>• Non-recurring expense form</li><li>• AAP-HSS Directory</li><li>• AD904B</li><li>• SDYS Adoption Flyer</li><li>• 02-101</li></ul> Once complete, route the paperwork to the assigned SW. |

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**Adoptive Placement  
Paper Procedures**

| Step | Who      | Action   |
|------|----------|--|
| 7    | SW       | Contact the family in order to schedule the reading of the Telling and signing of Adoptive Placement Papers.   |
| 8    | SW       | <p>Attend the Telling/Placement Paper Signing with the family. The following four packets of information will be presented to the family:</p> <ol style="list-style-type: none"> <li>1. Telling with AD 512 attachments</li> <li>2. Adoptive Placement Papers</li> <li>3. AAP packet</li> <li>4. Finalization packet</li> </ol> <p>The AD 42R will be completed by the SW.</p>   |
| 9    | SW       | <p>Submit the completed packets for further processing:</p> <ul style="list-style-type: none"> <li>• Adoptive placement papers to Adoptions Clerical</li> <li>• AAP packet to the assigned PSS for review</li> </ul> <p>The Telling, AD 512, and finalization packet are retained in the file until the case is ready to submit for finalization.</p>  |
| 10   | SW       | Enter the placement facility match into CWS/CMS.   |
| 11   | SW       | Submit 07-65 to the registrar to reflect adoptive placement.   |
| 12   | SW       | Create new home study page in CWS/CMS.   |
| 13   | Clerical | Process the Adoptive Placement Papers and return to the SW within 1 week.  |
| 14   | SW       | <p>Conduct a post placement visit at least 24 hours after Adoptive Placement Papers are signed. The visit cannot occur on the same day as the paperwork is signed.</p> <p>In CWS/CMS contact designate this as a “Post Placement Visit” in the beginning of the narrative section.</p> <p><b>NOTE:</b> SW continues to be responsible for monthly face to face contacts with the child per Contacts - SW and Child policy until the adoption is finalized.</p> |

**Adoptive Placement  
Paper Procedures  
(cont.)**

| Step   | Who              | Action  |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
|--|------------------|---|------------------|------------------|-----------------------|--|---|---|-----------------------------|---|---|---------------------------------|---|---|----------------------|---|---|--------------------------|---|---|--|---|---|--------------|---|---|-----------------------|---|---|-----------------------------------|---|--|-------|---|--|-------------------|---|--|---------|---|--|--|---|---|
| 15   | SW               | <p data-bbox="721 233 1495 300">Submit the AD and AP file to the assigned PSS along with the 02-28 for review. The following documentation must be included:</p> <table border="1" data-bbox="721 323 1495 1486"> <thead> <tr> <th data-bbox="721 323 1192 403">Form Name/Number</th> <th data-bbox="1192 323 1336 403">Finalizing in SD</th> <th data-bbox="1336 323 1495 403">Finalizing outside SD</th> </tr> </thead> <tbody> <tr> <td data-bbox="721 403 1192 516">Interagency Adoptive Placement Agreement (02-82)</td> <td data-bbox="1192 403 1336 516">X</td> <td data-bbox="1336 403 1495 516">X</td> </tr> <tr> <td data-bbox="721 516 1192 590">Notice of Placement (AD558)</td> <td data-bbox="1192 516 1336 590">X</td> <td data-bbox="1336 516 1495 590">X</td> </tr> <tr> <td data-bbox="721 590 1192 663">Post Adoption Contact Agreement</td> <td data-bbox="1192 590 1336 663">X</td> <td data-bbox="1336 590 1495 663">X</td> </tr> <tr> <td data-bbox="721 663 1192 737">Child's medical form</td> <td data-bbox="1192 663 1336 737">X</td> <td data-bbox="1336 663 1495 737">X</td> </tr> <tr> <td data-bbox="721 737 1192 810">Post Placement Narrative</td> <td data-bbox="1192 737 1336 810">X</td> <td data-bbox="1336 737 1495 810">X</td> </tr> <tr> <td data-bbox="721 810 1192 924">JV-320 Judgment for termination of parental rights</td> <td data-bbox="1192 810 1336 924">X</td> <td data-bbox="1336 810 1495 924">X</td> </tr> <tr> <td data-bbox="721 924 1192 997">ICWA 010-(A)</td> <td data-bbox="1192 924 1336 997">X</td> <td data-bbox="1336 924 1495 997">X</td> </tr> <tr> <td data-bbox="721 997 1192 1071">State Acknowledgement</td> <td data-bbox="1192 997 1336 1071">X</td> <td data-bbox="1336 997 1495 1071">X</td> </tr> <tr> <td data-bbox="721 1071 1192 1144">Information to prepare a petition</td> <td data-bbox="1192 1071 1336 1144">X</td> <td data-bbox="1336 1071 1495 1144"></td> </tr> <tr> <td data-bbox="721 1144 1192 1218">VS-44</td> <td data-bbox="1192 1144 1336 1218">X</td> <td data-bbox="1336 1144 1495 1218"></td> </tr> <tr> <td data-bbox="721 1218 1192 1291">Birth Certificate</td> <td data-bbox="1192 1218 1336 1291">X</td> <td data-bbox="1336 1218 1495 1291"></td> </tr> <tr> <td data-bbox="721 1291 1192 1365">AD 42-R</td> <td data-bbox="1192 1291 1336 1365">X</td> <td data-bbox="1336 1291 1495 1365"></td> </tr> <tr> <td data-bbox="721 1365 1192 1486">Certificate of Completion for Adoption Specialty Classes</td> <td data-bbox="1192 1365 1336 1486">X</td> <td data-bbox="1336 1365 1495 1486">X</td> </tr> </tbody> </table> | Form Name/Number | Finalizing in SD | Finalizing outside SD | Interagency Adoptive Placement Agreement (02-82) | X | X | Notice of Placement (AD558) | X | X | Post Adoption Contact Agreement | X | X | Child's medical form | X | X | Post Placement Narrative | X | X | JV-320 Judgment for termination of parental rights | X | X | ICWA 010-(A) | X | X | State Acknowledgement | X | X | Information to prepare a petition | X |  | VS-44 | X |  | Birth Certificate | X |  | AD 42-R | X |  | Certificate of Completion for Adoption Specialty Classes | X | X |
| Form Name/Number   | Finalizing in SD | Finalizing outside SD   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Interagency Adoptive Placement Agreement (02-82)         | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Notice of Placement (AD558)                              | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Post Adoption Contact Agreement                          | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Child's medical form                                     | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Post Placement Narrative                                 | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| JV-320 Judgment for termination of parental rights       | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| ICWA 010-(A)   | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| State Acknowledgement                                    | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Information to prepare a petition                        | X                |   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| VS-44  | X                |   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Birth Certificate  | X                |   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| AD 42-R  | X                |   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |
| Certificate of Completion for Adoption Specialty Classes | X                | X   |                  |                  |                       |  |   |   |                             |   |   |                                 |   |   |                      |   |   |                          |   |   |  |   |   |              |   |   |                       |   |   |                                   |   |  |       |   |  |                   |   |  |         |   |  |  |   |   |

**Adoptive Placement  
Paper Procedures  
(cont.)**

| Step          | Who      | Action   |                             |                                  |
|---------------|----------|--|-----------------------------|----------------------------------|
| 15<br>(cont.) | SW       | <b>If applicable:</b>  |                             |                                  |
|               |          | <b>Form Name/Number</b>  | <b>Finalizing<br/>in SD</b> | <b>Finalizing<br/>outside SD</b> |
|               |          | Remittitur   | X                           | X                                |
|               |          | Divorce Decree(s)  | X                           |                                  |
|               |          | Copy of the Certified Marriage/<br>Domestic Partnership Certificate                                      | X                           |                                  |
|               |          | AD 210   | X                           |                                  |
| 16            | PSS      | Review all material for completion and submit the file to the Adoption Finalization Desk for processing. |                             |                                  |
| 17            | Clerical | Notify the SW and PSS via email when the finalization date is set.                                       |                             |                                  |

**Alignment with SET  
Values**

This Policy aligns with our SET [Value 3](#) by holding a sense of urgency when seeking permanency for children through establishing both legal and relational permanence for children and youth.