

# **Completing a Pre-Finalization Adoption Assessment**

## **Knowledge Base Article**

# Completing a Pre-Finalization Adoption Assessment

## Table of Contents

<b>Adding Pre-Finalization Adoption Assessment Information</b> .....	3
<b>Selecting a Child</b> .....	4
<b>Selecting a Provider</b> .....	5
<b>Which Providers Display During a Search</b> .....	6
<b>Pre-Finalization Adoption Assessment Section</b> .....	8
<b>Important Information About the Three Date Fields</b> .....	9
<b>Date Field Availability (Enabled or Disabled)</b> .....	10
<b>Entering Dates for the Three Date Fields</b> .....	10
<b>Record Status (“In Progress” vs. “Complete”)</b> .....	11
<b>Maintain Adoptive Family Composition (First Topic Link)</b> .....	12
<b>Maintain Adoptive Parent Descriptions Link (Second Topic Link)</b> .....	17
<b>Narrative and Comments Completed Information</b> .....	20
<b>Maintain Additional Family Information Link (Third Topic Link)</b> .....	21
<b>Maintain Adoptive Child Descriptions Link (Fourth Topic Link)</b> .....	23
<b>Maintain Recommendation of Assessor Link (Fifth Topic Link)</b> .....	25
<b>Editing an In-Progress Pre-Finalization Adoption Assessment</b> .....	26
<b>Deleting an In-Progress Pre-Finalization Adoption Assessment</b> .....	26
<b>Completing a Pre-Finalization Adoption Assessment</b> .....	27
<b>Printing a Pre-Finalization Adoption Assessment Report</b> .....	29
<b>JFS 01699 Report</b> .....	31

## Completing a Pre-Finalization Adoption Assessment

You can now initiate and complete a pre-finalization adoption assessment record as well as generate the JFS 01699 report in SACWIS prior to a child being placed in an adoptive setting.

However, the following criteria must be met first:

- The child must be an active case member without a sealed adoption record and have a current legal status of permanent custody (PC) or permanent surrender (PS).
- There can only be one child per Pre-Finalization Adoption Assessment.
- There cannot be more than one “**In Progress**” Pre-finalization Adoption Assessment report for the same child.

Additional new SACWIS functionality and features about this process are discussed in this Knowledge Base Article. The resulting information appears on the Pre-Finalization Adoption Assessment (JFS 01699) report.

## Adding Pre-Finalization Adoption Assessment Information

To create a Pre-Finalization Adoption Assessment, complete the following steps:

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate adoption **Case ID** link.

**Note:** If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the adoptive child’s **Case Overview** screen.

4. On the adoptive child’s **Case Overview** screen, click the **Pre-Finalization Information** link at the bottom of the light-blue **Navigation** menu on the left.

	Child Name	Service Description	Provider Name	Begin Date/End Date	Agency	Status	
<a href="#">edit</a> <a href="#">report</a>				01/09/2012 01/09/2012	County ent of Job ily Services	Completed	<a href="#">leave</a>
<a href="#">edit</a> <a href="#">report</a> <a href="#">authorize</a>				04/01/2010 01/09/2012	County ent of Job ily Services	Completed	<a href="#">leave</a>
<a href="#">view</a> <a href="#">report</a> <a href="#">authorize</a>				01/14/2010 04/01/2010	County ent of Job ily Services	Completed	<a href="#">leave</a>
<a href="#">view</a> <a href="#">report</a> <a href="#">authorize</a>				10/09/2009 01/14/2010	County ent of Job ily Services	Completed	<a href="#">leave</a>

The **Pre-Finalization Adoption Assessment Information** screen appears.

# Completing a Pre-Finalization Adoption Assessment

## Selecting a Child

1. In the **Available Child(ren) to be Included in Pre-Finalization Adoption Assessment** section, click the appropriate radio button to select the child.

### Important:

- As was previously mentioned, only **one child** can be selected.
- SACWIS now displays the child's **Current Placement Provider / ID** (shown in green below).
- Both the child and the provider must first be selected before you can proceed with the remaining steps in this process.

Home Intake **Case** Provider Financial Administration

Workload Court Calendar Placement Requests help

Case Overview  
Activity Log  
Attorney Communication  
Case Conference Note  
Forms/Notices  
Intake List  
Safety Assessment  
Safety Plan  
Specialized A/I Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement  
Initial Removal  
Potential Adoptive Families

Pre-Finalization Adoption Assessment Information

Case ID: [Redacted] Case Status: Open ( 12/01/2008 )  
Case Name: [Redacted] Case Category: Adoption

Available Child(ren) to be Included in Pre-Finalization Adoption Assessment  
Select the Child to be Included in the Pre-Finalization Adoption Assessment:

	Name	Person ID	Current Placement Provider / ID
<input checked="" type="radio"/>	John Smith	[Redacted]	[Redacted]
<input type="radio"/>	Mary Smith	[Redacted]	[Redacted]
<input type="radio"/>	Jane Smith	[Redacted]	[Redacted]

Provider Id:

The child's radio button is selected.

# Completing a Pre-Finalization Adoption Assessment

## Selecting a Provider

When you click a radio button to select a child, the **Provider ID** field and **Provider Name** field (shown in green below) will auto-populate with data if the child's current placement is an approved adoptive home. These fields are displaying the provider information from the child's current adoptive placement.

You can change this provider information or proceed to the next sub-section.

**If no information appears**, you will need to locate a provider as follows:

1. To select a provider, click the **Retrieve Adoptive Provider** button.

Forms/notices  
Intake List  
Safety Assessment  
Safety Plan  
Specialized A/I Tool  
Law Enforcement  
Justification/Waiver  
Case Services  
Legal Actions  
Legal Custody/Status  
Living Arrangement  
Initial Removal  
Potential Adoptive Families

Available Child(ren) to be Included in Pre-Finalization Adoption Assessment  
Select the Child to be Included in the Pre-Finalization Adoption Assessment:

	Name	Person ID	Current Placement Provider / ID
<input checked="" type="radio"/>	John Smith		
<input type="radio"/>	Mary Smith		
<input type="radio"/>	Jane Smith		

Provider Id: 1234567    Provider Name: Jones, Sue & Jones, Robert

**Retrieve Adoptive Provider**

Add Pre-Finalization Adoption Assessment

The **Provider Match Search Criteria** screen appears.

2. Enter filter criteria to search for the child's provider. Some fields are read only.

Provider Match Search Criteria

Provider Information

Service Category: \* Placement    Search Date: 06/17/2011

Service Type: \* Approved Adoptive Home

Agency Type: Public    Agency: [ ]

By Available Capacity

Available Counties: Adams, Allen, Ashland, Ashtabula, Athens

Selected and Nearby Counties: [ ]    OR School District: [ ]

Additional Search Criteria

Child Information

Gender: [ ]    From Age: 6    To Age: [ ]    Language: [ ]

Additional Search Criteria

## Completing a Pre-Finalization Adoption Assessment

3. If you already know the **Provider ID** number, click the **Additional Search Criteria** link (shown in green below) to expand the filter criteria fields.
4. Enter the appropriate number in the **Provider ID** field.
5. Click the **Search** button at the bottom of the screen.

The screenshot shows a web form titled "Provider Match Search Criteria". It is divided into several sections:

- Provider Information:** Includes "Service Category" (Placement), "Service Type" (Approved Adoptive Home), "Agency Type" (Public), and "Search Date" (06/17/2011).
- Available Counties:** A list of counties (Adams, Allen, Ashland, Ashtabula, Athens) with "Add >>" and "<< Remove" buttons.
- Additional Search Criteria:** This section is expanded and highlighted with a green border. It contains a "Provider ID" field with the value "7654321" entered, and a "Provider Name" field.
- Member Information:** Includes "Member First Name" and "Member Last Name" fields, and a "Sounds Like" checkbox.
- Skills:** Includes "Available Skills" (Apnea Monitoring Training, Behavior Modification, Braille, C.P.R., Dentist) and "Selected Skills" with "Add >>" and "<< Remove" buttons.
- Child Information:** Includes "Gender", "From Age" (6), "To Age", and "Language" fields.
- Sort Results By:** A dropdown menu.
- Buttons:** "Search", "Clear Form", and "Cancel" buttons are at the bottom. The "Search" button is circled in red.

The results appear in the **Provider Match Search Results** section.

### Which Providers Display During a Search

- The provider match only returns results for providers who have been approved to accept that child's specified characteristics. The provider's acceptance criteria must match the selected child's characteristics.
- The system only displays providers who are **approved, active, and have a non-end dated status** as of the current system date.
- If a provider home is showing as closed or not approved, **the provider will not be returned** in the search results.

## Completing a Pre-Finalization Adoption Assessment

6. To choose a provider, click the **Select** link in the appropriate row.

Provider Match Search Results  
Result(s) 1 - 5 of 5 Page 1 of 1

	Provider Name / ID	Provider Category	Provider Status	Current Primary Address	Current Vacancies	Services	Agency
<a href="#">select</a> <a href="#">view</a>		HOME	ACTIVE			Adoptive Placement	Ohio Department of Job and Family Services
<a href="#">select</a> <a href="#">view</a>		HOME	ACTIVE			Adoptive Placement - Medical Apparatus	Ohio Department of Job and Family Services
<a href="#">select</a> <a href="#">view</a>		HOME	ACTIVE			Adoptive Placement - Drug Exposed	Ohio Department of Job and Family Services
<a href="#">select</a> <a href="#">view</a>		HOME	ACTIVE			Adoptive Placement - Legal Risk	Ohio Department of Job and Family Services
<a href="#">select</a> <a href="#">view</a>		HOME	ACTIVE			Adoptive Placement - Accessibility	Ohio Department of Job and Family Services

[OK](#) [Generate Report](#)

The **Pre-Finalization Adoption Assessment Information** screen appears displaying the newly selected provider information.

Forms/notices  
[Intake List](#)  
[Safety Assessment](#)  
[Safety Plan](#)  
[Specialized A/I Tool](#)  
[Law Enforcement](#)  
[Justification/Waiver](#)  
[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement](#)  
[Initial Removal](#)  
[Potential Adoptive Families](#)

Available Child(ren) to be Included in Pre-Finalization Adoption Assessment  
Select the Child to be Included in the Pre-Finalization Adoption Assessment:

	Name	Person ID	Current Placement Provider / ID
<input checked="" type="radio"/>	John Smith		
<input type="radio"/>	Mary Smith		
<input type="radio"/>	Jane Smith		

Provider Id: 7654321      Provider Name: Green, Bea & Green, Bob

[Retrieve Adoptive Provider](#)

[Add Pre-Finalization Adoption Assessment](#)

**Note:** If you navigate away from this screen, the provider record selected is not saved until the **Add Pre-Finalization Adoption Assessment** button is selected.

# Completing a Pre-Finalization Adoption Assessment

## Pre-Finalization Adoption Assessment Section

After both the child and provider have been selected, complete the following steps:

1. Click the **Add Pre-Finalization Adoption Assessment** button.

The screenshot shows a web application interface for completing a pre-finalization adoption assessment. On the left is a sidebar with navigation links: Forms/Notices, Intake List, Safety Assessment, Safety Plan, Specialized A/I Tool, Law Enforcement, Justification/Waiver, Case Services, Legal Actions, Legal Custody/Status, Living Arrangement, Initial Removal, Potential Adoptive Families. The main content area is titled 'Available Child(ren) to be Included in Pre-Finalization Adoption Assessment' and contains a table with columns 'Name', 'Person ID', and 'Current Placement Provider / ID'. Three children are listed: John Smith, Mary Smith, and Jane Smith. Below the table, there are fields for 'Provider Id: 7654321' and 'Provider Name: Green, Bea & Green, Bob', along with a 'Retrieve Adoptive Provider' button. At the bottom, the 'Add Pre-Finalization Adoption Assessment' button is highlighted with a red rectangular box.

The **Pre-Finalization Assessment Details** screen appears.

### Important:

- **You will only complete this task (clicking the button) once for each child.** If you have entered information and want to enter more information later, you will click the **Edit** link (shown below), instead of the button.
- When you click the **Edit** link, if the provider record or a family composition member has changed since the last time you updated this pre-finalization assessment record, the following error message appears:

Addition or deletion of member(s) and/or role changes has occurred in the provider record since the last update to this Pre-Finalization Adoption Assessment record. Therefore, data within the Adoptive Family Member(s) Information section does not match the Adoptive Family Composition of the Provider record. Continuing with completion of this assessment without updating the provider members will result in incorrect family members on the JFS 01699 report. Do you wish to update the members? Yes/No

**If this message appears, call the SACWIS Help Desk.**



## Completing a Pre-Finalization Adoption Assessment

Child	Provider Name/ID	Date Initiated/Completed	Status	
<a href="#">edit</a> <a href="#">report</a>		06/17/2011	In Progress	<a href="#">delete</a>

You will need to complete the fields within each link of the **Topics** section. Each link is discussed separately in a sub-section below.

Pre-Finalization Assessment Details  
Adoptive Child:

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)
- [Maintain Additional Family Information](#)
- [Maintain Adoptive Child Descriptions](#)
- [Maintain Recommendation of Assessor](#)

### For Additional Information:

- Refer to the **Editing an In-Progress Pre-Finalization Adoption Assessment** or **Deleting an In-Progress Pre-Finalization Adoption Assessment** towards the end of this Knowledge Base Article.
- See the **Narrative and Comments Completed Information** sub-section for more details on these two fields.

## Important Information About the Three Date Fields

Below the **Topics** links are three date fields, and a fourth date field will soon appear in a future version of SACWIS.

**Note:** The fourth field is the **Date Due to Probate Court** and is always editable.

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)
- [Maintain Additional Family Information](#)
- [Maintain Adoptive Child Descriptions](#)
- [Maintain Recommendation of Assessor](#)

Date Assessment Completed:  Date Provided to Adoptive Parents:

Date Assessment Submitted to Court:

[Apply](#) [Save](#) [Cancel](#)

## Completing a Pre-Finalization Adoption Assessment

### Date Field Availability (Enabled or Disabled)

The **Date Assessment Completed** field only becomes available once:

- The **Comments Completed** check boxes for **all narratives** are check marked as complete in each of the three major topic headings (links): Additional Family Information, Adoptive Child Descriptions, and Recommendation of Assessor.
- **All required fields** in the Adoptive Family Composition and the Adoptive Parent Descriptions (links) have been completed.
- Once the **Date Assessment Completed** field contains a date and is saved, the other two date fields become enabled.
- If the **Date Assessment Completed** field does not contain a date:
  - You can still print a JFS 01699 report at any time while working on the assessment.
  - The word “**Draft**” will appear as a watermark on the printed report until the **Date Assessment Completed** has been recorded and saved.
  - If no dates have been recorded in either the **Date Assessment Submitted to Court** field or the **Date Provided to Adoptive Parents** field, the dates on the report will be blank.

### Entering Dates for the Three Date Fields

- The **Date Assessment Submitted to Court** field and **Date Provided to Adoptive Parents** field can be back dated, but **not** dated prior to the **Date Assessment Completed** field.
- The (future) **Date Due to Probate Court** field can be dated prior to the completion of the report.
- None of the three date fields can be future dated, except the **Date Due to Probate Court** field which should be future dated.

## Completing a Pre-Finalization Adoption Assessment

### Record Status (“In Progress” vs. “Complete”)

- The **Pre-Finalization Adoption Assessment** record is considered to have a status of **In Progress** as long as the **Date Assessment Completed** field is null (blank).
- **Definition of “Complete”:** Once a date is entered in the **Date Assessment Completed** field and the record is saved, the adoption assessment is considered to be complete. The information can no longer be modified. The system automatically changes the record’s status from **In Process** to **Complete**.
- Once the status changes to **Complete**, the record can no longer be edited or deleted. The **Edit** link is replaced with the **View** link, and the **Delete** link is no longer available.
  - If the date field for **Date Assessment Completed** field is null (blank), the system displays an **Edit** link in the **Pre-Finalization Adoption Assessment** section.
  - If the **Date Assessment Completed** field is not null (not blank), the **Pre-Finalization Adoption Assessment** section displays a **View** link instead of an **Edit** link.
- Once in **Complete** status, both the **Date Assessment Submitted to Court** field and the **Date Provided to Adoptive Parents** field are enabled. They remain available until a date is entered and saved in each field.
- An Pre-Finalization Adoption Assessment **cannot** be marked as complete if:
  - The provider record linked to the assessment does not have a status of **Active**.
  - Members of the provider record linked to the assessment have been added, deleted, and/or their role was changed since the **Pre-Finalization Adoption Assessment** record was last updated. In these situations, the **Adoptive Family Member(s) Information** section does not match the **Adoptive Family Composition of the Provider** record and the provider record will need to be updated.

# Completing a Pre-Finalization Adoption Assessment

## Maintain Adoptive Family Composition (First Topic Link)

1. Click the **Maintain Adoptive Family Composition** link.

Pre-Finalization Assessment Details

Adoptive Child: [Redacted]

Topics:

- Maintain Adoptive Family Composition**
- Maintain Adoptive Parent Descriptions
- Maintain Additional Family Information
- Maintain Adoptive Child Descriptions
- Maintain Recommendation of Assessor

Date Assessment Completed: [ ] Date Provided to Adoptive Parents: [ ]

Date Assessment Submitted to Court: [ ]

Apply Save Cancel

The **Adoptive Family Member(s) Composition Information** screen appears.

Adoptive Family Member(s) Composition Information

Members	Role	Relationship	DOB	Birth Place	Level of Education Completed
<a href="#">edit</a> Green, Bea	Applicant 2				
<a href="#">edit</a> Green, Bob	Applicant 1				

Relationship to Petitioner: [ ]

Marital Information

Marital Status: [ ]

Marriage Date: 02/03/2001 [ ]

Place of Marriage: [ ]

This is an example showing multiple family members on that screen:

Adoptive Family Member(s) Composition Information

Members	Role	Relationship	DOB	Birth Place	Level of Education Completed
<a href="#">edit</a>	Child Household Member				Elementary School
<a href="#">edit</a>	Child Household Member			OH	No Formal Education
<a href="#">edit</a>	Child Household Member				No Formal Education
<a href="#">edit</a>	Child Household Member				High School
<a href="#">edit</a>	Applicant 1	Mother			Associate's Degree
<a href="#">edit</a>	Applicant 2	Father			Associate's Degree
<a href="#">edit</a>	Child Household Member				Elementary School
<a href="#">edit</a>	Child Household Member				Elementary School
<a href="#">edit</a>	Child Household Member				Elementary School

Relationship to Petitioner: Foster Child [ ]

## Completing a Pre-Finalization Adoption Assessment

### Important SACWIS Screen Changes:

- Only active provider members with no end date appear in the **Adoptive Family Member(s) Composition Information** section. Therefore, you will need to **confirm the provider record is up-to-date** prior to creating a Pre-Finalization Adoption Assessment.
- If a family member needs to be added or deleted from the Assessment record, you must update the provider record with the change(s) as both the **Add Family Member** button (formerly beneath the table) and the **Remove** link (formerly on the right) have been removed.
- The new **Role** column (shown in green above) displays each adoptive family member's role separate from the relationship.
- The **Relationship** column (shown in red above) now displays only relationship information. The **Relationship** field will **initially be blank** for each record.

2. Click the **Edit** link (shown in red below) for an adoptive family member.

### Important:

- To save the record:
  - You will need to click this link for each adoptive family member.
  - The mother and father must be identified.
- To mark the record as **Complete**, all members must be identified.

Adoptive Family Member(s) Composition Information						
	Members	Role	Relationship	DOB	Birth Place	Level of Education Completed
<a href="#">edit</a>	Green, Bea	Applicant 2				
<a href="#">edit</a>	Green, Bob	Applicant 1				

Relationship to Petitioner:

The **Adoptive Family Member Details** screen appears for the selected member.

## Completing a Pre-Finalization Adoption Assessment

3. In the **Relationship** field, choose their relationship within the provider family unit.
4. Click the **OK** button.

Adoptive Family Member Details

Family Member: [Redacted] (Applicant 2)

DOB: [Redacted]

Birth Place: [Redacted]

Level of Education Completed: [Redacted]

Relationship: [Dropdown Menu]

OK Cancel

The **Adoptive Family Member(s) Composition Information** screen appears displaying each person's relationship within the provider family unit (shown in green below).

Adoptive Family Member(s) Composition Information

	Members	Role	Relationship	DOB	Birth Place	Level of Education Completed
<a href="#">edit</a>	Green, Bea	Applicant 1	Mother	[Redacted]	[Redacted]	[Redacted]
<a href="#">edit</a>	Green, Bob	Applicant 2	Father	[Redacted]	[Redacted]	[Redacted]

Relationship to Petitioner: [Dropdown Menu]

5. Repeat the three previous steps for **each adoptive family member**.
6. In the **Relationship to Petitioner** field, choose the appropriate entry from the drop down list.

Adoptive Family Member(s) Composition Information

	Members	Role	Relationship	DOB	Birth Place	Level of Education Completed
<a href="#">edit</a>	Green, Bea	Applicant 1	Mother	[Redacted]	[Redacted]	[Redacted]
<a href="#">edit</a>	Green, Bob	Applicant 2	Father	[Redacted]	[Redacted]	[Redacted]

Relationship to Petitioner: [Dropdown Menu] No Relation

**Important:** This field is **not** completed for each adoptive family member. The **Relationship to Petitioner** field specifies the child's relationship to the provider as a whole and **is required** to save the assessment. The drop-down list values are:

- Foster Child
- Relative / Kin
- No Relation

## Completing a Pre-Finalization Adoption Assessment

7. In the **Marital Information** section, complete the fields as needed.

**Note:** In future versions of SACWIS, some fields in the **Marital Information** section will pre-populate with content based on information previously entered in the system.

Marital Information

Marital Status:

Marriage Date:

Place of Marriage:

Father's Other Marriages/Divorces

Former Spouse's Name:

Date Terminated:

Former Spouse's Name:

Date Terminated:

Mother's Other Marriages/Divorces

Former Spouse's Name:

Date Terminated:

Former Spouse's Name:

Date Terminated:

8. In the **Citizenship Information** section, complete the following fields for both the **Mother** and the **Father**:

- Legal Resident
- Citizen
- Status

Citizenship Information

Mother Legal Resident:

Citizen:

Status:

Father Legal Resident:

Citizen:

Status:

Non-Resident Alien  
Non-Immigrant Visa  
Immigrant Visa

Apply Save Cancel

## Completing a Pre-Finalization Adoption Assessment

**Important:** The **Status** field drop-down list is based on the **Yes / No** response selected in the **Legal Resident** field and the **Citizen** field, the following values are available in the **Status** field drop-down list:

If Legal Resident field shows...	If Citizenship field shows...	The Status field drop-down list selections are...
Yes	No	Resident Alien/with Permanent Resident Card
No	No	Non-Resident Alien Non-Immigrant Visa Immigrant Visa

9. When complete, click the **Save** button at the bottom of the screen.



The **Pre-Finalization Assessment Details** screen appears displaying the **Topic** links.



# Completing a Pre-Finalization Adoption Assessment

## Maintain Adoptive Parent Descriptions Link (Second Topic Link)

1. Click the **Maintain Adoptive Parent Descriptions** link.

Pre-Finalization Assessment Details

Adoptive Child:

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)**
- [Maintain Additional Family Information](#)
- [Maintain Adoptive Child Descriptions](#)
- [Maintain Recommendation of Assessor](#)

Date Assessment Completed:  Date Provided to Adoptive Parents:

Date Assessment Submitted to Court:

[Apply](#) [Save](#) [Cancel](#)

The **Adoptive Parent Descriptions** screen appears. The **Remove from Report** field (formerly above the table) has been removed. The adoptive parent names that appear on this screen are directly related to the mother and/or father identified on the maintain **Adoptive Family Composition** screen.

	Name	Comment Completed	Comment
<b>Discussion Topic: Appearance and Personality</b>			
<a href="#">edit</a>	Green, Bea	No	[Redacted]
<a href="#">edit</a>	Green, Bob	No	[Redacted]
<b>Discussion Topic: Physical Health (date of last physical examination, by whom and significant findings)</b>			
<a href="#">edit</a>	Green, Bea	No	[Redacted]
<a href="#">edit</a>	Green, Bob	No	[Redacted]
<b>Discussion Topic: Evidence of Mental Health, Emotional Stability, and Personal Integrity</b>			
<a href="#">edit</a>	Green, Bea	No	[Redacted]
<a href="#">edit</a>	Green, Bob	No	[Redacted]
<b>Discussion Topic: Occupation (Present and Previous)</b>			

2. Click the **Edit** link for **each** adoptive parent.

	Name	Comment Completed	Comment
<b>Discussion Topic: Appearance and Personality</b>			
<a href="#">edit</a>	Green, Bea	No	[Redacted]
<a href="#">edit</a>	Green, Bob	No	[Redacted]
<b>Discussion Topic: Physical Health (date of last physical examination, by whom and significant findings)</b>			
<a href="#">edit</a>	Green, Bea	No	[Redacted]
<a href="#">edit</a>	Green, Bob	No	[Redacted]

**Important:** Each **Edit** link asks a different question about the adoptive parents. However, the **birth mother** and **birth father** narratives will remain separate (an example is shown below).

## Completing a Pre-Finalization Adoption Assessment

3. Answer the question in the narrative field. The narrative text box size has been increased to 4,000 characters.
4. When you finish, click the **Comments Completed** check box (shown in green).

### Note:

- The check mark acts as a visual indicator while you complete the assessment. It also indicates that you are done entering information in that field for marking the assessment as complete.
- See the **Narrative and Comments Completed Information** sub-section below for more details on these two fields.

5. Click the **Save** button.

Appearance and Personality

Type Description Here

Spell Check Clear 3979

Comments Completed

Apply Save Cancel

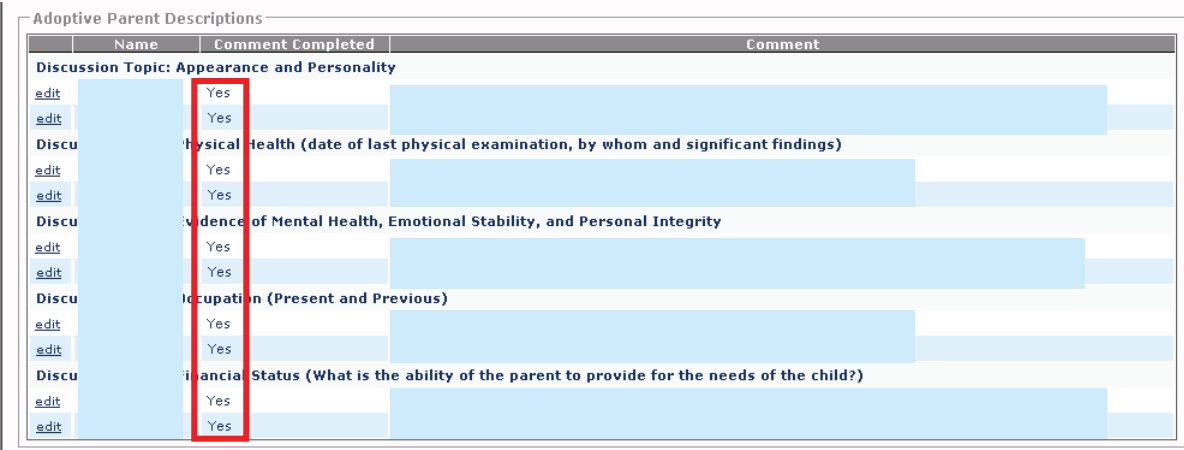
The **Adoptive Parent Descriptions** screen appears displaying a **Yes** in the **Comment Completed** column (if the check box was checked) and your narrative in the **Comment** column.

	Name	Comment Completed	Comment
Discussion Topic: Appearance and Personality			
<a href="#">edit</a>	Green, Bea	Yes	Type Description Here
<a href="#">edit</a>	Green, Bob	No	

6. Repeat the steps in this sub-section for each **Edit** link.

## Completing a Pre-Finalization Adoption Assessment

Example showing when all **Comments Completed** check boxes have been checked:



The screenshot shows a table titled "Adoptive Parent Descriptions" with three columns: "Name", "Comment Completed", and "Comment". The table contains several rows, each representing a different discussion topic. The "Comment Completed" column for every row has a "Yes" checkbox checked. A red box highlights the "Comment Completed" column. Below the table is a "Close" button.

Name	Comment Completed	Comment
<a href="#">edit</a>	Yes	
<a href="#">edit</a>	Yes	
Discussion Topic: Appearance and Personality		
<a href="#">edit</a>	Yes	
Discussion Topic: Physical Health (date of last physical examination, by whom and significant findings)		
<a href="#">edit</a>	Yes	
<a href="#">edit</a>	Yes	
Discussion Topic: Evidence of Mental Health, Emotional Stability, and Personal Integrity		
<a href="#">edit</a>	Yes	
<a href="#">edit</a>	Yes	
Discussion Topic: Occupation (Present and Previous)		
<a href="#">edit</a>	Yes	
<a href="#">edit</a>	Yes	
Discussion Topic: Financial Status (What is the ability of the parent to provide for the needs of the child?)		
<a href="#">edit</a>	Yes	
<a href="#">edit</a>	Yes	

[Close](#)

7. When complete, click the **Close** button at the bottom of the screen.



A close button labeled "Close" is shown, circled in red.

The **Pre-Finalization Adoption Assessment Details** screen appears displaying the **Topic** links.

## Completing a Pre-Finalization Adoption Assessment

### Narrative and Comments Completed Information

- The **Comments Completed** check boxes have been included in SACWIS to measure the assessment's overall completion progress. They tell the system you are done entering information in a narrative field.
- You can add all of your comments into a narrative field at one time, or add some comments into a field and then return later to add more or modify the content.
- Even after a **Comments Completed** check box has been marked as complete, comments **can** still be added to a narrative field.
- The **Date Assessment Completed** field (shown below) is only enabled once all narratives have been marked as complete in each of the three major topic headings (links): Additional Family Information, Adoptive Child Descriptions, and Recommendation of Assessor. And, once all required fields in the Adoptive Family Composition and the Adoptive Parent Descriptions (links) are complete.

Date Assessment Completed:	<input type="text"/>	Date Provided to Adoptive Parents:	<input type="text"/>
Date Assessment Submitted to Court:	<input type="text"/>		

- **All of your narratives will populate into the appropriate areas on the JFS 01699 report.**
- You can enter up to 4,000 characters in each narrative field.
- In future versions of SACWIS, some narrative fields will pre-populate with content based on previously entered information.

# Completing a Pre-Finalization Adoption Assessment

## Maintain Additional Family Information Link (Third Topic Link)

1. Click the **Maintain Additional Family Information** link.

Pre-Finalization Assessment Details

Adoptive Child:

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)
- [Maintain Additional Family Information](#)**
- [Maintain Adoptive Child Descriptions](#)
- [Maintain Recommendation of Assessor](#)

Date Assessment Completed:  Date Provided to Adoptive Parents:

Date Assessment Submitted to Court:

The **Additional Family Information** screen appears.

Additional Family Information

Multiple Children/Large Family Assessment Completed:  Results of the Multiple Children/Large Family Assessment:

Summary of the Multiple Children/Large Family Assessment:

Comments Completed

4000

Description of Other Household Members [Names, Appearance, Personality and Mental Health, Occupation]:

Comments Completed

4000

Description of Family Life [Home Life, Activities, Interests, Attitudes and Relationships of Members of Household]:

Comments Completed

4000

## Completing a Pre-Finalization Adoption Assessment

2. In the **Multiple Children/Large Family Assessment Completed** field, choose **Yes** or **No** from the drop-down list.
3. In the **Results of the Multiple Children/Large Family Assessment** field, choose **Recommended** or **Not Recommended** from the drop-down list.

**Note:** This field is **required** when the previous field's value is **Yes**.

4. Complete each narrative field (shown in orange). Only a partial screen shot is shown here.

**Note:** The **Summary of Multiple Children / Large Family Assessment** narrative field is **required** when the **Multiple Children / Large Family Assessment Completed** field's value is **Yes**.

5. When you are finished with each narrative, click the **Comments Completed** check box (circled in green). This tells the system you are done entering information in the field.

The screenshot displays a web form titled "Additional Family Information". At the top, there are two dropdown menus: "Multiple Children/Large Family Assessment Completed:" with "Yes" selected, and "Results of the Multiple Children/Large Family Assessment:" with "Recommended" selected. Below these are two narrative text areas, each with an orange border. The first is labeled "Summary of the Multiple Children/Large Family Assessment:" and contains the placeholder text "Type Content Here". Below this text area is a green circle around a checked checkbox labeled "Comments Completed". Below the checkbox are buttons for "Spell Check", "Clear", and a character count of "3983". The second narrative text area is labeled "Description of Other Household Members [Names, Appearance, Personality and Mental Health, Occupation]:" and also contains the placeholder text "Type Content Here". It also has a green circle around a checked checkbox labeled "Comments Completed", followed by "Spell Check", "Clear", and a character count of "3983".

6. When finished, click the **Save** button.

The screenshot shows the bottom of the form with three buttons: "Apply", "Save", and "Cancel". The "Save" button is circled in red.

The **Pre-Finalization Assessment Details** screen appears displaying the **Topic** links.

# Completing a Pre-Finalization Adoption Assessment

## Maintain Adoptive Child Descriptions Link (Fourth Topic Link)

1. Click the **Maintain Adoptive Child Descriptions** link.

Pre-Finalization Assessment Details

Adoptive Child: [Redacted]

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)
- [Maintain Additional Family Information](#)
- [Maintain Adoptive Child Descriptions](#)**
- [Maintain Recommendation of Assessor](#)

Date Assessment Completed: [Input Field]      Date Provided to Adoptive Parents: [Input Field]

Date Assessment Submitted to Court: [Input Field]

[Apply](#) [Save](#) [Cancel](#)

The **Adoptive Child Descriptions** screen appears.

2. Click the **Edit** link (shown in red) for **each** discussion topic. Each **Edit** link asks a different question about the adoptive child.

	Name	Comment Completed	Comment
<a href="#">edit</a>	Discussion Topic: Physical, mental, developmental characteristics/functioning of the child	No	
<a href="#">edit</a>	Discussion Topic: Child's and family's adjustment to placement	No	
<a href="#">edit</a>	Discussion Topic: Reason for placement from birth parent(s) and reason for placement with the adoptive parent(s)	No	
<a href="#">edit</a>	Discussion Topic: Child's and family's attitude toward finalization of the adoption	No	
<a href="#">edit</a>	Discussion Topic: Describe Pre-Finalization services that were requested or provided	No	
<a href="#">edit</a>	Discussion Topic: If a Pre-finalization service was planned but not provided, explain why it was not provided	No	
<a href="#">edit</a>	Discussion Topic: Present and Anticipated needs of the child and the adoptive family for post-finalization adoptive services, Title IV-E Adoption Assistance, State Adoption Subsidy, or other services	No	
<a href="#">edit</a>	Discussion Topic: If the child is an American Indian as defined in 25 U.S.C.A. 1903(4), how does placement comply with Indian Child Welfare Act of 1978, 22 U.S.C.A. 1901, as amended?	No	
<a href="#">edit</a>	Discussion Topic: Biological background of the child (including identifying information about the biological or legal parent(s) if known): Birth Mother	No	
<a href="#">edit</a>	Discussion Topic: Biological background of the child (including identifying information about the biological or legal parent(s) if known): Birth Father	No	
<a href="#">edit</a>		No	

[Close](#)

A details screen for that question appears.

## Completing a Pre-Finalization Adoption Assessment

3. Answer the question in the narrative field (an example is shown below).
4. When you are finished, click the **Comments Completed** check box (circled in green). This tells the system you are done entering information in the field.
5. Click the **Save** button at the bottom of the screen.

Adoptive Child Description Details

Adoptive Child: [Redacted]

Physical, mental, developmental characteristics/functioning of the child:

Type Comments

Spell Check Clear 3987

Comments Completed

Apply Save Cancel

The **Adoptive Child Descriptions** screen appears displaying a **Yes** in the **Comment Completed** column (if the check box was clicked) and your narrative.

Name	Comment Completed	Comment
Discussion Topic: Physical, mental, developmental characteristics/functioning of the child <a href="#">edit</a>	Yes	Type Comments
Discussion Topic: Child's and family's adjustment to placement <a href="#">edit</a>	No	
Discussion Topic: Reason for placement from birth parent(s) and reason for placement with the adoptive parent(s) <a href="#">edit</a>	No	
Discussion Topic: Child's and family's attitude toward finalization of the adoption		

6. After completing all of the **Edit** links (narrative fields), click the **Close** button at the bottom of the screen.

Close

The **Pre-Finalization Assessment Details** screen appears displaying the **Topic** links.



## Completing a Pre-Finalization Adoption Assessment

### Maintain Recommendation of Assessor Link (Fifth Topic Link)

1. Click the **Maintain Recommendation of Assessor** link.

Pre-Finalization Assessment Details

Adoptive Child: [Redacted]

Topics

- [Maintain Adoptive Family Composition](#)
- [Maintain Adoptive Parent Descriptions](#)
- [Maintain Additional Family Information](#)
- [Maintain Adoptive Child Descriptions](#)
- [Maintain Recommendation of Assessor](#)**

Date Assessment Completed: [Input Field]      Date Provided to Adoptive Parents: [Input Field]

Date Assessment Submitted to Court: [Input Field]

The **Assessor Recommendation Details** screen appears.

2. Type the recommendation in the narrative field.
3. When finished, click the **Comments Completed** check box (circled in green). This tells the system you are done entering information in the field.

**Note:** If needed, refer to the **Narrative Field and Comments Completed Check Box Information** sub-section above for additional information.

4. Click the **Save** button at the bottom of the screen.

Assessor Recommendation Details

Adoptive Child: [Redacted]

Recommendation of the Assessor:

Type Comments

3987

Comments Completed

The **Pre-Finalization Assessment Details** screen appears displaying the **Topic** links.

## Completing a Pre-Finalization Adoption Assessment

### Editing an In-Progress Pre-Finalization Adoption Assessment

You can edit a **Pre-Finalization Adoption Assessment Record** that is still in “**In Progress**” status at any time. To do so:

1. On the **Pre-Finalization Adoption Assessment Information** screen, locate the record in the **Pre-Finalization Adoption Assessment** section for the desired child. Remember, there could be multiple children with an active / in-process assessment record.
2. Click the **Edit** link in the appropriate row. The **Status** column must show **In Progress** (as shown in green).

Child	Provider Name/ID	Date Initiated/Completed	Status	
			In Progress	<a href="#">delete</a>

The **Pre-Finalization Assessment Details** screen appears displaying the **Topic** links.

**Note:** The **Copy** link has been removed from this table in SACWIS.

### Deleting an In-Progress Pre-Finalization Adoption Assessment

You can delete a **Pre-Finalization Adoption Assessment Record** that is still in “**In Progress**” status at any time. To do so:

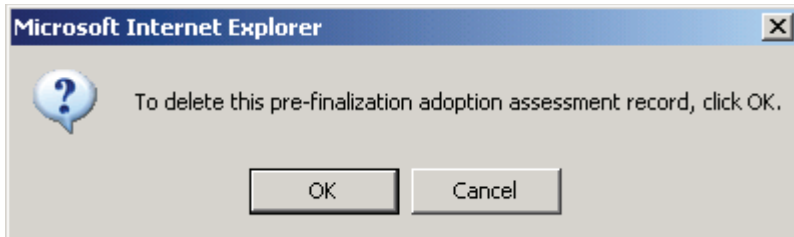
1. Locate the desired child’s record in the **Pre-Finalization Adoption Assessment** section.
2. Click the **Delete** link in the appropriate row.

Child	Provider Name/ID	Date Initiated/Completed	Status	
			In Progress	<a href="#">delete</a>

## Completing a Pre-Finalization Adoption Assessment

3. When a warning box appears, click the **OK** button.

**Important:** This process of deleting cannot be undone.



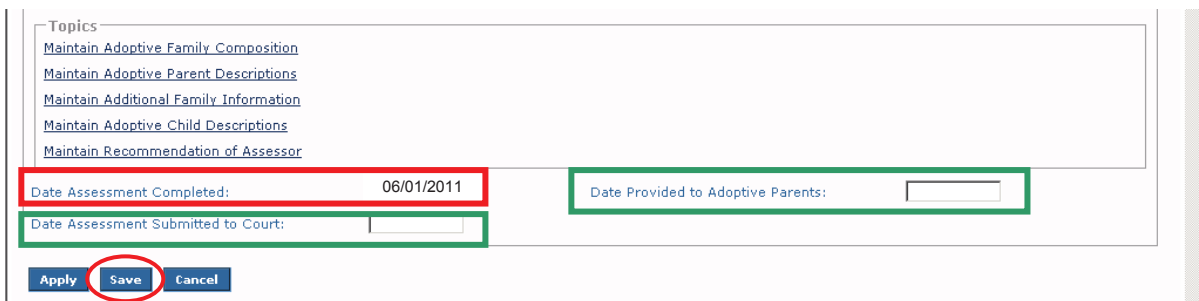
The record is deleted.

**Important:** Once the record has a status of **Completed**, the **Delete** link is unavailable.

## Completing a Pre-Finalization Adoption Assessment

Once **all of the required information** has been entered into the appropriate fields, the **Date Assessment Completed** field becomes available (enabled).

1. On the **Pre-Finalization Assessment Details** screen, enter a date in the **Date Assessment Completed** field.
2. Click the **Save** button.



## Completing a Pre-Finalization Adoption Assessment

### Important:

Once a date has been entered and saved in the **Date Assessment Completed** field, the system automatically does the following:

- Enables the **Date Assessment Submitted to Court** field and the **Date Provided to Adoptive Parents** field (shown in green above). A date can now be entered in both of these fields.
- Displays the record with a **Completed** status on the **Pre-Finalization Adoption Assessment Information** screen (shown in green below).
- Changes the **Edit** link in that row to a **View** link (shown in green below).
- The **Delete** link is removed from the right side of the screen.
- The date initiated is now changed to the date completed (shown in red below).

Child	Provider Name/ID	Date Initiated/Completed	Status
<a href="#">view</a>		05/31/2011	Completed
<a href="#">report</a>			

3. When available, fill in the dates on the **Date Assessment Submitted to Court** field and the **Date Provided to Adoptive Parents** field.
4. Click the **Save** button.

## Completing a Pre-Finalization Adoption Assessment

### Printing a Pre-Finalization Adoption Assessment Report

To print a **Pre-Finalization Adoption Assessment** report (JFS 01699 report), complete the following steps:

1. Locate the appropriate record in the **Pre-Finalization Adoption Assessment** section.
2. Click the **Report** link in the row for the desired child.

**Important:** If the pre-finalization assessment record is still **In Progress** status, you can still print a JFS 01699 report. However, the word “**Draft**” will appear as a watermark on the printed report.

Child	Provider Name/ID	Date Initiated/Completed	Status	
		06/17/2011	In Progress	<a href="#">delete</a>

The **Document Details** screen appears.

3. Click the **Generate Report** button.

ID	Date Created	Employee ID	Name
----	--------------	-------------	------


The **Pre-Finalization Adoption Assessment-JFS 01699** (parameters) screen appears. The parameters are presented in the **Version** section.

## Completing a Pre-Finalization Adoption Assessment

4. Click a radio button to select the appropriate version.

**Note:** Some of the fields will not appear on the report depending on which radio button that is selected.

5. Click the **Generate Report** button.



Pre-Finalization Adoption Assessment-JFS 01699

**Version: \***

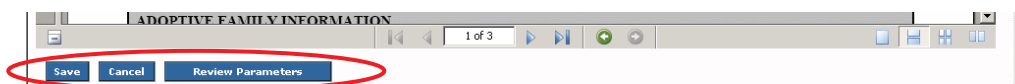
Adoptive Parent Version [NOTE: This version will exclude the following information: Adoptive Parent References; Biological Family information; Child's Pre-Adoptive Name]

Court Version

**Generate Report** **Cancel**

The report appears in a pdf format as shown below.

6. Using the buttons at the bottom of the screen, you can do the following with the report:
  - Save (**It is required that a copy be saved.**)
  - Cancel
  - Review Parameters (change report parameters)



You are returned to the **Pre-Finalization Adoption Assessment Information** screen. You are also reminded to generate and save (GAS) the report.

**Even if you are printing the report to take to court, it is required that a complete copy be saved in SACWIS.**

## Completing a Pre-Finalization Adoption Assessment

### JFS 01699 Report

By being able to complete a pre-finalization adoption assessment record in SACWIS, you can now generate the JFS 01699 report from the system and eliminate the duplication of paper forms.

The JFS 01699 report has been updated in SACWIS with the current revised JFS form (revised date 12/2006).

While all other parts of the JFS 01699 report have information that is pulled directly from the information you entered in the pre-finalization adoption assessment fields, this section of the report (shown below) functions differently.

Remember, as with all reports in SACWIS it is required that a completed version of each JFS 01699 report be saved.

#### Date(s) of Contact From the Date of Adoptive Placement Until Finalization

Date(s) of Contact From the Date of Adoptive Placement Until Finalization	
Parent #1 and Child	
Parent #2 and Child	
Parent(s) #1 and #2 and Child	
Child Only	
Other Household Member(s)	

The date(s) of contact that will populate into this grid are discussed below.

Specifically, the start date range will use the start activity date as the beginning of the date range.

- The **Start Activity Date** field on the **Activity Details** screen must have the following values:
  - **Case Category** field = **Adoption**
  - **Category** field = **Adoption**
  - **Sub Category** field = **Adoption Placement Agreement Signed** (You can only add this value once. After the start date range is pulled onto the report, the system will pull any other sub-category field value selected.)
  - On the **Associated Participant** screen, the child has a **Contact Status** of **Completed**.
  - The **Activity Log** record is marked as **Complete**.

When all of the following conditions are met, the end date range will use the termination date of the permanent custody (PC) or permanent surrender (PS) legal status where the termination reason equals **Adoption Finalized**.

## Completing a Pre-Finalization Adoption Assessment

Now that the date range has been defined for the grid as discussed above, each individual's dates of contact will pull from all pre-existing activity logs (based each adoptive family member) using the criteria in the five categories listed below:

- **Parent #1 and Child**
  1. The child has been marked as an associated participant and contact status is completed
  2. The Parent 1 has been marked as an associated participant and contact status is completed
  3. At least one of these contact types must be selected, although more can be selected: announced home visit, face-to-face, face-to-face visit with provider, or unannounced home visit
  
- **Parent #2 and Child**
  1. The child has been marked as an associated participant and contact status is completed
  2. The Parent 2 has been marked as an associated participant and contact status is completed
  3. At least one of these contact types must be selected, although more can be selected: announced home visit, face-to-face, face-to-face visit with provider, or unannounced home visit
  
- **Parent(s) #1 and #2 and Child**
  1. The child has been marked as an associated participant and contact status is completed
  2. The Parent 1 and Parent 2 have been marked as an associated participants and each of their contact status is completed
  3. At least one of these contact types must be selected, although more can be selected: announced home visit, face-to-face, face-to-face visit with provider, or unannounced home visit
  
- **Child Only**
  1. Only the child has been marked as an associated participant and contact status is completed
  2. At least one of these contact types must be selected, although more can be selected: announced home visit, face-to-face, face-to-face visit with provider, or unannounced home visit



## Completing a Pre-Finalization Adoption Assessment

- **Other Household Member(s)**
  1. The child has been marked as an associated participant and contact status is completed
  2. An adult household member has been marked as an associated participants and each of their contact status is completed
  3. At least one of these contact types must be selected, although more can be selected: announced home visit, face-to-face, face-to-face visit with provider, or unannounced home visit

For additional questions, contact the Help Desk at 1-800-686-1580. Then, following the voice prompts for the SACWIS Help Desk.