

# Completing a Matching Conference Record



**Knowledge Base Article**

# Completing a Matching Conference Record

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# Completing a Matching Conference Record

## Overview

The Matching Conference is a means of matching families with children who are awaiting adoption. Once a Pre-Adoptive Staffing record has been completed, a Matching Conference Record must be done; the Record is due ninety (90) days from the date of the Permanent Custody or Permanent Surrender legal status.

From the **Pre-Adoptive Staffing Records** screen:

1. Click the **Matching Conference** tab.

Pre-Adoptive Staffing ID	Child Name / ID	Date	Worker Completing	Status
[redacted]	[redacted]	09/11/2018	[redacted]	Complete

The **Matching Conference Records** screen appears.

2. Make a selection from the **Child Name** drop-down menu (this will activate the **Add Matching Conference** button).
3. Click the Add Matching Conference button.

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
[redacted]	[redacted]	07/05/2017	0	[redacted]	Complete 07/05/2017

The **Manage Matching Conference** screen appears.

**Important:** Completing Steps 1 and 2 above meets the requirement by rule where the ODJFS MEPA Coordinator is notified of a scheduled matching conference.

1. Enter the **Date Scheduled** (Ideally, the date you enter will be future date).
2. Click, **Save** (this will cause an email to be sent to the MEPA Coordinator).

The graphic below displays the email that will be sent to the MEPA Coordinator.

# Completing a Matching Conference Record

An example of the email received by the MEPA Coordinator is shown below:

[Redacted]  
[Redacted]

**From:** sacwis@jfs.ohio.gov  
**Sent:** Monday, November 26, 2018 10:54 AM  
**To:** JFS MatchingConference  
**Subject:** Matching Conference has been scheduled

Re: [Redacted]  
A Matching Conference has been scheduled for Case [Redacted] / Case ID [Redacted] on 11/30/2018 in Agency [Redacted] County Children Services Board and contact information [Redacted] and [Redacted]@jfs.ohio.gov [Redacted]  
[Redacted]

This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain private, confidential, and/or privileged information. Any unauthorized review, use, disclosure, or distribution is prohibited. If you are not the intended recipient, employee, or agent responsible for delivering this message, please contact the sender by reply e-mail and destroy all copies of the original e-mail message.

The **Matching Conference Records** screen appears.

Now that you are ready to complete the matching conference, you will click the edit link to finish the process.

3. Click, **edit**, in the appropriate row.

**Matching Conference Records**

Showing 2 Matching Conference records:

Child Name:

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
<a href="#">edit</a>		11/28/2018	1		In Progress 11/28/2018

The **Manage Matching Conference** screen appears with the Matching Conference Planning tab enabled. Notice the following message displays the following message:

ODJFS MEPA Coordinator has been notified on: [the date the Matching Conference was scheduled]. This message appears because you completed steps one and two above.

# Completing a Matching Conference Record

## Completing the Matching Conference Planning Tab

**Note:** In order for a child(ren) to display in the **Child(ren) To Be Matched** grid, they must first be recorded as a sibling group in person relationships and be in this same adoption case.

Name / ID	Role	Agency/Organization	Participated
Incredible, Jill	Child		<input type="checkbox"/>
Caseworker, John Q.	Adoption Supervisor	Public Children Services Agency	<input type="checkbox"/>
Caseworker, Suzy	Adoption Caseworker		<input type="checkbox"/>
Supervisor, Sally	Adoption Supervisor	Public Children Services Agency	<input type="checkbox"/>

**Note:** SACWIS will automatically add participants: child/youth, the assigned Adoption worker(s) and the Adoption Supervisor(s), the Provider Caseworker, WWK Worker and IL Worker as participants. Additionally, any non-end dated associated persons with a role of CASA, GAL Foster Parent, Kinship Caregiver Tribal Representative, WWK Recruiter, Probation Officer, Caseworker, Medical Professional, and Social Worker or WWK Recruiter will also be added to the Matching Conference Participants record at the time of the Matching Conference creation.

4. If it is necessary to delete a participant from the matching conference planning tab, click the trash can beside the appropriate name.
5. If it is necessary to add an individual to the matching conference record, click, **Add Participant**, and continue with the instructions.

The **Search For Person** screen appears. For information on search functionality, see the following KBA: [Using Search Functionality](#).

6. Enter search parameters.
7. Click, **Search**.
8. Make a selection from the search results you receive.

# Completing a Matching Conference Record

**Search For Person**

Person ID:  --OR-- SSN:

*Note: If Person ID or SSN are entered, all other search criteria will be ignored*

OR

Last Name:  First Name:  Middle Name:  Gender:

DOB:   --OR-- Age Range:  -

*From Age To Age*

[Reference, TCN, and Address Criteria](#) ▾

Name Match Precision

Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest) ▾

+ AKA/Nicknames

*Fewer Results More Results*

**Search**

Clear Form

Return

The **Participant Information** screen appears.

9. Make a selection from the **Role** drop-down menu.

10. Click, **Save**.

**Participant Information**

CASE NAME / ID:  Adoption / Open (03/09/2018)

**Matching Conference Participant Information**

Person Name:  Role: \*

Agency/Organization:

**Save** Cancel

You will be returned to the **Manage Matching Conference** screen with the **Matching Conference Planning** tab still enabled.

1. Click the **Families Considered** Tab.

**Manage Matching Conference**

CASE NAME / ID:  Adoption / Open (08/18/2017)

✔ Your data has been saved. ✕

Matching Conference Planning **Families Considered** Matching Chart Placement Decision

Date Scheduled: \*   Date Occurred:  

The **Manage Matching Conference** screen appears, with the **Families Considered** tab enabled.

# Completing a Matching Conference Record

## Completing the Families Considered Tab

### Adding a Family

1. Click, **Add Family**.

Manage Matching Conference

CASE NAME / ID: *Moxxy, Timmy* Adoption / Open (07/01/2015)

Your data has been saved.

Matching Conference Planning Families Considered Matching Chart Placement Decision

Families Considered

Child(ren) to be Matched:  
Moxxy, Timmy

Show only families to be presented

Provider Name / ID	Homestudy Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
<a href="#">edit</a>	Yes	Yes			

**Add Family**

Inquiry Name / ID	Inquiry Status	Application Reviewed	Family will be presented	Reason Family was not Presented	Comments	Conference Decision
<a href="#">edit</a> AdoptiveMom, Adelaide	Screen In - Application Received/Accepted					
<a href="#">edit</a> ProspectivePapa, Percy	Pending					

The **Search For Provider Profile** screen appears.

2. Perform a Provider search.

**Important:** When you access Provider Search from within a matching conference, only providers meeting the following criteria can be added:

- Home and non ODJFS are allowed
- Provider Type must be Adoptive Care
- Cannot include Closed Provider Type status
- Provider status can only be Active and On Hold

3. Make a selection from the search results.

**Note:** Once a family (provider) is added, it cannot be removed from the matching conference.

# Completing a Matching Conference Record

Search For Provider Profile

Provider ID:

OR

Provider Name:

Member Last Name:

Member First Name:

Member Middle Name :

Provider Category:

Agency Type:

Agency:

Provider Type:

Include "Closed" Provider Type Status

Provider Status:

[Address, Contact and Provider Reference Criteria](#) ▾

Name Match Precision

Returns results matching entered names including AKA names/nicknames

Fewer Results

More Results

Search

Clear Form

Return

The **Manage Provider** screen appears, displaying information on the selected family in the **Family/Provider Details** grid.

1. Make a selection from the options available in the **Large Family Assessment Information** section. The **None Selected** radio button is pre-selected by default. You must select a different option to mark the Matching Conference record as complete.
2. If you selected the radio button for **The following Large Family Assessment(s) are not applicable to this placement**, then you must complete the following:
  - Agency
  - Recommendation
  - Approval Date
  - Summary of the selected Large Family Assessment

## Completing a Matching Conference Record

3. Make a selection from the **Homestudy reviewed** drop-down menu.

**Note:** If **Yes** is the response to the Homestudy review question, you will need to provide the **Reviewed Date**.

Once you select, Yes, for the Homestudy reviewed question, the screen will expand to include a **Family will be presented** drop-down menu.

4. Make a selection from the **Family will be presented** drop-down menu.

If you answer, **No**, to the Family will be presented question, the screen will expand to include a **Reason family was not presented** drop-down menu. You must select the reason the family was not presented.

5. If necessary, enter narrative in the **Comments** text box.

6. Click, **Save**.

**Manage Provider**

CASE NAME / ID: Adoption / Open (05/31/2017)

**Family/Provider Details**

Provider Name/ID: Provider Address: Agency:

**Large Family Assessment information**

- None Selected
- N/A - Large Family Assessment not required.
- A Large Family Assessment is applicable to this placement.
- The following Large Family Assessment(s) are not applicable to this placement.

Status	Recommendation	Approval Date	Agency
Agency:	Recommendation:		

Approval Date:

Summary of the selected Large Family Assessment: [\(expand full screen\)](#)

Homestudy reviewed: \* Reviewed Date:

Family will be presented:

Comments: [\(expand full screen\)](#)

**Save** **Cancel**

## Completing a Matching Conference Record

The **Manage Matching Conference** screen appears on the **Families Considered** tab, displaying the provider's name and ID in the **Provider Name/ID** column.

The **Manage Matching Conference** Families Considered tab screen also displays the Inquiry(ies) in the **Inquiry** grid if any exist.

**Note:** When a new matching conference record is created, if present, the system adds the following families to the Inquiry Name grid: All inquiries where the provider type is associated to adoptive care type of the provider (Adoption, Adoption ICPC, Foster Care/ Adoption, Foster Care / Adoption ICPC, and Adoption Foster Caregiver Applicant (1692)) and at least one of the children listed on the matching conference record is listed as a specific Child of Interest where those inquiries are not linked to any Providers. Only inquiries with a status of Pending or Screened -In Application received/ Accepted will be displayed. Inquiries where the Exclude from future matches checkbox is checked on the previous Matching Conference record will not display on any future matching conference records.

**Important:** Inquiry records cannot be removed from the Matching Conference. Each inquiry family will each need to be addressed as to whether or not they will be presented and why.

1. If an Inquiry is displayed, click the **edit** link beside the desired Inquirer's name.

The screenshot shows the 'Manage Matching Conference' interface. At the top, there is a header with 'CASE NAME / ID: Moxy, Timmy' and 'Adoption / Open (07/01/2015)'. Below this is a green notification bar that says 'Your data has been saved.' The main navigation tabs are 'Matching Conference Planning', 'Families Considered' (which is highlighted with a green box), 'Matching Chart', and 'Placement Decision'. The central part of the screen is a table with the following columns: 'Inquiry Name / ID Inquiry Status', 'Application Reviewed', 'Family will be presented', 'Reason Family was not Presented', 'Comments', and 'Conference Decision'. Two rows are visible in the table, both highlighted with a green border. The first row has an 'edit' link circled in red and contains the text 'AdoptiveMom\_Adelaide Screen In - Application Received/Accepted'. The second row contains 'ProspectivePats\_Percy Pending'. At the bottom of the screen, there is a status bar with a dropdown menu set to 'In Progress' and buttons for 'Apply', 'Save', and 'Cancel'.

The **Manage Inquiry** screen displays

2. Make a selection from the **Was application reviewed** drop-down menu.

**Note:** If **Yes** is the response to the Was application reviewed question, you will need to provide the **Reviewed Date**.

Once you select, Yes, for the Was application reviewed question, the screen will expand to include a **Family will be presented** drop-down menu.

3. Make a selection from the **Family will be presented** drop-down menu.

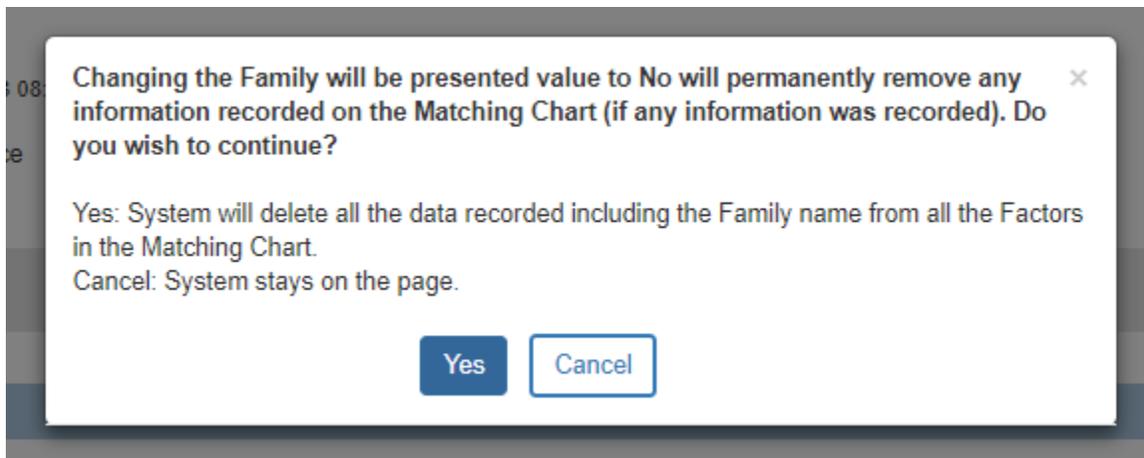
## Completing a Matching Conference Record

If you answer, **No**, to the Family will be presented question, the screen will expand to include a **Reason family was not presented** drop-down menu. You must select the reason the family was not presented.

4. If necessary, enter narrative in the **Comments** text box.
5. Click, **Save**.

**Important:** Repeat the above-listed steps for each Provider and each Inquirer listed, respectfully. If you do not complete the steps for each Provider and Inquirer, SACWIS will not pull those families in to the Matching Chart, and you will be unable to mark the Matching Conference as complete.

The image below is the message you will receive if you change the **Family will be presented** question from a Yes to a No.



**Manage Inquiry**

CASE NAME / ID: *Moxy, Timmy* Adoption / Open (07/01/2015)

**Inquirer Details**

Inquirer 1 Name: [AdoptiveMom, Adelaide](#) Inquirer 1 Address: [Redacted] Agency: Ohio Child Welfare Agency  
Inquiry Status: Screen In - Application Received/Accepted

Was application reviewed:\*  Reviewed Date:

Family will be presented:

Comments: [\(expand full screen\)](#)

# Completing a Matching Conference Record

The **Manage Matching Conference** screen appears.

## Completing the Matching Chart Tab

1. Click the **Matching Chart** tab.

The screenshot shows the 'Manage Matching Conference' interface. At the top, the case name is 'Adoption / Open (05/31/2017)'. A green notification bar states 'Your data has been saved.' Below this, there are four tabs: 'Matching Conference Planning', 'Families Considered', 'Matching Chart' (which is highlighted with a red box), and 'Placement Decision'. Under the 'Families Considered' section, there is a table with columns: 'Provider Name / ID', 'Homestudy Reviewed', 'Family will be presented', 'Reason Family was not Presented', 'Comments', and 'Conference Decision'. Below this table is an 'Add Family' button. At the bottom, there is another table with columns: 'Inquiry Name / ID', 'Application Reviewed', 'Family will be presented', 'Reason Family was not Presented', 'Comments', and 'Conference Decision'.

The **Manage Matching Conference** screen appears, displaying the **Matching Chart** tab page.

**Important:** If no families have been identified, or no families will be presented, there will be nothing to record on the Matching Chart tab, as shown on the screen below:

The screenshot shows the 'Manage Matching Conference' interface for case 'Moxy, Timmy' (Adoption / Open (07/01/2015)). The 'Matching Chart' tab is selected and highlighted with a green box. A yellow warning bar with a triangle icon states 'No families have been identified.' Below this, the 'Matching Chart' section is visible, followed by 'Factors' and 'Other Factors' sections, both indicating 'No Factors exist for this Matching Conference.' At the bottom, there is a status bar with 'Status: In Progress' and buttons for 'Apply', 'Save', and 'Cancel'.

# Completing a Matching Conference Record

- Click, **Details about matching factors** for an explanation of the following symbols: +, 0, -

**Note:** The page will expand, displaying the ratings you will use to determine whether or not a family meets the child’s needs (each rating is defined).

On this screen, you will be rating a family to determine whether or not they meet the needs of the child. You must complete the Matching Chart information to mark the Matching Conference as complete.

**Manage Matching Conference**

CASE NAME / ID: Adoption / Open (05/01/2018)

Your data has been saved.

Matching Conference Planning Families Considered **Matching Chart** Placement Decision

**Matching Chart**

Child(ren) to be Matched:

*For families presented in the matching conference, consider the specified factors reflected in the top row of each section. List the names of families presented in the first column on the left. For each column identify the response that most accurately describes the family's ability to meet the child's need. The impact on the child can be positive (+), neutral (0), or negative (-). Some factors may not apply because they are not a need of the child (ren) being presented. In those cases, check the "N/A" box. Use the following guidelines to rate the family's ability to meet a specific characteristic.*

**Details about matching factors** ▾

**Factors**

Factor	Topics	Status
<a href="#">Basic Daily Needs</a>	<ul style="list-style-type: none"> <li>Meets Child's Health Needs</li> <li>Meets child's physical needs (food, clothing, shelter)</li> <li>Home environment is free of child specific health and safety hazards</li> <li>Supervision to meet child's developmental or behavioral needs</li> </ul>	Not Started
<a href="#">Treatment Needs</a>	<ul style="list-style-type: none"> <li>Child needs mental health therapy and the family is able to participate in the treatment plan</li> <li>Understands the importance of and is able to follow through with medication management as prescribed</li> <li>Willing to advocate for child's special education needs</li> <li>Understands the limited life expectancy of the child</li> <li>Able to cope with and meet the demands of frequent clinic visits/hospitalizations</li> </ul>	Not Started

The graphic below shows the drawer that opens when you click, **Details about matching factors**.

**Details about matching factors** ▾

+ MEETS NEED VERY WELL	<ul style="list-style-type: none"> <li>Extensive experience, knowledge or insight of the child's need in the family's background</li> <li>Understands and/or seeks out the need for training and education</li> <li>Family's lifestyle will accommodate the child currently or with some modifications</li> <li>Family readily recognizes the child's need or issue as important</li> <li>Specialized support and resources exist in the environment to assist the caregiver and child.</li> </ul>
0 PARTIALLY ABLE TO MEET NEED	<ul style="list-style-type: none"> <li>Some experience, knowledge or insight with the child's need in the family's background</li> <li>Family's lifestyle requires some alteration</li> <li>Limited understanding of the child's need</li> <li>Some support or resources in the environment to assist the caregiver and child</li> <li>No experience with the child's need, though the family is willing to learn.</li> </ul>
- NOT ABLE TO MEET	<ul style="list-style-type: none"> <li>No experience, knowledge, or insight with the child's specific need</li> <li>Unmotivated to learn or be trained about the child's need</li> <li>Family's lifestyle is incompatible with meeting the child's need</li> <li>Family denies the importance or relevance of the child's need</li> <li>No support or resources exist in the environment to assist the caregiver or child.</li> </ul>

Note: Not all factors are weighted equally. It is possible for one component to override all other components. For example, a family who otherwise seems ideal for a child may be ruled out on one factor if that one factor indicates it would not be in the best interest of the child's safety, permanency, or well-being to be matched with that family.

# Completing a Matching Conference Record

In the **Factors** grid, the **Factor** column is a list of the ten (10) Factors. Each of the Factors has specific Topics that you will rate. You will need to click each **Factor** link in the Factor column to add your ratings for each Topic per family.

- For each Factor on the Maintain Factors page (**Basic Daily Needs, Treatment Needs, Preserving Connections, etc.**), select a rating for each Topic (+, 0, -), or mark the topic as Not Applicable per family.
- Click, **Save**.

**Treatment Needs**

This section addresses each family's ability to meet current and future social, emotional, behavioral, medical, and developmental treatment needs that will be beneficial in the care of the child(ren).

**Child needs mental health therapy and the family is able to participate in the treatment plan**

This topic is not applicable to this child

AdoptiveMom, Adelaide + 0 -	ProspectivePapa, Percy + 0 -
--------------------------------	---------------------------------

**Topic Comments** ▾

**Understands the importance of and is able to follow through with medication management as prescribed**

This topic is not applicable to this child

AdoptiveMom, Adelaide + 0 -	ProspectivePapa, Percy + 0 -
--------------------------------	---------------------------------

AdoptiveMom, Adelaide + 0 -
ProspectivePapa, Percy + 0 -
Save
Apply Cancel

The **Manage Matching Conference** screen appears, displaying the **Matching Chart** tab.

**Note:** The **Status** of the Factors will change as you work through them. The Status values include, **Not Started**; **Not Complete**; and, **Complete**.

- If you wish to add a Factor that does not fit within the ten (10) pre-defined factors, click, **Add Other Factor(s)** (Optional).

Factors		
Factor	Topics	Status
<a href="#">Basic Daily Needs</a>	<ul style="list-style-type: none"> <li>Meets child's health needs</li> <li>Meets child's physical needs (food, clothing, shelter)</li> <li>Home environment is free of child specific health and safety hazards</li> <li>Supervision to meet child's developmental or behavioral needs</li> </ul>	Not Started
<a href="#">Treatment Needs</a>	<ul style="list-style-type: none"> <li>Child needs mental health therapy and the family is able to participate in the treatment plan</li> <li>Understands the importance of and is able to follow through with medication management as prescribed</li> <li>Willing to advocate for child's special education needs</li> <li>Understands the limited life expectancy of the child</li> <li>Able to cope with and meet the demands of frequent clinic visits/hospitalizations</li> </ul>	Not Complete
<a href="#">Preserving Connections</a>	<ul style="list-style-type: none"> <li>Willing to establish or maintain a relationship with the birth family</li> <li>Willing to establish or maintain a relationship with other significant persons</li> <li>Willing to adopt available siblings</li> <li>Willing to engage ongoing sibling relationships</li> <li>Willing to consider siblings who may become available in the future</li> <li>Child has a positive relationship with the family presented</li> <li>Child will remain in current community/ environment (school, activities, faith, community, etc.)</li> <li>Child has expressed a preference to be adopted by the family presented</li> </ul>	Complete

# Completing a Matching Conference Record

## Adding Other Factor(s)

Other Factors

No Other Factors exist for this Matching Conference.

Add Other Factor(s)

Status: In Progress Apply Save Cancel

The **Maintain Factors** screen appears, displaying the **Other Factor** grid.

**Note:** If the agency wishes to capture something not listed in the predefined factors, it can be recorded here (as many additional factors as wanted/needed may be recorded).

6. Enter the **Other Factor** (Name).
7. Enter a **First Topic** (Name).
8. Enter the **New Topic Name**.
9. Click the plus (+) sign to add the additional Topic.

**Note:** Repeat the process to include additional topics.

10. Click, **Save**.

**Note:** If you wish to add another Factor, repeat steps 7-10, as needed.

Maintain Factors

CASE NAME / ID: Adoption / Open (09/13/2017)

Other Factor

This section addresses any factor not covered by the existing matching chart that should be rated for each family that will be beneficial in the care of the child(ren)

Other Factor: \*

First Topic: \*

New Topic: \*

Save Cancel

# Completing a Matching Conference Record

For every Factor you add, you must provide a rating.

1. Click the **rating** link.

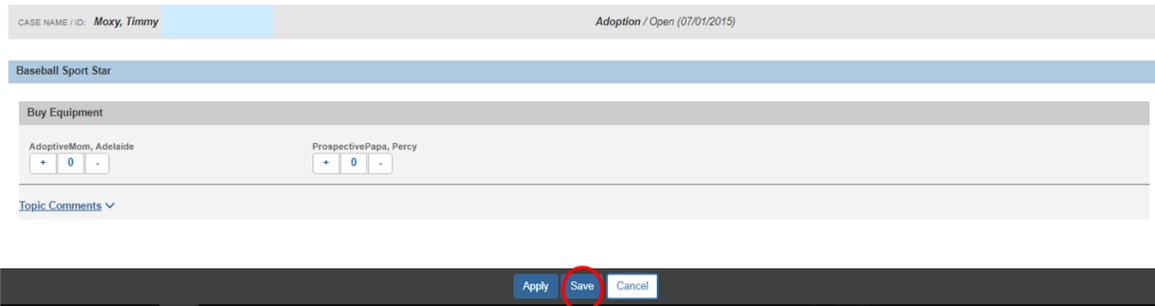


Other Factors				
	Factor	Topics	Status	
<a href="#">edit</a> <a href="#">rating</a>	Baseball Sport Star	• Buy Equipment	Not Started	
<a href="#">edit</a> <a href="#">rating</a>	Piano Star	• Pay for Piano Lessons	Not Started	

[Add Other Factor\(s\)](#)

The rating screen (bearing the Factor and Topic name you provided) appears.

2. Select a rating for each family.
3. Click, **Save**.



CASE NAME / ID: **Moxy, Timmy** Adoption / Open (07/01/2015)

**Baseball Sport Star**

**Buy Equipment**

AdoptiveMom, Adelaide: + 0 -  
ProspectivePapa, Percy: + 0 -

[Topic Comments](#) ▾

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

The **Manage Matching Conference** screen appears.

## Completing the Placement Decision Tab

1. Click the **Placement Decision** tab.



**Manage Matching Conference**

CASE NAME / ID: [redacted] Adoption / Open (03/09/2018)

✔ Your data has been saved.

[Matching Conference Planning](#) [Families Considered](#) [Matching Chart](#) [Placement Decision](#)

The **Manage Matching Conference** screen appears, displaying the **Placement Decision** tab page.

Based on the information previously recorded on your Providers and/or Inquirers, the Families Selected subsection may be empty. If there are families listed:

2. Click, **edit**, beside the **Family Name** to record a **Conference Decision**.

# Completing a Matching Conference Record

Manage Matching Conference

CASE NAME / ID: *Moxy, Timmy* Adoption / Open (07/01/2015)

Your data has been saved.

Matching Conference Planning Families Considered Matching Chart **Placement Decision**

Matching Chart

Child(ren) to be Matched:  
Moxy, Timmy

Families Selected

	Family Name	Conference Decision	Current Family Response	Date of Response
<a href="#">edit</a>	AdoptiveMom, Adelaide Inquiry ID: _____			
<a href="#">edit</a>	Provider ID: _____			

The **Family Conference Decision** screen appears.

3. Select the **Conference Decision** from the drop-down menu for the specific family. The options are:

- First Choice
- Second Choice
- Third Choice
- Fourth Choice
- No
- Withdrawn

**Note:** If the Conference Decision is First, Second, Third, or Fourth choice, the **Initial Family Response Details** and the **Subsequent Family Response Details** subsection will display. Otherwise, skip to step 9.

4. Enter narrative in the text box under **Explain reason for this conference decision**.
5. Enter the **Date of Presentation to the Family**.
6. Enter the **Family Response Deadline Date**.
7. Make a selection from the drop-down menu under **Family Response**.
8. Enter the **Date of Response**.
9. Click, **Save**.

**Note:** You must repeat the process listed above for each family listed on the **Placement Decision** tab.

# Completing a Matching Conference Record

Family Conference Decision

Family Name: AdoptiveMom, Adalaida

Family Address: [Redacted]

Agency: Ohio Child Welfare Agency

Conference Decision: First Choice

Explain reason for this conference decision: [Redacted]

Initial Family Response Details

Date of Presentation to the Family: [Redacted]

Family Response: [Redacted]

Family Response Deadline Date: [Redacted]

Date of Response: [Redacted]

Subsequent Family Response Details (if family later changed their decision)

Subsequent Family Response: [Redacted]

Date of Subsequent Family Response: [Redacted]

Subsequent Family Response Comments: [Redacted]

Apply Save Cancel

The **Placement Decision** tab is displayed.

1. Enter narrative that specifically answers each of the three questions in the grid labeled, **Additional factors considered during the matching conference**.

Matching Conference Planning Families Considered Matching Chart Placement Decision

Matching Chart

Children to be Matched:  
Moxey, Timmy

Families Selected

sd#	Family Name	Conference Decision	Current Family Response	Date of Response
sd#	AdoptiveMom, Adalaida Inquiry ID: [Redacted]	First Choice		
sd#	Americo, Lori Provider ID: [Redacted]	First Choice		

Additional factors considered during the matching conference:

If the children being considered together for matching are different than the pre-adoptive staffing or the previous matching conference, whichever was more recent, please explain the reason for the change. (expand full screen)

Is there a current JFS 01628 and Licensed Professional's statement that states race, color or national origin may be considered as one of the factors in the placement decision? If yes, please explain how race, color or national origin factored into the placement decision and not all the children that have a current completed JFS 01628. (expand full screen)

Summarize any other considerations that were central to the placement options selected or provide any additional comments. (expand full screen)

## Completing the Child Recruitment Plan Summary (when applicable)

**Note:** In the **Child Recruitment Plan Summary** section, there is a sub-section titled, **No Families Identified** and a sub-section titled, **No Families Matched**. These sub-sections will dynamically display based on the information on the **Families Considered** tab.

# Completing a Matching Conference Record

The **No Families Identified** means, zero (0) families are displayed on the Families Considered tab. When no families have been identified, a **Child Recruitment Plan** must be linked in this sub-section, showing recruitment efforts completed in the **last ninety days**.

The **No Families Matched** means, there was no family that had a First Choice Conference Decision on the Placement Decision tab. When no families have been matched, a **Child Recruitment Plan** must be linked in this sub-section, showing recruitment efforts to be completed in the **next ninety days**. Click the Child Recruitment Plan Details link (this will open a drawer).

## Completing the No Families Identified Sub-section

1. Click **Maintain Child Recruitment Plan** button.

The screenshot displays the 'Child Recruitment Plan Summary' interface. At the top, there is a header 'Child Recruitment Plan Summary'. Below it, the 'No Families Identified' section is highlighted with a green box. This section contains the text: 'No families have been identified as an adoptive placement for this child(ren), please link and review all applicable Child Recruitment Plans that show recruitment efforts completed in the last ninety days.' Below this text is a link 'Child Recruitment Plan Details' with a dropdown arrow. Underneath, it states 'No Child Recruitment Plan(s) have been linked'. A blue button labeled 'Maintain Child Recruitment Plan' is highlighted with a red box. Below this, there is a section for 'Child Recruitment Plans will not be linked for the following child(ren):' with an information icon and a list item 'Moxy, Timmy' with a checked checkbox. The 'No Families Matched' section is also visible below, with similar text and a 'Maintain Child Recruitment Plan' button. At the bottom of the interface, there is a 'Status:' dropdown menu set to 'In Progress', and 'Apply', 'Save', and 'Cancel' buttons.

## Completing a Matching Conference Record

The **Maintain Recruitment Plan** screen appears, displaying the **Select Child Recruitment Plan** section.

2. Select the desired **Child Recruitment Plan(s)**, by placing a checkmark in the checkbox beside the desired plan.

**Note:** Child recruitment plans available for selection (linked) include:

- Plans that have same child(ren) as in the matching conference
- Plans that have an effective date between the current date and current date minus 90 calendar days
- Plans regardless of status, excluding created in error
- Plans with a status of In Progress or Active if those plans are not linked to any other matching conference records

3. Click, **Add Selected**.

**Important:** If no Child Recruitment Plan is listed:

- Select the child's name from the drop-down menu:
- Click, **Add Recruitment Plan**. For more information regarding adding a Child Recruitment Plan, please see the following KBA:
- Click, **Save**.

**Maintain Recruitment Plan**

CASE NAME / ID: *Moxy, Timmy* Adoption / Open (07/01/2015)

**Select Child Recruitment Plan**

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
<input checked="" type="checkbox"/>	<a href="#">view</a> 26	<a href="#">Moxy_Timmy_</a>	12/03/2018		Complete	

Select child:

The **Select Child Recruitment Plan** screen appears.

- Complete steps 2 and 3, as described above.

## Completing a Matching Conference Record

**Note:** If the Child Recruitment Plan that is linked is incorrect, click, unlink and repeat steps 1-3 above.

**Important:** If no recruitment efforts have been made for the child(ren) within the past 90 days, thus, no **Child Recruitment Plan** exists, place a checkmark in the check box beside **Child Recruitment Plans will not be linked for the following child(ren)**.

**Child Recruitment Plan Summary**

**No Families Identified**

No families have been identified as an adoptive placement for this child(ren), please link and review all applicable Child Recruitment Plans that show recruitment efforts completed in the last ninety days.

[Child Recruitment Plan Details](#) ▾

	Recruitment Plan ID	Child Name	Effective Date	End Date	
<a href="#">edit</a> <a href="#">view</a>	26	Moxy, Timmy	12/03/2018		<a href="#">unlink</a>

[Maintain Child Recruitment Plan](#)

Child Recruitment Plans will not be linked for the following child(ren): ⓘ

Moxy, Timmy

### Completing the No Families Matched Sub-section

1. Click **Maintain Child Recruitment Plan** button.

**Child Recruitment Plan Summary**

**No Families Identified**

No families have been identified as an adoptive placement for this child(ren), please link and review all applicable Child Recruitment Plans that show recruitment efforts completed in the last ninety days.

[Child Recruitment Plan Details](#) ▾

*No Child Recruitment Plan(s) have been linked*

[Maintain Child Recruitment Plan](#)

Child Recruitment Plans will not be linked for the following child(ren): ⓘ

Moxy, Timmy

**No Families Matched**

Child(ren) were not matched with the family; within the new Child Recruitment Plan, document the agency's specific action steps for the next ninety days to find a permanent home by linking a new recruitment plan for each child.

[Child Recruitment Plan Details](#) ▾

	Recruitment Plan ID	Child Name	Effective Date	End Date	
<a href="#">edit</a> <a href="#">view</a>	50	Moxy, Timmy	12/10/2018		<a href="#">unlink</a>

[Maintain Child Recruitment Plan](#)

The **Maintain Recruitment Plan** screen appears, displaying the **Select Child Recruitment Plan** section.

2. Select the desired **Child Recruitment Plan(s)**, by placing a checkmark in the checkbox beside the desired plan.

## Completing a Matching Conference Record

**Note:** Child recruitment plans available for selection (linked) include:

- Plans that have same child(ren) as in the matching conference
- Plans that have an effective date between the current date and current date minus 90 calendar days
- Plans with a status of In Progress or Active if those plans are not linked to any other matching conference records

3. Click, **Add Selected**.

Maintain Recruitment Plan

CASE NAME / ID: Moxy, Timmy Adoption / Open (07/01/2015)

Select Child Recruitment Plan

	Recruitment Plan ID	Child Name / ID	Effective Date	End Date	Status	Linked
<input checked="" type="checkbox"/>	26	Moxy_Timmy	12/03/2018		Complete	

Select child:

Add Recruitment Plan

Add Selected Cancel

**Important:** If no Child Recruitment Plan is listed, select the child's name from the drop-down menu:

- Click, **Add Recruitment Plan**. For more information regarding adding a Child Recruitment Plan, please see the following KBA:
- Click, **Save**.

The **Select Child Recruitment Plan** screen appears.

- Complete steps 2 and 3, as described above.

If the Child Recruitment Plan that is linked is incorrect, click, **unlink** and repeat steps 1-3 above.

# Completing a Matching Conference Record

**No Families Matched**

Child(ren) were not matched with the family, within the new Child Recruitment Plan, document the agency's specific action steps for the next ninety days to find a permanent home by linking a new recruitment plan for each child.

[Child Recruitment Plan Details](#) ▾

	Recruitment Plan ID	Child Name	Effective Date	End Date	
<a href="#">edit</a> <a href="#">view</a>	50	Moxy, Timmy	12/10/2018		<a href="#">unlink</a>

[Maintain Child Recruitment Plan](#)

## Marking the Matching Conference Record as Complete

1. Go to the Matching Conference Planning tab on the Manage Matching Conference screen.
2. Enter **Date Occurred**.
3. Place a checkmark in the checkbox beside the name of each person who participated in the Matching Conference.
4. Select, **Complete**, from the Status drop-down menu.
5. Click, **Save**.

**Manage Matching Conference**

CASE NAME / ID: **Moxy, Timmy** Adoption / Open (07/01/2015)

**Matching Conference Planning** Families Considered Matching Chart Placement Decision

Date Scheduled: \* 12/31/2018  Date Occurred:  

**Child(ren) To Be Matched**

Moxy, Timmy

**Matching Conference Participants**

	Name / ID	Role	Agency/Organization	Participated	
<a href="#">edit</a>	Moxy, Timmy	Child		<input type="checkbox"/>	
<a href="#">edit</a>		WWK Recruiter		<input type="checkbox"/>	
<a href="#">edit</a>		IL Worker		<input type="checkbox"/>	
<a href="#">edit</a>		Adoption Caseworker		<input type="checkbox"/>	

Daphn, Polly A., 6751983 **Status:** \* **Complete**  **Apply** **Save** **Cancel** the Agency

The **Matching Conference Records** screen appears, displaying the record with a **Status** of **Complete**.

The **Matching Conference Records** screen appears.

1. Click, **view**, beside the appropriate record.

# Completing a Matching Conference Record

**Matching Conference Records**

Showing 4 Matching Conference records:

	Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
<a href="#">view</a>				3		Complete 10/10/2018
<a href="#">view</a>				0		Complete 04/07/2018
<a href="#">view</a>				0		Complete 12/26/2017
<a href="#">view</a>				0		Complete 09/28/2017

The **Manage Matching Conference** screen appears, displaying the **Matching Conference Planning** tab.

## Generating the Signature Page

2. Click, **Generate Signature Page**.

**Manage Matching Conference**

CASE NAME / ID: [redacted] Adoption / Open (09/13/2017)

Matching Conference Planning Families Considered Matching Chart Placement Decision

Date Scheduled: \* 06/11/2018 Date Occurred: 09/11/2018

ODJFS MEPA Coordinator has been notified on: 06/07/2018

**Child(ren) To Be Matched**

- [redacted]
- [redacted]

**Matching Conference Participants**

Name / ID	Role	Agency/Organization	Participated
[redacted]	Child		<input checked="" type="checkbox"/>
[redacted]	Foster Parent		<input checked="" type="checkbox"/>

**Generate Signature Page**

The **Document Details** grid appears.

3. Click, **Generate Report**.

Case=Workload+Reports

**Document Details**

Document Category: CASE Document Title: Matching Conference Signature Page

Work-Item ID: [redacted] Work-Item Reference: [redacted]

Task ID: [redacted] Task Reference: [redacted]

**Document History**

ID	Date Created	Employee ID	Name
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**Generate Report**

Cancel

The **Matching Conference Signature** page appears.

4. Click, **Save**.

## Completing a Matching Conference Record

### Generating the JFS 01689 (The Documentation of the Placement Decision-Making Process)

1. Click the report icon.

Matching Conference ID	Child(ren) Included	Date Matching Conference Occurred	Number of Families Presented	Worker Completing	Status
<a href="#">view</a> 73	Moxy, Timmy	07/12/2018	0		Complete  07/12/2018

The **Document Details** screen appears.

2. Click, **Generate Report**.

3. If required, enter narrative for No Families Were Identified and considered text box.
4. Answer Yes or No to the following question **Is there a current JFS01688 for any of the children being considered by matching that states that race, color, or national origin should be a consideration in the placement decision?**
5. Click, **Generate Report**.

# Completing a Matching Conference Record

Placement Decision Making Process Documentation - Placement Decision Making Process Documentation

If no families were identified and considered as an adoptive placement for this child at the matching conference. Explain why:

Is there a current JF501688 for any of the children being considered for matching that states that race, color, or national origin should be a consideration in the placement decision? \*

Yes     No

If you need additional assistance, please contact the SACWIS Help Desk.