

Client Names(s): _____

CHECKLIST FOR PROCESSING AGENCY ADOPTIONS
(Including other country agency adoptions not finalized in other country)

Primary Statutes for Review

Adoption: **ORS 109.309**

Petition: **ORS 109.315**

Adoption Summary and Segregated Information Statement: **ORS 109.317**

General Judgment of Adoption: **ORS 109.350**

Obtain Retainer Agreement and Client information

NOTE: Identify, discuss and resolve any issues, including the effect of Adoption Assistance and Indian Child Welfare Act.

Notify adoption agency of representation

Document Preparation

1. **Petition for Adoption: (ORS 109.315(1))**

Petitioners' full names. (109.315(1)(a))

The state and length of residency in the state of the petitioner, and information sufficient to establish residency requirement of **ORS 109.309(2)** has been met. (109.315(1)(b))

Current marital or domestic partnership status of Petitioners. (109.315(1)(c))

An explanatory statement why the petitioners are of sufficient ability to bring up the minor child and furnish suitable nurture and education sufficient for judgment to be entered under **ORS 109.350**. (There is considerable variability regarding the level of detail required by different counties. Inquire as to local practice and consider including: information regarding employment of petitioners, such as employer and length, sufficiency of income, type of residence and space for child, ability to provide medical care, plans for schooling, success with other children, if any, etc. (109.315(1)(d))

Information sufficient for court to establish compliance with jurisdiction and venue requirements of **ORS 109.309(4)** and **(5)** (109.315(1)(e))

Full name, gender, and date of birth and place of birth of child. (109.315(1)(f))

The marital or domestic partnership status of the biological mother when the child was conceived and born and during the 300 days prior to birth of the child. (109.315(1)(g))

A statement that the minor child is not an Indian child as defined in the **Indian Child Welfare Act (25 U.S.C. 1901 et seq.)** (109.315(1)(h)) or, if the **Indian Child Welfare Act** applies

Client Names(s): _____

If ICWA Applies:

- A statement of the efforts made to notify the appropriate Indian tribe(s) of the adoption. (109.315(1)(h)(A))
- A statement of the efforts made to comply with the placement preferences of the Indian Child Welfare Act or the placement preferences of the appropriate Indian tribe. (109.315(1)(h)(B))

- Name and relationship to child of any person who has executed a written release or surrender of parental rights or of rights of guardianship of the minor child as provided by **ORS 418.270** and the date of the release or surrender document. (109.315(1)(i))

NOTE: Each county sets its own policy on the requirement of a consent being notarized. It is good practice to notarize a consent whether or not it is required by statute to avoid rejection by the Court.
- Name and relationship to child of any person who has given consent pursuant to **ORS 109.321** and date consent given. (109.315(1)(j))
- Name and relationship to child of any person or entity for who the consent requirement is waived or not required. (109.315(1)(k))
- Name and relationship to minor child of all persons who signed Certificate of Irrevocability under **ORS 109.321(2)** OR a written certificate stating that a release or surrender under **ORS 418.270(4)** shall become irrevocable as soon as the child is placed for adoption. (109.315(1)(L))
- Statement of the facts and circumstances under which Petitioners obtained physical custody of the child, including date of placement with Petitioners and name and relationship to child of person or entity placing child with Petitioners. (109.315(1)(m))
- Length of time child has been in physical custody of Petitioners; if child not with Petitioners, provide reason, and date and manner in which Petitioners will obtain physical custody of child. (109.315(1)(n))
- Whether or not a continuing contact agreement exists under **ORS 109.305**, including names of the parties to the agreement and date of execution. (109.315(1)(o))
- A statement establishing that the requirements of ORS 109.353 regarding advisement about the voluntary adoption registry and the registry's services have been met (109.315(1)(p)).
- A statement establishing that the requirements of ORS 109.346 regarding notice of right to counseling sessions have been met (109.315(1)(q)).
- Statement that **UCCJEA** information is in **ASSIS**. (109.315(1)(r))
- Statement that **ICPC** does or does not apply. If applicable, statement of efforts to comply. (109.315(1)(s)). If applicable, attach **ICPC 100a** as exhibit. (**ORS 417.200**)

Client Names(s): _____

NOTE: The **ICPC 100a** contains identifying information, and it can be attached to the **ASSIS** at the attorney's discretion.

- Unless waived, statement that home study was completed in compliance with **ORS 109.309(7)**. (109.315(1)(t))
- A statement that Petitioners have been informed of the estimated costs and expenses associated with this adoption proceeding. (109.315(3)(e) and 109.311(1), (2))
- A declaration made under penalty of perjury that the petition, and the information and statements contained in the petition, are true to the best of the petitioners' knowledge and belief and that the petitioner understands the petition, and information and statements contained in the petition, may be used as evidence in court and are subject to penalty for perjury. (109.315(1)(u))

Prayer/Request (ORS 109.315(2))

- Entry of General Judgment of Adoption (109.315(2)(a))
- Petitioner be permitted to adopt the minor child as the child of petitioner for all legal intents and purposes (109.315(2)(b))
- Finding that the court has jurisdiction over the adoption proceeding, the parties, and the minor child. (109.315(2)(c))
- Termination of parental rights and/or determination of nonparentage (109.315(2)(d))
- Approval of the change of the child's name to the proposed adoptive name or that the child's name remain unchanged (109.315(2)(e))
- If applicable:* A finding that the *Continuing Contact Agreement* entered under **ORS 109.305** is in the best interests of the minor child, and that, if the minor child is 14 years of age or older, the minor child has consented to the agreement, and that the court incorporate the *Continuing Contact Agreement* by reference into the adoption judgment. (109.315(2)(f))
- That the court require preparation of and certify an *Adoption Report* as provided in **ORS 432.223**. (109.315(2)(g))
- That all records, papers, and files in the record of the adoption be sealed as provided under **ORS 109.319**. (109.315(2)(h))
- Any other relief requested by Petitioner. (109.315(2)(i))

Exhibits

Must include if applicable, but need not be limited to:

- If agency adoption of child from another country, need guardianship documents and

Client Names(s): _____

supporting documents from agency; attach as Exhibit.

- Any written release or surrender of the minor child for adoption, or a written disclaimer of parental rights. (109.315(3)(a))
- Any written consent to the adoption. (109.315(3)(b))
- Any *Certificate of Irrevocability and Waiver* (109.315(3)(c))
- Any *Continuing Contact Agreement* (109.315(3)(d))
- Adoption Disclosure Statement* (109.315(3)(e))
- Any other supporting documentation to comply with the petition requirement in **ORS 109.309** and **ORS 109.315**.

--Petition must be signed by Petitioners.--

2. **Adoption Summary and Segregated Information Statement (ORS 109.317)**

- Full name, permanent address and telephone number of each Petitioner (109.317(1)(a))
- Current Full Name, the Proposed Adoptive Name and Date and Place of Birth of the Minor Child. (109.317(1)(b))
- Names, permanent addresses and telephone numbers of any person whose consent to the adoption is required under **ORS 109.321**. (109.317(1)(c))
- Name and relationship to minor child and address of any person or entity for whom written consent requirement of **ORS 109.321** is waived or not required as provided in **109.322, ORS 109.323, 109.324, 109.325, 109.326** and **109.327**, or whose written consent may be substituted for the written consent requirement under **ORS 109.321** as provided in **109.322, ORS 109.323, 109.324, 109.325, 109.326, 109.327, 109.328** and **109.329**. (109.317(1)(d))
- The information required by the *Uniform Child Custody Jurisdiction and Enforcement Act* under **ORS 109701** to **109.834**. (109.317(1)(e))
- Name, address and telephone number for the Adoption Agency that will consent, or has consented, to this adoption. (109.317(1)(f))
- Name, bar number and contact information for any attorney representing a Petitioner or a person whose consent to the adoption is required under **ORS 109.321**. (109.317(1)(g))
- Type of adoption proceeding: (109.317(1)(h))
 - Private agency adoption, either domestic or international.
 - Non-related independent adoption.
 - Determination of validity of an adoption in a foreign nation under **ORS 109.385**.

Client Names(s): _____

- Relative independent adoption.
- Stepparent independent adoption.
- An independent adoption involving one petitioner who retains parental rights.
- Out-of-state public agency adoption.
- An adoption in which the Department Human Services gives consent under **ORS 109.325**.
- Any other specified adoption.

Exhibits - ORS 109.317:

- Home Study or written evidence that a home study has been approved as required by ORS 109.309, unless waived **OR** copy of Petitioners' Request for Waiver of Home Study. (Although the statute does not specifically allow for a copy of the request for waiver to be substituted for the waiver itself, this is common practice and courts have generally been willing to accept this substitution) (109.317(2)(a) and 109.317(3))
- Report of Adoption as required under ORS 432.223. (109.317(2)(b))
- Medical history of the minor child and of the biological parents as required by ORS 109.342. (109.317(2)(c))
- May include ICPC 100A as exhibit if it contains identifying information.

NOTE: Before Judgment is entered in this adoption, Petitioners have an obligation to file an Amended Adoption Summary and Segregated Information Statement when any of the required information changes or when information not previously known or ascertainable becomes known or ascertainable.

If Adoption Assistance applies:

If a family is seeking adoption assistance, it is imperative that the first order obtained in their adoption includes the required findings.

- Obtain supporting Affidavit from agency.
- Prepare Motion for Order regarding Adoption Assistance and Order regarding Adoption Assistance in compliance with the applicable State and Federal law. Adoption assistance is a complex issue, and inexperienced adoption attorneys should work with an experienced attorney.
- eFile both Motion and Order with the court.
- Obtain certified copy of the signed order.
NOTE: This process varies by county. Some counties require you to appear in person at the clerk's office to determine whether the order has been signed, while other counties will automatically send you a certified copy of the order.

3. **Judgment**

- Findings of Fact to support order (ORS 109.350) and refer to the Petition for

Client Names(s): _____

Adoption.

- Termination of parental rights of birth parent(s) and/or
- Determination of non-paternity of birth father
- Acknowledgment of the Court's authority to make a custody determination (UCCJEA)
- Child's name change
- Language making Petitioners the legal parents of the child
- Approval and incorporation of Continuing Contact Agreement if applicable
- Directing that the court require preparation of and certify an Adoption Report as provided in ORS 432.223.
- Directing Oregon Health Authority, Vital Records Department, to issue a new or amended birth certificate for the child.
- Language sealing records

4. **Fees.**

\$255.00 check payable to State of Oregon for filing fee
\$60 for amended birth certificate

After Filing of the Petition and Related Documents

1. ORS 109.315(5) requires that a true copy of the Petition and ASSIS to be served on the Department of Human Services by either registered or certified mail with return receipt, or personal service within 30 days after the documents have been filed with the court.
2. If all requirements have been met, DHS will issue you a letter waiving the 90-day waiting period and assign the placement report to the agency or DHS will issue a letter outlining further requirements.
3. Following receipt of the DHS waiver, the agency will prepare a Consent to Adoption and agency placement report. The agency will file the Placement Report directly with the court while providing the original Consent to Adoption for attachment to the Judgment as an exhibit.
4. Once the DHS waiver, agency consent and placement report are issued, a General Judgment of Adoption can be filed with the court.

NOTE: If adoption assistance applies – It MUST be granted before the judgment can be submitted to the court. To do otherwise will cause denial of adoption assistance. See OAR 413-130-0110(1)(b)

NOTES:

Client Names(s): _____

1. Every document is subject to errors, review all incoming and outgoing documents, including but not limited to certificates of adoption and birth certificates.
2. Every court sets its own policies on processing adoptions. Be prepared for requests for additional documents or information.

Client Names(s): _____

Client File Notes

Date File Opened: _____
Date of Client Meeting: _____
County for Filing: _____
Date Filed: _____
Case Number: _____
DHS Served: _____
DHS waiver received: _____
Agency Consent/Placement Report Received: _____
Adoption Assistance Granted (if applicable): _____
Date Judgment submitted: _____
Date Judgment Signed: _____
Date Judgment Sent to Client: _____
Date Birth Certificate Received: _____
Date Birth Certificate Sent to Client: _____
Date File Closed: _____

File Retention: See the PLF file retention and destruction guidelines, available on the PLF website, www.osbplf.org.

NOTES: _____

IMPORTANT NOTICES

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice. This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund except that permission is granted for Oregon lawyers to use and modify these materials for their own practices. ©2017 OSB Professional Liability Fund.