GLADNEY *Center for Adoption*

HOME STUDY GUIDELINES AND CHECKLIST

General Information:
The information outlined in the following checklist must be included in the home study report, unless prohibited by state law. As the author and conductor of the home study, please ensure each bulleted item has been addressed and included in the report, and indicate the page number on the checklist where the specific information is found in the home study document. Items not applicable to the Prospective Adoptive Parents (PAPs) should be marked with n/a.

Due to differing state requirements and specific family circumstances, the length of the home study document will vary.

Gladney requires receipt of this completed checklist with the home study draft in order for us to conduct our review.

****STOP – If you are a contract worker and NOT employed by your agency, Gladney cannot accept the home study. Please contact your supervisor and Gladney immediately if this pertains to you****

FAMILY NAME: _____

COUNTRY ADOPTING FROM: _____

HOME STUDY AGENCY: _____

SOCIAL WORKER: _____

SW EMAIL ADDRESS: _____

Please indicate which page number(s) each item is located within the home study document

	Length of Home Study (India only)
	Per India's requirement, a home study must not exceed 15 pages.
Page #(s)	**Section 1: Prepared by**
	SAFE – Applicant Information *(internal use only)*
	Indicate who is conducting this home study, credentials, license number (if applicable), the agency's authorization to conduct this home study, the relationship between the cooperating agencies, and the date the PAP initially requested home study services. ***Sample wording:*** *The (name) family contacted (HS agency) on (date) for the purpose of an international adoption home study. (social worker's name, credentials and license number and expiration date, if applicable), prepared this home study and is authorized by the State of (list state) to prepare home studies according to (list state statute regarding requirements of social workers who prepare home studies) and employed by (HS Agency). (HS Agency) is authorized by the State of (name state and cite state regulations that refers to agency licensing) to research and prepare home studies (list license number and expiration date, if applicable). (HS Agency) is an Exempted/Supervised Provider for Gladney Center for Adoption (Gladney), a Hague accredited agency, based on an agreement executed on (date Exempt/Supervised Provider Agreement was signed by Gladney). In accordance with 22 CFR Part 96, Gladney is a non-profit accredited agency on file with the Department of State as having the authority to supervise Convention home studies. This home study is to be used for the sole purpose of an international adoption from the country of (name country).* • **Colombia** requires that there must be a finalization date on the front page of the home study.
Page #(s)	**Section 2: PAP Identifying information**
	SAFE – Demographic Grid *(internal use only)*

	State the following information regarding the applicants:
	• Full legal names
	• Dates of birth
	• Telephone numbers
	• Education
	• Occupation
	• Citizenship
	  o If PAP is a naturalized citizen, please include alien registration number as shown on Certificate of Citizenship
	  o Colombian heritage families **must** list their dual citizenship
	  o India heritage families must list their NRI (Non-Resident Indian) or OCI (Overseas Citizen of India) status, including passport number or OCI card number
	• Address
	• Marriage (date & place)
	• Names and DOBs of other household members

Page #(s)	Section 3: Summary of Contacts
	SAFE – Dates of Contact *(internal use only)*
	For each interview, specify the date, length of time, location, and name of participant. A minimum of four (4) face-to-face, in-person interviews are required, on at least three (3) separate dates. Prospective Adoptive Parents should be interviewed individually and separately from others. Each household member must be interviewed. Children should be interviewed separately when possible. For a home study update, please list all previous visits, but include at least one recent home visit. ***Sample***: • May 4, 2020 – Joint interview with John & Jane Doe – HS agency office – 3 hours • May 5, 2020 – Individual interview with Jane Doe – Doe residence – 1 hour • May 5, 2020 – Individual interview with John Doe – Doe residence – 1 hour • May 10, 2020 – Individual interviews with Doe children, Mary and Tim – Doe residence – 1 hour • May 10, 2020 – Home inspection – Doe residence – 1.5 hours • May 11, 2020 – Phone call with references – 1 hour • May 12, 2020 – Zoom interview with guardians* – 0.5 hours **Colombia program only requires a documented **face-to-face** conversation with the designated guardians*
Page #(s)	**Section 4: Motivation to Adopt**
	SAFE – Motivation *(internal use only)*
	• If part of the motivation to adopt stems from infertility, a thorough discussion of the fertility issues, attempts at conception, grief and loss, and how they came to the decision to adopt internationally must be included. • Include a discussion as to why the PAPs chose the specific country, how they are educating themselves regarding the country, and how they intend to educate the child about adoption and his or her birth country. • Do not include any humanitarian statements. o ***Colombia** does not allow religious connotation or statements.* • Be sure to include wording such as "*Mr. and Mrs. Doe understand that each child has unique behavioral and performance abilities based upon his or her age, ability, and special needs. They are capable of setting realistic expectations for their child."* • *If applicable:* For a relative adoption, and/or if the adoption has already occurred in the country of origin, state that the PAP is completing the home study to adopt that specific child. (This does not include PAP's hoping to match with a certain waiting child)

Page #(s)	**Section 5: Child Preferences**
	SAFE – Applicant Disposition *(internal use only)*
	• State the number of children* the PAP is requesting to adopt, the country, gender preference**, age range at time of referral, and special needs*** the PAP is open to accepting. ***Please note families are not permitted to specify a preference for child's race/ethnicity/descent in any of Gladney's country programs.*** ***Gladney** does not allow the adoption of two (2) unrelated children at once. This cannot be suggested or discussed in the home study. Approval of more than one child can only occur when referencing siblings.* ****Colombia –** Cannot specify gender – must be open to both male and female. Must be open to special needs.* *****Colombia heritage program –** Please confirm the family is open and accepting of a child with minor special needs such as trauma, hip dysplasia, vision issues, hearing issues, developmental delay, language delay, hypotonia, etc. Please specify family would like to adopt through the Colombia heritage program.* *****India** – only heritage families can request a healthy child. Be sure to include wording such as "Mr. and Mrs. Doe are open to mild malnutrition and developmental delays commonly seen in children under institutional care. Mr. and Mrs. Doe understand and accept the lack of background and health information on the child they will adopt through the program." Non-Heritage families must be open to a child with special needs.* *****Thailand** may require listing specific special needs the family is open to consider based on a checklist provided by the orphanage. You should have received the checklist from the casework if it applies.* • Include if the PAP is open to adopt siblings, and if so, how many. • Do not identify a specific child to be adopted in the home study, unless it is a relative adoption and/or the adoption has already occurred in the country of origin as mentioned in the Motivation to Adopt section (above).
Page #(s)	**Section 6: PAPs Personal History**
	SAFE – History & Personal Characteristics *(internal use only)*
	For each PAP, address the following: • Biographical information – DOB, place of birth (as verified by birth certificate), parents' full names and ages, citizenship (include alien registration number if naturalized citizen), memories (childhood, adolescence, young adulthood). o ***For China** – If PAP was born in China, Hong Kong, Taiwan, or Macau, these locations must be written out as follows:* ▪ *The People's Republic of China (for China)* ▪ *Hong Kong, China (for Hong Kong)* ▪ *Taiwan, China (for Taiwan)* ▪ *Macau, China (for Macau)* • Background information on discipline methods used in the home, interactions/relationships with parents and siblings throughout the years, significant events (including personal tragedies or traumas), and any other noteworthy life experience.

	○ If the PAP has experienced a personal tragedy or trauma, include a discussion of the event, how the PAP coped with it, how it affects him or her currently, and how the PAP exhibits resiliency. ○ Abuse history (physical, sexual, emotional) if applicable – summarize the occurrence(s) of abuse, how the PAP has dealt with the trauma from the abuse, and an assessment regarding the PAPs processing and recovery as related to the abuse. ○ ***For Colombia**, if physical abuse was experienced in the PAP's childhood, the home study **must** say that the PAP will not use this type of abuse with their adopted child.* ○ ***For Taiwan,** discuss contact with extended family members, listing all names and ages of parents, siblings, nieces, and nephews, and how often time is spent with each. Include discussion of current and past relationship with PAPs parents.* • Family and/or client history of drug/alcohol abuse and mental illness ○ If PAP has a mental health diagnosis such as anxiety or depression, then you must state when it was diagnosed, what led to the diagnosis, how the PAP dealt with the diagnosis, what changes have been made to help, how it impacts daily life, and what their coping strategies are. • Summary of education and work history, hobbies and interests. • A self-identified list of strengths and weaknesses, as well as greatest accomplishments. • Any other notable traits or factors which may impact the PAPs ability to parent an adopted child • Include **detailed** information regarding the PAPs social environment and support system – specific names and relationships, how long PAP has known the support, what types of supports the person provides the family and their children, what types of support the person will provide upon adoption, etc. This section should be at least one robust paragraph with detail, as opposed to a sentence or two confirming support.
Page #(s)	**Section 7: Marital Relationship**
	SAFE – Marriage/Partnership *(internal use only)* • Date and place of marriage (verified by marriage license/certificate) • Discussion of: ○ When and how the couple met, what attracted them to each other, and length of courtship ○ Each spouse's view of the other, and attitude towards marriage ○ Patterns of communication, how they cope with difficult situations, problem solving skills, willingness and ability to appropriately deal with feelings of anger, frustration, conflict, sorrow, affection ○ Identification of common areas of disagreement, and methods of handling disagreements. ▪ ***For Taiwan** give two specific examples that illustrate an issue and their process for resolving the conflict.* ○ Extent of satisfaction with marriage, including activities the couple enjoys together ○ Marital separations and/or counseling ○ Discuss how **both** PAPs will be involved in the care of the child

	• If applicable, discussion of previous marriage(s):
	  o State number and dates of previous marriages for each spouse
	  o Include reasons for divorce, dates, names of previous spouse(s), current relationship with ex-spouse, and if any children were produced by the marriage
	• Confirm if no previous marriages
	Sample wording: *This is the first marriage for both John and Jane Doe.*
	• For non-married, cohabitating couples, include same items listed above, as well as a discussion of the couple's views on/plans for marriage.
	• Include a discussion on the couple's support system – who their supports are, how these people support the couple and nurture the marital relationship
	• ***For Colombia –*** *If PAPs have been married for less than 2 years, please demonstrate that they have been together for at least 3 years through items such as bank statements showing joint accounts, living in same residence, on same health insurance plan.*

Page #(s)	**Section 8: Current children**
	SAFE – Children or Others Residing or Frequently in Home *(internal use only)*

	For each minor child living in the home, include the following:
	• Full legal name, date of birth, country of birth (as stated on birth certificate/adoption documents), and whether child is biological or adopted
	  o If child/children is/are adopted, please include when they were placed in the home and how they have integrated into the family.
	• If applicable, alien registration number (as stated on the Certificate of Citizenship)
	• General physical description of the child
	• Identify any special needs or diagnoses of the child, and how the PAPs tend to those needs. If the child does not have special needs, please state that
	• Discussion of child's social, psychological, physical, mental, and behavioral health
	• School name and grade
	  o If homeschooled, discussion of who is the primary teacher, how the child is socialized with non-related peers
	• Any criminal history as per parental report or clearances (if allowable by state law). Suggested verbiage if state does not allow clearances: *"The child has no criminal history per the parents report. The state of residence does not allow criminal background checks on children."*
	• How each PAP views/describes the child
	• Attitude and feelings of the child regarding the adoption (use quotes)
	• Observations of the child and of the parent-child interactions
	• Please add conclusion statement such as the following: "The X children appear to be in excellent physical, mental, emotional and behavioral health and have no special needs."
	
	Regarding each adopted child, in addition to the above, please also include:
	• A discussion of the adopted child's integration into the family
	• Therapies the adopted child has received and is receiving
	• Any surgeries or medical interventions

	• Commentary on the attachment and bonding process on both the child's side and the PAPs • PAPs proven ability to seek out and secure resources for the child • If the family experienced a difficult transition, a discussion of how they addressed the difficulties, and confirmation that any significant challenges have been resolved Adult children living outside of the home: • Conduct telephone interviews and include feelings/attitude toward the adoption • If unable to include, state why
Page #(s)	**Section 9: Adult Household Members**
	SAFE – Others Residing in Home *(internal use only)*
	For each adult household member, include the following: • Full legal name and date of birth • Relationship to PAPs • Feelings and attitudes regarding the PAPs adoption intentions
Page #(s)	**Section 10a: Parenting Preparation**
	SAFE – General Parenting *(internal use only)*

	• The PAPs experience with children and their philosophy on child-rearing
	• For PAPs who have never had children, include a description of their experience and interactions with children (for example, through extended family, providing childcare, social circle, or other means)
	• Discipline methods currently used in the home, and plan for discipline methods with the newly adopted child.
	  o **This section must include a statement that the PAPs agree not to utilize any form of corporal punishment, and that they understand why the use of corporal punishment on an adopted child will not only add to the child's history of trauma, but will also hinder the attachment and bonding process.**
	  o **This section must also confirm that the PAP has signed, and understands, Gladney's Discipline Policy**
	• The PAPs willingness to advocate on behalf of their child, and work cooperatively with an agency for support, and help in securing resources.
	• Childcare plans. If there is a grandparent, nanny or similar caregiver who will be providing ongoing childcare, they most likely will need to be included as an adult household member. Please contact us with any questions.
	• Discuss how the PAP's support system will be involved in the child's life and daily activities
	• Review and discuss the PAP's completed Parent Preparation form
	• If family has more than two children in the home, provide in depth discussion as to how family will have time for the additional child(ren) to be adopted. And how they will make time for the children already in the home. **Be specific.**
	• Understanding of the importance of positive adoption language and positive attitude towards birth parents
	  o ***For Thailand:*** *State PAPs understand that there may be the possibility of sharing information with the child's birth family. In this case, they agree*

	to send photos and updates up to three times a year to be shared with the child's birth family. • The PAPs plan to integrate the child into the household, and how they plan to discuss adoption with the child and all other household members • Assessment of the PAPs understanding of inter-country adoption, potential risks, delays, expenses, and potential issues and challenges regarding attachment, bonding, and adjustment. • If the state of residence offers post-adoption support, include a discussion that the PAPs are aware of this resource, and they agree to utilize it as needed • Address PAPs intention to incorporate and maintain a connection to their child's heritage, and how they will instill in their child a pride for their ethnic heritage. Mention local ethnic communities and opportunities for participation. This is especially important for **India** and **Taiwan**. Please also include if there is an adoption support group in the area that PAPs plan to participate. o ***For Taiwan*** *the discussion of maintaining the child's culture and heritage, and how they recognize and value the importance of celebrating the child's heritage should be several paragraphs in length. The discussion should also include the PAPs willingness to travel back to Taiwan with the child in the future. This section should also address the family's openness to learning about their child's birth family and honoring the birth family. Discuss the family's feelings on meeting the child's birth family in Taiwan, and willingness to provide photos and updates to the birth family after placement through Gladney and the partner agency in Taiwan. Clearly state that the family understands that 'all communication with the birth family is processed through Gladney and the partner agency in Taiwan, and that there is no direct contact between the adoptive family and birth family during the post-placement reporting phase.'* • PAPs understanding of their responsibility in the case of disruption/dissolution. ***Sample wording:*** *The PAPs have realistic expectations and understand that an adoption is a permanent, irrevocable, and unconditional commitment to care for and nurture a child. In the event of disruption/dissolution of the placement, the PAPs understand that they will continue to be financially responsible for the child(ren), and they are prepared to provide any physical, emotional, and/or financial assistance that is needed in the best interest of the child(ren).* ***For Colombia, sample wording:*** *The PAPs have realistic expectations and understand that an adoption is a permanent, irrevocable, and unconditional commitment to care for and nurture a child. The PAPs understand that they are financially responsible for the child(ren), and they are prepared to provide any physical, emotional, and/or financial assistance that is needed in the best interest of the child(ren).*
Page #(s)	**Section 10b: Special Needs**
	SAFE – Specialized Parenting *(internal use only)*
	• **If PAP is requesting to be approved for the adoption of a child with special needs (pertinent to the majority of all international adoptions),** please have in depth discussion with PAPs and include the following verbiage IN A SEPARATE, TITLED SECTION

	Sample wording: *PAPs are willing, able, prepared and suitable to parent and provide proper care for children with developmental delays related to orphan care and limited resources. They are prepared to adopt children who have come from a background of abuse or neglect. They are prepared to adopt children whose background information may be limited as well as to adopt children who might have undiagnosed medical conditions.* *PAPs realize that children with special needs will experience more difficulty in some areas and may require more one-on-one time and more adjustment time. In addition, the family confirms that they have the needed employment benefits allowing them to attend to the special needs of their children. PAPs are prepared mentally and have the ability to provide proper care for children with special needs.*
Page #(s)	**Section 10c: Training (Pre-adoptive, Continuing, Child Specific)**
	SAFE – Specialized Parenting & Adoption Issues *(internal use only)* • **Pre-adoptive training** o Include details about the pre-adoptive education/training undertaken. Include dates of training(s), means, and who provided the training. Confirm receipt of training completion certificates. ▪ Be sure to include the dates of the in-person Gladney Pathways training that the PAP attended. Discuss reflections and insights from the PAPs specific to their participation in this training. o In compliance with 22 CFR §96.48(b), the pre-adoptive training must include: (1) The intercountry adoption process, the general characteristics and needs of children awaiting adoption, and the in-country conditions that affect children in the foreign country from which the prospective adoptive parent(s) plan to adopt; (2) The effects on children of malnutrition, relevant environmental toxins, maternal substance abuse, and of any other known genetic, health, emotional, and developmental risk factors associated with children from the expected country of origin; (3) Information about the impact on a child of leaving familiar ties and surroundings, as appropriate to the expected age of the child; (4) Data on institutionalized children and the impact of institutionalization on children, including the effect on children of the length of time spent in an institution and of the type of care provided in the expected country of origin; (5) Information on attachment disorders and other emotional problems that institutionalized or traumatized children and children with a history of multiple caregivers may experience, before and after their adoption; (6) Information on the laws and adoption processes of the expected country of origin, including foreseeable delays and impediments to finalization of an adoption; (7) Information on the long-term implications for a family that has become multicultural through intercountry adoption; and (8) An explanation of any reporting requirements associated with intercountry adoptions, including any post-placement or post-adoption reports required by the expected country of origin. o Gladney requires all PAPs to complete at least **12** hours of pre-adoptive training, regardless of country program. ***Please note: pre-adoptive training can NOT be more than two (2) years old***

	▪ ***Colombia*** *requires at least* ***15*** *hours of pre-adoptive training for the home study. However, prior to dossier submission 10 hours must be conducted face-to-face and can be a part of or in addition to the 15 hours for the home study.* o Assessment of PAPs understanding of the training topics, paying particular attention to areas of strength, as well as areas that may require more training. Utilization of real life examples showing that they truly grasp the training topics. o Discussion of the PAPs preparedness for their particular or anticipated situation, if PAP is requesting to adopt out of birth order, two unrelated children at once, an older child, a child with specific medical needs, and/or a child of the same age as a child in the home. Include additional training completed. Incorporate information from the PAP's Parent Preparation Form here. o **Please note Gladney will not approve any home study until receipt of the completed and signed Training Bundle from the home study agency.** • **Gladney Continuing Education Requirements for Gladney placement ONLY** o Confirm that both PAPs agree to Gladney's continuing education requirement – specifically that each PAP will read at least three (3) books pertaining to adoption, or complete three (3) additional adoption courses prior to travel ▪ *Suggested wording: In addition to the required hours of Hague approved training, the PAPs agree to fulfill Gladney's continuing education requirements. Specifically, Gladney requires that each parent complete a minimum of 3 additional hours of adoption related education (books, courses etc.), including a country specific training.* • **Child Specific Training and Counseling for Gladney placement ONLY** o Confirm that the PAP understands that Gladney requires, and will assign, Child Specific Training upon their acceptance of a referral, and will provide Child Specific Counseling following said training prior to travel. ▪ *Suggested wording: The PAPs further understand that Gladney will assign Child Specific Training after they have been matched with a child, and that the training and counseling by Gladney must be completed and approved by Gladney prior to travel*
Page #(s)	**Section 11a: Health of all household members**
	SAFE – Medical *(internal use only)*
	• **Regarding each PAP, state the following:** o Name of physician and date of exam ▪ ***For China, Colombia, & Thailand –*** *the exam must be completed by an MD or DO* o Currently prescribed medications – name, dosage, reason. If none, please state that in report. o Disabilities or significant diagnoses of the PAPs, and address if those will affect the ability to parent an adopted child o Height, weight, and BMI (Body Mass Index **must** be included)

- The physician's overall assessment of the PAPs health, and if the physician believes the PAP is suitable to be an adoptive parent
- The social worker's observations regarding the PAPs general well-being
- Discussion of history of substance abuse and/or mental health diagnoses
  - ***For China –*** *If history of substance abuse and/or mental health diagnosis and/or use of medications to treat issues of mental health, a letter from a psychological professional must be obtained and included*
  - ***All programs -*** *If PAP has a mental health diagnosis such as anxiety or depression, then you must state when it was diagnosed, what led to the diagnosis, how the PAP dealt with the diagnosis, what changes have been made to help, how it impacts daily life, and what their coping strategies are.*

Required wording for PAP health section: *Mr. and Mrs. Doe were both seen by their physician, Dr. Mark Smith on June 2, 2020. They were both found to be in good health with no physical or mental limitations that would prevent them from raising an adopted child. Dr. Smith states that both Mr. and Mrs. Doe have no physical, behavioral, or psychological issues that would interfere with their suitability to raise an adopted child. Neither Mr. nor Mrs. Doe have displayed any indication of alcohol or drug abuse. My observations support the physician's findings, and no further evaluations, tests, or referrals are required.*

- **Regarding Adult Household Members ("AHM"):**
  - Name of physician and date of exam
  - Currently prescribed medications – name, dosage, reason. If n/a, please state none taken.
  - Disabilities, special needs or significant diagnoses
  - The physician's overall assessment of the individual's health
  - The social worker's observations regarding the individual's general well-being
  - Discussion of history of substance abuse and/or mental health diagnoses

  Required wording for AHM health section: *Mary Doyle was seen by her physician, Dr. Mark Smith on June 2, 2020. Mary Doyle has not displayed any indication of alcohol or drug abuse. My observations support the physician's findings, and no further evaluations, tests, or referrals are required.*
- **Regarding children currently in the home-** A physical OR a doctor's letter of good heath is acceptable, dependent upon state regulations. Must include:
  - Name of physician and date of exam (last exam should be within two years)
  - Currently prescribed medications – name, dosage, reason. If none, please state that
  - Disabilities or significant diagnoses
  - The physician's overall assessment of the child's health
  - The social worker's observations regarding the child's general well-being

Page #(s)	**Section 11b: Psychological Evaluation (Dominican Republic, Ecuador, Philippines, Colombia, Thailand, and India only)**
	SAFE – Medical *(internal use only)*
	• All PAPs adopting from Dominican Republic, Ecuador, Philippines, Colombia, Thailand, and India are required to complete a psychological evaluation by a licensed psychologist. Please include the name/credentials of the psychologist, the date the evaluation was made, and the method(s)/test(s) utilized for the assessment. Please briefly summarize the evaluator's conclusions regarding the PAPs' psychological health, emotional stability, and suitability and readiness to parent the child they are trying to adopt. Please also state your general assessment on the conclusions. • ***India:*** Please start this paragraph with the following language "As required by the Indian authorities, all prospective adoptive parents must undergo a psychological evaluation." • Please discuss with the caseworker if there is any mental health history and/or if there is any concern raised in the evaluation.
Page #(s)	**Section 12: Employment and Finances**
	SAFE – Physical & Social Environment *(internal use only)*

	• Current annual income (as verified by tax returns and employment letters)
	  o ***For China –*** *the annual income must be at least $10,000 per person in the household, including the adopted child (but not including adult household members)*
	  o ***For Philippines –*** *the annual household income must be at least $40,000*
	• Stability/Likelihood of continued employment
	• Total assets, liabilities, and net-worth
	  o ***For China –*** *the net-worth must show at least $80,000, or $100,000 for singles.*
	• Total monthly expenditures, liabilities, and excess funds available
	• ***For Colombia*** *the following template* ***MUST*** *be used and included IN the body of the home study.*
	Yearly Annual Income:
	According to most recent Federal Tax Return $_____
	Husband Annual Salary: $_____
	Wife Annual Salary: $_____
	Monthly Net Income:
	Husband $_____
	Wife $_____
	Investments $_____
	Alimony and/or Child Support $_____
	State or Federal Assistance (SSI, Food Stamps, WIC, etc.) $_____
	*Other*_____ $_____
	TOTAL: **$_____**
	
	Monthly break down of expenses:
	Mortgage / Rent $_____
	Home Owner's Association Dues $_____
	Car Payments $_____
	Utilities (phone, cell phone, gas, water, electric, internet, cable/dish) $_____
	Home Owner's / Renter's Insurance $_____
	Car Insurance $_____

	Union or Professional Dues $_____ *Alimony and/or Child Support* $_____ *Food* $_____ *Clothing Expenses* $_____ *Family Fun / Entertainment* $_____ *Medical / Prescription Expenses* $_____ *Health Insurance* $_____ *Life Insurance* $_____ *Charge Accounts and Loan Payments* $_____ *Investment / Retirement Contributions* $_____ *Religious contribution* $_____ *Average monthly donations to non-profits* $_____ *Other*_____ $_____ ***TOTAL:*** ***$_____*** ***Average Monthly Checking account balance over past 12 months:*** *$*_____ ***Financial Assets:*** *Value of residence* $_____ *Amount in savings* $_____ *Amount in investments* $_____ *401(K) or Retirement Savings* $_____ *Personal Property* $_____ *Other assets* $_____ ***TOTAL:*** ***$_____*** ***Financial Liabilities:*** *Mortgage balance due on property owned* $_____ *Loan balance for motor vehicles* $_____ *Loan balance for all other loans* $_____ *Credit Card Balance(s)* $_____ ***TOTAL:*** ***$_____*** ***Total Net Worth (Financial Assets – Financial Liabilities)*** ***$_____*** ***Life Insurance Coverage:*** *Husband* $_____ *Wife* $_____ *Additional Life Insurance- For* _____ $_____ • State all insurance coverages – health, dental, auto, homeowners/rental, life, disability • Discussion of the PAPs ability to budget and spend within their means

Page #(s)	**Section 13: Home and Community**
	SAFE – Home & Community *(internal use only)*

	• Description of the home in detail, including square footage, lot size, number of bedrooms and bathrooms. Be sure to include:
	  o Compliance with state home safety checklist (specifically confirming safety compliance as it relates to: firearms, pools/water hazards, fire safety, pets, toxic/dangerous materials, etc.)
	  o A thorough description of the bedroom that the child will occupy, including the dimensions and whether another child will share the room
	  o Confirmation that the home meets all state regulations. Include the specific state statue.
	• Description of the community. Be sure to include:
	  o Accessibility of services – medical, educational, therapeutic
	  o Accessibility of resources – grocery, library, cultural, entertainment
	  o Discussion of diversity. If lacking in diversity, a discussion of how the PAPs plan to expose the adopted child to their culture of origin, as well as other cultures

Page #(s)	**Section 14: Religion (required for Philippines. Not required for other countries)**
	SAFE – Family Lifestyle *(internal use only)*
	• Name of religion • Name of church/temple/meeting house the PAPs belong to, as well as length of time there • Note any volunteer work or participation in church activities • ***Philippines – include verification of at least five years of religious affiliation, including multiple churches where necessary*** • ***Colombia – do NOT include any religious information in the home study*** • ***China – keep religious discussion to a minimum*** • ***India & Vietnam*** *– can include a brief synopsis of religious practices/beliefs of PAPs. Address plans to accommodate the religious beliefs or practices of an older child.*
Page #(s)	**Section 15: State Pre-adoption Requirements**
	SAFE – Country & State Specific Information *(internal use only)*
	• Describe the state's pre-adoption requirements for the state in which the child will reside. You **must** directly cite all relevant state statutes or regulations. o ***For Hong Kong, Philippines, Thailand –*** *As adoptions are not finalized in country in these programs, and children come to the US on an IH-4 visa, it is imperative that this section cover ALL pre-adoption requirements, including any post-placement requirements in the state of residence.* • If none, please state as such.

Page #(s)	**Section 16a: Criminal Clearances**
	SAFE – Clearance Grid *(internal use only)*
	Provide all criminal clearances as required by your state for the PAPs, all adult household members (if applicable), and children in the home (if applicable and permissible by state law). Please state the date of the clearance, as well as the issuing entity. Gladney requires a minimum of a state criminal clearance for each PAP and AHM. **If a criminal record exists for PAP or AHM:** Describe the incident and details surrounding the incident, the judgment and sentence, the rehabilitation, repentance, and correction. Use quotes to explain what the PAP/AHM learned from the experience, and how they have changed.
Page #(s)	**Section 16b: Child Abuse Clearances**
	SAFE – Clearance Grid *(internal use only)*
	Provide child abuse clearances from each state that each PAP and AHM (if applicable) has resided since the age of 18. Include date of clearance, as well as issuing entity. If PAP has secured a child abuse clearance for a previous home study, and has not lived in that state since, that clearance can be cited with confirmation that the PAP has not lived in that state since the clearance was obtained. If a PAP resided in a country after the age of 18 and the country does not have a Child Abuse Registry, please include a statement "The agency has been informed that the country of _____ does not have a Child Abuse Registry." ***Sample wording:*** *Since the age of 18, Mrs. Jane Doe has resided in Maryland, Pennsylvania, and Indiana. A child abuse clearance was obtained from the (MD name of issuing entity) on June 2, 2020, and confirms that no record exists. A child abuse clearance was obtained from the (IN name of issuing entity) on June 2, 2020, and confirms that no record exists. Mrs. Doe currently lives in Pennsylvania. A child abuse clearance was obtained from the (PA name of issuing entity) on June 2, 2020, and confirms that no record exists.*
Page #(s)	**Section 17: USCIS Regulations Compliance**
	SAFE – Self Statement *(internal use only)*
	• **Duty to Disclose** – confirmation that PAPs and AHM(s) understand their Duty to Disclose ***Required wording:*** *During the home study process, Mr. and Mrs. John Doe, and AHM, have each been informed of their duty to disclose. Mr. and Mrs. John Doe and AHM have each been informed and understand that under penalty of perjury it is their duty to disclose all information under 8 CFR 204.311(i). Mr. and Mrs. John Doe and AHM are aware that they must notify their home study preparer and USCIS of any new event or information that might warrant submission of an updated home study. Mr. and Mrs. John Doe and AHM have also been advised that their duty to disclose is ongoing while form I-800a or I-600a is pending, after form I-800a or I-600a is approved, and while any form I-800 or I-600 is pending until there is a final decision admitting the child to the US on a visa.*

	• **USCIS required disclosure questions –** The following questions must be asked of each PAP and AHM. Do not paraphrase. If an individual answers 'yes' to any question, the social worker must explain the situation in detail. ***Required wording:*** *In addition to the documentation received, the following questions were asked of Mr. and Mrs. John Doe and of AHM on May 10, 2020:* 1. *Have you ever been arrested and fingerprinted, even if the record was sealed, pardoned, or expunged?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 2. *Have you ever been accused of child abuse, sexual abuse, and/or domestic/family violence in the United States or abroad, even if it did not result in an arrest or conviction?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 3. *Do you have a history with child protective services in the United States or abroad?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 4. *Have you ever been the subjects of an unfavorable home study, or been rejected as prospective adoptive parents?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 5. *Do you have a history, or have you ever received treatment for drug, alcohol, substance abuse, and/or any other addiction?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 6. *Have you ever transferred or received permanent custody of a child outside of state/local authorities or state/local process?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 7. *Have you ever relinquished custody of any child?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 8. *Have you ever been determined to be partially or fully mentally incapacitated by any court?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.* 9. *Has immigration ever refused you visa clearance?* *Mr. Doe answered NO. Mrs. Doe answered NO. AHM answered NO.*
Page #(s)	**Section 18: Previous Home Studies**
	SAFE – Self Statement *(internal use only)*
	If PAPs/AHMs do not have a history of previous adoption home studies, please state , "Mr. and Mrs. X have not previously begun or completed a home study for adoption or foster care." If PAPs/AHMs have a previous home study(s) for adoption or foster care, please provide: • Date of home study • Purpose of home study (domestic adoption, international adoption, foster care, etc.) • Name of agency conducting home study • Outcome of home study ***Sample wording:*** *John and Jane Doe were asked if they have ever previously begun or completed a home study for adoption or foster care. John and Jane Doe confirmed that they completed a home study through ABC Adoptions in January*

	2015 for the purpose of a domestic adoption. The home study was approved, and resulted in the adoption of their son, Timothy Doe, in May 2015. Therefore, they have never been rejected as prospective adoptive parents, nor have they been the subjects of an unfavorable home study.
Page #(s)	**Section 19: References**
	SAFE – Reference Grid *(internal use only)*
	• Gather written references on behalf of the PAPs. • If not state mandated, the number of references included should be at least three (3), and should be from diverse candidates, such as one friend, one neighbor, one teacher, etc. • No more than one reference should be from a relative. • Reference should know PAP for a minimum of five years • Provide a discussion of the references' view of the PAPs, using quotes where possible. • Also state if and how the reference will be involved in the child's life. • Do NOT identify references by name within the home study. • ***Colombia - Verify each reference in person, by phone, or by zoom (required – list date of verification)*** • ***Philippines – one reference must be from a church leader, one from a non-relative, and one from each of the PAPs employers.***
Page #(s)	**Section 20: Guardian(s)**
	SAFE – Family Lifestyle *(internal use only)*
	Include information on the named guardians for the adopted child(ren), including name(s), age(s), occupation(s), income, health, relationship to the PAPs and suitability to act as guardian for the adopted child(ren). If guardian is unmarried or under the age of 25, please include a secondary guardian. • ***For China & Colombia –*** *the named guardians must meet the country's eligibility requirements to adopt. Please confirm this in the home study document.* • ***Colombia*** *requires a face to face discussion (via zoom is acceptable) to be documented within the home study stating that the designated guardians are in agreement to care for the child should the prospective adoptive parent not be able to for any reason.* • ***Philippines*** *– if listed guardian is over 55, please include a secondary guardian.* • ***India*** *prefers the guardian to be a same generation family member. In the case of a single PAP, the guardian is <u>required</u> to be a relative. In the case of a married couple, if PAPs choose non-family member guardians, please clearly describe their "family-like" relationship. The guardian must be prepared to provide a statement for family's dossier after referral acceptance.*
Page #(s)	**Section 21: Summary, Recommendation, and Authorization**
	SAFE – Placement Considerations, Recommendations, & Attestation *(internal use only)*
	• The report must confirm that the social worker recommends the family for adoption, including the child parameters, country, and special needs. This approval section **<u>must match</u>** the parameters listed in the "Child Desired" section in the beginning of the home study. ***Sample wording:*** *John and Jane Doe are recommended and approved to adopt one child of either gender from COUNTRY, who is birth to five years of age at time of referral*, and who has minor to moderate special needs including but not*

	limited to: cleft lip and palate, congenital heart disease, developmental delay, limb difference, and/or cerebral palsy. • The report must confirm that the PAPs agree to all post-placement/post-adoption supervision set forth by the PAPs state of residence, child's country of birth, and the placement agency. PLEASE NOTE: Gladney requires a 30-day post-placement/post-adoption visit and report for all families, regardless of program. o ***For Bulgaria –*** *Mr. and Mrs. Doe agree to comply with Bulgaria's, the state of STATE's, and Gladney post-adoption requirements. The reports will be completed at 30 days, 6 months, 12 months, 18 months, and 24 months following the adoption.* o ***For China -*** *Mr. and Mrs. Doe agree to comply with The People's Republic of China's, the state of STATE's, and Gladney's post-adoption requirements. The reports will be completed by a social worker at 30 days, 6 months, 12 months, and 24 months; and self-reported at 3 years, 4 years, and 5 years following the adoption. These reports will be submitted through Gladney. Following the 5th year report, Mr. and Mrs. Doe agree to the Second Phase of Post-Adoption Reporting, consisting of submitting at minimum 5 photos/videos annually directly to CCCWA until the adopted child turns 18.* o ***For Colombia -*** *Mr. and Mrs. Doe agree to comply with Colombia's, the state of STATE's, and Gladney's post-adoption requirements. The reports will be completed at 30 days, 6 months, 12 months, 18 months, and 24 months following the adoption. For sibling groups and children 8 years of age or older, additional reports are due at 30 months and 36 six months.* o ***For Dominican Republic*** *- Mr. and Mrs. Doe agree to comply with the Dominican Republic's, the state of STATE's, and Gladney's post-adoption requirements. The reports will be completed at 30 days, 6 months, 12 months, 2 years, 3 years, 4 years, and 5 years following the adoption.* o ***For Ecuador –*** *Mr. and Mrs. Doe agree to comply with Ecuador's, the state of STATE's, and Gladney's post-adoption requirements. The reports will be completed at 30 days, 4 months, 8 months, 12 months, 18 months, and 24 months following the adoption.* o ***For Hong Kong*** *- Mr. and Mrs. Doe agree to comply with Hong Kong, the state of STATE's, and Gladney's post-placement requirements. The reports will be completed at 30 days, 3 months, 6 months, 9 months, and 12 months following the placement. Mr. and Mrs. Doe acknowledge understanding that additional agency reports may be requested by Hong Kong Central Authority or Gladney at any time. Mr. and Mrs. Doe also acknowledge understanding that their adoption is not finalized in Hong Kong, thus state of residence may require additional reports until the adoption is finalized in the US. Please indicate specific state requirements within the home study.* o ***For Philippines*** *- Mr. and Mrs. Doe agree to comply with The Philippines', the state of STATE's, and Gladney's post-placement requirements. The reports will be completed by this social worker at 30 days, 4 months, and 6 months following the placement. In addition, the family agrees to complete self-reports at 2, 3, and 5 months if the child*

	was placed through the Special Home Finding list. Mr. and Mrs. Doe acknowledge understanding that additional agency reports may be requested by Philippines Central Authority or Gladney at any time. Mr. and Mrs. Doe also acknowledge understanding that their adoption is not finalized in the Philippines, thus state of residence may require additional reports until the adoption is finalized in the US. Please indicate specific state requirements within the home study. o ***For Thailand -*** *Mr. and Mrs. Doe agree to comply with Thailand, the state of STATE's, and Gladney's post-placement requirements. The reports will be completed at 30 days, 2 months, 4 months, and 6 months following the placement. Mr. and Mrs. Doe acknowledge understanding that additional agency reports may be requested by Thailand Central Authority or Gladney at any time. Mr. and Mrs. Doe also acknowledge understanding that their adoption is not finalized in Thailand, thus state of residence may require additional reports until the adoption is finalized in the US. Please indicate specific state requirements within the home study.* o ***For India –*** *Mr. and Mrs. Doe agree to comply with India's, the state of STATE's, and Gladney post-adoption requirements. The reports will be completed at 30 days, 3 months, 6 months, 9 months, 12 months, 18 months, and 24 months following the adoption. Mr. and Mrs. Doe understand that some states in India may require additional reports and agree to comply with any additional post-adoption requirements.* o ***For Vietnam –*** *Mr. and Mrs. Doe agree to comply with Vietnam's, the state of STATE's, and Gladney post-adoption requirements. The reports will be completed at 30 days, 6 months, and 12 months following the adoption. Mr. and Mrs. Doe understand that Vietnam requires additional self-reports at 6 months, 12 months, 18 months, 24 months, 30 months, and 36 months and agree to comply with these additional requirements. Mr. and Mrs. Doe are willing to participate in the post-adoption process with home visits and reports being conducted according to the schedule required by the US state of residence and Vietnam.* o ***For Taiwan*** *– Mr. and Mrs. Doe agree to comply with Taiwan's, the state of STATE, Gladney, and the partner agency's post-adoption requirements. Mr. and Mrs. Doe understand that they are required to provide post-adoption reports for at least 7 years with a minimum of 3 reports completed by a social worker. Mr. and Mrs. Doe understand that family reports, based on a designated schedule set at time of referral, are periodic for up to 10 years post adoption.* • ***For Hong Kong, Philippines, and Thailand –*** *The report must confirm that the PAPs agree to adopt the child within their local family court following completion of the required post-placement reports. Specific state requirements pertaining to the adoption of a foreign child should be included in the home study. PAPs also agree to obtain Certificate of Citizenship and new birth certificate as soon as possible for their child, and promptly provide both to Gladney. In addition,* ***for Thailand,*** *the report must confirm that the PAP agrees to register the adoption at their nearest Thai Embassy or Consulate.*

	• The report must confirm that the PAPs meet **all** the requirements of country they are adopting from, including the specific language below: o ***For Bulgaria -*** *Mr. and Mrs. Doe meet all the requirements to adopt from Bulgaria. They are at least 15 years older than the child they are approved to adopt. They are physically and mentally healthy, and do not have a criminal or child abuse history. They are financially stable, and both have earned at least a high school diploma.* o ***For China –*** *Mr. and Mrs. Doe meet all the requirements to adopt from The People's Republic of China. Mr. and Mrs. Doe, who wish to adopt a child with special needs, are at least 30 years of age and less than 50 years older than the child they are approved to adopt, and have been married for over two years (change this to five if there is a history of divorce). They are physically and mentally healthy. Each has a Body Mass Index of less than 40. Their net-worth is greater than $80,000, and their annual income is at least $10,000 per person in the home including the child to be adopted. Both have earned at least a high school diploma, and neither has a history of criminal or child abuse. They have no more than 5 minor children in the home, and the youngest child is over the age of 3.* o ***For Colombia –*** *Mr. and Mrs. Doe meet all the requirements to adopt from Colombia. They are both at least 25 years of age, and at least 15 years older than the child they are approved to adopt. The older parent is no more than 45 years older than the child they are approved to adopt; however, exceptions may be made for children with more moderate special needs. The Does are financially stable, and have been married for more than two years. Single parents as well as same sex married couples of either gender are allowed to adopt children with special needs. They are physically and mentally fit to parent, and have not had a cancer diagnosis within the past five years. They have at least 15 hours of Hague approved adoptive training.* o ***For Dominican Republic –*** *Mr. and Mrs. Doe meet all the requirements to adopt from The Dominican Republic. They are both at least 30 years old, and at least 15 years older than the child they are approved to adopt. They are financially stable, and have legally been married for over five years. The Does are mentally and physically healthy.* o ***For Ecuador –*** *Mr. and Mrs. Doe meet all the requirements to adopt from Ecuador. They have been married for at least three years. Single women are allowed to adopt as well. They are at least 25 and at least 14 years older than the child but not more than 45 years between the youngest parent and child to be adopted. They are financially stable and able to provide for the needs of the child. They have adequate physical and mental health to fulfill parent responsibilities. Neither of them have any significant criminal history.* o ***For Hong Kong*** *- Mr. and Mrs. Doe meet all the requirements to adopt from Hong Kong. They are both at least 25 years old. They are financially stable, and have legally been married for over three years. The Does are mentally and physically healthy, and do not have a criminal history.*

- ***For Philippines -*** *Mr. and Mrs. Doe meet all the requirements to adopt from The Philippines. They are both at least 27 years of age, and are at least 16 years older than the child they are approved to adopt. The older parent is not more than 45 years older than the child they are approved to adopt. The Does income is at least $40,000 annually, and both have a high school diploma. The Does have been legally married for over 3 years, and neither have more than 2 divorces. The Does are actively practicing a religion, and both have a Body Mass Index of less than 35.*
- ***For Thailand -*** *Mr. and Mrs. Doe meet all the requirements to adopt from Thailand. They are both at least 25 years of age, and at least 15 years older than the child they will adopt. They are legally married. They are eligible to adopt a foreign born child under US laws and regulations.*
- ***For India -*** *Mr. and Mrs. Doe meet all the requirements to adopt from India. Their combined ages total under 85 and are eligible to adopt a child 0-2 years of age, or older. Neither of them is more than 45 years older than the child they will adopt. They are physically, mentally, emotionally, and financially capable of parenting the child they are approved to adopt. They do not have any life-threatening medical condition, nor do they have any criminal or child abuse record. They have at least two years of stable marriage. and less than two children at home. (For families adopting a child with special needs and have two or more children, follow this sample "They have at least two years of stable marriage. They have two children at home and are adopting a child with special needs.") Please utilize the age eligibility requirements below to find the appropriate verbiage to use for this specific family's approval paragraph.*
  - ***India's Age Eligibility Requirement****: Couples with combined ages total under 85 (counting days, months, and years) are eligible to adopt a child 0-2 years of age, or older (Singles under 40); couples with combined ages total under 90 are eligible to adopt a child 2-4, or older (Singles under 45); couples with combined ages total under 100 are eligible to adopt a child 4-8, or older (Singles under 50); couples with combined ages total under 110 are eligible to adopt a child 8 or older (Singles under 55).*
- ***For Vietnam –*** *Mr. and Mrs. Doe meet all the requirements to adopt from Vietnam. They are physically, mentally, emotionally, and financially capable of parenting the child they are approved to adopt. They are at least 20 years older than the child they are approved to adopt. They are of good character and have no criminal or child abuse record.*

- The report must conclude with the following required wording:

  <u>Mr. and Mrs. Doe</u> have successfully met the pre-adoptive requirements of adoption for the State of <u>STATE</u>. This home study report has been prepared in accordance with licensing standards for approved adoption agencies, the State of <u>STATE</u>, USCIS, Hague Convention, and the Center for Excellence in Adoption Services (CEAS). This home study is a true and accurate original of the home study which has been provided to the adoptive family. This home study was

	performed in accordance with 8 CFR 204.311 and any applicable state laws. *Home Study Agency is a non-profit agency licensed by the State of STATE as a child placement agency authorized to conduct adoption/home study services (license # _____). Under 22 CRF Part 96, Home Study Agency is operating as an Exempt/Supervised Provider for Gladney Center for Adoption who has earned full Hague accreditation.* *This home study was completed by NAME, MSW. The writer has a master's Degree in social work and is licensed in STATE (if applicable). I am an employee of Home Study Agency with over eight years experience. I meet all state, federal and Hague regulations to conduct home study and post-placement/ post-adoption reports.* *I, NAME, MSW, verify that under perjury of law of the United States of America that I have acted with the professional diligence necessary to protect the best interest of any child whom the applicant might adopt in preparing the home study, including personal interviews, home visits, and all other aspects of the investigation needed to complete the home study. The content and statements within this home study are true and correct to the best of my knowledge, information and belief. I have notified the applicants of their duty to disclose information, and of their duty disclose any new information or new events per The Hague regulations. I certify that this is a true and accurate copy of the home study as provided to the prospective adoptive parents, DHS, USCIS, and the COUNTRY. I verify that this home study meets all state, federal, and inter-country requirements.*
Page #(s)	**Section 22: Validity and Signatures**
	• Signed by the Social Worker who conducted and wrote the home study • Signed by the direct supervisor or Executive Director of the home study agency • Must include a final date • Must include an expiration date (according to state laws) • Must be notarized

Signature of Social Worker **Date**