

7.4 Declining or Canceling Matches

PURPOSE

The purpose of this policy is to establish clear guidelines for agencies within the Coordinated Entry System (CES) when deciding to decline or cancel a match for a prioritized household. The policy ensures that any refusal or cancellation is handled transparently and that all decisions are properly documented and communicated. This process is crucial for maintaining the integrity of the CES and ensuring that eligible individuals receive the appropriate and timely support they need.

FORMS

There are no forms related to or required for this Policy

POLICY

Below are the only allowable reasons a CES match to a COC Housing Program can be denied or canceled. In such cases, the agency must promptly notify the CES Facilitator of the denial and provide a detailed reason for the decision.

Guidelines for Declining or Canceling Matches:

Eligibility Issues:

Agencies may cancel a match if the individual is not eligible for the program's services, has been incorrectly matched, or is banned from the program. This includes communications with the CES Facilitator and the housing program must document the reason for canceling or declining the match in the Homeless Management Information System (HMIS) with a note explaining the decision.

Client Refusal:

If an eligible individual refuses the assigned placement, the agency may decline the match in HMIS, marking the reason as "client refused services."

Inability to Locate Client:

If the referred individual cannot be located within five business days of the initial match, and only if there are other eligible clients ready for placement, the CE facilitator may cancel the match.

Housing Providers are required to do their due diligence when locating clients who are matched to their program. Including but not limited to: calling the client, calling any/all service providers connected to their HMIS profile, enlisting assistance from outreach workers to go to their known locations to make contact and going to shelters to locate the matched client(s). All due diligence must be documented in HMIS and/or communicated in routine Housing Case managers Staffing meetings.

Safety and Capacity Concerns:

Refusals are acceptable if:

- The individual does not meet the project's eligibility criteria.
- The individual poses a danger to themselves or others if placed in the project.
- The services offered by the project are insufficient to meet the participants' needs.
- The project is at capacity and cannot accept matches at the time.

Canceling & Denial Communication and Documentation:

- The agency must notify the CES Facilitator of the refusal before any actions are taken in HMIS as it relates to the denial or refusal of the match.
- The agency must also inform the CES Facilitator about how the participant was notified of the refusal, what alternative resources were offered, and whether similar refusals are expected to occur in the future.
- Documentation in HMIS and communication in routine Housing Case Managers Staffing meetings are required to determine the next appropriate steps for both the project and the participant.

This policy ensures that all match cancellations or refusals are handled transparently and that eligible individuals receive appropriate and timely support through the CES.

KEY TAKE AWAYS

- **Notification and Documentation:** Agencies must promptly notify the CES Facilitator of any match refusal or cancellation and provide a detailed reason for the decision. This must be documented in the Homeless Management Information System (HMIS).
- **Eligibility Issues:** Matches may be declined if the individual is ineligible, incorrectly matched, or banned from the program. These reasons must be recorded in HMIS.
- **Client Refusal:** If a client refuses the offered placement, the agency may decline the match, with the refusal documented in HMIS as "client refused services."
- **Inability to Locate Client:** If a client cannot be located within five business days, and other eligible clients are ready for placement, the CES Facilitator may cancel the match, after the housing program has demonstrated an communicated dule diligence of the match. The client will remain in the By-Name List for future matching.
- **Safety and Capacity Concerns:** Refusals are allowed if the client is ineligible, poses a danger, the project's services are insufficient, or the project is at capacity.
- **Other Justifications:** Any other reasons for declining a match must be explained in HMIS and communicated to the CES Facilitator.

This policy ensures transparency, proper documentation, and effective communication, all of which are vital for the smooth operation of the CES and the fair treatment of those in need.