



## 2-for-1 Match Policy and Procedure

July 9, 2025 DRAFT

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[CoordinationEntry@ocgov.com](mailto:CoordinationEntry@ocgov.com) | [ceo.ocgov.com/care-coordination/homeless-services/coordinated-entry-system](https://ceo.ocgov.com/care-coordination/homeless-services/coordinated-entry-system)

**The proposed 2-for-1 Match Request Policy is open for public feedback through Friday, July 25, 2025. Please submit all feedback to [CoordinatedEntry@ocgov.com](mailto:CoordinatedEntry@ocgov.com)**



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## Contents

Background .....	3
Scenarios for Requesting a 2-for-1 Match .....	3
Criteria for 2-for-1 Match Requests .....	4
Procedure.....	5
How to Request a 2-for-1 Match .....	6
Attachment A: 2-for-1 Match Request Form .....	8
Attachment B: 2-for-1 Secondary Match Confirmation.....	10

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## Background

Housing Providers (housing provider, public housing authorities, developer, etc.) may request a secondary match for a single unit vacancy, commonly referred to as 2-for-1 matches. In this practice, the two (2) households from the Coordinated Entry System (CES) Community Queue are matched to one (1) housing opportunity, as made available by the Housing Provider. This updates the households to a “pending referral” status in the CES Community Queue as they work through the application process for the housing opportunity that were made available.

The Homeless Management Information System (HMIS) does not have the technical capability to keep a household active on the CES Community Queue, while also matched to a housing opportunity as the “secondary match”. As such, households who have a “pending referral” status may not be considered for additional housing opportunities concurrently. The 2-for-1 matches will only be used with Office of Care Coordination approval.

The 2-for-1 Match Policy and Procedure provides guidance to when and how 2-for-1 matches can be requested by Housing Providers, as well as the needed communication with households who are the identified secondary match.

## Scenarios for Requesting a 2-for-1 Match

2-for-1 matches can only be requested by the Housing Provider, when one of the two following scenarios is applicable:

1. Property has a unit(s) that is approaching the 120 day vacancy date. The request for 2-for-1 for one match can only be submitted after the unit has been vacant for at minimum 90 days.
2. A newly opened property needs to achieve a specified occupancy rate by a specified date. The request for 2-for-1 match can only be submitted no earlier than 45 days before the specified date.

The Office of Care Coordination as the CES Lead reserves the right to request documentation confirming either of the data points previously listed with any 2-for-1 Match Request submissions.



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## Criteria for 2-for-1 Match Requests

When requesting a 2-for-1 Match, the Housing Provider is agreeing to processing the matches as detailed below. The following guidance must be followed to ensure that any 2-for-1 match requests are handled appropriately and that households involved in the processed are treated with the most trauma informed way possible. All guidelines points below are in alignment with current CES policies and procedures.

1. "Primary" matches must proceed with the initial application process for the available unit.
2. "Secondary" matches may only proceed with the initial application process after the Primary match either declines, is denied, or is considered unresponsive after 14 days of no contact from the original match email, to the housing opportunity.
3. A "first come – first served" approach will not be utilized By Housing Providers who are requesting a 2-for-1 match.
4. Only when both matches are denied, decline, considered unresponsive, or a combination of the three, may the Housing Provider can submit another 2-for-1 match request form for that same unit for two new matches.
  - a. This means that a new Secondary match cannot be requested, after the Primary match is denied, decline, or considered unresponsive.
  - b. A matched household, Primary or Secondary, will be considered unresponsive after 14 calendar days from the original match email.
  - c. If a Primary match is unresponsive, the Secondary match will become the Primary match.
5. All stakeholders (Property Manager, Public Housing Authority, developer, supportive services provider, etc.) associated with the specific housing opportunity where a 2-for-1 match request is being requested must agree with the 2-for-1 match request. The Office of Care Coordination will verify via email with all stakeholders that this agreement exists.
6. The Secondary household matched must sign the 2-for-1 Secondary Match Confirmation indicating authorization of removal from the CES Community Queue and must be returned to the Office of Care Coordination via email to the original match email within seven (7) calendar days after being received.
  - a. The Office of Care Coordination will follow up with the staff member who submitted the 2-for-1 Secondary Match Confirmation form if the form has not been signed by the secondary household by the seven (7) days.
  - b. On the 8<sup>th</sup> day, the secondary household match will be voided and returned to the CES Community Queue.
7. Secondary matches reserve the right to be returned to the CES Community Queue for other housing opportunities in which the household wishes to be considered for at any time.
8. 2-for-1 Match Requests are only available for two referrals for every one housing unit. If there are two available units to accept referrals, Housing Providers must submit two separate match request forms and so on.



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If any of the following steps are not followed, the Office of Care Coordination will deny any future requests submitted by the same housing provider, public housing authority, and developer.

## Procedure

The Secondary match will only be matched once all other primary matches have been identified based on the number of housing opportunities available for the specific match meeting taking place. This procedure is meant to ensure that the CES Prioritization Policy is followed, and that a household is not considered as a secondary match prior to being matched as a primary to other housing opportunities based on their length of homelessness, disabling conditions and other eligibility criteria.

Example: If there are three (3) units who received approval from the Office of Care Coordination for 2-for-1 Matches, this means that six (6) households will be removed from the CES Community Queue.

The first secondary match, would be the fourth household to appear on the CES Community Queue, and not the second household to appear on the CES Community Queue.

CES Community Queue and matches to Housing Opportunities:

1. John Doe ← First Primary match to unit #1
2. Jane Doe ← Second Primary match to unit #2
3. John Smith ← Third Primary match to unit #3
4. Jane Smith ← First Secondary match to unit #1
5. John Jones ← Second Secondary match to unit #2
6. Jane Jones ← Third Secondary match to unit #3

This practice will ensure that the higher prioritized households will be the primary match in the order of prioritization and maintain the integrity of the CES Community Queue that align with the CES policies and procedures as approved by the Orange County Continuum of Care.

Matches may not be shifted to other units in cases where a property has more than one (1) approved 2-for-1 Match Requests. All secondary matches must maintain their originally matched unit.

**Any Secondary Matches are only to be made after all current housing opportunities available have identified Primary Matches.**

If any of the following steps are not followed, the Office of Care Coordination will deny any future requests submitted by the same housing provider, public housing authority, and developer.



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## How to Request a 2-for-1 Match

Housing Providers requesting a 2-for-1 match, shall complete the following steps:

1. The Housing Provider must submit the [2-for-1 Match Request Form](#) for a specific housing opportunity to the CES Lead Agency, through the linked Google Form.
  - a. The Office of Care Coordination can supply this link as requested.
2. Once the Office of Care Coordination reviews a request for completion and additional verification as needed, the Office of Care Coordination will respond with an approval or denial of the request within three (3) business days from the date of form submission.
  - a. If approved proceed to step 3
  - b. If denied proceed to step 5
3. If the Office of Care Coordination has approved the request in writing, the Housing Provider may proceed to enter the housing opportunities into HMIS.
  - a. All 2-for-1 match requests entered in HMIS must include a label of “Primary” or “Secondary” or be included in the opportunity description.
  - b. All 2-for-1 match requests will require a unit number to be entered into the HMIS opportunities.
  - c. These housing opportunities will receive matches the following week in which they were approved, and if the housing opportunities were entered by Friday, or last business day of the week, at 12pm, Pacific Standard Time.
4. A 2-for-1 Secondary Match Confirmation must be filled out by *both* CES Access Point case manager and the Secondary matched household (once the matches have been confirmed)
  - a. This document will be provided by the Office of Care Coordination via the original match email for the secondary matched household.
  - b. The 2-for-1 Secondary Match Confirmation must be completed and returned within seven (7) calendar days from the date of the original match email.
5. If the 2-for-1 Match Request is denied, the Office of Care Coordination will provide reason for the denial via email to the original requesting staff member as indicated in the 2-for-1 Match Request Form. The Housing Provider may appeal the decision by responding to the denial email that was sent by the Office of Care Coordination indicating that the 2-for-1 Match Request was denied. The appeal should include any pertinent information that clearly illustrates the need for a secondary match.
6. The Office of Care Coordination will respond to all appeals in a timely manner to ensure that if the decision is overturned, two matches can be received by the next planned match meeting.
7. For all approved 2-for-1 Match Request, weekly updates on the application process for the Primary match must be provided to the Office of Care Coordination via email at the [coordinatedentry@ocgov.com](mailto:coordinatedentry@ocgov.com) every Friday by 2pm with the most updated information. While updates are provided on the Secondary match regularly.
  - a. Failure to provide weekly updates on the application process and status for both households will result in automatic denial of future requests.



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If any of the following steps are not followed, the Office of Care Coordination will deny any future requests.

All questions regarding 2-for-1 Match Requests should be directed to [coordinatedentry@ocgov.com](mailto:coordinatedentry@ocgov.com).

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### Attachment A: 2-for-1 Match Request Form

Question:	Response:
Please list your CES participating agency name:	_____
Please list the Housing Opportunity or HMIS Program in which you would like to request a secondary match for:	_____
Please list the unit number that this request is being made for:	_____
Please list any criteria for this match (MHSA, Veteran preference, senior, etc). If none, type "N/A":	_____
Please indicate the public housing authority partnering with this housing community:	Anaheim Housing Authority Garden Grove Housing Authority Orange County Housing Authority Santa Ana Housing Housing Authority N/A
Please list the property management organization partnering with this housing community	_____
Can the property manager confirm that the partnering Public Housing Authority, or supportive services agency, has approved this 2-for-1 Match Request?	Yes No
Please list your full name and title	_____
Please list your email address	_____
Please list your <b>direct</b> phone line	_____
Do you understand that your housing opportunities entered into HMIS must include a label of "primary" and "secondary" or will be subject to deletion or not receiving a second match?	Yes No
Do you understand that a "primary" match will begin the application process and either decline, be denied, or become unresponsive, prior to a secondary match beginning their application process? <u>*This means a "first-come-first-served" practice will not be utilized, and follows a trauma-informed care approach.*</u>	Yes No
Do you understand that failure to comply with these guidelines will result in future 2-for-1 match requests being denied?	Yes No





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Do you understand that you will only be able to enter both housing opportunities after receiving written approval from the Office of Care Coordination?	Yes No
Do you understand that a secondary match reserves the right to return to the CES Community Queue to be considered for other housing opportunities. <u>This will not allow for a new secondary only match.</u>	Yes No
The 2-for-1 Secondary Match Confirmation form must be filled out by both the CES Access Point and CES Household who is the secondary match. The secondary match has the right to deny being a secondary match, if there is a denial, this will not result in receiving a secondary match. Do you understand this?	Yes No



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### Attachment B: 2-for-1 Secondary Match Confirmation

This form must be completed in its entirety and attached to the email reply, in the same thread as the original match email that was sent by the CES Match Maker. This form must be submitted within seven (7) calendar days from the date of the original match email. Failure to do so will result in the Office of Care Coordination voiding this secondary match.

**The following section is to be completed by the CES Access Point:**

1. CES Access Point who accepted the secondary match:

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2. CES User who accepted this secondary match (first name, last name):

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3. CES User email:

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4. CES User contact phone number:

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5. Name of housing opportunity that was accepted as used in the original match email:

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6. Household's HMIS ID and full name as it appears in HMIS:

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**The following section is to be completed by the CES Household:**

*You have been matched to a housing opportunity as a secondary match. This means you are the second applicant to a unit in which a primary applicant was identified. This means you will only move forward with the application process should the primary applicant either decline or be denied for any reason. **There is no definitive timetable as to when you will proceed with the application process for this opportunity.***

*As a secondary match you will **not be matched to other housing opportunities** while the primary applicant goes through the application process. As a secondary match you can deny being a secondary match at any time and be considered for other housing opportunities as they become available. If you wish to deny being a secondary match at a later time, please communicate this with your case manager.*

*The benefit of being a secondary match is that you are the next person to be matched to this specific housing opportunity, if and only if, the primary applicant declines or is denied for any reason. However, there is no definitive timetable, when the primary applicant will decline, or be denied for this opportunity.*

*You have the right to deny this secondary match for any reason and wait for a housing opportunity where you can be considered a primary match. A primary match gives you priority to the housing opportunity when matched.*

1. Are you aware that by accepting this secondary match you will not be considered for any other housing opportunities (with no definitive timetable), including housing opportunities where you may have been considered a *primary* match?

☐ Yes

☐ No

2. Do you accept being a secondary match to this housing opportunity and understand you will only be considered for this housing opportunity only when and if the primary match declines or falls through for any reason? This means that as a secondary match you may have to wait an unknown amount of time before beginning your application process.

☐ Yes

☐ No

3. Please sign indicating you authorize accepting this secondary match:

\_\_\_\_\_ Date: \_\_\_\_\_