

## Guidelines for matching applicants and customers to a suitable home

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CT-GDL-006

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## 1. Introduction

The purpose of this guideline is to help you to match an applicant<sup>1</sup> or customer<sup>2</sup> and their whānau to a home with the aim of creating a sustainable tenancy.

Whānau-centred wellbeing support applies to all our customer interactions and we want our customers to feel confident that we will provide a great home in the right community for them.

This guideline will provide you with the key information needed for each stage in the matching process and should be read with process [Match applicants and customers to a suitable home \(CT-PRO-001\)](#).

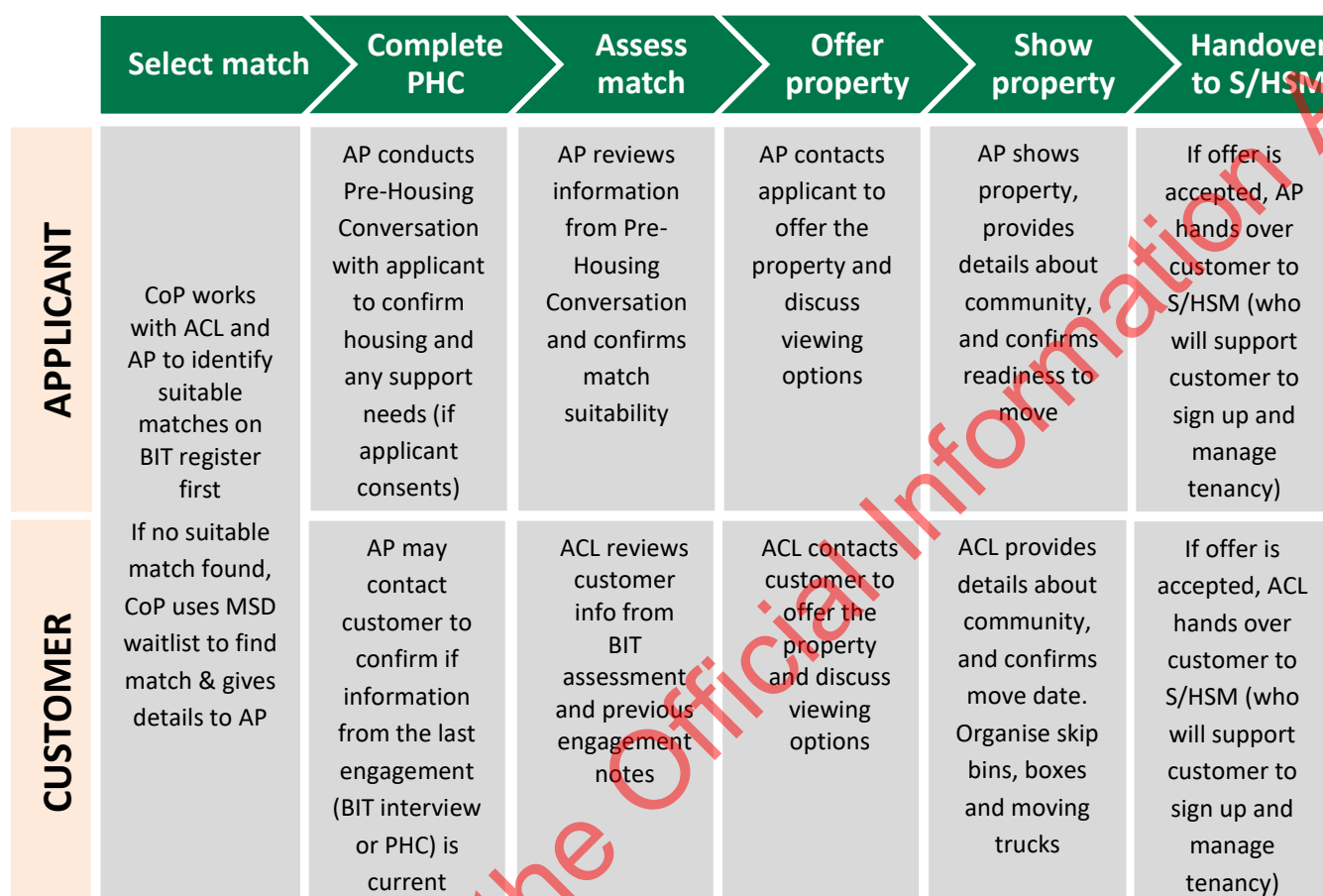
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<sup>1</sup> An applicant is a person on the MSD Social Housing Register who may be considered for a Kāinga Ora property, but is not yet a Kāinga Ora customer.

<sup>2</sup> A customer is a person who is a tenant of a Kāinga Ora property.

## 2. Overview

The following diagram shows an overview of the matching and placement process for applicants and customers.



**Key:**

Coordinator Placement (CoP); Advisor Placement (AP); Advisor Customer Liaison (ACL); Senior/Housing Support Manager (S/HSM); Pre-Housing Conversation (PHC); Business Initiated Transfer (BIT)

## 3. Our approach to matching an applicant or customer to a home

Management, prioritisation and allocation of social housing is shared between the Ministry of Social Development (MSD) and Kāinga Ora – Homes and Communities.

MSD is responsible for assessing an applicant’s eligibility and setting the priority order that applicants on the Social Housing Register (SHR) must be placed according to.

We are responsible for matching applicants from the SHR, and existing customers from the Business Initiated Transfer (BIT) register, to a Kāinga Ora home according to placement priority. For more details, see [Principles for placement priority](#).

We have a limited ability to determine what ‘suitable’ looks like for an applicant or customer. This is limited due to what MSD is responsible for under the Public and Community House Management Act 1992 and the agreement we have with Ministry of Housing and Urban Development (MHUD).

When we make placement decisions, we follow the principles for placement priority. We also have to base our decisions on what the applicant/customer is [eligible for](#).

However, there are circumstances where we make housing available to, or prioritise a specific type of housing for applicants or customers with certain needs. For more details, see [Appendix A](#).

### 3.1 Eligibility

What an applicant/customer is eligible for is based on their housing specification needs (eg, bedroom number, letting area, accessibility requirements etc).

MSD is responsible for determining an applicant/customer's eligibility.

### 3.2 Principles for placement priority

Placement priority is the order in which we match applicants or customers to a property. Priority is determined by applying the four principles of:

1. safety and security
2. legal obligations
3. enabling housing for future customers
4. empowering customers to maintain connections to their communities.

To be considered a high priority BIT customer, the BIT must be necessary to meet one of the four principles above. For a full description of these principles, and examples of situations that align with high priority BITs, refer to Appendix 1 of [Policy: Match to a Suitable Home policy \(POL-354\)](#).

#### 3.2.1 Following the priority order

When making decisions about who to match, we must continue to follow the placement priority order. This means that:

- A high priority BIT customer is considered for an available property first
- A Social Housing Register applicant is considered for an available property if there are no high priority BIT customers, or the property is not suitable for a high priority BIT customer
- Remaining (non-high priority) BIT customers may be considered for an available property if the property is not suitable for an applicant on the Social Housing Register.

**Note:** For details about how we determine whether a property is unsuitable, see [section 4](#) Bypass an applicant and [section 7](#) Withdraw a property match.

### 3.3 Including applicants and customers in decision making

We want applicants and customers to be involved in determining when a property is suitable for them. Therefore, we will not consider a property unsuitable based on factors such as being too far away from a school or public transport, without having a discussion with the applicant or customer first.

Instead, if the property specifications (bedroom number, letting area, accessibility needs, etc) are suitable for the applicant or customer, we will proceed with the offer and viewing stage of the process. This is to enable the applicant or customer to decide whether the property is suitable for their needs at that point of time.

We take this approach because we do not know when an applicant/customer might decide that having a home is the most important thing to them at that point in time. We want to give applicants/customers more chances to accept a property so that we remain responsive to any changing circumstances that an applicant or customer might be facing.

The key thing is to talk with the applicant or customer as much as you can. If an available property appears to be suitable, but may not meet all of the applicant/customer's needs, discuss this with the applicant/customer wherever possible. The aim is to collaboratively explore solutions and determine suitability in line with property specification needs.

**Note:**

Your ability to freely discuss the exact details of the available property will be dependent on the stage of the process that you are in.

- During the **'complete PHC'** or the **'assess match'** stages, the property being considered may still be tenanted and notice to vacate can be revoked by the current tenant. Therefore, we should not tell the applicant/customer that they are being considered for a property that is potentially becoming available. Instead, you can ask questions about certain property characteristics more generally to seek their views.
- If you are in the **'offer property'** or **'show property'** stages, then you can freely discuss all details of the property with the applicant/customer because they have received an offer.

### 3.4 Matching BIT customers

We are responsible for matching existing customers from the Business Initiated Transfer (BIT) list to alternative Kāinga Ora homes.

High priority BIT customers are considered for available properties first. This ensures we meet the housing needs of customers whose tenancies have been affected by business decisions. High priority customers on the BIT list are those who require a BIT move to meet one of the four principles outlined in Appendix 1 of Policy: [Match to a Suitable Home policy \(POL-354\)](#).

When checking for high priority BIT customers, a list is generated against the BIT register using the property address. Kotahi will select the customers that match the letting area, bedrooms required, and any specific characteristics such as modifications if required.

If no high priority BIT customers are available, or where the available property is unsuitable for a high priority BIT customer, then the property will be matched to the highest priority applicant on the MSD Social Housing Register.

Applicants on the Social Housing Register will be given priority over remaining (non-high priority) BIT customers.

### 3.4.1 Special Event BIT

A 'Special Event' BIT move may be considered if a move is extremely urgent. This BIT move is generally captured under the 'safety and security' guiding principle for placement priority.

A 'Special Event' may be considered where there is a significant risk to the customer and their whānau, and a property has already been identified and will be available within the next 10 working days.

Approval for a 'Special Event' must be sought from and granted by a Manager Regional Placement. If a 'Special Event' is approved, then it is considered the highest priority for placement.

## 3.5 Matching Social Housing Register applicants

We are also responsible for matching applicants from the Social Housing Register to an available Kāinga Ora home.

When a property becomes available, MSD provides us with a shortlist of applicants whose housing specification requirements match the specifications of the property. Kotahi selects the highest priority applicant who best matches to the available property according to letting area, bedrooms required, and any specific characteristics such as modifications if required.

When an MSD shortlist is generated, information about the applicant, their household, and housing needs becomes available to view.

**Note:** The MSD shortlist includes any known risk factors; for example, probation conditions.

### 3.6 Manual matching

Manual matching should be used sparingly, and only for limited circumstances that have been approved. It should not be used as a regular method for matching applicants. This is because we have an obligation to match the highest priority applicants first, and undertaking a manual match does not necessarily meet that obligation.

If you are seeking a manual match, you need to speak to a Manager Regional Placement and provide a reason for the manual match:

- The Manager Regional Placement will discuss the request with the delegated Manager Regional Placement for your region
- The delegated Manager Regional Placement has discretion to decide whether a manual

match would be an appropriate course of action for the situation. If they agree that a manual match is appropriate, then they will make the request via the [Interagency Team](#) (who will contact MSD).

Note that a Manager Regional Placement must request and receive approval from MSD (via Interagency Team) before a manual match may be actioned. Once approval has been received, then the process outlined in [CT-PRO-001 Match applicants and customers to a suitable home](#) is triggered.

Some acceptable manual match circumstances might include:

- When there is a death of a sole tenant (that is, the only signatory to the tenancy). In this instance, we might manually match an eligible household member so that they do not have to move out.
- When an applicant has declined a property offer, but contacts us soon after the decline as they have changed their mind and want to now accept the property.
- When an applicant is experiencing critical negative health and wellbeing effects due to their current living arrangements and this requires immediate action to avoid death or disability.

MSD sometimes approaches us to request that we urgently match an applicant to a property via manual match. If this happens, we first need to identify if there is a suitable property available. We cannot complete a manual match if no properties are available.

### 3.7 Matching refugee customers

MSD works with the Refugee Resettlement Centre to assess quota refugees for public housing. Housing options for quota refugees include all social housing providers and if available, private rentals.

Immigration New Zealand (INZ) will give early notice of upcoming intake dates, the details of refugees and their whānau along with their housing requirements to the Interagency Team (IA). They manage this through a spreadsheet.



### 3.7.1 Match and offer

If the Coordinator Placement matches a quota refugee to a void property, they'll refer the match to the IA team. The IA team will complete all placement actions from the offer stage through to the sign-up of the tenancy.

The Refugee Centre address and contact details shown on the T-365 form indicates the applicant is a quota refugee.

The IA team will:

- update the VOID path to refugee
- contact the relevant Team Leader Housing Support to see if there are any concerns. If the area office is happy with the match, the IA team contacts the Refugee centre to tell them about the property.
- let the Coordinator Placement know if the match is unsuitable.

### 3.7.2 Accept offer

The Refugee Centre will accept the match within 24 hours. Once they confirm the match is suitable, they'll talk about a tenancy start date, key collection and furnishing the home.

The interagency Team (IA) will arrange the sign-up process before key collection.

IA will make contact with Team Leader Housing Support and recommend assigning a Senior Housing Support Manager for the customer and their whānau needs, they'll also let the property in the system. If any relevant information is identified through the placement process, they'll let the SHSM know.

Handover information can include:

- support the customer already receives
- new support the customer needs
- T-365 MSD applicant summary form.

### 3.7.3 Orientation and Overview Tenancy Agreement

IA delivers a presentation to all customers and their whānau offered a home by us or walk through the Tenancy Agreement. The presentation is at the Refugee Centre or virtually and generally takes place in week four of the five week programme.

The presentation also provides an opportunity for our customers to ask questions before they sign their Tenancy Agreement.

### 3.7.4 Sign-up process

The sign-up is completed at the Refugee Centre or virtually by a nominated staff member at a time arranged by the Team Leader Interagency Administration. The IA team will let the property in Kotahi on the start date as per the Tenancy Agreement.

IA will upload all documents to Objective and forward the Tenancy Agreement to the relevant area office by courier and put into the property hard file.

The keys are given to INZ and a volunteer from the Red Cross or other support service will arrange to collect the keys and furnish the home.

The Red Cross or other support service will then give the keys to the customer on their tenancy start date. IA will help with issues like moving or transferring.

### 3.7.5 Ongoing support

Support services designated to customers and their whānau such as, Red Cross New Zealand will work with them for one year.

As part of the Support to Settle in service, the S/HSM will arrange to check in with a new customer within the first couple of weeks to see how the customer is settling into their new home and arrange a date and time for the first settle in hui. If the customer consents, the S/HSM may need to contact the support services to understand what support is in place. The S/HSM should engage with the support services at six and 12 months to ensure there's ongoing support.

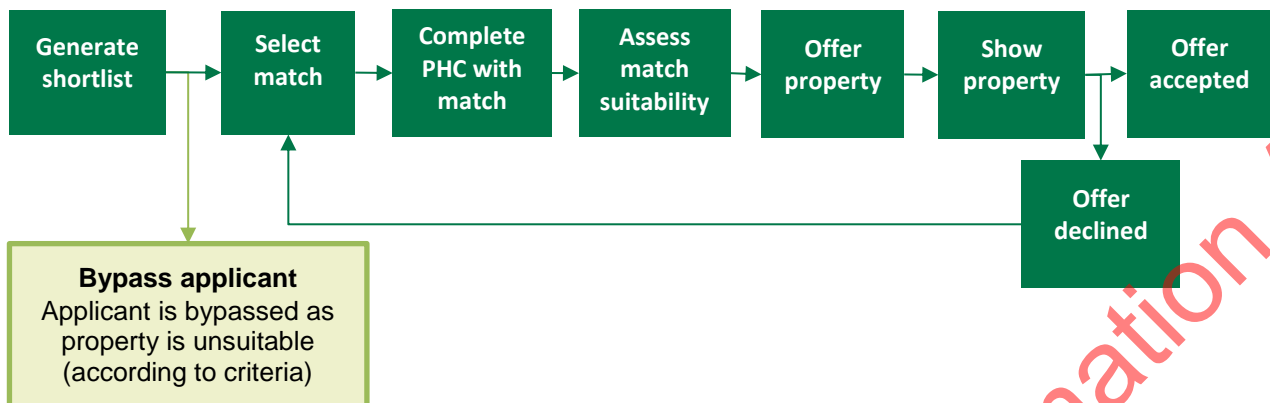
The S/HSM will need to work with the customer based on their needs to settle-in to their new home. If at any point, the customer is considered a low service level need and doesn't require much support, the customer maybe handed over to a HSM. The S/HSM should discuss this with their Team leader Housing Support.

## 4. Bypass an applicant

A bypass can be actioned after generating the Social Housing Register shortlist for the available property, and before a recommended match is made.

When reviewing the Social Housing Register shortlist, if the available property is not suitable for the highest priority applicant then the Coordinator Placement may bypass the applicant so that the property can be matched to the next highest priority applicant.

See the diagram below for a representation of when a bypass may occur in the process.



A bypass should only occur under limited circumstances. Therefore, only consider bypassing the highest priority applicant if the property is clearly unsuitable for a significant or justifiable reason.

If you are considering a bypass, you first need to check Kotahi to see if the applicant has a previous withdraw or decline (and a clear reason for the withdraw/decline) recorded.

- If the applicant **does not** have a recorded previous bypass, withdraw or decline, then proceed with the match and pass the match on to the next stage of the process.
- If the applicant **does have** a recorded previous bypass, withdraw or decline, then look at recent information that is available for the applicant (such as their Pre-Housing Conversation (PHC) or requirements in their Social Housing Register application) and use section below to decide if the applicant may be bypassed.

#### 4.1 Acceptable reasons to bypass an applicant

An applicant can only be bypassed from an available property based on the recorded reason for the most recent previous bypass, withdraw, or decline. Before a bypass can be actioned, all of the below conditions have to be met:

- The current property has to be approximately the same as the property that was most recently bypassed/withdrawn/declined. For example, it must have the same number of bedrooms or be the same property type.
- It has to be less than three months since the most recent bypass/withdraw/decline.
- It is clear from notes on Kotahi that we have spoken with the applicant about why they declined the most recent available property, or why the most recent available property was unsuitable (resulting in a withdraw).

##### Notes:

- If the bypass conditions above have not been met, the Coordinator Placement should proceed with the match and pass the applicant on to the next stage of the process. For example, if it was more than three months since the most recent

bypass/withdraw/decline, the Coordinator Placement cannot bypass the applicant again. Instead, they should match the applicant and pass the match on to the Advisor Placement so that we engage with the applicant again. Kotahi should be updated on any change in the applicant's circumstances or reasons why a property is unsuitable.

- It is important that any information used to determine a bypass is recent. For example, if the Pre-Housing Conversation was completed or updated within the last three months, then that information is likely recent enough to support making a decision.

For more detail on the acceptable bypass reasons and the conditions that must be met, see operational [Policy: Match to a Suitable Home policy \(POL-354\)](#), Appendix 2 – Acceptable reasons to bypass an applicant.

#### **Example scenario**

In June, an applicant who owns five dogs appeared as the highest priority applicant for a currently available two-bedroom property that can only reasonably accommodate two dogs.

Records show that in May, the applicant was offered a previously available two-bedroom property that could also only reasonably accommodate two dogs. However, the applicant decided to decline the offer as they wanted to keep all five dogs.

During the decline offer stage, we asked the applicant if they would be willing to part with any of their dogs in order to live in a home that could not accommodate all five dogs. The applicant said no. We asked the applicant if their decision will be the same for future similar properties and the applicant said they are prepared to be bypassed for other similar properties that cannot accommodate all five dogs.

June is the first time the applicant has appeared for another available property since their most recent decline in May. This applicant may be bypassed for the currently available property because:

- the properties are similar
- it has less than three months since the most recent decline
- we have spoken with the applicant about their needs.

## **5. Advise MSD of match to property**

The Coordinator Placement informs MSD when an applicant from the MSD social housing register is matched to a property. This is an automated system process using Kotahi. MSD will confirm whether the applicant is still on the MSD social housing register.

- If the applicant is still on the MSD register, MSD will provide contact details, income related rent (IRR) amount, and also confirm if the applicant has applied for payment of rent in advance and it is approved.
- If the applicant does not have access to assistance from MSD for rent in advance, the Advisor Placement will need to discuss payment options with the applicant.

## 6. Pre-Housing Conversation

The Pre-Housing Conversation helps us to further understand the housing needs of an applicant and their whānau. It also helps us to identify any support that they might need to move and successfully settle-in and live well in their new home.

The Pre-Housing Conversation is optional. We should explain the purpose of the conversation and let the applicant know that participation in the Pre-Housing Conversation is optional, and not partaking will not affect their chance of being housed. However, we should encourage the applicant to take part because it will help us to make the best match to a home.

If an applicant does not want to have a Pre-Housing Conversation, it will not prevent them from being housed. We will use information available from MSD (refer to T-365 MSD applicant summary form) and Kotahi to assess the match.

See [Guidelines on completing the Pre-Housing Conversation \(CT-GDL-011\)](#)

**Note:** The Pre-Housing Conversation is not an opportunity to re-assess or verify the applicant's eligibility for social housing.

A Pre-Housing Conversation does not guarantee that we have a home for an applicant.

- An applicant should not be notified of a property match until the property status is at CONFVOID and the property is vacant.
- When undertaking a Pre-Housing Conversation, we should not indicate to the applicant that they are being considered for a property that is potentially becoming available.
- It is up to each office to decide where and how they wish to meet the applicant or customer safely. Below are some options to consider. See [Guideline for Staying Safe and Secure \(SS-GDL-110\)](#); [Customer Visits Guidelines](#), and if necessary, [Manage Customer Risk Rating](#).

	Settings	Options and considerations
<b>Suitable places for the PHC to take place</b>	Controlled access locations	<ul style="list-style-type: none"> <li>• In a Kāinga Ora office</li> <li>• Community Link (co-location with other agencies)</li> <li>• Transitional housing provider</li> </ul>
<b>Distance to travel</b>	Rural or remote areas	<ul style="list-style-type: none"> <li>• How long is too long distance to travel</li> <li>• Number of PHC that could be arranged for the same day to make the trip more feasible</li> <li>• Going in pairs where necessary according to <a href="#">Staying safe and secure guideline (SS-GDL-110)</a></li> <li>• Is the customer comfortable with having the conversation over the phone</li> </ul>

Before the conversation, the Advisor Placement will:

- contact the applicant/customer to arrange a suitable date, time and location
- decide the best place for the Pre-Housing Conversation. The best place may be a compromise of what is best for the applicant/customer and what is practical, taking into account safety, distance, whether they can make it (For more detail, see [Guidelines for completing pre-housing conversation \(CT-GDL-011\)](#))
- find out if the applicant/customer would like to bring a support person (whānau or support service they are currently receiving support from)

At the meeting:

- explain the purpose of the Pre-Housing Conversation
- read the [Pre-Housing Conversation Privacy Statement \(CT-FRM-007\)](#) and get the applicant's consent to proceed with the assessment
- get the applicant to sign the form if conversation is face to face (if by phone, the Advisor Placement can tick the form to confirm agreement)
- confirm letting areas
  - discuss our pet policy if applicable (see [Managing pets \(CT-PRO-202\)](#))
  - discuss short and long term housing goals
  - identify supports that may be needed to sustain a tenancy
  - tell the applicant/customer what happens next

**Note:**

- We can only use information collected during the Pre-Housing Conversation for the purpose of confirming a housing match and to identify the tenancy support service level the applicant/customer and their whānau may require from us, once housed.
- For BIT customers, the Advisor Customer Liaison will have already met with any customer who is on the BIT register and have a good understanding of their needs. See Kāinga Ora [Business Initiated Transfer Interview Sheet \(T-474\)](#). However, if it has been three months since the last engagement (BIT interview or a PHC) we should make contact with the customer to see if circumstances are the same.

## 6.1 Assessing need for another Pre-Housing Conversation

If a Pre-Housing Conversation was completed before, we will not complete another full Pre-Housing Conversation unless we do not have sufficient or current information available to support the placement decisions.

First, check the previous Pre-Housing Conversation information to assess the available information. If there is enough information available to make a good and informed placement decision, and that information is recent, then proceed.

If there is critical information missing, or if it has been a long time since the Pre-Housing Conversation was completed (eg, greater than three months), then contact the applicant.

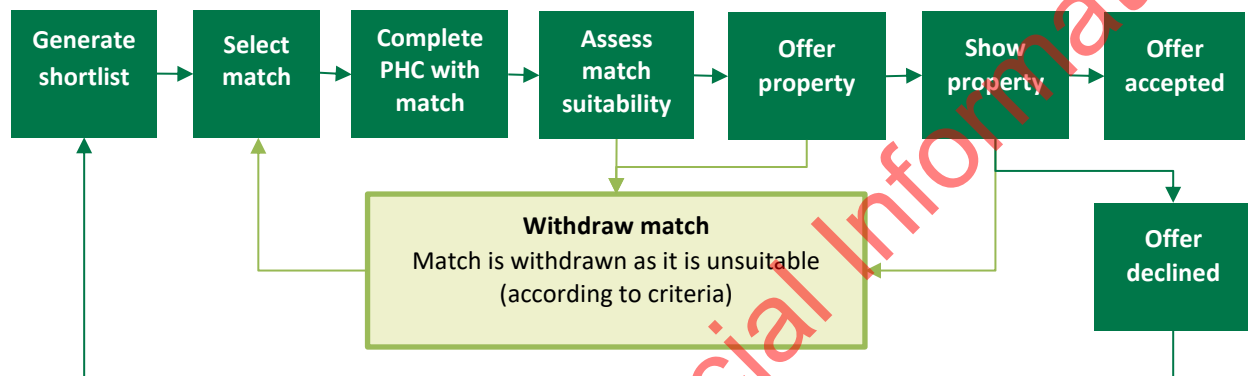
Rather than undertaking a full Pre-Housing Conversation, give the applicant a call and check if their circumstances have changed since the Pre-Housing Conversation was completed.

The Advisor Placement will contact applicants to determine if there is a change in circumstance and how detailed any future Pre-Housing Conversation needs to be.

**Note:** The applicant can choose to have a new Pre-Housing Conversation.

## 7. Withdraw a property match

A match can be withdrawn at any time during the assess/offer/show property stages of the process, as shown in the following diagram.



A match can only be withdrawn if the property is unsuitable for the applicant or customer. A property match can be considered unsuitable on two grounds:

- The property is [unsuitable based on the applicant/customer's housing specification needs](#) against the specifications of the available property.
- The property is [unsuitable due to legal requirements](#).

The Advisor Placement should refer to the below sub-sections when deciding whether a match can be withdrawn. When a decision is reached, this decision is passed on to the Coordinator Placement to action in Kotahi.

If the Advisor Placement notifies the Coordinator Placement that a match is unsuitable and is to be withdrawn, and the Coordinator Placement does not agree with this decision, both roles should discuss the match and come to an agreement.

If the Advisor Placement and the Coordinator Placement cannot reach an agreement about the match's suitability, they should escalate these concerns to the Manager Regional Placement to make a decision. The Manager Regional Placement may consult with the Manager Housing and Wellbeing Support, if required.

### 7.1 Unsuitable due to housing specification needs

If you think that a property match is unsuitable because it may not meet the applicant/customer's housing specification needs, you must check the criteria outlined in the operational [Policy: Match to a suitable home \(POL-354\)](#), Appendix 3 – Acceptable

reasons to withdraw a property match to see if any of the acceptable reasons to withdraw apply.

If the property match meets one of the acceptable reasons outlined in the operational policy criteria, then the Advisor Placement may choose to withdraw the property match and clearly record appropriately detailed notes on the reasons for the withdraw.

However, the property match does not always have to be withdrawn if it meets one of the acceptable reasons outlined in the operational policy. The property match may proceed, for example, if the applicant or customer indicates that they still want the property.

**Note:** it is best practice to include the applicant/customer in decision making as much as possible. This means talking with the applicant about why a property might be unsuitable as much as you can. Refer to section [3.3 Including applicants and customers in decision making](#).

After a property match has been withdrawn and notes recorded, the Advisor Placement can consider the next highest priority applicant or customer for the available property.

## 7.2 Unsuitable due to legal requirements

There are some circumstances where we have to withdraw a property match because the applicant or customer has to meet legal requirements around where they can live. A property is considered unsuitable according to legal requirements if placing the applicant/customer in the available property would:

- result in a violation of their probation conditions; or
- result in a violation of the requirements for placing child sex offenders (refer to [Child Sex Offenders - Recording and Placement \(CT-PRO-301\)](#)); or
- result in an applicant/customer being in close proximity to a person protected from the applicant/customer by a restraining order or protection order.

Under these circumstances, the Advisor Placement does not have discretion to decide whether the match should be withdrawn – the property match must be withdrawn.

**Note:** Once a property match has been withdrawn and notes recorded, the Advisor Placement can consider the next highest priority applicant or customer for the available property.

## 8. Offer property

When the match has been approved, the Advisor Placement contacts the applicant (or Advisor Customer Liaison contacts the BIT customer) to make the offer and provide key information, including:

- that any offer including the amount of rent payable is subject to review if there is any change in circumstances before sign up
- any special tenancy conditions i.e., body corporate rules
- when the property is expected to be ready



- the rent amount
- the rent in advance required and whether this has been pre-approved by MSD
- the different viewing options
- if the offer is subject to probation (that is, Corrections) approval
- if the offer is conditional upon Tribunal approval in the case of a minor
- the suitability for pets, if applicable. See [Managing pets \(CT-PRO-202\)](#)
- property details, for example:
  - if the property is fully fenced
  - what sort of heating is provided (for example, heatpump, panel heater, log burner, gas heater)
  - what sort of cooking is provided (for example, gas or electric)
  - if the property is an apartment, is there a lift or only stairs
  - if there are any modifications (for example, ramp access or if the bathroom has been modified)
  - if there is carpet/wooden/lino flooring and curtains
  - general details about the neighbourhood – local schools, public transport, doctors, etc

The customer must be advised that any offer outcome (acceptance or decline with reasons) will be communicated to MSD.

Advisor Placement or Advisor Customer Liaison will provide applicant/customer with a clear and reasonable timeframe for applicant/customer to provide their offer response by. When setting this timeframe, ensure it includes property viewing and working days (not weekends).

During the offer process, if the applicant/customer advises their circumstances and/or housing requirements have changed:

- the Advisor Placement will need to advise the applicant/customer that the offer must be put on hold
- the Coordinator Placement will advise MSD (with the applicant's consent) that a change has occurred
- the applicant/customer must be advised MSD will be in contact within the following 24 hours to discuss the change, and they therefore need to be contactable.

If there is a change to the applicant/customer's rating or eligibility, MSD will advise us.

## 9. View property

When the Advisor Placement identifies a property match, the applicant/customer will be offered an opportunity to view the home.

Viewings allow us the opportunity to provide the applicant/customer with further information about the property's features. This includes identifying whether any

maintenance work is scheduled to take place, and giving further details about the surrounding area and community.

**Note:** Any health and safety risks must be flagged to all our people, including contractors who may be working on a property. See also [Guideline for staying safe and secure \(SS-GDL-110\)](#); and, if necessary, [Manage customer risk register \(CT-PRO-300\)](#).

### **Provide viewing options**

We try to give the applicant/customer different options to view the property so they can choose which one works best; for example, we can offer:

- viewing the property in person
- driving past the property
- viewing photos via email or in one of our offices. (**Note:** When providing photos, ensure that we do not breach the neighbours' privacy).

In areas where there are Void Specialists, the Placement Team will need to work with them to decide if there is an opportunity to conduct a viewing at the property during the VOID process or after the expected completion date.

The Advisor Placement or Advisor Customer Liaison will arrange a time that works for both the applicant/customer and Kāinga Ora. A support person is encouraged to attend a viewing, at the applicant/customer's request.

The Void Specialist will be responsible for expectations of what will be done to the home, and the Placement Team will be there to understand any support the customer may need for the move.

In areas where there are no Void Specialists, the Advisor Placement/Advisor Customer Liaison can:

- conduct the viewing using information available in Kotahi to provide details about any property work still to be done and the completion date; or
- offer other viewing options mentioned above.

### **Safety considerations for viewing**

When arranging a viewing, the Advisor Placement should assess the risks and create a safe work plan if required. For more details, see:

- [Safework Plan Guidelines](#)
- [Manage customer risk register \(CT-PRO-300\)](#)
- [Staying Safe and Secure \(SS-GDL-110\)](#)

During the viewing discuss community characteristics, provide information about the neighbourhood and be prepared to answer any additional questions.

### **When applicant/customer does not choose to view property**

Sometimes, an applicant/customer may choose not to view a property before accepting an offer. If this occurs, the most recent photos from the pre-let or final inspection must be made available to these applicants/customers.

## 10. Accept offer

The applicant/customer must tell us that they accept the property within the set reasonable timeframe mentioned under section 8: [Offer property](#).

The applicant/customer must contact the Advisor Placement or Customer Service Centre to communicate their decision to accept or decline the property. Customer Support Advisor contacts Advisor Placement or Customer Liaison Advisor to let them know the applicant/customer's decision.

When the applicant/customer accepts the property, the Advisor Placement/Customer Liaison Advisor will inform the applicant/customer what happens next.

If Kāinga Ora does not hear back from the applicant/customer within the set timeframe, we will take all reasonable steps to contact the applicant/customer to confirm their acceptance of the property (using a range of communication methods, for example calling, emailing, texting). If we cannot make contact after the set timeframe and all reasonable attempts have been made, then treat the offer as declined.

When the applicant/customer accepts the property, the Advisor Placement will:

- work with the applicant/customer to understand the support they need for the move and refer the applicant/customer to MSD or other support agencies if needed;
- with consent, continue to connect with support providers the customer may be engaged with to support a smooth transition into their new Kāinga Ora home.
- ask if they would like to get a link or electronic copy of the [Guide to understanding your Tenancy Agreement](#) sent to them by email or phone text. Explain the guideline will:
  - help them understand what's needed before they meet their Housing Support Manager for sign-up.
  - have a link to [Welcome to Your Home](#) video that they can check out. If they prefer to only get the video link, send it to them.

**Note:** If the customer prefers, you can also forward a copy of the guideline by email. If our external website is unavailable, you can get a copy of the Guide to understanding your Tenancy Agreement in Atamai.

## 11. Decline offer

When the applicant/customer declines an offer, we need to discuss their reasons for declining the property. This is because we need to record a reason in Kotahi for why the applicant or customer declined.

**Note:** There are some circumstances where it may be appropriate to withdraw a property match rather than decline (refer to the acceptable reasons noted in section 7: [Withdraw a property match](#)). For example, if you find out during the viewing stage that the property will not meet an applicant or customer's accessibility needs. However, a withdrawal should not be used in place of, or to avoid, a decline. This is because a decline serves an important function of notifying MSD of why a property was unsuitable for an applicant.

Reasonable reasons for decline can include some of the following:

- distance from public transport
- distance from essential services
- parking inadequate
- not suitable for cultural reasons
- unsafe community

**Note:** is it not our responsibility to determine whether the reason for declining a property is acceptable. MSD will determine whether decline reasons are acceptable. Our main responsibility in this situation is to record the reason that the applicant or customer provides.

The Advisor Placement must also ask the applicant who declined the offer if they are happy to be bypassed from similar available properties in the future based on the reason why they have declined the current property. If they indicate that they do not want to be bypassed for similar available properties in the future, then leave clear notes not to bypass the applicant in the future based on their decline reason.

The Advisor Placement must tell the applicant that MSD will review their application and notify them directly of any outcome.

MSD will review all declined offers from Social Housing Register applicants and they will notify the applicant directly of the outcome.

Where a Kāinga Ora customer on the BIT register declines an offer, the Coordinator Placement will record the reasons for decline.

## 12. Hand over customer information to Senior/Housing Support Manager

Once the applicant/customer has accepted a property, a handover will take place with the Advisor Placement and the allocated Senior/Housing Support Manager. To ensure the customer doesn't need to repeat their story and continuity of care or plan is in place, the Advisor Placement will advise the Senior/Housing Support Manager the following:

- Support customer already engaged with
- Support the customer needs in the home and other support needs
- Any referrals sent to service providers

**Note:** It is up to the Regional teams to decide the best way to conduct the hand-over process. This must be done within 48 hours after the applicant/customer's decision to accept the property.

## Appendix A: Housing Needs

This section provides more details about some of the housing needs that may affect placement priorities of our applicants/customers.

### Modified properties

If a vacant property is modified it must be offered firstly to any applicant/customer who needs a property with those modifications. Placement priority still applies.

The Advisor Customer Liaison may have a suitable special event transfer or customer from the BIT register who needs a property with modifications, they should check with their appropriate manager to proceed with the match.

If no manual request is received, include restrictions when generating a shortlist in Kotahi. This will prioritise those applicants/customers who MSD identified as needing a modified property during the Needs Assessment.

If an applicant/customer needs a modified property, their occupational therapist may need to determine if the property is suitable. If this is necessary, it should be noted by MSD and captured in the information provided in the social housing register to assist with placement.

If the occupational therapist determines that the property is not suitable this must be recorded as a 'withdrawal' not a 'decline'.

If no applicant/customer can be found who needs a modified property, we can consider other priority applicants who do not need a modified property. If a property is accepted by an applicant/customer who does not need the modifications, they may be required to move if this property is identified as a more suitable match by another applicant who does need the modifications. We need to ensure we inform the applicant/customer and they understand this at sign-up.

**Note:** Customers who require modified housing during their tenancy may be considered for a business initiated transfer if it is not possible or desirable to modify their current property.

### Relocatable homes

We have some homes sited on land not owned by Kāinga Ora. These properties are primarily sited on multiply-owned Māori land, and we have a licence to occupy. In some cases, as part of the condition of this licence, any placement of an applicant/customer into these homes must be approved by the Trustee/owners of the land. While we would not enter into this kind of arrangement today, as it does not align with our legal obligations in relation to placement, they have been agreed and are still in force.

The Regional Manager Placement will:

- request a manual match if there are specific licence conditions which must be considered;
- confirm that the normal matching process can proceed.

When there are specific licence conditions, the Regional Manager Placement and/or Maori Land Lease Manager will contact the trustees/owners to see if they have any prospective customers for the property and obtain contact details. Any prospective customer must be an eligible applicant/customer from the BIT or MSD registers. With the consent of the applicant/customer, the Regional Manager Placement will email the Interagency Team to obtain the application reference number or request an urgent needs assessment appointment with MSD if there is no current application for the prospective customer.

If the Trustee/owners are unable to provide us with a recommendation of an eligible applicant/customer, then Kāinga Ora will advise the Trustee/owners that our normal matching process from either the Kāinga Ora BIT register and/or the MSD social housing register will proceed.

### Child sex offenders (CSO) placement

See [Child Sex Offenders - Recording and Placement \(CT-PRO-301\)](#).

### Probation conditions

If an applicant/customer is subject to probation conditions, their probation officer may need to determine if the property is suitable and formally sign off any offer before placement can proceed. If the tenancy is subject to this condition, it will be included in the information provided by MSD.

For child sex offenders, see [Child Sex Offenders - Recording and Placement \(CT-PRO-301\)](#).

If the probation officer determines that the property is not suitable this must be recorded as a 'withdrawal' not a 'decline'.

### Housing minors (persons under the age of 18 years)

See [Guideline for tenancy management \(CT-GDL-004\)](#).

## 13. Document control

Current and previous versions of this document are stored in our document management system, and are managed by the Technical Writing team. For any queries contact [busdoc@kaingaora.govt.nz](mailto:busdoc@kaingaora.govt.nz).

Version	Reason for change
6	Customer programme changes. Welcome visit wording now updated to settle in. Broken hyperlinks removed and/or replaced.

### SME review

Name	Designation	Date
Naomi Finau	Senior Advisor – Customer Programme	19/08/2022
Aaron Jeavons	Team Leader – Customer Experience	19/08/2022

#### Endorsers

Legal		Date
Business Owner		Date

#### Keywords for Atamai

t-245
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#### Information architecture

CT – Core Tenancy – Manage tenancies > Guidelines > CT-GDL-006 Guideline for matching applicants and customers to a suitable home (wasT-245)

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