**Email Thread Summary:**

The conversation revolves around the "WFD × RC — October MOU Data Check-In (Clean Start Protocol)" between Eric Jones (Recovery Compass) and Jacob Lozoya (Whittier First Day), with Randall Trice and Nuha Sayegh CC'd.

* **October 10, 2025 (Eric Jones):** Eric initiated the email, thanking Jacob for September data and following up on the October Clean Start Protocol. He emphasized that October 2025 is the "clean baseline month for full MOU compliance." Eric requested three key things:
  + **Canonical October Folder Access:** A direct link to the October 2025 master folder for automated sync.
  + **October Housing Tracker (Client-Level Data):** The client-level Housing Tracker for October with 7 MOU-required fields (Client ID, Program Name, Intake Date, Exit Date, Exit Destination, Housing Placement Date, Length of Stay). He stressed the importance of "Intake Date" for calculating "Length of Stay."
  + **Field Mapping Clarifications:** If Jacob uses an existing structure, Eric needed clarification on mapping "UHA Received Date" to "Intake Date," "Date completed" or "Housed" to "Housing Placement Date," and the presence of an "Exit Destination Field" with potential standardized values.
* **October 14, 2025 (Jacob Lozoya - First Reply):** Jacob apologized for the delay, confirmed he created a new folder, and was updating October's information.
* **October 14, 2025 (Jacob Lozoya - Second Reply):** Jacob provided a direct link to the "Master Folder October 2025" and asked for clarification on ".md files" and their placement.
* **October 14, 2025 (Jacob Lozoya - Third Reply):** Jacob clarified Eric's mapping questions:
  + "UHA Received Date" is *not* the Intake Date; Intake Date is program enrollment, UHA is during the stay.
  + "Housed" refers to successful permanent housing placement for the Housing Placement Date.
  + He has been entering client destinations in the Exit Destination field but is open to using standardized values if Eric prefers.
* **October 14, 2025 (Eric Jones - Reply):** Eric acknowledged Jacob's responses, stating he would review the folder and mapping clarifications. He also explained that ".md (markdown) files" are plain text files for simple formatting, can be opened with any text editor, and should be kept in the same October folder.

**Action Items:**

* Jacob Lozoya to provide the actual Intake Date field.
* Jacob Lozoya to confirm which field represents the Housing Placement Date.
* Jacob Lozoya to confirm if he wants Eric to suggest standardized values for the Exit Destination field, or if he would like to use specific, defined values for the Exit Destination field.
* Jacob Lozoya to ensure all October Housing Tracker data fields are populated with ≥80% coverage, especially the Intake Date field.
* Jacob Lozoya to ensure the Exit Date and Exit Destination fields are present (or confirmed as coming soon).

**My Responses in this Chat:**

Here are all the responses I've provided in this conversation:

* **Initial Summary:**
  + On October 10, Eric Jones followed up on the October 2 clean start protocol for MOU compliance, requesting the direct link to the October 2025 master folder, the client-level Housing Tracker for October 2025 with 7 MOU-required fields (especially Intake Date), and clarifications on field mappings if an existing structure is used.
  + On October 14, Jacob Lozoya apologized for the delay, confirmed he created a new folder and was updating October information, and provided a direct link to the "Master Folder October 2025".
  + Jacob also asked for advice on what ".md files" are and where to put them.
  + Jacob clarified that "UHA Received Date" is not the intake date, "Housed" refers to clients successfully placed into permanent housing, and he has been entering client destinations in the Exit Destination field but can use specific, defined values if preferred.
* **Primary Purpose of October 2025 Clean Start Protocol:**
  + According to Eric Jones's email, the primary purpose of the October 2025 clean start protocol is for October to be the "clean baseline month for full MOU compliance." This means it's the month they're using to establish a clear starting point for collecting data that meets all the requirements outlined in their Memorandum of Understanding (MOU).
* **7 MOU-Required Fields:**
  + The 7 MOU-required fields that Eric Jones needs for the October Housing Tracker client-level data are:
    1. Client ID (HMIS / CID)
    2. Program Name (Site)
    3. Intake Date (date client entered program)
    4. Exit Date (date client exited program, blank if still enrolled)
    5. Exit Destination (where client went after exit: Permanent Housing, Temporary Housing, Returned to Homelessness, etc.)
    6. Housing Placement Date (actual move-in date to permanent housing)
    7. Length of Stay (calculated: Exit Date - Intake Date)
* **Distinction between "UHA Received Date" and "Intake Date":**
  + According to Jacob Lozoya, "UHA Received Date" is not the intake date. The "Intake Date" is when a client actually enrolls and enters the program, while a "UHA" (Universal Housing Application) takes place during the client's program stay.
* **Status of October 2025 Master Folder and Access:**
  + The October 2025 master folder has been created, and Jacob Lozoya is currently updating the information for October.
  + Eric Jones can access it via a direct link provided by Jacob Lozoya: [Master Folder October 2025](https://1whittierfirstday-my.sharepoint.com/personal/kperez_whittierfirstday_org/_layouts/15/onedrive.aspx?id=%2Fpersonal%2Fkperez_whittierfirstday_org%2FDocuments%2FFirst%20Day%20Sr.%20Team%20Shared%20Folder%2F1.%20WFD%20Services%20Report%2FMaster%20Folder%20October%202025&viewid=94980dd3-49de-4aa3-83de-88da11d2ef26&ga=1&LOF=1). Eric can then bookmark this URL as the canonical source and set up automated sync.
* **Key Reason for Emphasizing 'Intake Date':**
  + Eric Jones emphasizes the 'Intake Date' field because it is essential for calculating the "Length of Stay" (Exit Date minus Intake Date), which is the primary outcome metric in their MOU. Without the Intake Date, they cannot measure how long clients stay in housing, which is crucial for validating program effectiveness.
* **Discrepancy between "UHA Received Date" and "Intake Date" and Importance for MOU Compliance:**
  + According to Jacob Lozoya, the "UHA Received Date" is not the "Intake Date." The "Intake Date" is when a client actually enrolls and enters the program (e.g., when a new client comes into Ted's Place). The "UHA" (Universal Housing Application) is an event that takes place *during* a client's program stay, not at the beginning.
  + This distinction is important for MOU compliance because the "Intake Date" is a key field for calculating the "Length of Stay" (Exit Date minus Intake Date), which is the primary outcome metric required by the MOU to validate program effectiveness. Using the "UHA Received Date" instead would lead to an incorrect calculation of the "Length of Stay," jeopardizing compliance and the accurate measurement of program outcomes.
* **Key Purpose of the Partnership:**
  + The key purpose of the partnership between Whittier First Day (WFD) and Recovery Compass (RC), as outlined in the MOU, is to establish WFD as the implementation and data collection site for a formal case study. This study aims to validate the Environmental Response Design (ERD) model as an Evidence-Based Practice. In exchange for this research opportunity, RC provides pro-bono data systems architecture.
* **Action Items (as of previous turn):**
  + Jacob Lozoya to provide the actual Intake Date field
  + Jacob Lozoya to confirm which field represents the Housing Placement Date
  + Jacob Lozoya to confirm if he wants Eric to suggest standardized values for the Exit Destination field, or if he would like to use specific, defined values for the Exit Destination field
  + Jacob Lozoya to clarify what .md files are and where he should put them
  + Jacob Lozoya to ensure all October Housing Tracker data fields are populated with ≥80% coverage, especially the Intake Date field
  + Jacob Lozoya to provide the October 2025 folder URL (canonical source for automated sync)
  + Jacob Lozoya to provide the October Housing Tracker (client-level data with MOU fields or confirmed mappings)
  + Jacob Lozoya to ensure the Exit Date and Exit Destination fields are present (or confirmed as coming soon)
* **Consequence of Not Accurately Capturing 'Intake Date':**
  + The consequence of not accurately capturing the 'Intake Date' for MOU compliance is that it directly impacts the ability to calculate the "Length of Stay" (Exit Date minus Intake Date). Since "Length of Stay" is the primary outcome metric in the MOU, an inaccurate 'Intake Date' means they cannot properly measure how long clients stay in housing, which in turn prevents them from validating program effectiveness and ensuring full MOU compliance.
* **Suggested Reply Options:**
  + Thanks for the update, Jacob! I'll check out the folder and the field mappings.
  + Thanks, Jacob! I appreciate the clarity on the fields and the October folder link.
  + Got it, Jacob. I'll review the folder and the mapping clarifications for the dashboard.
* **Suggested Reply with .md File Clarification:**
  + Hi Jacob,  
    Thanks for the update and the folder link! I've bookmarked it.  
    Regarding the .md (markdown) files, those are typically plain text files used for simple formatting. You can usually open them with any text editor. For our purposes, it's best to keep them in the same October folder you're using for the other data files.  
    Thanks,  
    Eric
* **Confirmation of Sent Email:**
  + Great, you've sent the clarification regarding the .md files. Is there anything else I can help you with?