**Report**: ANCHOR Journal Entry Report

**Purpose:** The purpose of the ANCHOR Journal Entry Report is to pull ANCHOR-related Journal entries for consumers enrolled in the ANCHOR program.

**Utilization:** The ANCHOR Journal Entry Report confirms two main components of a consumer’s involvement and reason for being enrolled in ANCHOR. The two components are: identification that **initial contact** was made and that the **goals** of the consumer were identified and documented. This report provides operational oversight to ensure basic requirements are documented and being met. Supervisors and Managers are expected to use this report to ensure program requirements are being met on a monthly basis. Business Rule Tracking ANCHOR in SAMS dated Feb. 1, 2019 *footer: Business Rule – Tracking ANCHOR in SAMS Final 2-10-19.docx*

The ANCHOR Journal Entry Report is based on a Harmony Advanced Reporting (HAR) query. The HAR query pulls data from the HAR\_Consumers, HAR\_Care\_Enrollments, and HAR\_Journal tables which contains data related to Social Assistance Management System (SAMS) consumers, enrollments and journal entries. The filters in the report are ANCHOR care enrollment start date and the ASAP.

The query pulls consumers with an ANCHOR enrollment start date within the reporting period set in the filters. The reporting period can be set by the user and be monthly, quarterly, annual or customized. The Start Date (greater than or equal to) should be used to enter the reporting period start date. The Start Date (less than or equal to) should be used to enter the reporting period end date. The Agency filter includes a list of all of the ASAPs and one or more ASAPs can be selected.

Example: If you wanted to see a list of consumers who were started in ANCHOR during the month of July 2019, you would enter 7/1/2019 in the Start Date (greater than or equal to) filter and 7/31/2019 in the Start Date (less than or equal to or null) filter.

For all consumers with a start date within the reporting period, the report displays all journal entries with a type of ANCHOR – Initial Contact and ANCHOR – Goals. If a consumer enrolled in ANCHOR during the reporting period but does not have any ANCHOR – Initial Contact of ANCHOR – Goals journal entries, the consumer will be included in the report but the journal entry columns will be blank.

The report has seven columns. The first column is the Agency (ASAP) name which is listed as the default agency in the SIMS consumer record. The second column is the Care Program and always displays ANCHOR, the third column in the SIMS consumer ID, and the fourth column is the consumer's full name. The fifth column in the ANCHOR care enrollment start date, followed by the ANCHOR care enrollment End Date, and the ANCHOR care enrollment Termination Date. The next column is the journal Entry Date, followed by the journal Type (either ANCHOR – Initial Contact or ANCHOR – Goals) and the last column is the journal note.