**Revision History**

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| Date | Version | Description | Author |
| December 15, 2021 | 1.0 | Initial publication  | EOEA Home Care & Research/Data Teams |

# User Guide: ANCHOR Validation Report

Executive Office of Elder Affairs (EOEA) has initiated an Advocacy & Navigating Care in the Home with Ongoing Risks (ANCHOR) program, as of 2/1/2019. ANCHOR enrolled consumers receive highly focused care management and coordination level that provides more frequent, intense and time intensive delivery of advocacy and other support to elders with behavioral health needs, who are at risk of institutionalization or homelessness due to their inability to accept or retain services. Aging Services Access Points (ASAPs) are required to track consumers enrolled in the ANCHOR program and the outcomes of these Enrollments.

A specific Care Enrollment, ANCHOR, is required in Aging & Disability (A&D) once a consumer has been enrolled in the program. This report focuses on accurate data entry of the enrollment, consisting of review with the status, reason, and length of time of ANCHOR program, flagging areas which may require additional review for accuracy.

The Anchor Validation report provides a review of data entry related to an ANCHOR consumer once enrolled into the program in accordance with the Business Rule. This data will provide an oversight on the status of an ANCHOR consumer’s enrollment, ensuring enrolled consumers are appropriately enrolled and receiving intensive case management resulting in a measure of the program’s outcomes. The report will display the length of a consumer’s enrollment, which can be utilized to flag for follow-up for an extension request if needed, along with ensuring length of enrollment meets the Business Rule requirements. A review of the reason for each closed enrollment and the end results of the ANCHOR program (ex: transferred into a Home Care Program, terminated due to lack of participation) also present to ensure accurate data entry to measure outcomes.

For the details of data required to record in (A&D), see the Business Rule document: **Tracking Advocacy & Navigating Care in the Home with Ongoing Risks (ANCHOR) in (A&D).** Business rule can be located at: [**https://umassmed.typepad.com/files/business-rule---tracking-anchor-in-sams-final-2-10-19.docx**](https://umassmed.typepad.com/files/business-rule---tracking-anchor-in-sams-final-2-10-19.docx) **.**

**The ANCHOR VALIDATION REPORT should be run, reviewed, and utilized monthly to ensure compliance with the ANCHOR program requirements.**

**Report Location**

The ANCHOR Enrollment Validation Report is available in the HAR Community folder. Login to Report Library using your current WellSky user ID and password. If you do not have this access role, it can be requested through your ASAP’s Access Manager.

URL: <https://har4.harmonyis.net/MA/Report%20Library>

Navigate to Report Library>Community> ANCHOR. Open the report titled ANCHOR Enrollment Validation Report.

**Report Parameters**

A report runner can indicate their ASAP(s) of interest as well as the range of dates for the enrollments to be reviewed. Adjust the following parameters to assist with filtering report as needed.

Enrollment Start Date

Set the Enrollment start to capture any enrollments starting on or after this date.

Start Date Range

Set the Start Date end range to capture enrollments up to this date. Field defaults to current date, but able to change date range once report is run.

Agency

Set the AGENCY parameter to display the ASAP(s) of interest, you may choose more than one ASAP.

**Export to Excel**

Export the report’s output to Excel. The rest of this User Guide will refer to the XLS and its names tables.

**About the dataset**

Query is based upon ANCHOR enrollments as entered in A&D.

Each row of the report lists the Consumers with an Anchor enrollment sorted by Agency (if more than one selected), by status of enrollment, and by start date of enrollment.



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| **Agency** | Identifies Agency which Consumer is enrolled under. Filtered based on selected Agency parameter. |
| **Client ID** | Provides Consumer A&D ID for Review as needed. |
| **Start Date** | Lists start date of Consumer’s ANCHOR enrollment. |
| **End Date** | End Date of ANCHOR enrollment as entered in A&D. Required when closing enrollment regardless of status type. |
| **Termination Date** | Termination Date of ANCHOR enrollment as entered in A&D. Required when closing enrollment regardless of status type. |
| **Status** | Identifies current Status for Enrollment as entered in A&D. |
| **Reason** | Identifies Status Reason for the selected Status, if applicable |
| **Length** | Identifies the length of time from Start Date of enrollment to either End date or current run date (if no end date entered). |
| **Over 9 Month? flag** | Flags as a Check status if the enrollment is identified as being over 9 months per program requirement. If still active, ensure that an ANCHOR extension has been submitted, reviewed, and approved by EOEA. |
| **Wrong status? flag** | Reviews ANCHOR enrollment status and flags as check if it does not meet acceptable Status. Status should only be either Active, Terminated, or Transferred. |
| **Correct closure? flag** | Reviews whether Status is identified as Terminated or Transferred and whether there is an End date and Termination date entered. |
| **Correct Reason? flag** | Flags whether Reason is appropriate or missing based on the Status of enrollment.  |