



Axiom Budgeting and Performance Reporting 2018.2

Release Notes

Last Updated: 8/27/2018

KaufmanHall

5202 Old Orchard Rd. Suite N700
Skokie, IL 60077
(847) 441-8780
(847) 965-3511 (fax)
www.kaufmanhall.com

Support email: support@kaufmanhall.com

Kaufman Hall® is a trademark of Kaufman, Hall & Associates, LLC. Microsoft®, Excel®, and Windows® are trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

This document is Kaufman, Hall & Associates, LLC Confidential Information. This document may not be distributed, copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable format without the express written consent of Kaufman, Hall & Associates, LLC.

Copyright © 2018 Kaufman, Hall & Associates, LLC. All rights reserved.

Version: 2018.2.3

Updated: 8/27/2018

Contents

- Summary 5
- Product upgrade notes 6
- Patches 7
- New features summary 9
 - Multi-select Refresh Variables for drivers 9
 - Productivity reports independent of system period 11
 - Additional Comparison Time Series options for VCC reports 12
 - Executive Monthly Package reporting 14
 - Budget Service Line Supplement 15
 - Archive current year plan files 16
 - Red flag alert to enter variance explanations 17
 - Change current payroll period 18
 - Driver data copied for new file groups 18
 - Standard Data Assessment dashboard 19
 - Updated CDM table columns 20
- Issues resolved in 2018.2 24
 - Driver, template, and calc method updates 24
 - Report updates 26
- Issues resolved in 2018.2.1 28
 - Driver, template, and calc method updates 28
 - Report updates 28
- Issues resolved in 2018.2.2 29
 - Driver, template, and calc method updates 29
 - Report updates 30
- Issues resolved in 2018.2.3 31
 - Driver, template, and calc method updates 31
 - Report updates 32
- Manual setup instructions 33
 - Updating the 2019 file group 33
 - Updating file group aliases 35

Deleting a file group	37
Known issues	39
Workaround: Editing the Recalculate Budget Files job manually	41

Summary

Kaufman Hall is pleased to announce the 2018.2 release of Axiom Budgeting and Performance Reporting . Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options, including:

- Self-help videos
- Recorded webinars
- Virtual training courses

For a complete listing of our courses, please visit www.kaufmanhall.com.

Product upgrade notes

IMPORTANT: Apply this update ONLY if you have already applied the 2018.1 (April 2018) release and completed all the manual setup steps from the corresponding release notes.

When upgrading to the 2018.2 version of Axiom Budgeting and Performance Reporting 2018.2, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

Patches

Between versions, Kaufman Hall may release a patch for a product. A patch includes corrections to the product, such as reports, the Master template, calculation methods, driver files, and utilities, or other components.

When installing the patch, the system extracts the contents of the patch from a folder location that is not viewable by the Master System User and then places it into its applicable location by processing the Update 2019 File Group utility in the Bud Admin task pane. For example, if the patch contains an update to the Expense calc method library, the updated calc method is extracted from the non-viewable location and copied to the Calc Method Library of the Budget-2019 File Group. At this point, the updated item is then available for use. For instructions, see [Updating the 2019 file group \(page 33\)](#).

There are several decisions to consider if applying a patch is right for your organization:

1. If you are currently in your planning cycle for budgeting and using plan files, then we generally recommend that you NOT update for a patch if the Master templates, calculation methods, or Driver files are included. Because plan files were built using the prior versions, this may cause a conflict with the updated version. Any new plan file that you build would contain the updates.
2. If you are currently testing plan files and are not in a final build state, we recommend that you consider applying the patch so that you use the most updated version for your final build.
3. If you have not begun your planning cycle, we recommend that you apply the update.

When applying the patch using the Update 2019 File Group utility, consider the following:

- You must delete the current Budget-2019 file group so that the system can rebuild it from the Update 2019 File Group utility.
- **IMPORTANT:** The system will delete all current plan files in the Budget-2019 file group!
- Any data entered in driver files WILL REMAIN because the system saves the data to driver tables, which remains untouched by the update. The system may update the Driver files, but the previously saved data will return from the driver tables.
- You will need to contact Kaufman Hall Support to acquire the patch installation media. This is the step that loads the patch to the non-viewable folder location so that the Update 2019 File Group utility can extract it.

Your Kaufman Hall Technical Account Manager downloads patches from the Admin Tools menu in the Axiom Launch page.

IMPORTANT: We recommend that you DO NOT download the patch yourself.

Product Update Manager

Staged Product Package: KH_Update - 2018.2.2.2

Stage a new package with one of the following versions from the portal:

Kaufman Hall Healthcare Bundle 2016.4.2.10
Released: 12/18/2016
[\[release notes\]](#) [\[manifest\]](#) [Download and Stage](#)

Or, stage an update by choosing an installer file from your computer:

[Browse for product package...](#)

Select the features to be installed or updated:

- Budget Planning - 2017.3.1.8
- Budget Provider - 2017.3.1.8
- Capital Planning - 2017.2.0.105
- Capital Tracking - 2017.2.0.105
- Financial Planning - 2017.2.0.105
- Performance Reporting - 2017.3.1.8

Set selection: [Update Required](#) [Installed](#) [All](#) [None](#)

Automatically proceed with installation if no verification errors are found

[Update Selected Features](#)

[<< Back to Update History](#)

New features summary

This section includes a description for each new feature included in this release.

IMPORTANT: Some of the new features and resolved issues listed in this document have been included in a Prototype file group folder. You must create a new file group or update an existing file group to extract the updated contents from the 2018.2 release. For instructions, see "Updating the 2019 file group" or "Chapter 8 – Rolling Forward to a New Budget Year" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Multi-select Refresh Variables for drivers

IMPORTANT: This new feature is only included with the file group prototype, which means that it is only available in the 2019 and 2020 file groups that you create after your system is upgraded to 2018.2. Older file groups (2018 and older) will not include this new feature.

As part of the 2018.2 release for Axiom Budgeting, updates were made to the user experience when selecting budget groups via Refresh Variables. The updates bring consistency to many of the budget drivers that formerly did not have a multi-select option or contained only a single-select option for budget groups.

Another important update to the user experience was a platform change to the multi-select refresh variable that includes a **Select All** and **Clear All** option, making the selection experience easier.

Multi-select was added to the following drivers:

- Budget Assumptions
- Budget Configuration
- Budget Driver
- Budget Expense Adjustments
- Budget Labor Accounts
- Budget Labor Configuration
- Budget Provider Driver
- Budget Provider Simple Dept Rate
- Budget Revenue Payor Adjustments
- Budget StatAcct

Multi-Select was added to the following drivers that were single-select:

- Budget GlobalExp
- Budget Revenue GlobalRev
- Budget Labor JobCode Dropdown
- Budget Depreciation
- Budget Labor Target

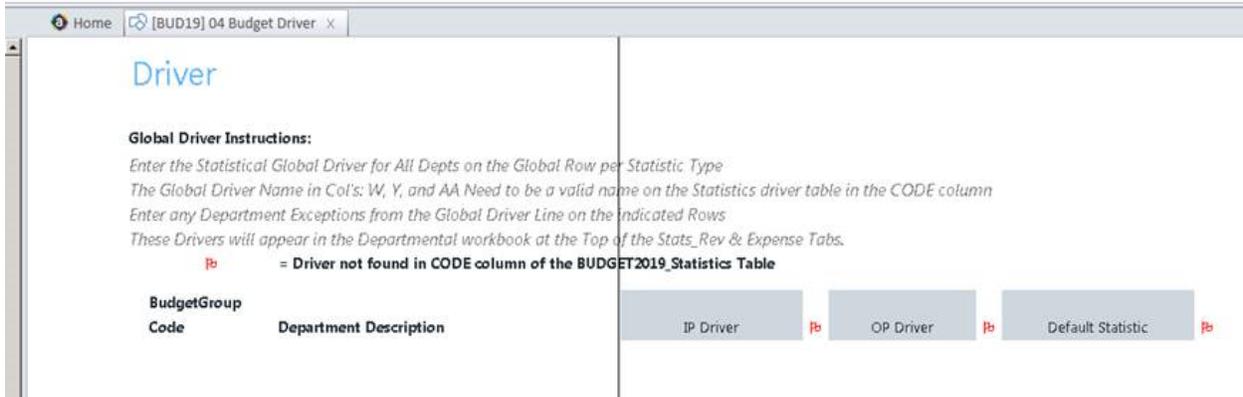
NOTE: The multi-select feature was not included for Budget Global Data for this release. It will be addressed in a future release.

Refresh options on selected drivers

Depending on the driver selected, the driver data may first populate directly on open with the user's security filter. On subsequent refresh, the multi-select options will then be available to limit data by budget group. The reason for this experience is to maintain the option to insert new data when needed.

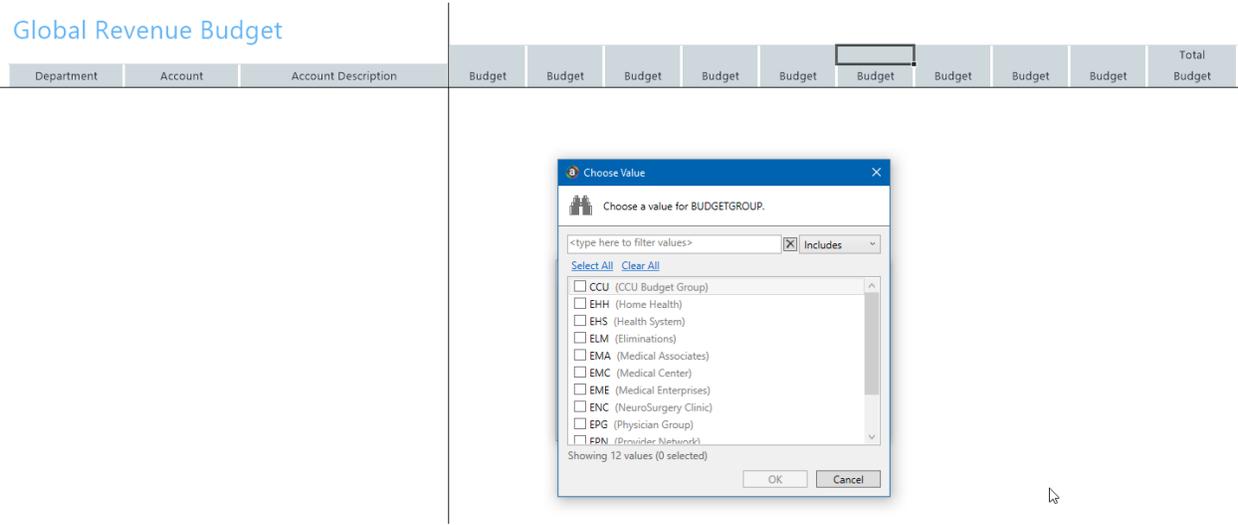
For example, if the Budget Driver was used for the first time, the Global section would need to be present and the Double Click to Insert New Budget group block would also need to display so that the driver can be configured for additional budget groups, as shown in the following example:

Without this behavior, the driver displays blank and not editable, as shown in the following example:



NOTE: The variables that display in the Refresh Variables list depend on the security role assigned to you in Axiom Budgeting and Performance Reporting. For example, all Budget Groups display to users assigned the Global Driver Management role while only the allowed subset of Budget Groups display to users assigned the Budget Admin or Budget Analyst role.

To select more than one variable, select the checkbox next to the variables to include, and click **OK**. You can also use **Select All** to select all the check boxes, or **Clear All** to deselect all of the check boxes.

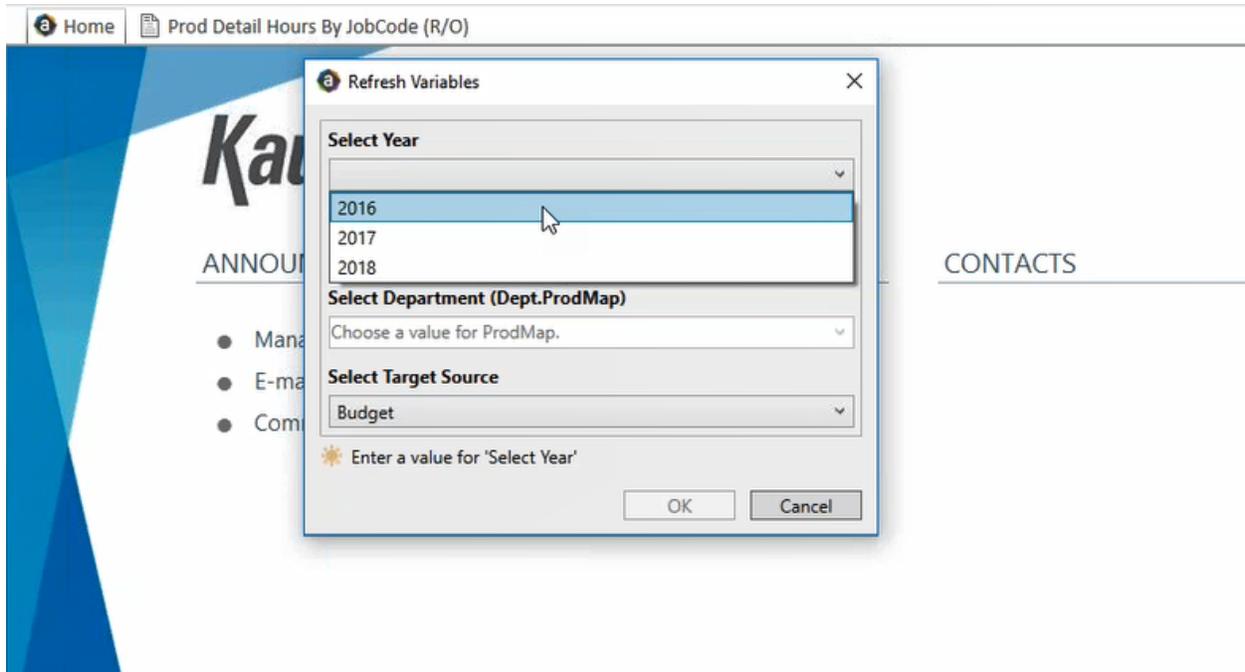


For instructions, see "Opening budget driver files" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Productivity reports independent of system period

You can now run the Productivity reports independent of the system period by selecting the year and periods available.

NOTE: When you run a Productivity trending report, you may not be able to report on the next year's data because the table does not yet exist. For example, if you turn over to the first period of 2019, then the 2020 table may not be available yet so 2020 will not display as a variable option.



When running Productivity reports, refresh variables are now available.

NOTE: The Productivity reports and utilities are optional add-ons available for purchase. They are not included with the standard reports and utilities included with Axiom Budgeting and Performance Reporting.

Additional Comparison Time Series options for VCC reports

You can now configure the Variance Comments Collections reports to include 3-Month Average, Prior Month, and Same Month Last Year data. We added the additional comparison selections for clients who do not have budget data. For example, an Axiom Rolling Forecast client who does not have a budget can use the Variance Comments Collection process by now comparing actuals to one of the newly added options. For those clients with budgets, they can use this update to compare actuals to one of the new options as a replacement for comparing to budget or flex.

IMPORTANT: To use this update, you need to contact Kaufman Hall Support so that they can manually update the Data Validation list source to include 3MthAvg, LastMth, and SameMthLY.

Tolerance Levels for Alerts:

FSSummary Groups:		Description	Min Yellow	Max Red	Threshold Red	Summary Account	Level of Comments
Custom Filter for Alert Processing:							
Comparison Time Series:							
Revenue & Usage Comparison:							
Flag Max Positive Variances as Required							
Use H_JCHours for Paid Hours filter (Default is H_Hours)							
General Threshold Levels							
Summary	Summary						
S_KeyStat	Key Statistic		0.0%	2.0%		700000	Summary
H_JCHours	Paid Hours		0.0%	2.0%		760000	Summary
R_PatientRev	Patient Revenue		0.0%	5.0%	\$0	730000	Summary

Select Budget or YTD Average for CDMCode Comparison

* Select desired level to store comments to per report area

These new options apply to the following Variance Comments Collections reports:

- Axiom\Reports Library\Management Reporting\Variance Comments\Dept Variance
- Axiom\Reports Library\Management Reporting\Variance Comments\MultiDept Variance
- Axiom\Reports Library\Management Reporting\Variance Comments\Variance Review

The following are examples of reports using the new data types available:

▶ Three Month Average

Month-End Variance Explanation

27200 - EMC Radiology - MRI (JobCode)

Report Period: Feb-2018
 Vice President: Scott Johanson
 Director: Dianne Farnell
 Manager: Chris Sparks
 Report Date: 05/18/18

Account	Description	Actual	3 Mth Avg	Better/(Worse) Variance	Percent	3 Mth Avg Alert	Required Comment	Rate	Volume	Efficiency	YTD Variance	12 Mo Trend Alert	Year-To-Date Actual	Last Yr YTD	Better/(Worse) Variance	Percent	YTD Alert
800000	Key Volume Statistic	28	28	0	0.00%	▲		0	0	0	243	▲	28	28	0	0.00%	▲
730000	Patient Revenue	1,257,545	1,214,012	43,533	3.59%	▲		43,533	0	0	9,578,675	▲	9,578,675	9,578,675	0	0.00%	▲
800100	Other Operating Revenue	2,838	1,907	931	48.79%	▲		931	0	0	12,412	▼	12,412	12,412	0	0.00%	▲
58000	Non-Operating Revenue	0	0	0	0.00%	▲		0	0	0	0	▲	0	0	0	0.00%	▲
760000	Paid Hours	1,224	1,344	120	8.9%	▲		120	0	0	(10,329)	▼	10,329	10,329	0	0.00%	▲
	FTEs	7.65	8.40	0.75	8.93%						(7.44)		7.44	7.44	0.00	0.00%	
	Hours Per Unit of Service	43.71	48.00	4.29	8.93%						368.88		368.88	368.88	0.00	0.00%	
	Revenue per FTE	164,385.35	144,519.72	19,865.63	13.75%						160,968.90		1,287,751.21	1,287,751.21	0.00	0.00%	
	Wages per Hour	26.15	24.87	(1.28)	(5.13%)						(26.02)		26.02	26.02	0.00	0.00%	
60100	Salary & Benefit Expenses	38,103	38,972	869	2.2%	▲		(2,612)	0	3,481	(310,423)	▼	310,423	310,423	0	0.00%	▲
60100	Salaries - Regular	28,838	27,020	(1,818)	(6.73%)	▼		(4,232)	0	2,413	(215,479)	▲	215,479	215,479	0	0.00%	▲
60110	Salaries - Overtime	630	1,771	1,140	64.40%	▲		982	0	158	(11,228)	▼	11,228	11,228	0	0.00%	▲
60120	Salaries - Non-Productive	1,675	3,830	2,155	56.27%	▲		1,813	0	342	(35,605)	▲	35,605	35,605	0	0.00%	▲
60600	Salaries - Contract Labor	865	811	(54)	(6.70%)	▼		(127)	0	72	(6,465)	▲	6,465	6,465	0	0.00%	▲
61100	Employee Annuity	675	677	2	0.25%	▲		(59)	0	60	(5,445)	▲	5,445	5,445	0	0.00%	▲
61200	Medical Insurance	1,634	1,795	161	8.99%	▲		1	0	160	(15,934)	▲	15,934	15,934	0	0.00%	▲
61220	Group Term Life	50	48	(1)	(2.16%)	▼		(5)	0	4	(464)	▲	404	404	0	0.00%	▲
61230	Disability Insurance	149	168	19	11.08%	▲		4	0	15	(1,305)	▲	1,305	1,305	0	0.00%	▲
61300	FICA - Social Security	2,291	2,400	109	4.54%	▲		(105)	0	214	(19,363)	▲	19,363	19,363	0	0.00%	▲
61510	Employee Benefits - PDO	1,296	453	(843)	(186.22%)	▼		(884)	0	40	805	▼	(805)	(805)	0	0.00%	▲

► Last Month

Month-End Variance Explanation																
27200 - EMC Radiology - MRI (JobCode)																
Report Period: Feb-2018 Vice President: Scott Johanson Director: Dianne Parnell Manager: Chris Sparks Report Date: 05/18/18																
Legend: ▼ Negative Variance: Required Comment ▲ Positive Variance: Required Comment ▼ Negative Variance: Exceeds \$ Threshold ▲ Negative Variance: Not Exceed \$ Threshold ▲ Positive Variance																
Account	For the Month of February		Better/(Worse) Variance	Percent	Last Mth Alert	= Required Comment	Rate	Volume	Efficiency	YTD Variance	12 Mo. Trend Alert	Year-To-Date Actual	Last Yr YTD	Better/(Worse) Variance	Percent	YTD Alert
800000	Key Volume Statistic	28	28	0	0.00%	▲	0	0	0	243	▲	28	28	0	0.00%	▲
730000	Patient Revenue	1,257,545	1,263,890	(6,345)	(0.50%)	▲	(6,345)	0	0	9,578,675	▲	9,578,675	9,578,675	0	0.00%	▲
800100	Other Operating Revenue	2,838	1,238	1,600	129.24%	▲	1,600	0	0	12,412	▼	12,412	12,412	0	0.00%	▲
58000	Non-Operating Revenue	0	0	0	0.00%	▲	0	0	0	0	▲	0	0	0	0.00%	▲
760000	Paid Hours	1,224	1,346	122	9.0%	▲	122	0	0	(10,329)	▼	10,329	10,329	0	0.00%	▲
	FTEs	7.65	8.41	0.76	9.05%					(7.44)		7.44	7.44	0.00	0.00%	
	Hours Per Unit of Service	43.71	48.06	4.35	9.05%					0.00		368.88	368.88	0.00	0.00%	
	Revenue per FTE	164,385.35	150,270.63	14,114.73	8.39%					160,968.90		1,287,751.21	1,287,751.21	0.00	0.00%	
	Wages per Hour	26.15	24.71	(1.44)	(5.84%)					(26.02)		26.02	26.02	0.00	0.00%	
60100	Salary & Benefit Expenses	38,103	37,395	(707)	(1.9%)	▼	(4,090)	0	3,383	(310,423)	▼	310,423	310,423	0	0.00%	▲
60100	Salaries - Regular	28,838	25,684	(3,154)	(12.28%)	▼	(5,477)	0	2,323	(215,479)	▲	215,479	215,479	0	0.00%	▲
60110	Salaries - Overtime	630	2,724	2,093	76.86%	▲	1,847	0	246	(11,228)	▼	11,228	11,228	0	0.00%	▲
60120	Salaries - Non-Productive	1,675	4,071	2,396	58.85%	▲	2,027	0	368	(35,605)	▲	35,605	35,605	0	0.00%	▲
60600	Salaries - Contract Labor	865	771	(94)	(12.19%)	▼	(164)	0	70	(6,465)	▲	6,465	6,465	0	0.00%	▲
61100	Employee Annuity	675	678	3	0.39%	▲	(59)	0	61	(5,445)	▲	5,445	5,445	0	0.00%	▲
61200	Medical Insurance	1,634	1,795	161	8.99%	▲	(1)	0	162	(15,934)	▲	15,934	15,934	0	0.00%	▲
61220	Group Term Life	50	49	(9)	(0.81%)	▼	(5)	0	4	(404)	▲	404	404	0	0.00%	▲
61230	Disability Insurance	149	177	28	15.74%	▲	12	0	16	(1,305)	▲	1,305	1,305	0	0.00%	▲
61300	FICA - Social Security	2,291	2,389	99	4.13%	▲	(118)	0	216	(19,363)	▲	19,363	19,363	0	0.00%	▲
61510	Employee Benefits - PDO	1,296	(942)	(2,238)	(237.50%)	▼	(2,153)	0	(85)	805	▼	(805)	(805)	0	0.00%	▲
62100	Supply Expense	11,350	18,215	6,865	37.7%	▲	6,865	0	0	(106,172)	▲	106,172	106,172	0	0.00%	▲

► Same Month Last Year

Month-End Variance Explanation																
27200 - EMC Radiology - MRI (JobCode)																
Report Period: Feb-2018 Vice President: Scott Johanson Director: Dianne Parnell Manager: Chris Sparks Report Date: 05/18/18																
Legend: ▼ Negative Variance: Required Comment ▲ Positive Variance: Required Comment ▼ Negative Variance: Exceeds \$ Threshold ▲ Negative Variance: Not Exceed \$ Threshold ▲ Positive Variance																
Account	For the Month of February		Better/(Worse) Variance	Percent	Last Yr Alert	= Required Comment	Rate	Volume	Efficiency	YTD Variance	12 Mo. Trend Alert	Year-To-Date Actual	Last Yr YTD	Better/(Worse) Variance	Percent	YTD Alert
800000	Key Volume Statistic	28	28	0	0.00%	▲	0	0	0	243	▲	28	28	0	0.00%	▲
730000	Patient Revenue	1,257,545	1,257,545	0	0.00%	▲	0	0	0	9,578,675	▲	9,578,675	9,578,675	0	0.00%	▲
800100	Other Operating Revenue	2,838	2,838	0	0.00%	▲	0	0	0	12,412	▼	12,412	12,412	0	0.00%	▲
58000	Non-Operating Revenue	0	0	0	0.00%	▲	0	0	0	0	▲	0	0	0	0.00%	▲
760000	Paid Hours	1,224	1,224	0	0.0%	▲	0	0	0	(10,329)	▼	10,329	10,329	0	0.00%	▲
	FTEs	7.65	7.65	0.00	0.00%					(7.44)		7.44	7.44	0.00	0.00%	
	Hours Per Unit of Service	43.71	43.71	0.00	0.00%					0.00		368.88	368.88	0.00	0.00%	
	Revenue per FTE	164,385.35	164,385.35	0.00	0.00%					160,968.90		1,287,751.21	1,287,751.21	0.00	0.00%	
	Wages per Hour	26.15	26.15	0.00	0.00%					(26.02)		26.02	26.02	0.00	0.00%	
60100	Salary & Benefit Expenses	38,103	38,103	0	0.0%	▲	0	0	0	(310,423)	▼	310,423	310,423	0	0.00%	▲
60100	Salaries - Regular	28,838	28,838	0	0.00%	▲	0	0	0	(215,479)	▲	215,479	215,479	0	0.00%	▲
60110	Salaries - Overtime	630	630	0	0.00%	▲	0	0	0	(11,228)	▼	11,228	11,228	0	0.00%	▲
60120	Salaries - Non-Productive	1,675	1,675	0	0.00%	▲	0	0	0	(35,605)	▲	35,605	35,605	0	0.00%	▲
60600	Salaries - Contract Labor	865	865	0	0.00%	▲	0	0	0	(6,465)	▲	6,465	6,465	0	0.00%	▲
61100	Employee Annuity	675	675	0	0.00%	▲	0	0	0	(5,445)	▲	5,445	5,445	0	0.00%	▲
61200	Medical Insurance	1,634	1,634	0	0.00%	▲	0	0	0	(15,934)	▲	15,934	15,934	0	0.00%	▲
61220	Group Term Life	50	50	0	0.00%	▲	0	0	0	(404)	▲	404	404	0	0.00%	▲
61230	Disability Insurance	149	149	0	0.00%	▲	0	0	0	(1,305)	▲	1,305	1,305	0	0.00%	▲
61300	FICA - Social Security	2,291	2,291	0	0.00%	▲	0	0	0	(19,363)	▲	19,363	19,363	0	0.00%	▲
61510	Employee Benefits - PDO	1,296	1,296	0	0.00%	▲	0	0	0	805	▼	(805)	(805)	0	0.00%	▲

To configure this option, see Step 2 in the General Settings section of "Configuring the Variance Comments Collection reports" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Executive Monthly Package reporting

To help speed up report processing and distribution, you can now run all of the Executive-level reports in one report using the Executive Monthly Package report. You can find this new report in **Explorer > Reports Library > Management Reporting > Report Packages**.

This new package report includes the following individual reports:

- Cover_Executive
- Top 10 Variances
- Summary Income Statement
- Variance Overview
- Dept Variance Rollup
- Statistic Variance Summary
- Budget Variance Rollup
- Budget Variance Summary
- Payroll Summary by Dept

IMPORTANT: While the individual Executive reports will continue to be available through version 2018.2, the Executive Monthly Package report will be the primary method for generating Executive reports going forward. As a result, the individual Executive reports will be removed starting with 2018.3. To continue using the individual reports, you can move them to a custom reporting folder. If you do this, make sure to update existing batches to reflect the new report location.

After you configure this batch report, you can then run and distribute it using the new Monthly All in One Executive Reporting batch. You can find this new utility in **Explorer > Reports Library > Management Reporting Utilities > Report Batches**.

For instructions, see "Configuring the Executive Monthly Package report" and "Running the Monthly All in One Executive Reporting batch" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Budget Service Line Supplement

IMPORTANT: This new feature is only included with the file group prototype, which means that it is only available in the 2019 and 2020 file groups that you create after your system is upgraded to 2018.2. Older file groups (2018 and older) will not include this new feature.

You can now configure Service Lines budget statistics by using the new Budget Service Line Supplement driver. This new driver will access data imported into the new service line data tables much like the Statistics driver accesses ACT20XX tables.

GLOBAL SERVICE LINE STATISTICS SUPPLEMENT

Instructions:
 Double Click to insert a new custom row. From there enter the Budget Group and a Custom Name. This can be anything that isn't already used as another stat. Add to the getdata in AB. Keep the reference to AB\$21. Copy and paste where indicated

SERVICE LINE STATISTICS				Service Line	Entity	Data Type	Spread Tag	FY 2016 Actual	FY 2017 Actual
Medical Center For YTD through Period 6									
BudgetGroup	Custom Name	Budget Group Description							
EMC	Cardiology_Encounters	Medical CenterCardiology_Encounters		Cardiology	EMC	Encounters		0	214
Save				Double Click to Insert New Custom Row Double Click to Insert New Service Line Subtotal Double Click to Insert New Budget Group					

The values you enter in this new driver are pulled into the existing Budget Statistics driver as a new subsection, where you can edit the Remaining Projection and NYB monthly values, as needed.

GLOBAL STATISTICS

Instructions:
 After adding a new Budget Group code or new Dept & Acct codes for the Dept\Acct rows, Hit Save. The new rows will come back populated with historical data if available.

Generic Statistics			Spread Tag	FY 2016 Actual	FY 2017 Actual	FY 2018 Budget	FY 2018 Jan YTD Actual	FY 2018 Feb-Dec Projected	FY 2018 Projected	Actual Percent of Total
Calendar Days				366	365	365	31	334	365	
Worked Days				261	261	260	173	87	260	
Paid Hours				2,086	2,091	2,086	1,051	1,034	2,086	
Consolidated										
Admits	Total Admissions			8,195	8,195	2,490	592	3,879	4,471	
Discharges	Total Discharges			0	0	0	0	0	0	
PatientDays	Total Patient Days			117,764	107,330	90,832	8,984	52,668	61,652	
TotalVisits	Total Outpatient Visits			239,788	239,788	223,722	15,923	117,227	133,150	
ERVisits	Total ER Visits			0	0	0	0	0	0	
EMC	Test	Medical Center\Test	Default Calc	3,442,692,848	3,461,711,476	2,588,833,907	966,665,482	#####	#####	
BudgetGroup	Service Line Name	Service Line Selection								
EMC	Cardiology_charges	Medical CenterCardiology_charges	Previous Input	0	13,517,089		6,449,632	500	6,450,132	
EMC	Cardiology_Encounters	Medical CenterCardiology_Encounters	Default Calc	0	214		103	1,110	1,213	
EMC	Cardiology_Net	Medical CenterCardiology_Net	Default Calc	0	3,460,522		0	0	0	
EMC	EMC_Combined	Medical CenterEMC_Combined	Default Calc	0	38,182,607		17,885,420	192,700,976	210,586,396	
EMC	General Medicine_charges	Medical CenterGeneral Medicine_charges	Default Calc	0	24,665,518		11,435,788	123,211,393	134,647,181	
EMC	General Medicine_Encounters	Medical CenterGeneral Medicine_Encounters	Default Calc	0	361		166	1,789	1,955	
EMC	GI Medical_Days	Medical CenterGI Medical_Days	Default Calc	0	733		382	4,116	4,498	
Double Click to Insert New Budget Group Block										

From here, this information is then pulled into the Budget Driver for use in plan files.

For more information, see "Budget Service Line Supplement" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Archive current year plan files

You can now archive current year plan files at any time by using the Archive Current Year Plan Files command. This command performs several actions, including converting all of the formulas in the plan files to hard-coded values, to prepare the file for archiving. After you archive the current year's plan file, you can then make the appropriate dimension configuration changes to prepare for next year's budget planning without affecting the data in the current year budget.

The Archive Current Year Plan Files utility is located in the **Bud Admin** task pane, in the **Budget System Maintenance** section.

For more information, see the following topics in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*:

- "Archiving current year plan file"
- "Restoring archived plan files"
- "Managing restore points"
- "Configuring plan file purging"

Red flag alert to enter variance explanations

In the Budget Configuration driver, you can now require users that are assigned the Budget User security role to enter comments when a line item exceeds a defined threshold in the Stat_Rev and Expense tabs before saving the plan file.

NOTE: This option only affects users with the Budgeting User role. Users assigned the Bud Admin, Bud Analyst, or custom roles will not be required to save. This also does not affect Scheduler job processes.

Global Budget Workbook Configuration Settings

Global Setup	Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl	BudPrelim	Bud_Target
Dept Dimension Grouping Code to be used for Global Assignments								BudgetGroup		
Use KHACMDimGrp?								Yes		
Activate Red Flag PopUp?								No		
Expense Transaction Drilling, On or Off?								No		
Dept Column Width?								Yes		
Acct Column Width?								0		
Allow Manual Refresh of AQs?								15		
								Off		

If enabled, in the Stat_Rev and Expense tab, the red flag pop-up message displays above the Comments heading, and a red flag icon displays in the Red Flag column.

FY 2018 /Unit	Global Adjust	% Adjust	Amt Adjust	FY 2019 /Unit	FY 2019 Budget	Budget Method	Bud-Proj Variance Amt	%	Red Flag	Comments	Oct-18 Budget
365 Default Statistic											31
32.26	0.0%	10,000	59.65	21,774	Per Calendar Days	10,000	84.9%				1,849
0.00	0.0%	0	0.00	0	Per Calendar Days	0	0.0%				0
0 Per Key Total Statistic											0
0.00	0.0%	0	0.00	0	Per Key Total Statistic	0	0.0%				0
7.21	0.0%	0	7.21	156,947	Per Key IP-Statistic	72,080	84.9%	RF			13,328
7.21		0	7.21	156,947		72,080	84.9%				13,328

For more information, see "Budget Configuration" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Change current payroll period

You can now use the new Change Payroll 27 Tables-Current Period utility to change the Payroll 27 tables current period.

NOTE: You must have the Administrator role profile to access this utility.

Set Pay Period

Use this form to change the Current Pay Period.

Current System Info:

Current Pay Period: 18

New Pay Period Info:

New Pay Period:



A screenshot of a dropdown menu. The menu is open, showing a list of numbers from 11 to 18. The number 18 is highlighted in blue, indicating it is the selected option. The dropdown is positioned to the right of the 'New Pay Period:' label.

You can find the **Change Payroll 27 Tables-Current Period** utility in the **Bud Admin or Management Reporting Admin** task pane, in the **Budget System Maintenance** section.

For more information, see "Configuring the current payroll period" in the *Axiom Budgeting and Performance Reporting 2018.2 Administrator's Guide*.

Driver data copied for new file groups

Prior to this release, clients would need to contact Kaufman Hall Support to obtain utilities to copy driver content from a prior planning file group. Now when you create a new file group, the system copies your driver data automatically to the file group. For example, if you create a 2020 file group, the driver tables from the 2019 file group are copied automatically into the 2020 driver tables as the starting point for creating a new budget plan file. As a result, we removed the instructions for copying drivers from the Bud Admin task pane because they are no longer needed.

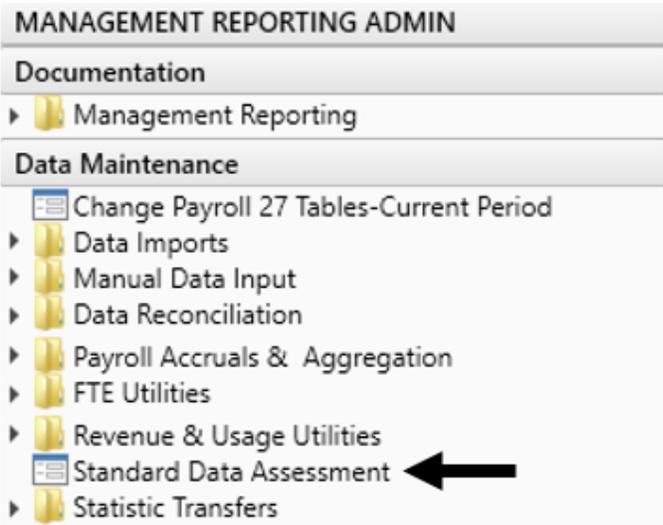
Standard Data Assessment dashboard

The new Standard Data Assessment dashboard has been included in your Management Reporting Admin task pane. This tool provides several benefits:

- Helps improve the quality of your data
- Ensures that you use standard Kaufman Hall codes to keep you compliant with Kaufman Hall standards
- Helps save time in preparing for monthly reporting and annual budgeting

We added the KHASstandardClass column in the ACCT, DEPT, ENTITY, JOBCODE, and Paytype tables to help standardize reporting across the organization. Currently, the column populates with a default value of NotMapped. We will populate these columns at a later date, but until then they will be out of compliance.

This dashboard is located in the **Management Reporting Admin** task pane, in the **Data Maintenance** section.



The following is an example of the dashboard:

Standard Data Assessment
 Period ending: January 31, 2017

Refresh

Include Net Income in Fund Balance? Yes No

View: All

Organization	Balanced BS Actual	Balanced BS Budget	Standard FSDetail	Standard FSSummary	KHA Standard Class		Current Period Min. Period	Jan-2017 Apr-2018	Jan-2017 Apr-2018
KHA Health	○	○	○	✓	○				

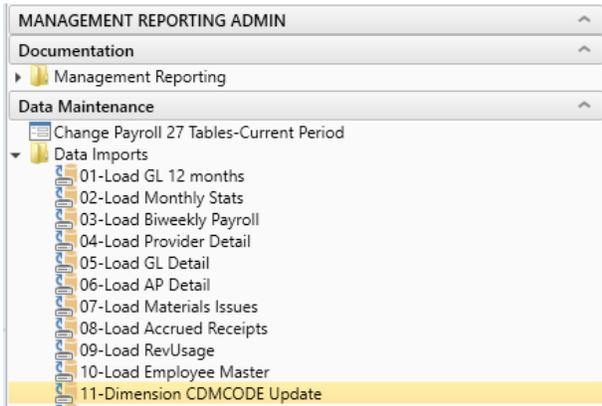
Entity	Description	Actual GL	Budget GL	Actual Bal Sheet	Budget Bal Sheet	Actual Rev/Usage	Cur Month Volatility	Financial Current	Payroll Current
1	KH Health System	✓	✓	✓	✓	✓	✓	○	○
2	KH Medical Center	✓	✓	✓	▲	▲	✓	○	○
3	KH Physician Group	✓	✓	✓	▲	✓	✓	○	○
4	Rehabilitation Care Hospital	✓	✓	✓	▲	▲	✓	○	○
5	KH Medical Enterprises	✓	▲	✓	▲	✓	✓	○	○
6	KH NeuroSurgery Clinic	✓	✓	✓	▲	✓	✓	○	○
9	Eliminating Entries	✓	▲	✓	▲	✓	✓	○	○
10	KH Medical Associates	✓	✓	✓	▲	✓	✓	○	○

Updated CDM table columns

You can now post Universal Billing Revenue Codes (UBRev) and Health Care Procedure Coding System/Current Procedural Terminology Codes (HCPCS_CPT) for every CDM CodeNew columns. Both columns are data type String and can be up to 25 characters in length. This allows you to report on charges and volumes using either the UBRev or HCPCS_CPT codes.

String 25	String 100	String 25	String 25
CDMCode	Description	UBRev	HCPCS_CPT
C2723009117	Zz-5Fr 65Cm Cobra C2 No Sideholes	0827	G0141
C2723009118	Zz-5Fr 65Cm Cobra C2 Sideholes	0910	G0925
C2723009122	Zz-5Fr 65Cm Pigtail Flush Cathete	0558	G0139
C2723009127	Zz-5Fr 65Cm Simmons 2 Catheter	0877	G0847
C2723009129	Zz-5Fr 90Cm Pigtail Flush Cathete	0465	G0372
C2723009135	Zz-5Fr 100Cm Simmons 3 Catheter	0308	G0759
C2723009146	Zz-6Fr All Purpose Draincath Pig	0286	G0961
C2723009148	Zz-6Fr Sheath Set	0677	G0551
C2723009153	Zz-7Fr Sheath Set	0531	G0007
C2723009158	Zz-8Fr Sheath Set	0109	G0360
C2723009161	Zz-8Fr 22Cm Ureteral Stent	0997	G0887
C2723009163	Zz-8Fr 24 Cm Ureteral Stent	0114	G0568
C2723009166	Zz-8Fr All Purpose Drain Catheter	0428	G0937
C2723009167	Zz-8Fr All Purpose Draincath Pig	0443	G0865
C2723009168	Zz-8Fr Biliary Drain Catheter	0039	G0312
C2723009169	Zz-8Fr Nephrostomy Catheter	0671	G0345
C2723009172	Zz-8Fr Vanadel Dilatation Cath	0243	G0178
C2723009177	Zz-9Fr Banana Peelwaw Sheath Set	0238	G0199

In addition, the new Dimension CDMCODE Update import allows you to update the Dimensions table. This import is located in the Management Reporting task pane, in the Data Maintenance section.

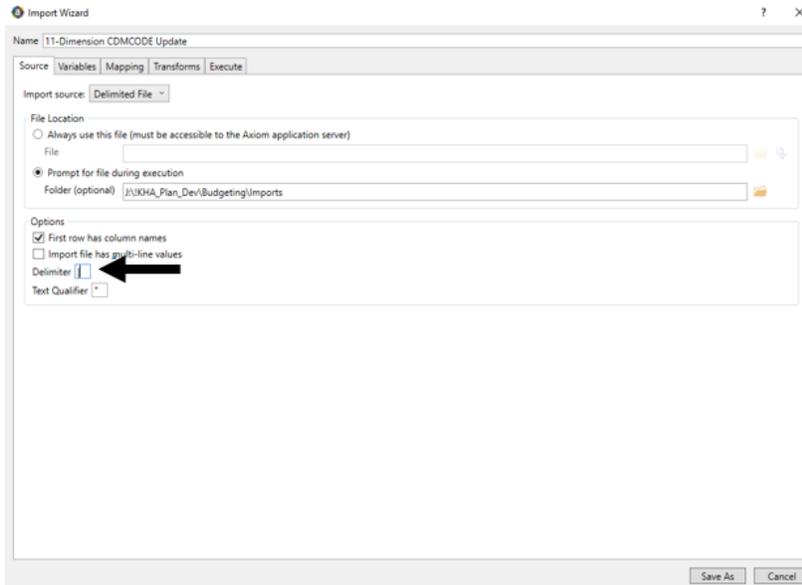


This import allows you to import a .CSV file using with the first row having headers.

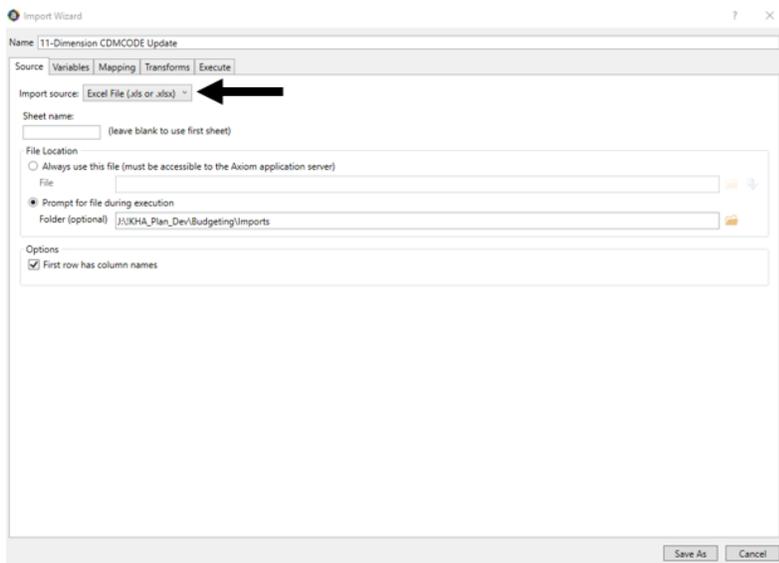
NOTE: The import adds the letter C to your CDM codes.

```
File Edit Format View Help
|-----|
| CDMCode,Desc,UBRv,HCPCs
| 2614010150,ER Level I <2Hr,0436,G0369
| 2614010151,ER Level I >2Hr,0511,G0721
| 2614010152,ER Level II <2Hr,0816,G0332
| 2614010153,ER Level II >2Hr,0824,G0102
| 2614010154,ER Level III <2Hr,0611,G0182
| 2614010155,ER Level III >2Hr,0846,G0788
| 2614010156,ER Level IV <2Hr,0919,G0706
| 2614010157,ER Level IV >2Hr,0249,G0105
| 2614010158,ER Level V <2Hr,0999,G0323
| 2614010159,ER Level V >2Hr,0519,G0070
| 2614010160,ER Code 99,0127,G0615
| 2614010161,ER Level I Comptrac,0550,G0301
| 2614011000,1A Regular Private Room Charge,0728,G0533
| 2614011008,1A Observation,0811,G0404
| 2614015000,1E Regular Private Room,0880,G0062
| 2614015008,1E Observation,0768,G0434
| 2614020065,Splint Orthoglass 0g3L 3X15Ft,0378,G0681
| 2614020151,Crutch Adult Pair,0149,G0337
| 2623005001,CVS Recovery Charge-1 Hour,0058,G0486
| 2623005007,CVS Recovery Charge-4 Hours,0564,G0181
| 2623005009,CVS Recovery Charge-5 Hours,0197,G0403
| 2623005010,CVS Recovery Charge-5 1/2 Hours,0501,G0986
| 2623010002,Blood Withdrawal CVS,0270,G0896
| 2623010007,"Venipuncture, CVS",0216,G0107
| 2623020002,Monitor Blood Pressure,0414,G0452
| 2623020040,Telemetry Monitoring,0393,G0304
| 2623023000,CVS Regular Private Room,0044,G0575
```

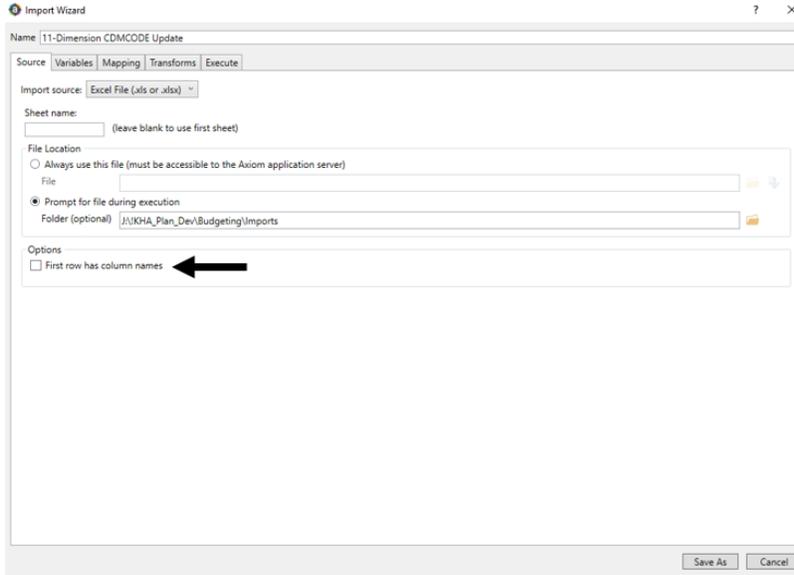
If you cannot provide a file in a .CSV format, you can update this import to use a pipe delimiter or an Excel file. To update the file to accept an Excel file, launch the import from the task pane, and click the Source tab. In the Delimiter field, type the pipe symbol, as shown in the following example.



To change the import to use an Excel spreadsheet, in the **Source** tab, change the import source to Excel File. If your data is on the first sheet of the workbook, no other changes required.



If your data does not have headers on the first row for either file format, unselect the **First row has column names** check box.



The following table lists the file specs for this import and will work with the import described above:

Field	Description	Opt/Req	Field Type	Length
CDM Code	Charge Code Number	R	Text	25
CDM Description	Description of CDM Code	O	Text	100
UBRev	Universal Billing Code	R	Text	25
HCPCS CPT	Health Care Procedure Coding System/Current Procedural Terminology Codes	R	Text	25

Issues resolved in 2018.2

The following tables list the resolutions for issues addressed in 2018.2, released on June 25, 2018:

Driver, template, and calc method updates

Location	Issue and Resolution
<p>Template: PFB-06424 - Issue Provider Simple Stat and Provider Simple Rev calc methods [TFS 22861]</p>	<p>Symptom: The Bud Admin role does not allow Bud Admin users to add or change the Provider Simple Stat and Provider Simple Rev calc methods.</p> <p>Resolution: Corrected by updating the insert control formula in each row in columns CB and CC.</p>
<p>Template: PFB-06381 - Employee List Tab Freeze Panes are set above the header row [TFS 22863]</p>	<p>Symptom: Freeze Panes on the Employee List tab are set above the header row.</p> <p>Resolution: Corrected by updating the Freeze Panes on the Empl_List column on Control Sheet to range 71.</p>
<p>Template: PFB-06319 - Stat_Rev - Column AX should be formatted as % with 2 decimals [TFS 21429]</p>	<p>Symptom: For the Provider Simple calc method, the format in column AX should be a percentage with 2 decimals.</p> <p>Resolution: Corrected by updating the Provider_Simple_Rev calc method in column AX. Relevant cells in Column AX (col 50) are now formatted as a % with two decimal places.</p>
<p>Template: PFB-05622 - Incorrect formula for Projected Year Total on Contract Providers [TFS 14023]</p>	<p>Symptom: When using the Contract Provider section on the top of the ProviderComp tab (Rows 122-126), the formula for the Projected Total Year Dollars (column O) is incorrect.</p> <p>Resolution: Corrected in version 2017.3.</p>
<p>Driver: PFB-06290 - Incorrect Budget Month Headings in GlobalRevenue Driver [TFS 21005]</p>	<p>Symptom: When using the Global Revenue Driver in the Budget 2019 file group, the headings for the last six months of the year (assuming a 6/30 FYE) display incorrectly as 2018.</p> <p>Resolution: Corrected the formatting in the GlobalRev worksheet tab in cells AC45:AN45.</p>
<p>Driver: PFB-05748 - Budget Labor Benchmark formula error [TFS 16642]</p>	<p>Symptom: There is a formula error in column V of the Budget Labor Benchmark driver file that results in the CY target for PHPUOS not properly carrying forward to the NY Target.</p> <p>Resolution: Corrected by changing the Benchmark and New Benchmark calc methods.</p>

Location	Issue and Resolution
Calc Method: PFB-06297 - Modify column L in Jobcode Calc method [TFS 22350]	<p>Symptom: In the release notes for Axiom Budgeting 2017.3, we mention that the % Variable conditional formatting on the JobCode tab will be fixed in future release. However, the resolution notes did not mention column L, which was part of the original reported problem. Column L should have the formula to hide the cell.</p> <p>Resolution: Corrected by reformatting the column.</p>
Calc Method: PFB-06382 - Expense Drill - Global Expense [TFS 22624]	<p>Symptom: When drilling on a row where the budget method is Global Expense, the system displays an error.</p> <p>Resolution: Corrected the GlobalData, GLocalExpense and CM_GlobalExp calc method and column CR by adding the formula to allow for drilling in column CR.</p>
Calc Method: PFB-06255 - Budget Allowance Calc Method is not Budget Group compliant [TFS 20979]	<p>Symptom: The Allowance calc method does not recognize a Budget Group exception on the Budget Revenue Deductions driver.</p> <p>Resolution: Corrected the formula in column BB to reference anchored cell \$P\$38 on Variables tab which will reference the Deductions driver.</p>
Calc Method: PFB-06280 - Revenue_Stat calc method is referencing incorrect col for price increase effective month [TFS 21004]	<p>Symptom: In the Revenue_Stat calc method, the reference to price increase effective month is off by two columns, preventing the price increase from taking effect.</p> <p>Resolution: Corrected by updating the formula in column AV of the Stat_Rev calc method library and Revenue_Stat calc method to reference column BB instead of BD.</p>
Calc Method: PFB-06323 - Stat_Rev Calc method missing = [TFS 22871]	<p>Symptom: It is actually a bad formula in column AQ for the Revenue_Stat calc method.</p> <p>Resolution: Corrected by changing the Revenue_Stat calc method (Stat_Rev Calc Library/Stat_Rev worksheet tab).</p>
Calc Method: PFB-05302 - Detail Method Rev vs Expense [TFS 11181]	<p>Symptom: When using the Detail Calc Method, the methodology behavior differs between the Stat_Rev tab and the Expense tab.</p> <p>Resolution: Corrected by removing the hard coded [HideRow] in col BH-BL of the Preliminary Estimate row (row 2 of the calc method) for both the Add New Detail and Detail calc methods.</p>
Calc Method: PFB-06426 - Error in Non-Key Statistics when using multiple Key Stat Accts [TFS 22895]	<p>Symptom: When a dept has multiple rows of Key Stats and multiple rows of Non-Key stats referencing the key stat rows, the last month causes a negative value.</p> <p>Resolution: Changed the formula in column AY to reference the total IP, OP or Oth stat totals on rows 59, 60, 63 on the Stat_Rev tab.</p>

Location	Issue and Resolution
Table: PFB-06562 - DEPT.RptMap Description error [TFS 24927]	<p>Symptom: The Description in the DEPT Dimensions for the RptMap column in incorrectly listed as Repeat Map. This should read Report Map</p> <p>Resolution: Corrected by changing Repeat Map to Report Map.</p>

Report updates

Location	Issue and Resolution
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\RU Report.xlsx	<p>Issue: PFB-06352 - RU Report has dev data left behind on the List tab [TFS 22970]</p> <p>Symptom: There is demo data in cell C7 of the List tab.</p> <p>Resolution: Corrected by removing the demo data from cell C7.</p>
\Axiom\Reports Library\Management Reporting Utilities\Flex Budget\FlexCalculator by Month.xlsx	<p>Issue: PFB-06224 - Urgent: FlexCalculator by Month formula issue [TFS 19932]</p> <p>Symptom: Incorrect formula in K4.</p> <p>Resolution: Corrected by changing the formula.</p>
\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Batches\Biweekly Alert Processing Batch.xlsx	<p>Issue: PFB-06240 - Biweekly Alert Processing [TFS 20174]</p> <p>Symptom: In columns F and G, the report headers do not align with the set up for the batch.</p> <p>Resolution: Corrected the issue on the labels on row 7 to match the coding on row 1.</p>
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\Dept Variance.xlsx	<p>Issue: PFB-06132 - VCC Dept Variance report windows client font [TFS 19051]</p> <p>Symptom: The Dept Variance report uses Wing Dings 3 in column T for the arrows using 2 for up arrow and 4 for down arrow. This font does not translate for these choices in the Windows Client.</p> <p>Resolution: Corrected the formulas and formatting.</p>
\Axiom\Reports Library\Budgeting Reports\Provider Budget\Compensation\Provider Compensation Comparison	<p>Issue: PFB-06295 - Provider Compensation Comparison report-Hold Harmless calculation [TFS 21006]</p> <p>Symptom: The formula in cell M4 does not have the reference to the hold harmless rate in cell E7 anchored.</p> <p>Resolution: Corrected by changing the formula in M4 to handle negative input values.</p>

Location	Issue and Resolution
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill01Transaction.xlsx	Issue: VCC drills returning a #ERR in header for account description [TFS 23775]
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill02JobCode.xlsx	Symptom: Several VCC drills had an issue created when we added Acct.RptMap when using Acct.RptMap.Description. The system would return a #ERR with the formulas fixed in the dev notes.
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill03Employee.xlsx	Resolution: Corrected by updating the formula in each drill to resolve the error.
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill04Trend.xlsx	
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill07JE.xlsx	

Issues resolved in 2018.2.1

The following tables list the resolutions for issues addressed in 2018.2.1, released on July 16, 2018:

Driver, template, and calc method updates

No issues were addressed in the 2018.2.1 release related to these items.

Report updates

Location	Issue and Resolution
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	<p>Issue: PFB - 06099 - Budget Variance by Dept: #NA when running multipass [TFS 26019]</p> <p>Symptom: When running multipass for the Budget Variance by Dept report, the drop-downs in T10, T11, and T12 do not resolve.</p> <p>Resolution: Corrected by updating the combo box in column T and adjusting the header when running multipass.</p>

Issues resolved in 2018.2.2

The following tables list the resolutions for issues addressed in 2018.2.2, released on August 6th, 2018:

Driver, template, and calc method updates

Location	Issue and Resolution
<p>Driver: PFB-05834 - BP Budget Statistic Supplement security defect [TFS 26630]</p>	<p>Symptom:There are issues with the Budget Statistics Supplement driver when being used by a NON-Admin user.</p> <ol style="list-style-type: none"> 1. The report opens as (R/O). This is a static file which does not rebuild so if you do not have access to save the file, you cannot add your new statistics to the file. It will save the values to the database for the initial time however the statistic does not get added to the file itself. 2. Since this is a static file, all Budget Groups are populated on the same driver. If I do not have access to a particular budget group, the save data fails since I am attempting to save to a budget group that I do not write access to. 3. Since this is a static file, I have the opportunity to edit data for other budget groups, other than my own. <p>Resolution: The following corrections have been made to the issues listed above:</p> <ol style="list-style-type: none"> 1. This driver remains a static Excel style meaning only one user may open and edit the file. 2. Changed the Security Setting for the Budget Statistics Supplement within the Budget Analyst role to Read/Write. Now both BudAdmin and BudAnalyst roles have read/write access to the driver. 3. Modified Save and Hide logic on the calc method rows of the Budget Statistics Supplement. User's Write Filter will determine budget group access. Budget groups outside a user's write filter will no longer be viewable or editable.
<p>Calc Method: PFB-06233 - Bad Debt calc method does not work with Revenue_Stat calc method for patient rev [TFS 26632]</p>	<p>Symptom:The BadDebt calc method does not calculate when the calc method for patient revenue accounts is Revenue_Stat. The BadDebt calc method looks to column AS to find dept#_PtRev and Revenue_Stat method tags this column with a project method, e.g. OPProj.</p> <p>Resolution: Corrected by updating formulas in the Revenue_Stat calc method.</p>

Location	Issue and Resolution
Calc Method: PFB-06550 - Budget Statistics Supplement Manual Spread [TFS 26631]	<p>Symptom:When using the Budget Statistics Supplement Driver, the Manual Spread option does not allow for user entry.</p> <p>Resolution: Corrected by adding conditional formatting to Add Custom Row calc method for columns AV:BG, and removed cell protection for columns AV:BG.</p>
Calc Method: PFB-06706 - Error on Market1 and Market 2 for Dept Group calc method on Labor Rates driver [TFS 26527]	<p>Symptom: When using the Dept Global exception for Market 1 and Market 2 percentage, the values do not retain after saving.</p> <p>Resolution: Corrected by updating cells AG140 and AK140.</p>

Report updates

No issues were addressed in the 2018.2.2 release related to these items.

Issues resolved in 2018.2.3

The following tables list the resolutions for issues addressed in 2018.2.3, released on August 27th, 2018:

Driver, template, and calc method updates

Location	Issue and Resolution
Calc Method: PFB-06119 - Add New Provider Detail Calc Method [TFS 26633]	<p>Symptom: In the Add New Provider Detail calc method of the Provider tab, the end of the match range in the formula is hard coded to Z\$5792. When a user adds a new provider outside of that range, the system does not find the data and returns a #REF!.</p> <p>Resolution: Updated the Add New ProviderDetail calc method.</p>
Calc Method: PFB-06557 - BP Employee Labor Add New Jobcode CYP Rate error [TFS 26628]	<p>Symptom: When selecting Add New Job Code on the Employee labor tab, the Current Year Projected dollars do not calculate correctly (column O).</p> <p>Resolution: Corrected by updating the Add New Jobcode and the Add New Employee calc methods</p>
Calc Method: PFB-06709 - Incorrect Calc Method tag on Procedure lines in Add New Provider Blk [TFS 26565]	<p>Symptom:When there are Procedures in the Add New Provider block, the Budget Method incorrectly defaults to "Per Net Production Days" even though the primary stat (ex. Encounters or Visits) exist. This causes the system to not correctly budget for the Procedures, which can impact the other items for the Provider as well.</p> <p>Resolution: Corrected by updating the matching logic in the following calc methods::</p> <ul style="list-style-type: none"> • New Encounter ProviderDetail FinClass • New Procedure ProviderDetail FinClass • New RVU ProviderDetail FinClass • New Encounter ProviderDetail FinClass • New WRVU ProviderDetail FinClass
Template: PFB-05752 - BP Change font color on Expense Tab warning [TFS 26635]	<p>Symptom: In cell D88 on the Expense tab of the Master template, recommend changing the font on the row that alerts users that Salaries do not match to red.</p> <p>Resolution: Corrected by adding conditional formatting to cell D88 (salaries) and D112 (Hours) to include red text formatting when the formula is activated for out of balance. If in balance, the cell displays as blank for formatting.</p>

Location	Issue and Resolution
Table: ACT_Pay27_2019ACT_Pay27_2019 table has mislabeled columns [TFS 27286]	<p>Symptom: In the ACT_Pay27_2019ACT_Pay27_2019 table the columns for AlertComments for period 1, 2 and 3 say AlertCommentPre1, AlertCommentPre2 and AlertCommentPre3 and should just say AlertComment1, AlertComment2 and AlertComment3.</p> <p>Resolution: Corrected by updating the column for the proper name.</p>

Report updates

No issues were addressed in the 2018.2.3 release related to these items.

Manual setup instructions

Use the following instructions for updating Axiom Budgeting and Performance Reporting for this release.

Updating the 2019 file group

Between releases, Kaufman Hall may update the prototype file group, which is the basis for all file groups in Axiom Budgeting and Performance Reporting.

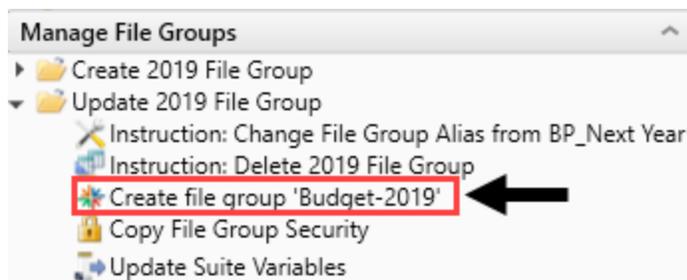
Update Existing File Group allows you to manage and apply patches issued by Kaufman Hall for a particular version. For example, after creating a new 2019 File Group using Budget Planning version 2018.1, suppose that work begins on existing driver files and budget plan files prior to final build. Subsequently, Kaufman Hall issues a patch for 2018.1. Master System Users can download the patch and use the Update Existing File Group to apply the updated files to the existing 2019 file group.

To apply the patch, you need to recreate the existing file group (2019 in this example) using Update Existing File Group. Any updates made to the drivers will remain because the driver tables are not affected when deleting the existing file group. Plan files built prior to the update for the patch remain unchanged, but you do need to re-process them, which is why we instruct you to select updates before your final build.

Your organization is not required to implement these prototype file group updates, but if you do, follow these steps to update your existing Budget 2019 file group.

To update the 2019 file group:

1. [Change the file group alias for BP_Next Year](#). This is necessary because BP_Next Year cannot point to the file group you are deleting. You will change it back to 2019 after you delete the file group.
2. [Delete the 2019 file group](#).
3. In the **Bud Admin** task pane, in the **Manage File Groups** section, click **Update 2019 File Group**, and double-click **Create File Group 'Budget-2019'**.



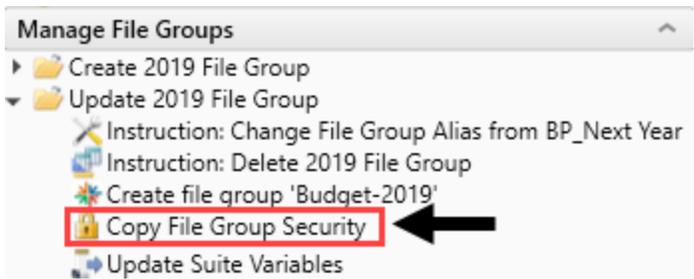
4. Change the BP_Next Year file alias to 2019.
5. The system displays a dialog that lists of all the tables it will create as part of the new file group.

Review the list, and to continue, click **OK**.

NOTE: This may take a couple of minutes to complete.

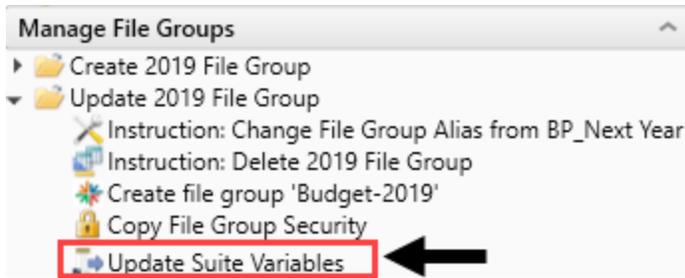


6. Double-click **Copy File Group Security**.



7. At the **Successfully copied file group security** prompt, click **OK**.

8. Double-click **Update Suite Variables**.



9. In the Suite Variable Input Form, edit the following fields, and click Save:

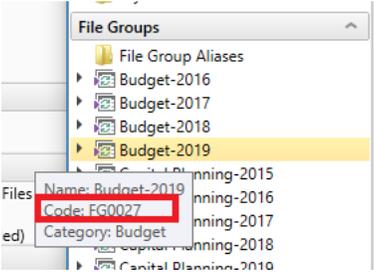
SuiteVariables Input Form

Suite_Info Description Parameter Product

Table to Post To: SuiteVariables

Click "Save" to save values to the database

Suite_Info	Description	Parameter	Product	Default
Suite				
ORGNAME	OrgName	KHA Health	Suite	My Organization
File Group Variables				
BudActiveFG	Budgeting Active File Group	FG0044	Budgeting	FG001
BudPlanCode	Budgeting Plan Code Table	DEPT	Budgeting	Dept
BudgetYr	Budget Active Budget Year	2018	Budgeting	2017
BudActiveFGName	Budget Planning Active File Group Name	Budget2018	Budgeting	Budget-2017

Field	Entry
BudActiveFG	FG0027 (example of code only. Mouse over the File Group created and use that code). 
BudgetYr	Type 2019.
BudgetActiveFGName	Type the file group to activate. For example Budget2019.

10. In the Main ribbon tab, click Save.

11. Close the Suite Variable Input Form.

Updating file group aliases

File group aliases are reference pointers that are used throughout the application to determine which file group corresponds to which budgeting year.

IMPORTANT: The aliases must be set before copying driver security so that the most recent year is used. For example, if a 2019 File Group was created and the intent is to copy the file group security from 2018, then BP_CurrentYear must point to 2018 File Group.

To update file group aliases:

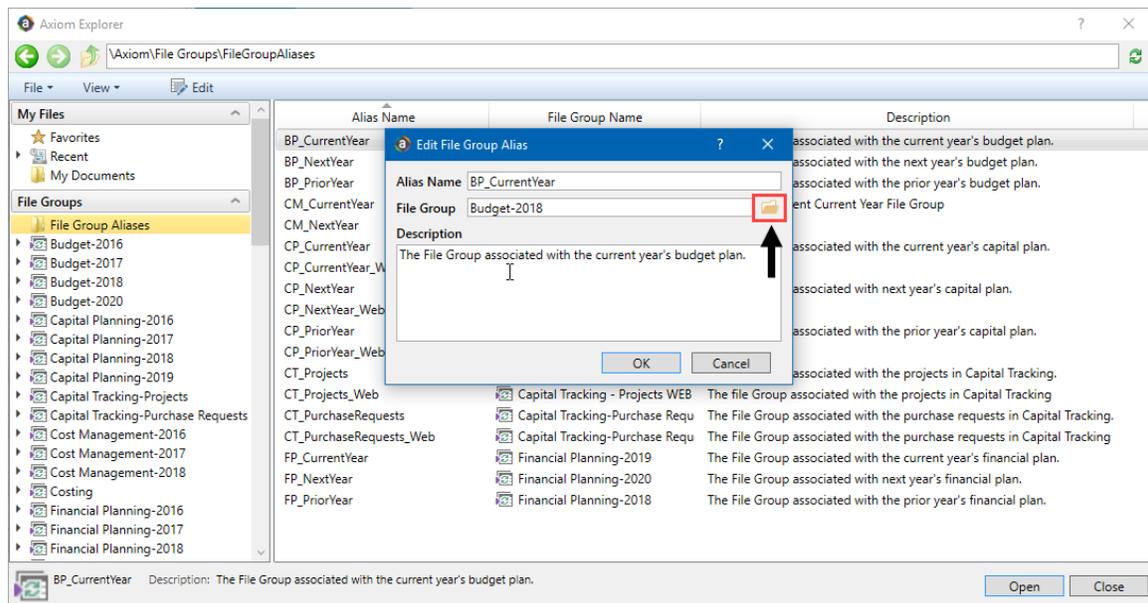
1. In the Admin ribbon tab, click System Browser.



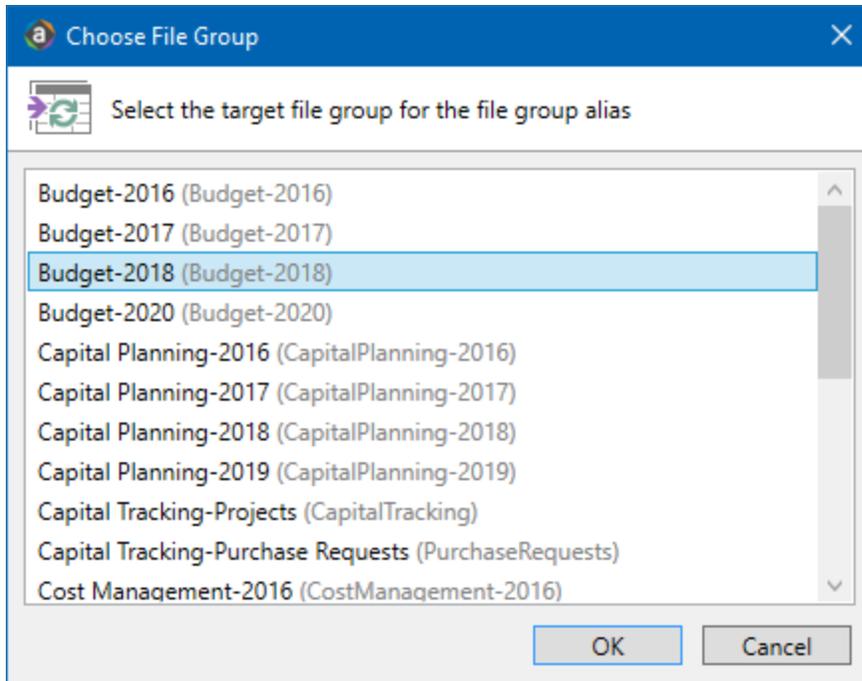
2. In the Axiom Explorer window, click File Group Aliases, and double-click the BP_CurrentYear or BP_PriorYear aliases to assign their respective file group year relative to the new file group year. For example, if creating a new 2020 file group, set the BP_CurrentYear to 2019 and BP_PriorYear to 2018.

Alias Name	File Group Name	Description
BP_CurrentYear	Budget-2017	The File Group associated with the current year's budget plan.
BP_NextYear	Budget-2020	The File Group associated with the next year's budget plan.
BP_PriorYear	Budget-2016	The File Group associated with the prior year's budget plan.
FP_CurrentYear	Financial Planning-2017	The File Group associated with the current year's financial plan.
FP_NextYear	Financial Planning-2018	The File Group associated with next year's financial plan.
FP_PriorYear	Financial Planning-2016	The File Group associated with the prior year's financial plan.

3. In the Edit File Group Alias dialog, click the folder icon.



4. In the Choose File Group dialog, select the file group, and click OK.



5. Click **OK**.
6. Click **Close**.
7. Continue to [Copying security from the prior file group \(page 1\)](#).

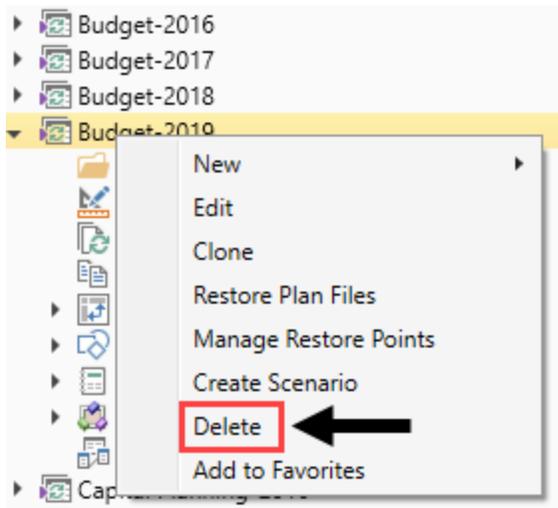
Deleting a file group

Deleting a file group deletes all files stored in the associated file group folder, including templates, plan files, drivers, calc method libraries, and workflows. Additionally, any document reference tables linked to the file group are also deleted.

NOTE: This action cannot be undone, and the deleted files cannot be recovered using normal Axiom Budgeting and Performance Reporting functionality. You should be sure that you no longer need the file group before you delete it. You may want to take a backup of the Kaufman Hall Axiom database before deleting the file group.

To delete a file group:

1. In the Explorer task pane, in the **File Groups** section, right-click the file group to delete.



2. Click **Delete**.
3. At the confirmation prompt, click **Yes**.

The file group and all associated files are deleted.

Known issues

The following table lists the known issues in this release:

Issue Description	Explanation
Plan File: Provider [TFS 19225]	<p>Symptom: Possible to encounter a #REF! error when using the Add New Provider Detail calc method if inserting beyond a range of appx 5,700 rows</p> <p>Explanation: Will be fixed in a future release.</p>
Plan File: Provider [TFS 21056]	<p>Symptom: If Visits is configured for use, the Add New Provider Summary calc method does not include the added visits</p> <p>Explanation: Will be fixed in a future release.</p>
Plan File: Stat_Rev [TFS 20926]	<p>Symptom: The BadDebt calc method does not calculate when the calc method for patient revenue accounts is Revenue_Stat.</p> <p>Explanation: Will be fixed in a future release.</p>
Driver: Statistics [TFS 6165]	<p>Symptom: Statistics like Calendar Days from Configuration driver for YTD only use the Global period for YTD. This means that if another budget group is used on the Configuration driver, the Calendar Days YTD will be the period used in the global section.</p> <p>Explanation: Will be fixed in a future release.</p>
Driver: GlobalData 1-4 [TFS 20768]	<p>Symptom: System Administrator can no longer modify the data filter due to this driver being “locked” from edits.</p> <p>Explanation: Will be fixed in a future release.</p>
Budget Utilities\Budget Reconciliation\Budget Process Management Report [TFS 16498]	<p>Symptom: Currently doesn't filter based on user's security.</p> <p>Explanation: Will be fixed in a future release.</p>
Axiom\Reports Library\Budgeting Utilities\Balance Sheet & Deductions\NYB_Deductions_FSPayor.xlsx [TFS 16492]	<p>Symptom: The “Rest of Year” column in the Patient Revenue by Payor section (Cells M34:M54) are hard coded to zero. There should be a formula in these cells to back into the rest of year value. For M34, this formula would be “=O34-L34-N34”.</p> <p>Explanation: Will be fixed in a future release.</p>
Axiom\Reports Library\Budgeting Utilities\Security\Budget Security Update [TFS 20980]	<p>Symptom: User login IDs using a leading zero will cause an error in the Budget Driver Security Update Utility. The leading zero will not be recognized in the utility.</p> <p>Explanation: Will be fixed in a future release.</p>

Issue Description	Explanation
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Labor Non-Matched [TFS 17097]	<p>Symptom: The Sumbly used for Jobcode on this report should be Jobcode.KHABgtCode. The symptom can be that not all the needed records are flagged.</p> <p>Explanation: Will be fixed in a future release.</p>
\Axiom\Reports Library\Management Reporting Utilities\Flex Budget\FlexCalculator by Month.xlsx [TFS 24173]	<p>Issue: On the control sheet there is a table type filter for DEPT.FLEXDept='Yes'. This is affecting the save of the report to only calculate out the flex budget for those departments with a 'Yes' filter. The issue does not occur when you run this report Multi-Pass.</p> <p>Explanation: Run this report with the Multi-Pass settings.</p>

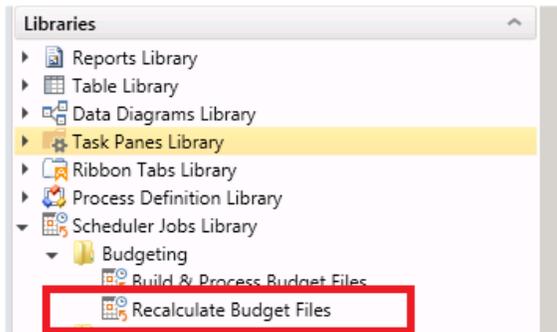
IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.2 Release Notes** for additional known issues that have a suite-wide impact.

Workaround: Editing the Recalculate Budget Files job manually

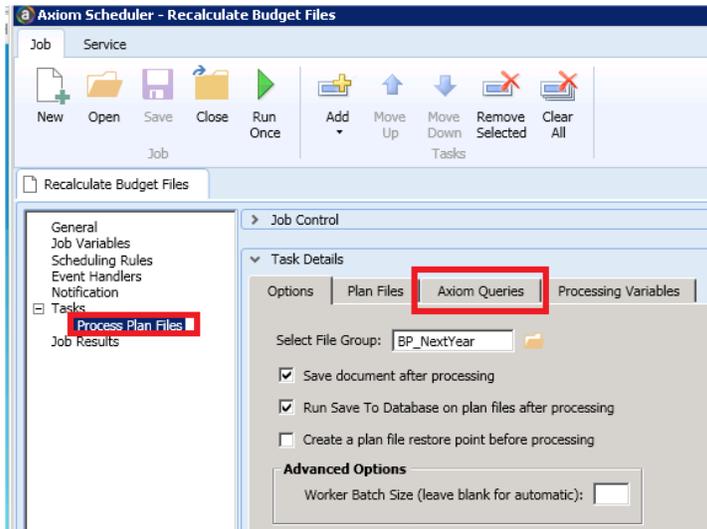
Use the following steps to manually edit the Recalculate Budget Files job manually for the AQs and save the changes.

To edit the Recalculate Budget Files job manually:

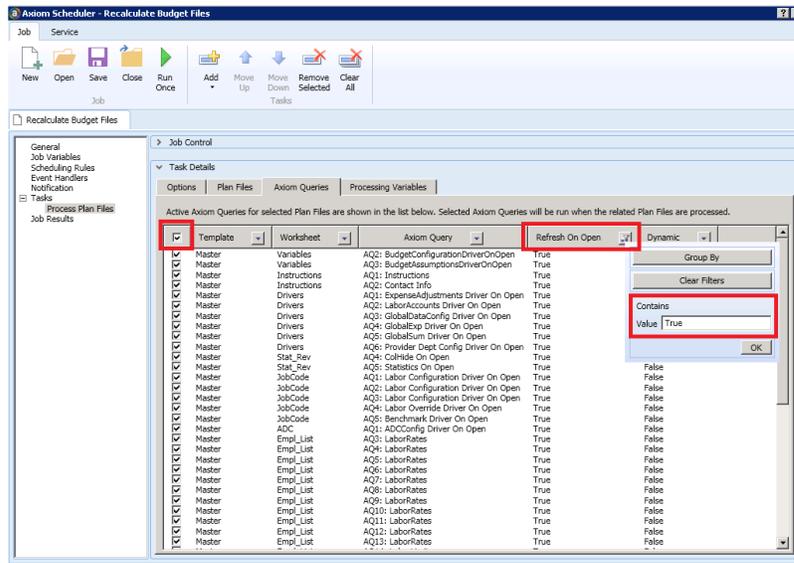
1. In the **Explorer** task pane, in the **Libraries** section, click **Scheduler Jobs Library > Budgeting**, and double-click **Recalculate Budget Files**.



2. In **Tasks** list in the left window pane, click **Process Plan Files**, and click the **Axiom Queries** tab.



3. In the **Refresh On Open** column heading, click the gray drop-down, and in the **Value** field, type **True**. This filters the list for all the AQs that should contain the check mark.



4. Apply the check mark to the AQs noted in the following table, and save the recal job:

Worksheet	Axiom Query	Refresh on Open
Stat_Rev	AQ6: CP on Open	TRUE
Jobcode	AQ11: StdHours	TRUE
Staffing	AQ6: StdHours	TRUE
Employee	AQ8: StdHours	TRUE
Empl_List	AQ15: LaborRates	TRUE
Empl_List	AQ17: LaborRates	TRUE
Empl_List	AQ18: LaborRates	TRUE
Empl_List	AQ19: LaborRates	TRUE
Empl_List	AQ20: LaborRates	TRUE
Empl_List	AQ21: AltFTEFactors	TRUE
Initiatives	AQ1: Approval	TRUE
ProviderComp	AQ12: StdHours	TRUE
Expense	AQ10: Integration	TRUE
HHLabor	AQ11: HHStats	TRUE
Integration	AQ1: CM on Open	TRUE
Integration	AQ2: CP on Open	TRUE

NOTE: If you saved the standard budget recalc job using Save As and named your own job, then review your version of the recalc job and apply the same edits noted above.