KaufmanHall
axiom software

Axiom Budgeting and Performance Reporting 2018.3

Release Notes

Last Updated: 11/15/2018

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Version: 2018.3.3

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Summary

Kaufman Hall is pleased to announce the 2018.3 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 release and completed all the manual setup steps from the corresponding release notes.

When upgrading to Axiom Budgeting and Performance Reporting 2018.3, 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.

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

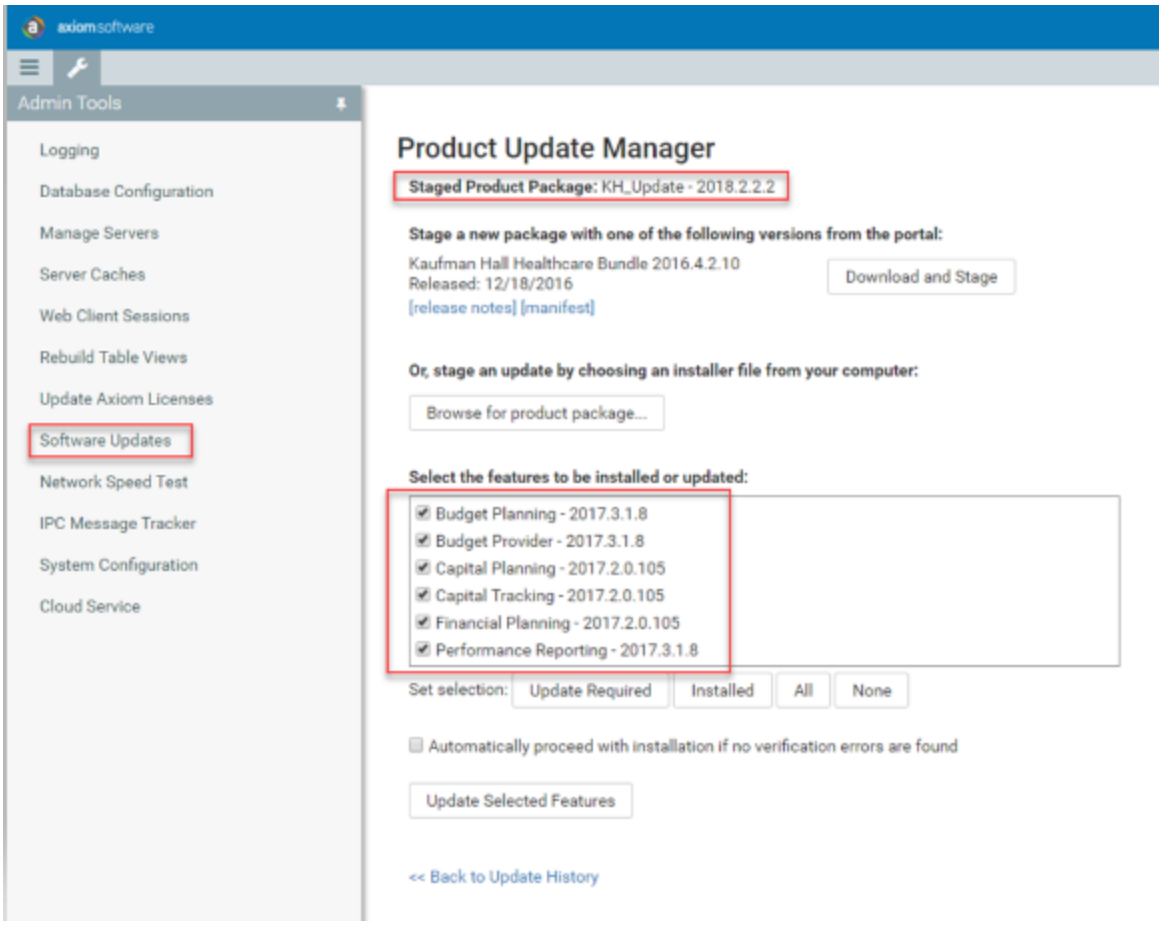
1. If you are currently in your planning cycle for budgeting and using plan files, then we generally recommend that you NOT update for a patch if the Master templates, calculation methods, or Driver files are included. Because plan files were built using the prior versions, this may cause a conflict 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.


axiomsoftware
Admin Tools
Logging
Database Configuration
Manage Servers
Server Caches
Web Client Sessions
Rebuild Table Views
Update Axiom Licenses
Software Updates
Network Speed Test
IPC Message Tracker
System Configuration
Cloud Service
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 the latest Prototype file group. You must create a new file group or update an existing file group to utilize the updated contents from the 2018.3 release. For instructions, see "Updating the 2019 file group" or "Rolling Forward to a New Budget Year" in the Axiom Budgeting and Performance Reporting online help.

Redesigned Budget Deductions utility

The Budget Deductions utility has been significantly modified as a rebuildable report with newly added advanced filtering capabilities. As you are likely familiar with rebuildable formats such as driver files, the Budget Deductions utility has a similar approach in that multiple user access is now available. Similarly, we have now created a new table in which to store and retrieve user selections. As with all rebuildable formats, future updates to the utility will be made to this single report.

NOTE: The topics regarding this utility assume a working knowledge of reimbursement principals and are familiarity with the previous version of this utility. Additionally, we assume you have a working knowledge of Axiom reporting concepts such as Table.Column and report filtering.

Because the Budget Deductions utility in now rebuildable, all users can now access the same report, and no longer need to save multiple versions as SaveAs.

For more information, see the following in online help:

- Setting up the Budget Deductions utility
- Using the Budget Deductions utility

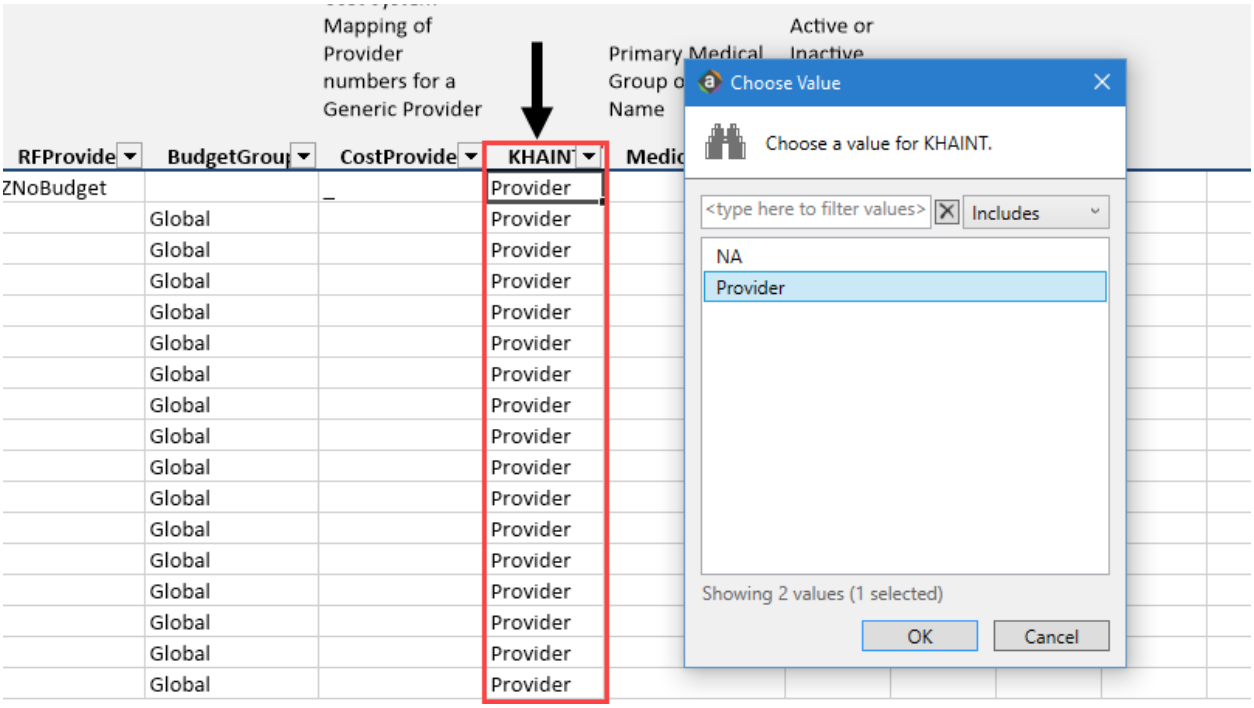
Enhancements to Provider budgeting

We have made several enhancements for Provider budgeting in this release to make the administration of the provider planning process easier.

Provider.KHAINT

We have added KHAINT as a new column to the Provider dimension. This feature allows you to exclude a provider when processing plan files.

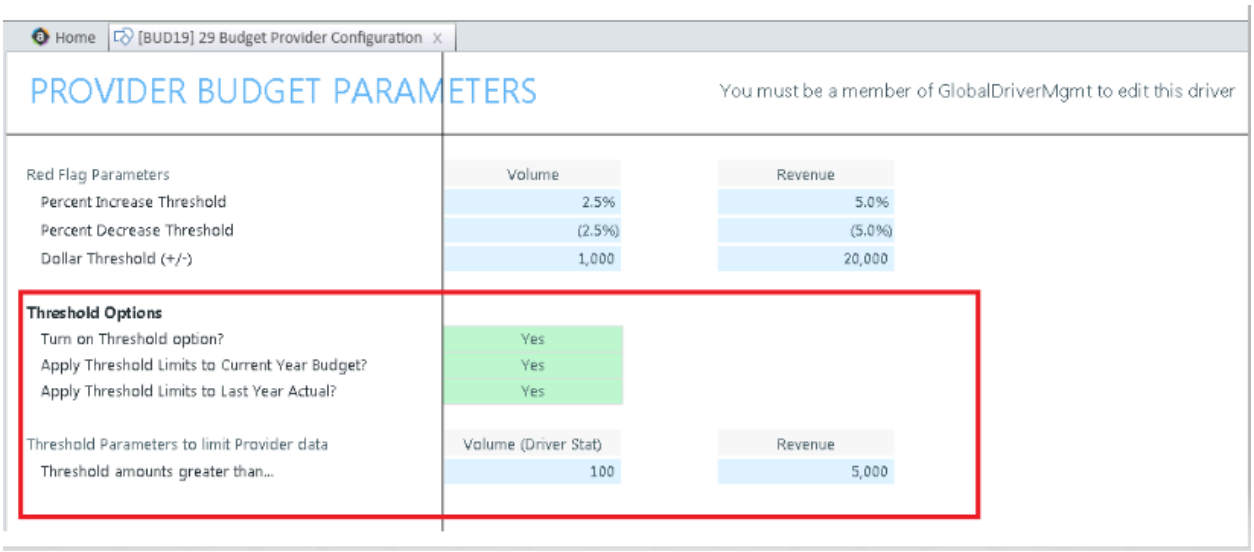
NOTE: When your system is updated to 2018.3, the default value for the new column will be set to the **Provider** value so that all providers will initially be included. To exclude a provider, you will need to change the selection to **NA**. This will be effective for both the Provider Detail and Provider Summary methods.



Provider threshold settings

We have updated the Budget Provider Configuration driver to include threshold settings that allow you to filter out unwanted data when processing provider plan files. Unlike using Provider.KHAINT, configuring the threshold settings allows providers to be added to the Provider tab of the plan files if they exceed the values in the threshold settings.

This feature applies to both the Provider Detail and Provider Summary methods.



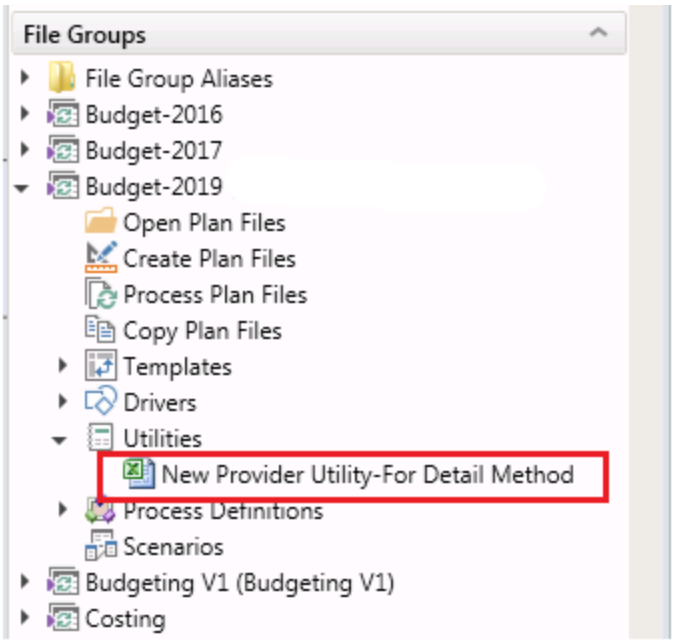
For instructions, see "Configuring threshold parameters to limit Provider data" in the Axiom Budgeting and Performance Reporting online help.

▶ New Provider utility

You can now add providers to plan files automatically by using the New Provider utility! This utility is for Provider Detail method only and is essentially an improved version of the Copy From Existing Provider calc method.

After you add the new provider using this utility, the plan file automatically adds the provider into the plan file, with all of the rows defined in the utility. End users can then enter volume and revenue values.

To open the utility, in **Explorer**, navigate to **File Groups** > ***budge file group*** > **Utilities**, and double-click **New Provider Utility-For Detail Method**.



For instructions, see "Configuring the New Provider utility" in the Axiom Budgeting and Performance Reporting online help.

Configuring data filter in Global Data Budget drivers

The Global Data Budget 1-4 drivers requires a Budget Admin to modify and save a unique data filter. In previous versions of Axiom Budgeting and Performance Reporting, however, the ability to save drivers was removed, which meant that administrators could not modify and save filters.

At the top of each driver, the new Client Filter cell now allows administrators to filter the data in the driver by using the Filter Wizard.

NOTE: Only users assigned the Global Driver Management role can modify and save the filter.

The filter does the following:

- Retrieves data from the tables where it comes from. For example, from the ACCT tables.
- Retrieves data from the Global Data Driver table any values that qualifies to come into the driver.

After you configure the filter, you can then refresh the data to select one or more records to view. You can then adjust current year projections and next-year budget values by month for individual expense items, and/or delete a record.

NOTE: The data the system displays depends on your financial table type filter and driver filter.

For more information, see the following in the Axiom Budgeting and Performance Reporting online help:

- Budget Global Data 1-4
- Using the Filter Wizard

Rebuildable setup report utilities

The following setup report utilities have been redesigned as rebuildable:

- FP_Payor

  IMPORTANT: By default, Payor1 will always be Medicare. This means that if you currently use Payor1 for another payor, it will revert to Medicare when you open and save this utility.

- GLPayrollMapping renamed to VCC_Payroll_Mapping
- ThresholdLevel renamed to VCC_Threshold
- Year and Period tables combined into a single form named YearPeriod
- Payroll renamed to Payroll_Dates

While the names of the reports have changed, the table names remain the same. This means that any previously saved data will display.

IMPORTANT: If you have made customizations in any of these tables, they will not display in the form. For example, if you have added more than two cycles in the Payroll table, then the third cycle will not display in the form. However, these customizations will still exist in the table, but you will need to make any changes in the table itself.

For instructions, see the following in the Axiom Budgeting and Performance Reporting online help:

- Managing payors
- Setting VCC Payroll mapping
- Setting variance thresholds
- Setting year and period
- Setting payroll dates

Installation instructions

Payroll Dates setup report utility:

- After upgrading your system, first set the number of days in a pay period for Cycle 1 and Cycle 2. For more information, see "Setting payroll dates" in the Axiom Budgeting and Performance Reporting online help.
- In the previous version of this table, some columns displayed as mm/dd/yyyy and some as mmm-yyyy. You may notice, however, that the new table displays all of the dates as mm/dd/yyyy. Also, some columns saved as serial dates while others were real dates. In the new version, all dates are stored as mm/dd/yyyy while the serial dates are read in fine and represented correctly.
- The column headers are slightly different in description between the previous and new versions of the table.

YearPeriod setup report utility:

- Select the hours in the FTE Hours drop-down. For more information, see "Setting year and period" in the Axiom Budgeting and Performance Reporting online help.

Updates to the Month End Review dashboard

Significant enhancements have been made to the Month End Review dashboard, including new tabs and sub-tabs.

Use the updated filter function to specify the information to display in the dashboard. For more information, see "Viewing and filtering the Month End Review dashboard" in the Axiom Budgeting and Performance Reporting online help.

Summary tab

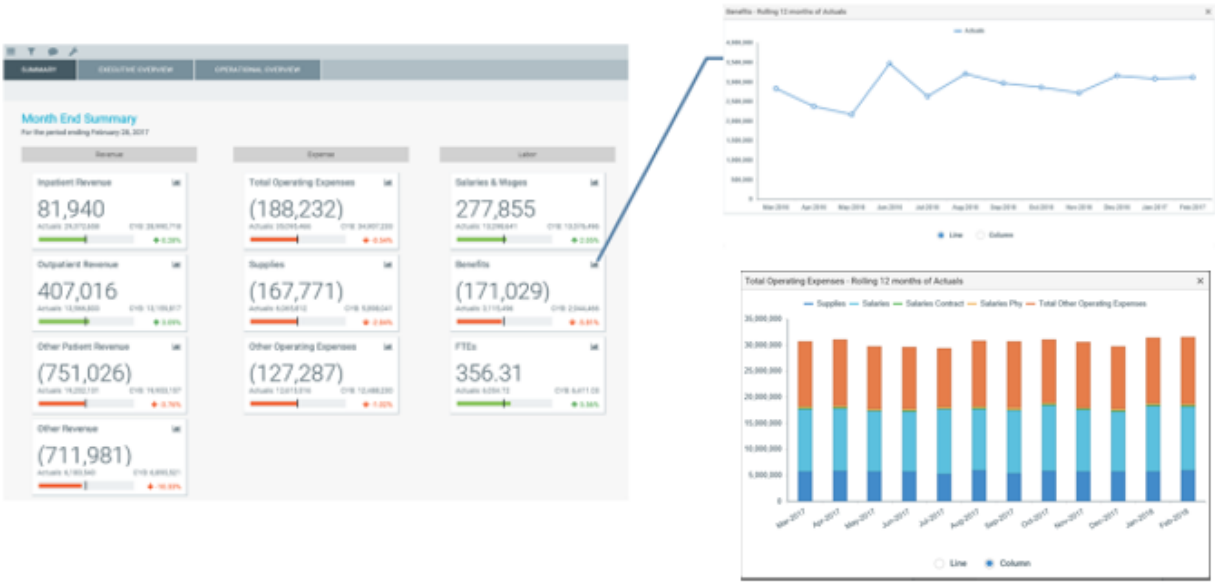
The statistic and per-unit calculations have been removed from the KPIs that display in the Summary tab. You can now find the statistic and per-unit KPI information at the department-level on the Operational Overview tab. The purpose of the Summary tab is to provide KPI visibility into all of your departments for the current period and year.

NOTE: The page will only include those departments in which you have permissions to view.

Click the filter icon in the upper left corner of the page to use the updated filter function to filter the data by the following:

- **Time Period** - Period, Year
- **Target** - Budget, Flex, 3 Month Average, Last Month, Same Month LY
- **Category (Summary and Executive)** - VP, Directory, Manager, Budget Group, Division, Dept
- **Filter (Summary and Executive)** - Select from those created by your organization.

To see a chart of rolling 12 months actuals, click the chart icon in the upper left corner of each box. Within the chart, you can see a columnar view that displays the categories that comprise the values.



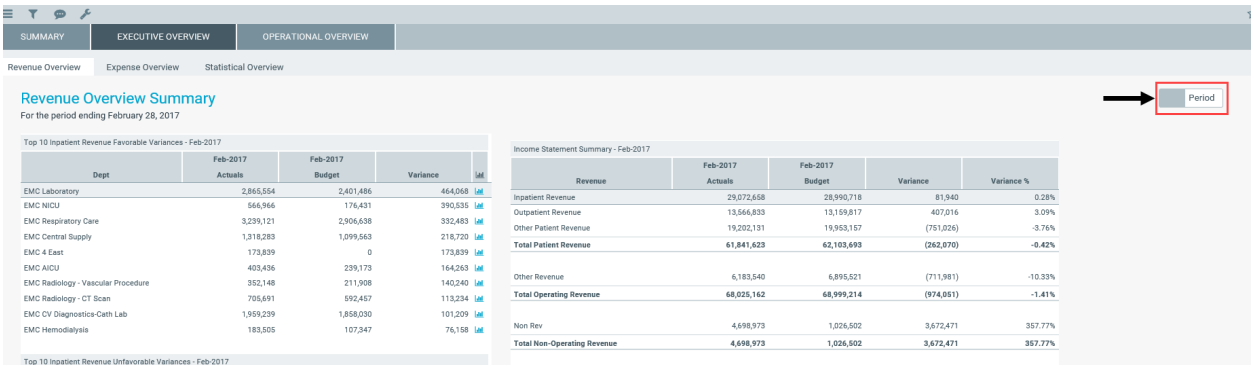
Executive Overview tab

The new Executive Overview tab displays summary-level revenue, expense, and statistics information for all the departments in your organization. Click the filter icon in the upper left corner of the page to use the updated filter function to filter the data by the following:

- **Time Period** - Period, Year
- **Target (All Except Statistical)** - Budget, Flex, 3 Month Average, Last Month, Same Month LY
- **Category & Filter (Summary and Executive)** - VP, Directory, Manager, Budget Group, Division, Dept
- **Filter (Summary and Executive)** - Select from those created by your organization

To see a chart of rolling 12 months actuals, click the chart icon in the upper left corner of each box.

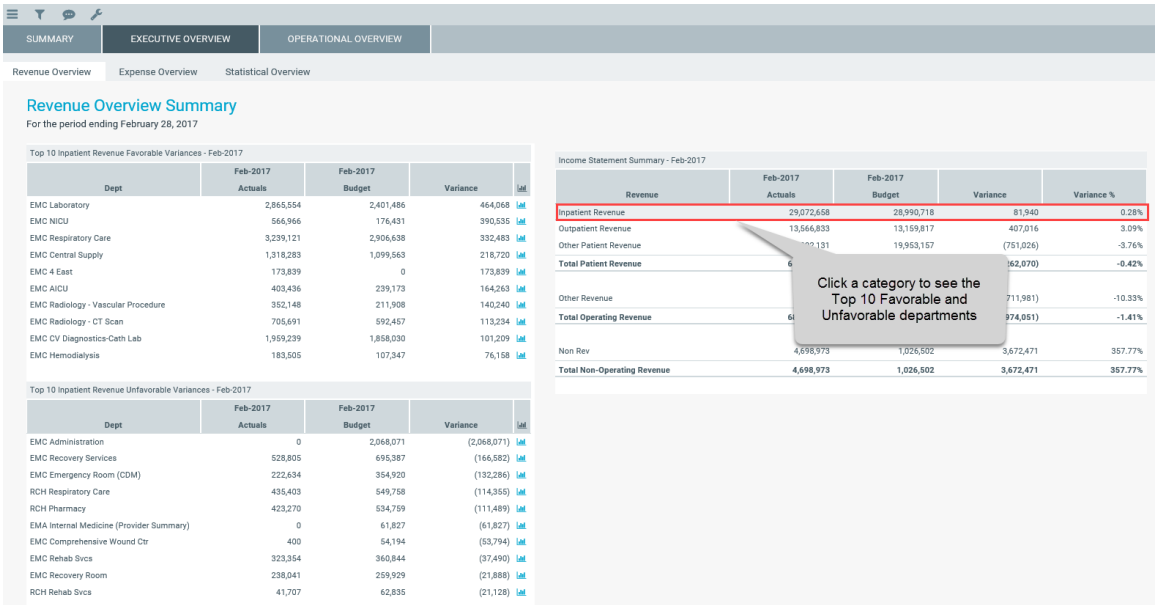
You can also toggle between viewing the data for the period or YTD.



Revenue Overview and Expense Overview tabs

The Revenue Overview and Expense Overview tabs work similarly by displaying the following sections for revenue and expenses:

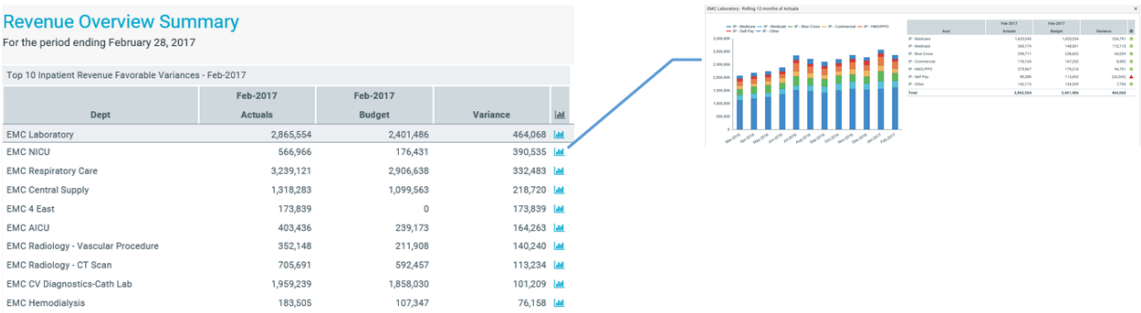
- **Income Statement Summary** – Shows the actuals, targets, variance, and variance percentage for inpatient revenue, outpatient revenue, other patient revenue, other revenue, and non-revenue categories. As you click each category, the Top 10 Favorable and Unfavorable sections list the departments that make up those values. For example, if you click Inpatient Revenue, the Top 10 Favorable and Unfavorable inpatient departments display.



- **Top 10 Favorable Variances** – Shows the top ten departments with the highest favorable variance of actuals compared to target by department, actual, target, and variance.

- **Top 10 Unfavorable Variances** - Shows the top ten departments with highest unfavorable variance of actuals compared to target by department, actual, target, and variance.

  For each department in the Top 10 Favorable and Unfavorable sections, click the department chart icon to see a rolling 12 months of actuals as well as the actuals, target, and variance listed by account.



Revenue Overview Summary

For the period ending February 28, 2017

Top 10 Inpatient Revenue Favorable Variances - Feb-2017

Dept	Feb-2017 Actuals	Feb-2017 Budget	Variance
EMC Laboratory	2,865,554	2,401,486	464,068
EMC NICU	566,966	176,431	390,535
EMC Respiratory Care	3,239,121	2,906,638	332,483
EMC Central Supply	1,318,283	1,099,563	218,720
EMC 4 East	173,839	0	173,839
EMC AICU	403,436	239,173	164,263
EMC Radiology - Vascular Procedure	352,148	211,908	140,240
EMC Radiology - CT Scan	705,691	592,457	113,234
EMC CV Diagnostics-Cath Lab	1,959,239	1,858,030	101,209
EMC Hemodialysis	183,505	107,347	76,158

Statistical Overview tab

The Statistical Overview tab shows a list of key statistics by department for the selected month and year. This tab shows:

- Prior month, two month, and three month data
- Four month average
- Variance to the prior month
- Variance to the four month average
- Current target (Budget or Same Month Last Year)
- Variance to target
- Year To Date Actual
- Year to Date Target
- Year to Date Target Variance

By using the filter function, you can filter the data by:

- **Target (Only Statistical)** - Select the target of either Budget or Same Month Last Year
- **Category & Filter (Summary and Executive)** - Select VP, Director, Manager, Budget Group, Division, Dept
- **Time Period** - Select a month and year

You can sort on any column, apply a column specific filter and export the data to Excel.

SUMMARY | EXECUTIVE OVERVIEW | OPERATIONAL OVERVIEW

Revenue Overview | Expense Overview | Statistical Overview

Statistical Overview Summary

For the period ending February 28, 2018

Export to Excel

Show items with value that: Is equal to | And | Is equal to | Filter | Clear

Dept	Description	Statistic	4 Mth Avg	Variance 4 Mth Avg	Variance Last Mth	YTD Feb-2018	YTD Budget	YTD Variance Budget
29310	EMC Facility Operations	Square Feet	1,186,151		-	9,489,208	9,363,476	125,732
29300	EMC Environmental Services	Square Feet	1,144,678		-	9,157,424	9,036,088	121,336
29540	EMC Mailroom	Items	403,681		77,253	2,887,853	3,548,316	(660,463)
28530	EMC Linen Services	Pounds	340,242		10,469	2,724,130	2,612,937	111,193
28510	EMC Food And Nutrition Services	Calendar Days	112,817		(7,488)	894,285	850,891	43,393
27640	EMC Surgery	Minutes	90,199		8,018	724,248	733,273	(9,025)
27650	EMC Recovery Room	Cases	56,182		(3,063)	582,138	591,850	(9,712)
27060	EMC Laboratory	Procedures	52,335	(583)	2,687	415,979	711,145	(295,166)
27070	EMC Pathology Support	Procedures	41,911	(2,794)	(546)	342,835	696,405	(353,570)
29510	EMC Purchasing	Orders	34,071	(546)	(1,339)	267,689	256,463	11,226
29520	EMC Receiving	Orders	33,971	420	(794)	273,342	275,850	(2,508)
101010	EMA Internal Medicine (Provider)	0	20,083	(403)	(1,123)	158,431	84,811	73,620
29330	EMC Patient Transportation	Orders	19,646	(2)	1,102	158,038	151,364	6,674
29210	EMC Health Information Management	Visits	18,077	307	262	144,364	133,389	10,975
27030	EMC Central Supply	Units	15,560	696	1,338	123,309	103,196	20,113
107090	EMA Pathology	0	14,558	(5,275)	(4,068)	126,117	-	126,117

Operational Overview tab

While this tab is new, most of the sub-tabs were included in the previous release of Axiom Budgeting and Performance Reporting, but two new have been added:

KPI tab

This tab displays a visual representation of actuals versus target, grouped into Revenue, Labor, and Expense categories. This tab provides KPI visibility into a department for the selected period and year.

SUMMARY | EXECUTIVE OVERVIEW | OPERATIONAL OVERVIEW

KPI | Patient Revenue | Labor | Benefits | Other Expenses

EMC Radiology - MRI (JobCode) - KPI Summary

Manager: Chris Sparks | For the period ending February 28, 2018

Period

Revenue

Key Statistics
709
Actuals: 776 CYB: 67
1058....

Inpatient Revenue per Unit
(18,546.49)
Actuals: 604.48 CYB: 19,150.97
-96.84%

Outpatient Revenue per Unit
(9,710.48)
Actuals: 5,881.55 CYB: 15,592.03
-62.28%

Expense

Total Operating Expense per Unit
2,031.24
Actuals: 196.35 CYB: 2,227.59
91.19%

Supplies Expense per Unit
116.53
Actuals: 14.63 CYB: 131.16
88.85%

Other Expense per Unit
1,371.17
Actuals: 132.61 CYB: 1,503.79
91.18%

Labor

Salaries per Unit
449.64
Actuals: 41.26 CYB: 490.90
91.60%

Average Hourly Rate
(2.59)
Actuals: 12.90 CYB: 10.31
-25.08%

Paid Hours per Unit
449.64
Actuals: 41.26 CYB: 490.90
91.60%

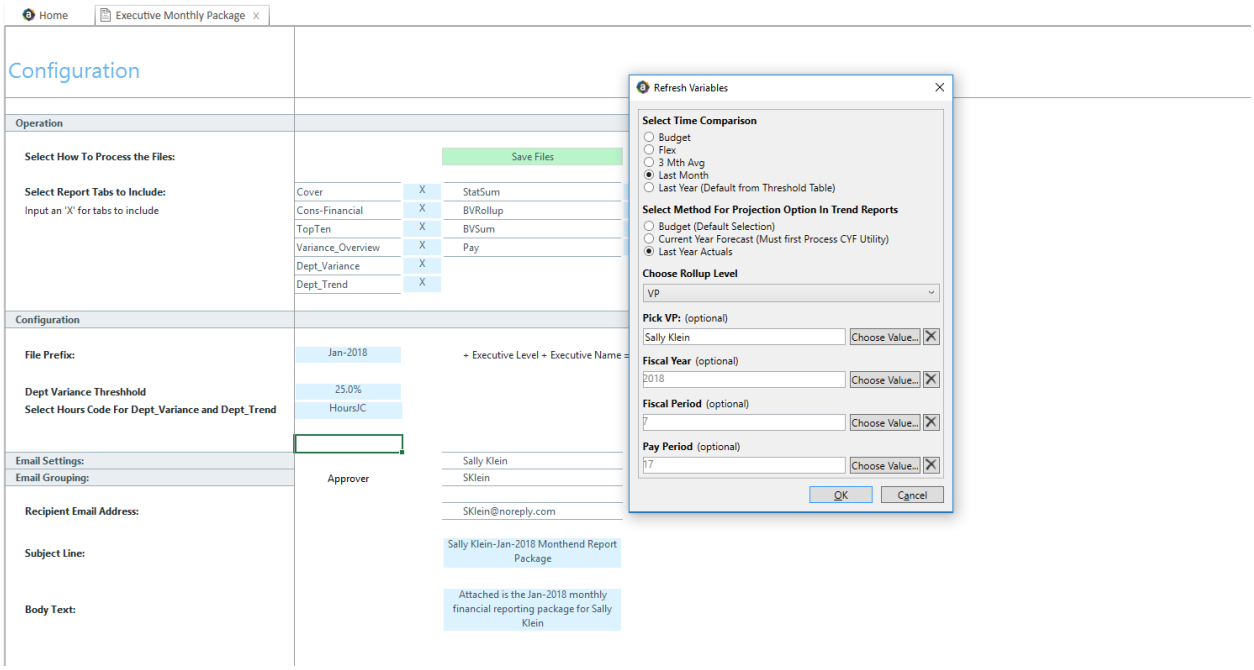
By using the filter function, you can filter the data by:

- **Target (All Except Statistical)** - Budget, Flex, 3 Month Average, Last Month, Same Month LY
- **Dept (Only Operational)** - Select Dept using dropdown or typing Dept number
- **Time Period** - Select a month and year

Additional Comparison Time Series options for Executive Monthly Package report

You can now configure the Executive Monthly Package reports to show 3-Month Average, Prior Month, and Same Month Last Year data in the Variance Overview tab.

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.



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

Three Month Average

Variance Overview

KHA Health
For The Period Ending January 31, 2018
VP: Sally Klein
▼ =Required Comment

Account	Acct Description	Dept	Department	For the Month of January Actual	3 Mth Avg	Better/(Worse) 3 Mth Avg Variance	Percent	Alert	Act v LY YTD Variance
	Salary Expenses			**300,269**	**264,644**	**(35,625)**	**(13.5%)**	▼	**0**
60100	Salaries - Regular	26440	EMC Mother/Baby	164,586	146,573	(18,012)	(12.29%)	▼	0
60100	Salaries - Regular	26520	EMC Pediatrics	105,213	91,177	(14,035)	(15.39%)	▼	0
60110	Salaries - Overtime	26520	EMC Pediatrics	15,359	9,241	(6,118)	(66.21%)	▼	0
60120	Salaries - Non-Productive	26520	EMC Pediatrics	15,112	17,654	2,541	14.40%	▲	0
	Supply Expense			**324,841**	**341,883**	**17,042**	**5.0%**	▲	**0**
62130	Supplies - Med Surg Nonbillable	26520	EMC Pediatrics	2,796	2,421	(375)	(15.50%)	▼	0
62130	Supplies - Med Surg Nonbillable	26530	EMC 5C	4,677	4,666	(11)	(0.24%)	▼	0
62130	Supplies - Med Surg Nonbillable	26630	EMC 6C	2,971	3,129	159	5.07%	▲	0
62145	Supplies - Implants	27640	EMC Surgery	314,397	331,667	17,270	5.21%	▲	0
	Other Operating Expense			**0**	**0**	**0**	**0.0%**	▲	**0**

Last Month

Variance Overview

KHA Health
For The Period Ending January 31, 2018
VP: Sally Klein
▼ =Required Comment

Account	Acct Description	Dept	Department	For the Month of January Actual	Last Month	Better/(Worse) Last Month Variance	Percent	Alert	Act v LY YTD Variance
	Salary Expenses			**300,269**	**245,842**	**(54,427)**	**(22.1%)**	▼	**0**
60100	Salaries - Regular	26440	EMC Mother/Baby	164,586	134,399	(30,186)	(22.46%)	▼	0
60100	Salaries - Regular	26520	EMC Pediatrics	105,213	90,312	(14,901)	(16.50%)	▼	0
60110	Salaries - Overtime	26520	EMC Pediatrics	15,359	8,841	(6,517)	(73.71%)	▼	0
60120	Salaries - Non-Productive	26520	EMC Pediatrics	15,112	12,290	(2,822)	(22.97%)	▼	0
	Supply Expense			**324,841**	**352,507**	**27,666**	**7.8%**	▲	**0**
62130	Supplies - Med Surg Nonbillable	26520	EMC Pediatrics	2,796	2,354	(443)	(18.80%)	▼	0
62130	Supplies - Med Surg Nonbillable	26530	EMC 5C	4,677	4,763	86	1.81%	▲	0
62130	Supplies - Med Surg Nonbillable	26630	EMC 6C	2,971	3,568	597	16.74%	▲	0
62145	Supplies - Implants	27640	EMC Surgery	314,397	341,822	27,425	8.02%	▲	0
	Other Operating Expense			**0**	**0**	**0**	**0.0%**	▲	**0**

Same Month Last Year

Variance Overview

KHA Health
For The Period Ending January 31, 2018
VP: Sally Klein
▼ =Required Comment

Account	Acct Description	Dept	Department	For the Month of January Actual	Last Year	Better/(Worse) Last Year Variance	Percent	Alert	Act v LY YTD Variance
	Salary Expenses			**300,269**	**300,269**	**0**	**0.0%**	▲	**0**
60100	Salaries - Regular	26440	EMC Mother/Baby	164,586	164,586	0	0.00%	▼	0
60100	Salaries - Regular	26520	EMC Pediatrics	105,213	105,213	0	0.00%	▼	0
60110	Salaries - Overtime	26520	EMC Pediatrics	15,359	15,359	0	0.00%	▼	0
60120	Salaries - Non-Productive	26520	EMC Pediatrics	15,112	15,112	0	0.00%	▼	0
	Supply Expense			**324,841**	**324,841**	**0**	**0.0%**	▲	**0**
62130	Supplies - Med Surg Nonbillable	26520	EMC Pediatrics	2,796	2,796	0	0.00%	▼	0
62130	Supplies - Med Surg Nonbillable	26530	EMC 5C	4,677	4,677	0	0.00%	▼	0
62130	Supplies - Med Surg Nonbillable	26630	EMC 6C	2,971	2,971	0	0.00%	▼	0
62145	Supplies - Implants	27640	EMC Surgery	314,397	314,397	0	0.00%	▼	0

To configure this option, see Step 2 in the General Settings section of "Setting variance thresholds" in the online help.

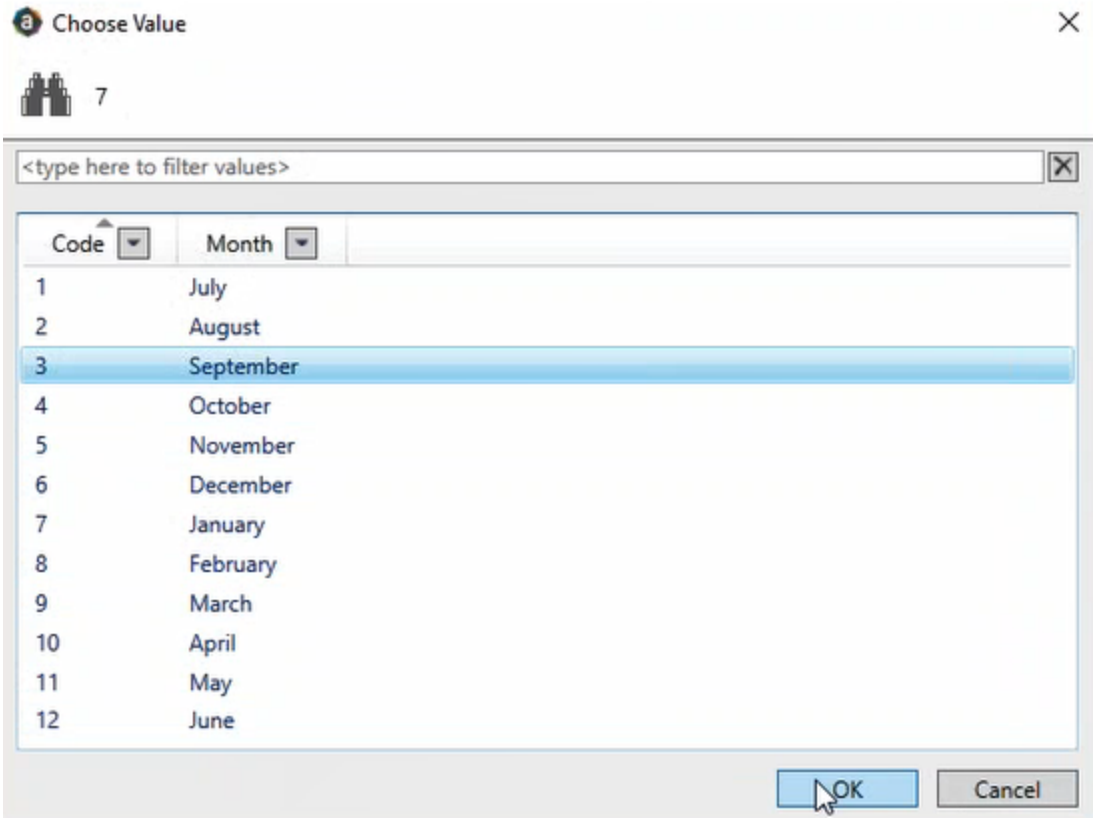
Updates to the Manager Monthly Package report

The following lists the new features and enhancements made to the Dept Monthly Package report in the Monthly Manager Package:

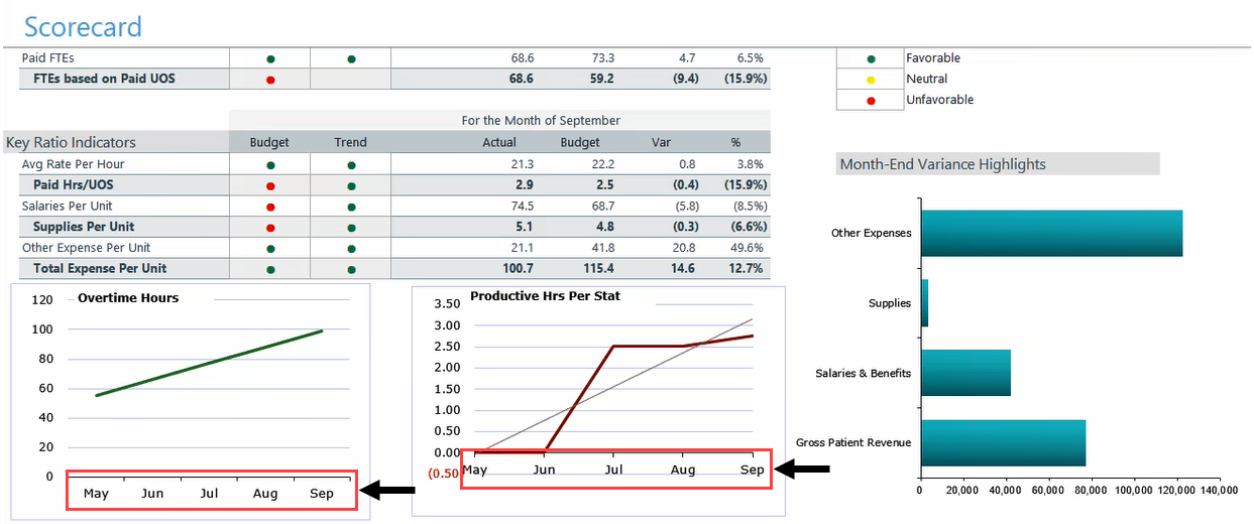
Prior fiscal year included in the Scorecard tab

The columns in the Scorecard tab of the Dept Monthly Package report now automatically include prior fiscal year periods when the Refresh Variables of the report are set to the first few months of the current fiscal year.

In the following example, the organization's fiscal year starts in July. When configuring the Refresh Variables for the Dept Monthly Package report, the user sets the Fiscal Period to 3 (September).

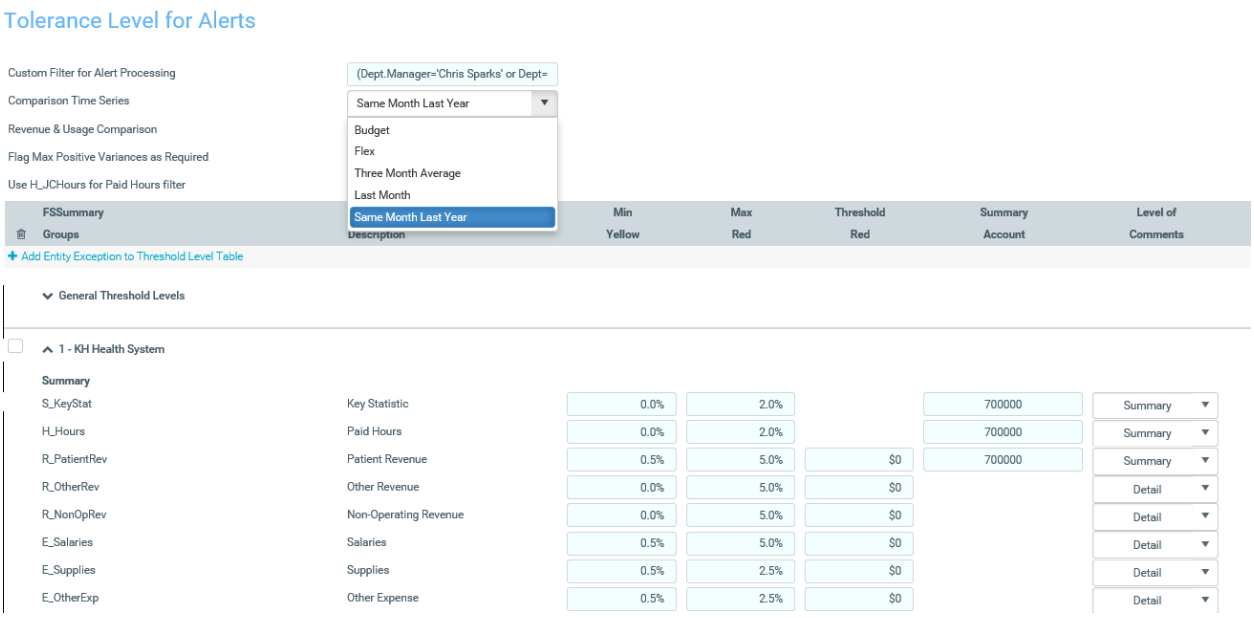


By default, the system shows the last five periods. In this example, the trend shows September through July of the current fiscal year as well as June and May of the last fiscal year.



Additional Comparison Time Series options

You can now configure the Dept Monthly Package report to include 3-Month Average, Prior Month, and Same Month Last Year data in the Scorecard, SCDetail, and VarAlert tabs.



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

▶ Three Month Average

Home | Dept Monthly Package

Scorecard

Key Financial Indicators	3 Mth Avg	Trend	For the Month of January Actual	3 Mth Avg	Var	%
Workload Statistic	●	●	828	783	45	0.057
Gross Patient Revenue	●	●	**1,263,890**	**1,182,475**	**81,415**	**6.9%**
Operating Expenses	●	●	170,777	172,736	1,960	1.1%
Salaries & Benefits	●	●	**37,395**	**39,562**	**2,166**	**5.5%**
Supplies	●	●	18,215	13,447	(4,768)	(35.5%)
Other Expenses	●	●	**115,166**	**119,728**	**4,561**	**3.8%**
Paid FTEs	●	●	7.8	7.9	0.1	1.0%
FTEs based on Paid UOS	●		**7.8**	**8.3**	**0.5**	**6.4%**

Key Ratio Indicators	3 Mth Avg	Trend	For the Month of January Actual	3 Mth Avg	Var	%
Avg Rate Per Hour	●	●	24.1	24.9	0.9	3.4%
Paid Hrs/UOS	●	●	**1.7**	**1.8**	**0.1**	**6.4%**
Salaries Per Unit	●	●	45.2	50.5	5.3	10.6%
Supplies Per Unit	●	●	**22.0**	**17.2**	**(4.8)**	**(28.2%)**
Other Expense Per Unit	●	●	139.1	152.8	13.8	9.0%
Total Expense Per Unit	●	●	**206.3**	**220.5**	**14.3**	**6.5%**

▶ Last Month

Scorecard

Key Financial Indicators	Last Mth	Trend	For the Month of January Actual	Last Mth	Var	%
Workload Statistic	●	●	828	745	83	0.111
Gross Patient Revenue	●	●	**1,263,890**	**1,120,600**	**143,290**	**12.8%**
Operating Expenses	●	●	170,777	181,830	11,054	6.1%
Salaries & Benefits	●	●	**37,395**	**41,418**	**4,023**	**9.7%**
Supplies	●	●	18,215	9,278	(8,937)	(96.3%)
Other Expenses	●	●	**115,166**	**131,134**	**15,967**	**12.2%**
Paid FTEs	●	●	7.8	8.5	0.7	8.0%
FTEs based on Paid UOS	●		**7.8**	**9.4**	**1.6**	**17.2%**

Key Ratio Indicators	Last Mth	Trend	For the Month of January Actual	Last Mth	Var	%
Avg Rate Per Hour	●	●	24.1	23.4	(0.7)	(3.1%)
Paid Hrs/UOS	●	●	**1.7**	**2.0**	**0.3**	**17.2%**
Salaries Per Unit	●	●	45.2	55.6	10.4	18.8%
Supplies Per Unit	●	●	**22.0**	**12.5**	**(9.5)**	**(76.6%)**
Other Expense Per Unit	●	●	139.1	176.0	36.9	21.0%
Total Expense Per Unit	●	●	**206.3**	**244.1**	**37.8**	**15.5%**

▶ Same Month Last Year

Scorecard

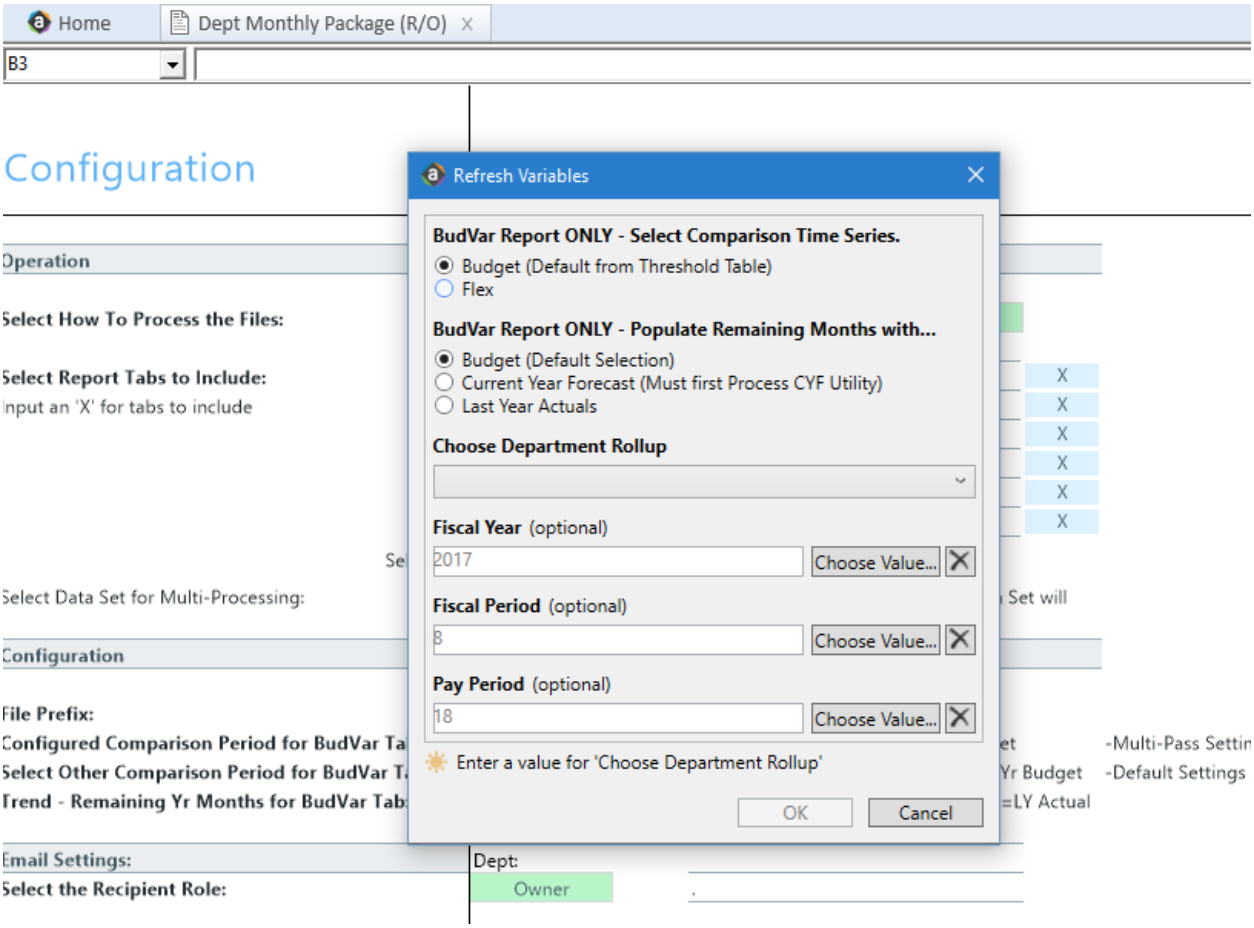
Key Financial Indicators	Last Yr	Trend	For the Month of January Actual	Last Yr	Var	%
Workload Statistic	●	●	828	828	0	0.000
Gross Patient Revenue	●	●	**1,263,890**	**1,263,890**	**0**	**0.0%**
Operating Expenses	●	●	170,777	170,777	0	0.0%
Salaries & Benefits	●	●	**37,395**	**37,395**	**0**	**0.0%**
Supplies	●	●	18,215	18,215	0	0.0%
Other Expenses	●	●	**115,166**	**115,166**	**0**	**0.0%**
Paid FTEs	●	●	7.8	7.8	0.0	0.0%
FTEs based on Paid UOS	●		**7.8**	**7.8**	**0.0**	**0.0%**

Key Ratio Indicators	Last Yr	Trend	For the Month of January Actual	Last Yr	Var	%
Avg Rate Per Hour	●	●	24.1	24.1	0.0	0.0%
Paid Hrs/UOS	●	●	**1.7**	**1.7**	**0.0**	**0.0%**
Salaries Per Unit	●	●	45.2	45.2	0.0	0.0%
Supplies Per Unit	●	●	**22.0**	**22.0**	**0.0**	**0.0%**
Other Expense Per Unit	●	●	139.1	139.1	0.0	0.0%
Total Expense Per Unit	●	●	**206.3**	**206.3**	**0.0**	**0.0%**

To configure this option, see Step 2 in the General Settings section of "Setting variance thresholds" in the Axiom Budgeting and Performance Reporting 2018.3 online help.

Select current period, year, and pay period

When refreshing the variables in the Dept Monthly Package report, you can now select a year, period, and pay period. This feature has also been made to the Monthly All in One Manager Reporting Batch.



For instructions, see "Configuring the Manager Monthly Package report" in the Axiom Budgeting and Performance Reporting online help.

Issues resolved in 2018.3

The following tables list the resolutions for issues addressed in 2018.3, released on September 24, 2018:

Driver, template, and calc method updates

Location	Description
Calc Method: PFB-06119 - Add New Provider Detail Calc [TFS 19225]	**Symptom:** In the Provider tab of the plan file, the end of the match range in the formula is hard coded to Z$5792 in columns Z-AL, rows 22 and 27 of the New Provider Detail calc method. When a user adds a new provider outside of that range, the system does not find the data and displays a #REF!. **Resolution:** Corrected by extending the Index and Match ranges in several cells.
Calc Method: PFB-06233 - Bad Debt calc method does not work with Revenue_ Stat calc method for patient rev [TFS 20926]	**Symptom:** The BadDebt calc method does not calculate when the calc method for patient revenue accounts is Revenue_Stat. **Resolution:** Corrected by moving the formula from column AS to AR, and added the formula in column AS as used in the other patient revenue calc methods.
Calc Method: PFB-06334 - Employee Staffing Tab Float staff error YTDFTE [TFS 21561]	**Symptom:** When there are Float/Inactive FTEs in the YTD, these values are counted as FTEs as well as the breakout of the Productive/Nonproductive FTEs, which doubles the YTDFTE count on reports. **Resolution:** Corrected by updating the reported noted below by appending "and Empid=0" to the existing filter. Affected reports include the following: • \Axiom\Reports Library\Budgeting Reports\Payroll Analysis\FTE Additions and Changes by JobCode • \Axiom\Reports Library\Budgeting Reports\Payroll Analysis\FTEs By Department • \Axiom\Reports Library\Budgeting Reports\Payroll Analysis\FTEs By Department By JobCode • \Axiom\Reports Library\Budgeting Reports\Payroll Analysis\FTEs By JobCode

Location	Description
Calc Method: PFB-06616 - Dollars double up in summary tab of workbook while using DetailCYBHistory Method [TFS 25193]	**Symptom:** When using the Detail_CYBHistory methodology, it appears that the values for these accounts are getting double counted in the Summary tab of the workbook. **Resolution:** Corrected by removing the tag used in the sumif formula causing the duplicate.
Calc Method: PFB-06557 - BP Employee Labor Add New Jobcode CYP Rate error [TFS 25513]	**Symptom:** When selecting Add New Job Code on the Employee labor tab, the Current Year Projected dollars are not calculating correctly (column O). **Resolution:** Corrected by updating the Start Rate to equal the Current Rate.
Calc Method: PFB-06550 - Budget Statistics Supplement Manual Spread [TFS 25517]	**Symptom:** When using the Budget Statistics Supplement Driver, the Manual Spread option does not allow for user entry. **Resolution:** Corrected by adding conditional formatting to Add Custom Row calc method for columns AV:BG, and removing cell protection for columns AV:BG.
Calc Method: PFB-06706 - Error on Market 1 and Market 2 for Dept Group calc method on Labor Rates driver [TFS 26663]	**Symptom:** When using the Dept Global exception for Market 1 and Market 2 percentage, the values do not retain after saving. **Resolution:** Corrected by Corrected by updating the reference for Market 1 and Market 2 percentage for the affected row.
Calc Method: PFB-06709 - Incorrect Calc Method tag on Procedure lines in Add New Provider Blk [TFS 27339]	**Symptom:** When using the Add New Provider block and you have Procedures in the block, the Budget Method incorrectly defaults to "Per Net Production Days" even though the primary stat (ex. Encounters or Visits) exists. This causes the system to incorrectly budget for the Procedures, which can impact the other items for the Provider as well. Resolution: Corrected updating the match formula columns to include the additional columns to match on. The affected calculation methods include the following: • Add New Encounter ProviderDetail • Add New Procedure ProviderDetail • Add New RVU ProviderDetail • Add New Encounter ProviderDetail • Add New WRVU ProviderDetail

Location	Description
Driver: PFB-05834 - BP Budget Statistic Supplement security defect [TFS 16488]	**Symptom:** In the Supplemental Stat driver, the rows do not display due to how security is set up for the Hide Row logic. **Resolution:** Corrected by modifying the Hide Row logic to remove hiding if user is not assigned the role of the GlobalDriverManagement. Also added hide logic to now only display rows that user had security for.
Driver: PFB-06227 - Budget GlobalData - Ability to save filter [TFS 20768]	**Symptom:** Budget GlobalData (and Budget GlobalData2, 3 and 4) requires a Budget Admin to modify and save a unique data filter (example: Acct.Acct=12345). Now that the drivers are locked down, they cannot modify and save filters because the ability to save the file has been removed. A refresh variable of some sort needs to be added to allow the Budget Admin to make this filter change. **Resolution:** For more information, see Configuring data filter in Global Data Budget drivers (page 11). **IMPORTANT:** If you are using the existing file group and you want to update it with the changes from the prototype file group, then you must first delete all GlobalData tables 1-4 to use the new tables.
Driver: PFB-06387 - BP Contract Labor description on labor Config Driver [TFS 26269]	**Symptom:** Users cannot edit the descriptions for Contract Labor on the Labor Config drivers. This prevents users from knowing which Agency type they are budgeting for on the Labor tabs of the plan files. **Resolution:** Corrected by making the Contract Labor description cells in the Labor Configuration driver editable by users.
Template: PFB-05752 - BP Change font color on Expense Tab warning [TFS 27057]	**Symptom:** Recommend changing the font to red on the row that alerts users that Salaries do not match in cell D88 of the Expense tab on the Master template. **Resolution:** Corrected by implementing formatting to cell D88 (salaries) and D112 (Hours) to include red text formatting when formula is activated for out of balance.
Utility: PFB-06559 - Budget Deductions uses FPCategory in AQ2 filter [TFS 22504]	**Symptom:** The Budget Deductions Utility AQ2 filter includes Acct.FPCategory IN ('Deduction','Disch'....etc.). If client does not have a license Financial Planning, the FPCategory is not a delivered column in the Acct dimension. **Resolution:** Corrected by creating a BPCategory column in the Acct dimensions that is modeled after the FPCategory column. The BPCategory column is automatically populated with the information in the FPCategory column.

Report updates

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	**Issue:** PFB-06099 - Budget Variance by Dept: #NA when running multipass (2018.3) [TFS 19944] **Symptom:** When running multipass, the drop-downs in cells T10, T11, and T12 do not resolve. **Resolution:** Corrected by making adjustments to the header.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\06_ OtherExpenses.xlsx	**Issue:** PFB-06676 - On the Month End Review dashboard on the other expenses tab, the graph is labeled supplies trend, but the data populated in graph is actually other expenses. 2018.3 [TFS 26281, TFS 26819] **Symptom:** AQ not firing properly on click of KPI box. **Resolution:** Corrected by updating the Dashboard to properly display the correct trending values.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Variance Comments\ProductivityCommentReview.xlsx	**Issue:** PFB- 06870 Productivity Comment Review has the wrong reference for AlertComment. [TFS 27335] **Symptom:** Report was pulling AlertComment.Cur column which is no longer valid as the comments are now saving to the appropriate AlertComment period. **Resolution:** Updated the report to properly reference the appropriate AlertComment column from the payroll27 table.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Variance Comments\MultiPeriodCommentReview.xlsx	**Issue:** PFB- 06871 Multiperiod Comment Review has the wrong reference for AlertComments. **Symptom:** Report was pulling AlertComment.Cur column, which is no longer valid as the comments are now save to the appropriate AlertComment period. [TFS 27334] **Resolution:** Updated the report to properly reference the appropriate AlertComment column from the payroll27 table.

Issues resolved in 2018.3.1

The following tables list the resolutions for issues addressed in 2018.3.1, released on October 15, 2018:

Driver, template, and calc method updates

Location	Description
Calc Method: Default Calc Method on Provider tab uses incorrect calc method [TFS 28670]	**Symptom:** When using the Add New Provider Utility, the Gross Charge section of the Add New Provider from Utility calc method does not allow users to enter a revenue rate. When a user adds a new provider outside of that range, the system does not find the data and displays a #REF!. **Resolution:** Corrected the Revenue lines to add revenue rate for new providers added using the New Provider utility.

Report updates

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Flex Budget\FlexCalculator by Month.xlsx	**Issue:** PFB-06552 - FlexCalculator by Month Running Multipass [TFS 24173] **Symptom:** When running the FlexCalculator utility in Multipass, it stored information in the FLX2018 table for only departments where Dept.FlexDept=Yes. **Resolution:** Corrected by updating formulas in cells D34, J64, J79, and S57.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-06906 - Summary Accounts do not populate on the VarAlert tab in Dept Monthly Package [TFS 28749] **Symptom:** When using the Dept Monthly Package, the VarAlert tab does not populate with summary accounts (if you are reporting variances at a Summary Account level), which leads to users not knowing the variances they need to report on. **Resolution:** Corrected by updating several formulas.

Location	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\Variance Review.xlsx	**Issue:** PFB-06908 - Bad alert filter on Variance Review report [TFS 28750] **Symptom:** When using the Variance Review report, the filter in AQ1 is set to use a hard coded reference in cell C12 to only bring back accounts that have alert flag>=1. This is a problem as this renders the refresh variable of "All Comments" or "Required Comments" ineffective in limiting the comment types brought in. **Resolution:** Corrected by updating several formulas.

Issues resolved in 2018.3.2

The following tables list the resolutions for issues addressed in 2018.3.2, released on November 5, 2018:

Driver, template, and calc method updates

Location	Description
Table: PFB-06134 - SaveTagCustom Act_ Pay27 [TFS 29174]	**Symptom:** The SaveTagCustom data length is 25, but some clients' Save tags exceed this limit. This causes issues when applying updates. It would be preferable to change SaveTagCustom in the Act_Pay27 tables to a data length of 100 to be consistent with the Financial and Provider Tables. **Resolution:** Corrected by updating the Save tags to 100 in the Act_Pay27_2017 table.
Table: PFB-06135 - Grade Employee Roster [TFS 29208]	**Symptom:** Some organizations' Pay Grades may exceed the current data length of five in Employee_Roster_XXXX.Grade. Some clients' data tables were changed to accommodate a longer GRADE data length, but this caused issues when updating. Update the data length to 25 for the Grade column in this table. **Resolution:** Corrected by updating the length to 25 for the Employee_Roster_2017, _2018, and _2019 tables.

Report updates

Location	Description
\Axiom\Reports Library\System Files\ProdVCC Drills\KHA_ Drill04StaffMix.xlsx	**Issue:** PFB-06935 - Productivity VCC Report, Drill 4 Staffing Mix Analysis the graph is not populating [TFS 29262] **Symptom:** The graph is not populating in the Productivity VCC Report, Drill 4 Staffing Mix Analysis report. **Resolution:** Corrected by updating columns AK:AV to the correct AQ1 Control Rows.

Issues resolved in 2018.3.3

The following tables list the resolutions for issues addressed in 2018.3.3, released on November 15, 2018:

Driver, template, and calc method updates

Location	Description
Template: Performance Improvement Project - Batch AQs [TFS 29489]	**Symptom:** Improve performance of opening and refreshing plan files by batching database queries and reordering when tabs are processed by the system. **Resolution:** Corrected by batching queries so that calls to the database can be made together. This allows queries not related to each other to run together, helping speed up processing time. The processing order for the Master template tabs was also changed to make processing more efficient. For example, the Expense tab was moved to process sooner because the tabs that processed before it relied on this information.
Template: Performance Improvement Project - Review Time Stamp AQs [TFS 29622]	**Symptom:** To help improve workbook processing time, the Master template currently includes the ability to refresh the data in the workbook only if the database table changes. If this option is enabled, the system time stamps each query when the primary table was last refreshed. The system then compares the query time stamp with the time stamp in the table. If the table time stamp is newer, it triggers the system to query the database to retrieve the updated data. If a query references other tables and those tables change but the query's primary table does not, the system will not recognize the changes to the tables. **Resolution:** Corrected by reviewing all the queries in the Master template and enabling all of the tables - not just the primary table - with the time stamp option, as appropriate.

Location	Description
Tasks: Standard Recalc Job AQs missing not activated for Refresh on Open [TFS 29718]	**Symptom:** In the standard Recalc Scheduler job, there are several Axiom queries that are not set to Refresh on Open, which causes the plan files to not update correctly. **Resolution:** Corrected by updating the Recalc Scheduler job to run the identified Axiom queries to Refresh on Open. **NOTE:** If you have made your own copies of the Recalc Scheduler job, you need to identify the Axiom queries that you want to Refresh on Open. For instructions, see steps 9 and 10 of "Copying the Recalculate Budget Files job" in the online help.

Report updates

No items related to reporting were addressed in this release.

Manual setup instructions

Follow the installation instructions for setting up the Payroll Dates and YearPeriod setup report utilities.

Known issues

The following table lists the known issues in this release:

Issue Description	Explanation
Plan File: Provider [TFS 21056]	**Symptom:** Volume section and Visits/Encounters section of the Add New Provider Summary calc method does not include the default CPT code used. “NA” is hard coded in column AO. **Explanation:** Will be fixed in a future release.
Driver: Statistics [TFS 6165]	**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. **Explanation:** Will be fixed in a future release.
Budget Utilities\Budget Reconciliation\Budget Process Management Report [TFS 16498]	**Symptom:** Currently doesn't filter based on user's security. **Explanation:** Will be fixed in a future release.
Axiom\Reports Library\Budgeting Utilities\Security\Budget Security Update [TFS 20980]	**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. **Explanation:** Will be fixed in a future release.
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Labor Non-Matched [TFS 17097]	**Symptom:** The Sumby used for Jobcode on this report should be Jobcode.KHABgtCode. The symptom can be that not all the needed records are flagged. **Explanation:** Will be fixed in a future release.
Plan File: ProviderComp [TFS 12507]	**Symptom:** If a provider used on ProviderComp also uses PayrollGLMapping, the GLClass and JobClass may not populate if there is current budget but no current year actuals for the provider. **Explanation:** Will be fixed in a future release.

Issue Description	Explanation
Plan File: Expense [TFS 12583]	**Symptom:** The SUMIF formula of Total Paid Hours row uses column CE for the text of "PaidHours". Column CE is populated from Acct.DropDowns dimension. If this column is not filled out properly the SUMIF will not find the text to sum hours on the Expense tab. **Explanation:** Will be fixed in a future release but ensure Acct. DropDowns is configured.
Plan File: Expense [TFS 16186]	**Symptom:** The Salaries do Not Match and Hours Do Not Match may give a false reading when the calculation method of ProviderComp and ProviderCompHours is used. Reason is the logic test for Salaries do Not Match and Hours Do Not Match is expecting the use of ProviderLaborComp and ProviderLaborHours. **Explanation:** Will be fixed in a future release.
Task Panes Library: Task Panes [TFS 23999]	**Symptom:** Unable to edit Edit Task Panes without Administrator box. **Explanation:** Will be fixed in a future release.
Plan File: Budgeting Guide [TFS 10427]	**Symptom:** When using Widows client and more than one plan file is open, the Budgeting Guide will only display on the first plan file tab opened. As a work-around, click back to the first plan file opened and the Budgeting Guide should be visible. **Explanation:** Will be fixed in a future release.
\Axiom\Reports Library\Budgetin g Reports\Budget Statement\Budget Income Summary [TFS 16153]	**Symptom:** Drill Path on Budget Income Summary is not granted to default roles for Budget Admins. Drill error will occur showing permissions not granted. **Explanation:** Will be fixed in a future release.
\Axiom\Reports Library\Management Reporting Utilities\Flex Budget\FlexCalculator by Month.xlsx [TFS 24173]	**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. **Explanation:** On the control sheet in cell J61, the formula is =IF(OR (Variables!$K$57="",Variables!$I$22),"DEPT.FlexDept='Yes'","Dept.Dept="&Variables!$K$57) and should be =IF(OR (Variables!$K$57="",Variables!$I$22), **"DEPT.FlexDept<>'NA'"**,"Dept.Dept="&Variables!$K$57).
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Vari ance Alert.xlsx	**Issue:** Report not pulling in the accounts used for summarized comments. **Explanation:** Will fix in a future release.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.3 Release Notes** for additional known issues that have a suite-wide impact.