KaufmanHall
axiom software

Axiom Rolling Forecast 2018.3

Release Notes

Last Updated: 1/25/2019

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Version: 2018.3.1

Updated: 1/25/2019

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Summary

Kaufman Hall is pleased to announce the 2018.3 release of Axiom Rolling Forecast. 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 configuration steps needed to enable features for this version.

> **IMPORTANT:** Complete the Manual configuration instructions (page 12) if you are using the Drivers form for the first time.

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
- Self-help videos
- Recorded webinars

- Virtual training courses

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

Product upgrade notes

> **IMPORTANT:** If you have any customizations that were made specific to your organization and did not take the 2018.2 update, you may not want to take this update. Please review the release notes for 2018.2, 2018.3, as well as the Axiom Rolling Forecast 2018.3 Administrator's Guide. If these item do not exist, submit a PFB. However, if you have made customization and want to use the standard product, please apply the update.

When upgrading to the 2018.3 version of Axiom Rolling Forecast, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, 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.
- Driver files will 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.

New features summary

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

Set the variable percentage default to use for plan files

In the Forecast tab, you can change the default variable percentage, as needed. The percentage is located in the **Variable Revenue** rows in column W (Forecast Method), where you can select to use the variable percentage from the driver or from the prior forecast. The **Fixed Variable** cell displays either the percentage amount from the driver or from the prior forecast.

> **NOTE:** You can update the percentage in the Fixed Variable cell, but once you enter a number, it remains for the duration of that forecast. When perform your next forecast, the number will display the default set up in the Assumptions driver (Driver or PriorForecast), and you can either leave the percentage as-is or you can change it again for the duration of the forecast.

For instructions, see "Managing the Adjustments driver" and "Forecast tab" in the Axiom Rolling Forecast online help.

Assign Benefits code to Salary code

In the Revenue and Salary Codes driver, you can now assign specific Benefits codes to your Salary codes. The benefits are then based off the Salary codes that you select.

As a result, the total benefits for the following calc methods are now calculated based on salaries based on the selected Benefits Code:

- Percent of Salary
- Rate Per FTE
- Salaries

At least one code must be selected for each Salary code for any of the benefits calc methods to work. For instructions, see Managing the Revenue and Salary Codes driver.

At least one code must be selected for each Salary code for any of the benefits calc methods to work. For instructions, see "Managing the Revenue and Salary Codes driver" in the Axiom Rolling Forecast online help.

Issues resolved in 2018.3

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

Issue Description	Description
PFB-06811 - RFDedPayorCodes field length [TFS 27573] \Axiom\Table Library\Rolling Forecasting\Data\RFDEDPayorCodes	**Summary:** RFDedPayorCodes is a table used to save data from RF Deductions Calculator. The RF Deductions Calculator create the Code (key field in RFDedPayorCodes) by concatenating the RFPlanGroup and the Payor Suffix. The RFPlanGroup max field length is 50 and the Suffix max field length is 25. When these are concatenated (with and underscore separating) to create the Code, the length could be up to 76. The column that it saves to is PayorCode and that needs to be widened to 100. **Resolution:** Corrected by updating the Max String Length in the RFDedPayorCodes table for column PayorCode to 100 from 25.
RFConfig Driver - WorkDay Period - Hours calculation toggle 2080 or 2086 [TFS 25142]	**Summary:** The following changes should be made: • "Annual FTE hours" (toggle) - 2080, 2086 - Implement toggle on Config-WorkDay Period • Hours per period formula - visible on "Show Additional Detail" • 2086 would be the default (will be blank for new customers -- Set conditional to look to queried for the code, if it does not exist, default to 2086 • This formula will account for the leap year [e.g. multiplying by N76 (i.e. days in period calculation)] **Resolution:** Corrected by adding a toggle to choose between 2080 and 2086.
RF Driver Error on StatData tab due to incorrect Period formula. [TFS 27253]	**Summary:** On the RF drivers the client has set the period to 1 and selected QFM to forecast out the 2 monthly current period months as they were starting a new RF for the first period of the new year. As a result the formula that calculates the monthly periods to use for the previous 3 months was producing an error for period 12 and 11 and possibly 10 where it was producing period 012, 011, and 010, which is incorrect. **Resolution:** Corrected by updating the RFDriver to properly accommodate the appropriate periods.

Issue Description	Description
RF OtherPtRevenue CM causing a circular reference [TFS 27331]	**Summary:** RF Other Patient Revenue CM causing a circular reference in the Average Rate Per Unit row for Current Quarter Forecast. **Resolution:** Corrected by updating the Other Patient Revenue CM to properly calculate the Average Rate per Unit.
RF Config Hours Codes do not include RFCode.Type=HoursJC [TFS 27333]	**Summary:** RF Config Revenue and Salary Code mapping Hours Code column did not include hours mapped to RFCode.Type=HoursJC **Resolution:** Corrected by adding RFCode.Type=HoursJC to column options.
RF Drivers Additional Query Missing HoursJC Code [TFS 26990]	**Summary:** Adjustments Driver for hours does not include RFCode.Type=HoursJC. **Resolution:** Corrected by including RFCode.Type=HoursJC to the Hours column of the Adjustments driver.
CT to RF History Not Populating [TFS 26895]	**Summary:** CT to RF History does not populate. **Resolution:** Corrected by updating the CT integration CM to populate the historical values.

Issues resolved in 2018.3.1

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

Issue Description	Description
RF Driver double counting the stats in current quarter column [TFS 28004]	**Summary:** In the Drivers tab of the Rolling Forecast drivers, the calc method in the current quarter column sums up twice. **Resolution:** Corrected by updating the calc method.
RF Driver Current Quarter Monthly Adjustment column needs conditional formatting [TFS 28006]	**Summary:** In the Drivers tab of the Rolling Forecast drivers, the calc method on the Adjustment row of Current Quarter Monthly columns needs to have conditional formatting as follows: • The adjustment row in column AQ should be an editable blue cell if cell AQ79<>Actuals (this will never occur because there is always one month of actuals) • The adjustment row in column AS should be an editable blue cell if cell AS79<>Actuals • The adjustment row in column AU should be an editable blue cell if cell AU79<>Actuals **Resolution:** Updated columns for correct formatting.
RF Drivers Workdays Not Matching in Plan Files for Current Year quarter and 1st Forecast Quarter [TFS 28480]	**Summary:** The workdays does not point to the correct cell in the driver. **Resolution:** Corrected by modifying the formula for "Workdays".

Manual configuration instructions

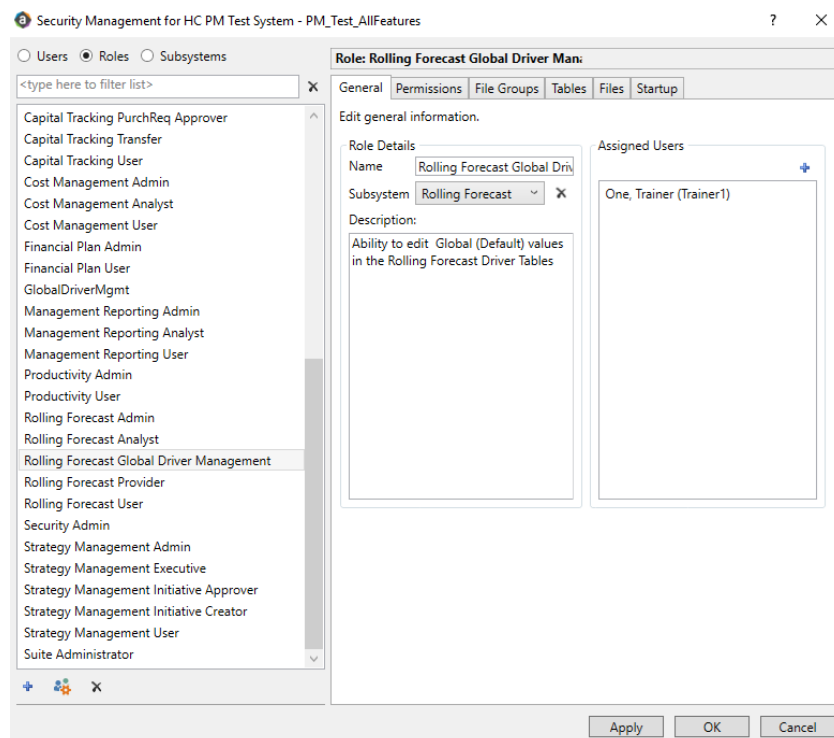Complete the following configuration steps after Axiom Rolling Forecast 2018.3 is installed:

▶ Configure Driver form security

> **IMPORTANT:** If this is the first time your organization is using the Drivers form, you must first complete these steps.
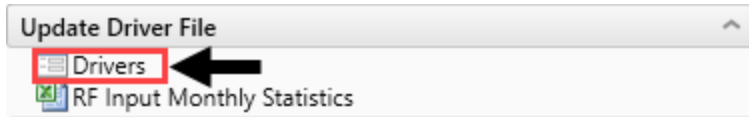
To configure Driver form security:

1. Save your current driver file before applying the update.

2. Apply the update.

3. Your Security Administrator must assign the new Rolling Forecast Global Driver Management role to at least one user (preferably a user previously assigned the RF Admin role). This role allows full access to all driver data in the updated form. If your organization does not decentralize the access to the drivers, you may assign this role to more than one RF Admin or RF Analyst user.

   > **NOTE:** If more than one user is assigned the Rolling Forecast Global Driver Management role and both users open the driver files simultaneously, the data from the user that saves last will override any data saved by the other user in the drivers.

4. In the **RF Admin** task pane, in the **Update Driver File** section, double-click **Drivers** to open the new Rolling Forecast drivers. Click each driver tab, and click **Save**. This will properly apply the correct RFPlangroup tags to the data for security purposes.

5. These new drivers allow multiple users simultaneous access. If you have more than one Rolling Forecast Administrator and you want to control the access for that user without assigning the Rolling Forecast Global Driver Management role, the Security Administrator will need to update the Driver Security form for each of the users to apply the specific Driver Access and data access. The data access will be applied using the RFPlangroups as the filter.

> **NOTE:** The filters applied for the driver files should coincide with the filters created in the table security. For example, all RFPlangroups assigned in the driver should encompass all the Entities and/or RFGroups assigned in the RF_Monthly table.

▶ Update benefits code

To update benefits code:

1. After Axiom Rolling Forecast 2018.3 is installed, the Benefits Code drop-down remains blank by default until you select a code from the drop-down. As part of setup, you must assign one Benefits code to each listed Salary code. For instructions, see "Assigning a Benefits Code to a Salary Code" in Axiom Rolling Forecast online help.

2. Review the Adjustment setup for the Variable Pct to use in the Plan Files and set as needed.

Known issues

Issue Description	Description
PFB-06704 – RF Deduction Calculator – Multiple Defects [TFS 27877]	**Summary:** A list of issues noted in the RF Deduction Calculator that was noted in a client review: **Explanation:** Working to resolve defects in upcoming patch. Continue to use your existing custom deduction utility.

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