KaufmanHall
axiom software

Axiom Cost Accounting and Decision Support 2018.2

Release Notes

Last Updated: 6/25/2018

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

Version: 2018.2

Updated: 6/25/2018

Contents

Summary

Kaufman Hall is pleased to announce the 2018.2 release of Axiom Cost Accounting and Decision Support. 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 Cost Accounting and Decision Support, keep in mind the following:

- This product upgrade contains new tables, columns, updated templates, reports, scripts/imports 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 you moved to a new location since the last upgrade 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.

New features summary

This section includes a summary of the new or updated features for this release:

Assign default Cost Methods to Cost Items

You can now easily assign Cost Methods to Cost Items by using the new Default Cost Method Assignment utility.

For more information, see "Assigning default Cost Methods to Cost Items" in the Axiom Cost Accounting 2018.2 Administrator's Guide.

Managing default Cost Methods

To make viewing and assigning default Cost Methods easier, the new Rev Code Defaults utility allows you to view and manage the default Cost Methods for Cost Pools by Rev Code. You can also use this utility to do manage default Cost Methods for Cost Pools at the RevCode/Department level of specificity (e.g. to define a separate set of methods for the Drugs cost pool in the pharmacy department by rev code different from Drugs with the same RevCode in all other departments).

Using this utility, you can:

- View a list of the default Cost Methods by Rev Code and Cost Pool.
- Edit the default Cost Method for all Rev Codes or for specific Rev Code(s).
- Edit the default Cost Method for all Rev Codes and Cost Pools or for specific Rev Codes and Cost Pools.

You can also perform these same tasks to assign Cost Methods for Rev Codes and Cost Pools by department.

For more information, see "Maintaining default Cost Methods for Rev Codes and Departments by RevCodes" in the *Axiom Cost Accounting 2018.2 Administrator's Guide*.

Copy method definitions

Axiom Cost Accounting now uses a dedicated ETL that allows you to create a new method definition set based on a copy of an existing method definition set.

For more information, see "Copying method definitions" in the *Axiom Cost Accounting 2018.2 Administrator's Guide*.

Redesign of reclassification definition setup

The creation and management of reclassification definitions has been completely redesigned for version 2018.2. The reclass definition worksheet is now a form that allows you to more easily set up and configure your reclass definitions.

When selecting the source department, source ACCT or group, and target and basis for the spread, you can now use the Filter Wizard redesigned in version 2018.1 to easily select, create, and save filters without needing to create a new filter each time.

The list of reclass definitions has also been redesigned to offer a better user experience so you can more easily view and manage your definitions.

For more information, see the following in the *Axiom Cost Accounting 2018.2 Administrator's Guide*:

- "Viewing reclass definitions"
- "Creating or modifying reclass definitions"
- "Activating or deactivating reclassification definitions"
- "Deleting reclassification definitions"

Redesign of allocation definition setup

The creation and management of allocation definitions has been completely redesigned for version 2018.2. The allocation definition worksheet is now a form that allows you to more easily set up and configure your allocation definitions.

When selecting the source ACCT or group and target and basis for the spread, you can now use the redesigned Filter Wizard in version 2018.1 to easily select, create, and save filters. Saved filters can then be reused without needing to create a new filter each time.

The list of allocation definitions has also been redesigned to offer a better user experience so you can more easily view and manage your definitions.

For more information, see the following in the *Axiom Cost Accounting 2018.2 Administrator's Guide*:
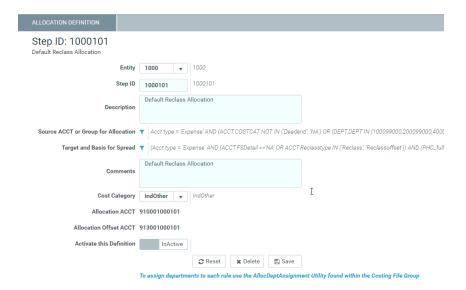
- "Creating or modifying allocation definitions"
- "Deleting allocation definitions"

Reclass and Allocation Distribution Reconciliation report

The Reclass and Allocation Distribution Reconciliation report now allows you to now find variances after you run your allocation and reclass processing or if there are changes in your GL structure.

For more information, see "Running the Reclass and Allocation Distribution Reconciliation report" in the *Axiom Cost Accounting 2018.2 Administrator's Guide*.

Enhanced Reclass and Allocation Department Summary report

We made several enhancements to the Reclass and Allocation Department Summary report, including:

- Changed the column header names.
- Changed the data table column referenced in one of the column filters that breaks out Other Operating Revenue. Some clients want to treat revenue that, on the financial statements, are not classified as "Other Operating Revenue" as "Other Operating Revenue" for reclass purposes.

- Added a new column specific to Axiom Cost Accounting in the ACCT table for use by a new column filter.

- Redesigned the column sections to make it easier to read the report from left to right.

- Added new columns to break out payroll reclasses from the other types of reclasses (i.e. Department reclasses, Account reclasses, Other Operating Revenue reclasses)

Reclass and Allocation Reconciliation
KH COSTING Entities: 2
Fiscal Year: 2014 Period: 12 Month

Department and Description	Other Operating Revenue	Total GL Expenses before adjustments	Dead End Account Expenses	Total Expenses before applying offsets	Expense Offsets - Other Operating Revenue Reclass	Total Expenses before Payroll Reclasses
Indirect Departments						
26000 - NURSING RESOURCES-26000	0	23,876	0	23,876	0	23,876
26005 - ACCREDITATION-26005	0	38,377	0	38,377	0	38,377
26010 - SHIFT MGT/STAFF-26010	0	127,069	0	127,069	0	127,069
26015 - CENTRALIZED SCHEDULING-26015	0	49,887	0	49,887	0	49,887
26020 - PROFESSIONAL SERVICES-26020	0	1,163	0	1,163	0	1,163
Total Indirect Departments	**0**	**240,372**	**0**	**240,372**	**0**	**240,372**
Direct Departments						
21637 - ADULT PHYSCHIATRIC-21637	0	280,742	0	280,742	0	280,742
21640 - OUTPATIENT-21640	11,468	28,376	0	28,376	(11,468)	16,909
26040 - PRE-HOSPITAL CARE-26040	600	16,912	0	16,912	(600)	16,312
26080 - STEP DOWN UNIT-26080	0	291,229	0	291,229	0	291,229
26090 - SHORT STAY UNIT-26090	0	1,526	0	1,526	0	1,526
26100 - 3RD FLR S.EAST CAMPUS-26100	0	430,482	0	430,482	0	430,482
Total Direct Departments	**12,068**	**1,049,267**	**0**	**1,049,267**	**(12,068)**	**1,037,200**

Remove Key Dates from several reports

The following assets now reference variables instead of the KeyDates table for improved ease of use and greater flexibility:

- Cost Item Method Assignment.xlsx
- Costing Data Structures Table Data Population.xlsx
- Micro Method Calculation.xlsx
- RCC Method Calculation.xlsx
- Reverse Markup Method Calculation.xlsx
- RVU Method Calculation.xlsx
- Transaction Microcost Method Calculation.xlsx
- Direct to Encounter Processing.axi
- Provider Method Calculation.xlsx
- RCU Method Calculation.xlsx

Episode Builder

In Axiom Decision Support, you can now use the new Episodic Grouper utility provides that provides an easy way to select patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition. This includes the ability to define rules and reuse them where appropriate, and then use them to define an episode or bundle of care.

For more information, see "Working with Episodes" in the *Axiom Decision Support 2018.2 Administrator's Guide*.

Patient/Encounter Viewer

In Axiom Decision Support, the Patient/Encounter Viewer allows you to view all the related data for Encounters and Patients. This intuitive and powerful reporting tool allows you to view the entire data set for the patient and/or its encounters. With this tool, you can create lists and save them for future use, including using the Advanced Filter Wizard to limit the patients or encounters to include in each list—all in one easy-to-use interface. The capability to create such saved lists allows you to define patient cohorts, populations, and service and disease registries. These cohorts or populations can then be reviewed in detail using the Patient/Encounter Viewer.

Patient Encounter Viewer

Patient / Encounter List Viewer

Use this form to create a new list or open an existing list of Patients / Encounters

- ● Create a New List
- ○ Select a Saved List

Choose Date Type: Discharge ▼

Discharge Start Date: [ ] 📅 ✕

Discharge End Date: [ ] 📅 ✕

Filter (New or Saved): Filter = None ▼

☐ Save List Settings
List Name
List Description

≡ Encounter List ≡ Patient List

Each lists shows you a complete set of patients and encounters information in real-time for your review. This allows your organization to easily validate that patients or encounters belong within a defined services, cohorts, populations, and episodes meet those criteria. From the list, you can filter information, drill down to specific Encounter and Patient details, view other lists, and save filter changes to create and modify lists.

axiomsoftware — KaufmanHall

ENCOUNTER LIST | PATIENT LIST

Encounter List: Cardiology 1/20
Encounter.DischargeCalDate >= 20160101 and Encounter.DischargeCalDate <= 20160131 and Encounter.ServiceLine1 = 'Cardiology'

Encounter Seq	Patient ID	Entity	PTType	PTType Description	Admit Date	Discharge Date	Financial Class	Charges	Payments	Total Cost
3319	4772765549433	6200	PB	Professional	Jan-2016	Jan-2016	UHC	$47	$6	$25
3321	0786829873710	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3323	1514788917584	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3325	7187804609271	6200	PB	Professional	Jan-2016	Jan-2016	CIGNA	$47	$40	$25
3327	3077235516542	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3330	3144289061202	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3334	6853091158143	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3335	0314815174369	2000	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3336	3077235516542	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3337	6775651114133	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3340	5985690803542	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3341	4583674629662	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3342	1833540202905	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$47	$5	$25
3343	3155086601997	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3344	7187804609271	6200	PB	Professional	Jan-2016	Jan-2016	CIGNA	$47	$40	$25
3345	4916068747510	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3346	0801706003315	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3347	1537389968915	6200	PB	Professional	Jan-2016	Jan-2016	Medicare	$0	$0	$0
3348	5030996961943	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25
3349	6817749774413	6200	PB	Professional	Jan-2016	Jan-2016	Anthem	$47	$17	$25
3350	3654512529589	6200	PB	Professional	Jan-2016	Jan-2016	Medicare Complete	$47	$5	$25

|◄ ◄ 1 2 3 4 5 … ► ►| 1 - 50 of 12943 items

For more information, see the following topics in the *Axiom Decision Support 2018.2 Administrator's Guide*:

- "Creating a list of Encounters and Patients"
- "Selecting a Patient and Encounter List to view"
- "Filtering Patient and Encounter lists"
- "Filtering by column in an Encounter and Patient list"
- "Removing filters in Encounter and Patient lists"
- "Drilling down on Encounter and Patient details"

Issues resolved in 2018.2

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

Issue Description	Resolution
PFB-05370 - Report: Inpatient Summary Analysis [TFS 20039]	**Symptom:** The Inpatient Summary Analysis report should have a refresh variable containing an entity selection. Multi-entity clients cannot select just one entity for review. **Resolution:** Corrected by updating formulas.
PFB-06182 - Cost RVU - Wrong description title [TFS 19629]	**Symptom:** In the CostRVU table, the YRMO should be titled Ending YRMO not Beginning effective YRMO. **Resolution:** Corrected by changing the column title.
PFB-06236 - CostVarPct Reclass [TFS 20222]	**Symptom:** The calculation of CostVarPct (Costing Variable/Fixed Percentage) for Reclass Accounts needs to be reviewed, but the solution we need to pursue at this time is to not set the CostVarPct column on the ACCT table during processing, and allow clients to set it manually as they have been doing. **Resolution:** Implemented recommended approach by commenting out/ disabling any transform step that writes to the Acct.CostVarPct field in each of the following utilities: • \Axiom\Imports Library\Costing\02 Internal Data\GL Redistributions\Allocation by Dept.axi • \Axiom\Imports Library\Costing\02 Internal Data\GL Redistributions\Reclass by Account.axi • \Axiom\Imports Library\Costing\02 Internal Data\GL Redistributions\Reclass by Department.axi • \Axiom\Imports Library\Costing\02 Internal Data\GL Redistributions\Reclass Payroll.axi
PFB-06242 - System Account Range Table short digit [TFS 20223]	**Symptom:** In the System Account Range tables, a couple of accounts are short by one digit. These include the following: Payroll Reclass by Account, Payroll Reclass by Account – Offsets, System Calculated Statistics, and Payroll Statistics ENDING field lengths are nine digits, but they should be ten digits. **Resolution:** Corrected by updating the field to ten digits.

Issue Description	Resolution
PFB-06353 - RCC Utility Defect [TFS 21699]	**Symptom:** During the costing process, we identified a variance that may occur under certain circumstances between amounts that posted back to the CGL as an allocation offset compared to what posted to Cost Results. The amounts used in the Cost Results were correct for the RCC method. **Resolution:** Corrected by changing transform step 28 from an internal join type to a left join type on the CostingRCC_ ChargeTotalsByDepartment table. This ensures that the parent department without cost activity is included in the CGL update.
PFB-06369 - Reclass Offset Posting without Basis [TFS 22741]	**Symptom:** It was identified that the CGL had Reclass offset entries but no Reclass entries. Further investigation confirmed that any Reclass rule processed that does not have a basis may post a Reclass offset, but does not post a reclass to the CGL. This was found to be true in all Reclass types: Payroll, Account, OOR, and Dept. **Resolution:** Corrected by adding a new transform to confirm proper treatment of the reclasses for both the initial reclass and the resulting offsets.
PFB-06379 - Encounter Staging missing columns [TFS 21968]	**Symptom:** Columns CoderID String and CoderName String are missing from the EncounterStaging table. **Resolution:** Corrected by adding the columns to the table.
PFB-06410 - Costing Data Table Type - CostItem Column missing lookup [TFS 22590]	**Symptom:** The Costing Data table type currently defines a required column of CostItem. This column does not have a lookup to CostItem.CostItem, however all of the packaged tables assigned to this Table Type have a lookup on their CostItem column to CostItem.CostItem. **Resolution:** Corrected by updating the Costing Data Table Type to have a lookup to CostItem.CostItem.
PFB-06411 - RVU Processing using ItemType [TFS 22589]	**Symptom:** When there is a CostItem with a CostRVU.ItemType = 'NA', the system did assign that RVU to all matching cost items except those that have an ItemType match that is specifically defined in the CostRVU table. **Resolution:** Corrected by updating the formula in cell O14.
PFB-06422 - CostingDefaults Driver [TFS 23770]	**Symptom:** During the Client set up, a default Cost Method could not be established. **Resolution:** Corrected by adding "Code" to cell A1.
PFB-06427 - Reclass Input Manual Statistics [TFS 23433]	**Symptom:** The drop-down in the refresh variables does not include the last CGLyyyy table in your system. **Resolution:** Corrected by updating the data filter.

Issue Description	Resolution
PFB-06475 - A Calculation Utility is creating miscellaneous variance [TFS 23434]	**Symptom:** After running the RCC calculation, several departments may contain small variances of approximately $1. The variance is always small and immaterial. **Resolution:** Corrected by adjusting the SQL code related to the calculation of the percentage spread across the moths so that cost categories that were not processed did not appear in the table. The $1 was actually 1.00% spread percentage across a period range of 1 and appeared this way only because single months at a time were being processed when discovered.
PFB-06531 - Service Line Definition - Service Code Type [TFS 24510]	**Symptom:** SERVICELINEDEF columns for ServiceCodeType and DefCodeType were too short for modern columns. **Resolution:** Corrected by increasing the column width to 50.
PFB-06592 - ReconUC_02_3_Cost Results report not pulling correct data [TFS 25019]	**Symptom:** The report pulled data from CGL2014 table, even when selecting the 201812 cost set. **Resolution:** Corrected by updating the field definition rows.
2018.1 Patch - CA/DSS: RVU Import [TFS 23928]	**Symptom:** The RVU import does not use the RVU version selected for the Cost Set. For example, using Cost Set 201812 and set up to use method version 201712 and RVU version 201712. When processing the RVUs, the import uses the {varServiceEndYRMO} and not the selected RVU version. **Resolution:** Corrected by making the following changes: 1. Added new transform step #9 that establishes the RVUVersion variable. 2. Altered transform step #28 by replacing the predicate "rvu.yrmo = {varServiceEndYRMO}" with "rvu.yrmo = {varRVUVersion}" affecting three SQL statements.

Manual setup instructions

There is no manual setup or configuration instructions required for this release. Please see the relevant administration manual for using the features in this release.

Known issues

The following table lists the known issues in this release:

Issue Description	Explanation
PFB-06194 - Cost Category Expense Analysis [TFS 22333]	**Symptom:** In the Refresh Variables dialog, when you select **Actual** for Net Revenue, the report displays **Estimated** Net Revenue. **Explanation:** A reference is looking at the wrong cell to determine if the row should display Actual or Estimated. The values are still actual, as selected in the Refresh Variables, but the label is incorrect.
PFB-06422 – Costing Defaults Driver [TFS 23220]	**Symptom:** During the client initial setup, one may experience difficulty in setting up the default Cost Method due to the Costing Defaults driver missing the word "Code" in cell A1. **Explanation:** Open the CostingDefaults driver, and navigate to cell A1. Type the word "Code" and save the file.
PFB-06532 - Service Line Assignment - Admit YRMO Dates [TFS 24514]	**Symptom:** Cannot be processed with a scheduled job. **Explanation:** The workbook needs variables added so that is can accept job variables from a scheduled job.
PFB-06619 - Costing: Direct to Encounter [TFS 25423]	**Symptom:** The job does not accept limit query filters. **Explanation:** The Direct to Encounter filtering mechanism was not designed to accept limit query filters.
PFB-06620 - Costing: Reclass Filters [TFS 25417]	**Symptom:** The reclass rules filters fail if they go more than two levels for Table.Field definitions (IE: Acct.CostCat.CostCat). **Explanation:** The SQL code cannot accept more than one level of Table.Field definition in the filters, even though it is perfectly acceptable in Axiom reports.
PFB-06627 - Refresh Variable Column Filter - Margin Analysis Report [TFS 25418]	**Symptom:** An error occurs when the user selects a **To** refresh variable but nothing in the **From** variable. **Explanation:** Missing conditional to set value when the **From** variable is empty.
PFB-06631 - Bad Data Range Filter Professional Utilization Department Analysis report [TFS 25413]	**Symptom:** An error occurs in AQ4. **Explanation:** The Data Range filter requires a department value to run properly. The department does not always populate in the report as expected.

Issue Description	Explanation
DSS Reporting: Patient Analysis Reports - Inpatient Summary Analysis [TFS 25413]	**Symptom:** The following formula issues have been found in three locations on the report: 1. ALOS variances (total, pct average, pct) 2. Net Patient Revenue 3. Payor Mix % of cases variance average
DSS Reporting: Patient Analysis Reports - Margin Analysis [TFS 25545]	**Symptom:** The Quick filter does not work. **Explanation:** The report is not compatible with quick filtering. Quick filter UI to be removed.
DSS Reporting: Physician Analysis Reports - Key Performer Inpatient Period Comparison [TFS 25567]	**Symptom:** The Provider names are not listed with ID.
DSS Reporting: Physician Analysis Reports - Physician Utilization Detail [TFS 25568]	**Symptom:** • The freeze pane should be locked. • Total Case and Provider Total Case calculations should be a distinct count of encounters, not a sum of all totals below. • PT Type Refresh Variables should also include DSS PT type.
DSS Reporting: Physician Analysis Reports - Utilization by Day of Stay [TFS 25569]	**Symptom:** • Freeze pane should be locked. • Formula issue (1) Top 10 Doc detail view – Case Avg & Detail Avg formula issue (okay for individual Providers just wrong for Top 10 Docs); Case Avg = Total Cost / Day Total Cases; Detail Avg = Total Cost / Dept Total Cases
DSS Reporting: Population Analysis Reports - Population Trends [TFS 25572]	**Symptom:** The Total is missing from print version of the report.

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