



Axiom Budgeting and Performance Reporting 2018.4

Release Notes

Last Updated: 3/11/2019

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 © 2019 Kaufman, Hall & Associates, LLC. All rights reserved.

Version: 2018.4.4

Updated: 3/11/2019

Contents

Summary	4
Product upgrade notes	5
New features summary	6
Modifying job code designations for a department	6
New department enhancements overview	7
Values for taxes and retirement in Labor Config Driver pre-populate	9
Audit View on Stat_Rev and Expense tabs	9
Monthly Review Dashboard updates	10
Variance Comments Collection tab on Month End Review Dashboard	11
Improved performance by batching database queries	13
Issues resolved in 2018.4	14
Driver, template, calc method, and other updates	14
Report updates	24
Issues resolved in 2018.4.1	33
Driver, template, calc method, and other updates	33
Report updates	33
Issues resolved in 2018.4.2	34
Driver, template, calc method, and other updates	34
Report updates	35
Issues resolved in 2018.4.3	37
Driver, template, calc method, and other updates	37
Report updates	37
Issues resolved in 2018.4.4	39
Driver, template, calc method, and other updates	39
Report updates	39
Manual configuration instructions	41
Known issues	42

Summary

Kaufman Hall is pleased to announce the 2018.4 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 configuration updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

IMPORTANT: Some features in this release require configuration after installation. For more information, see [Manual configuration instructions \(page 41\)](#).

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 2018.4, 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.

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.

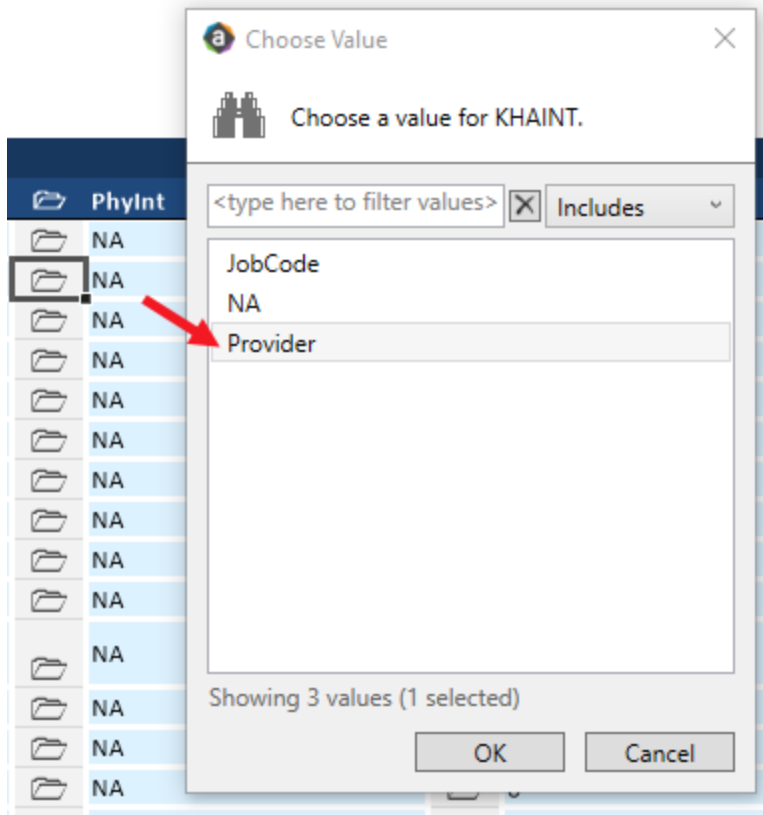
Modifying job code designations for a department

Kaufman Hall has enhanced how you assign Axiom Budgeting and Performance Reporting job codes to a labor method by adding department level configuration. This feature is especially useful for assigning job codes to departments with employees that have a dual assignment. We added a new column to manage job code assignment in the **JOB**CODE dimension table: **PhyInt**. The **KHAInt** column is the standard distribution set that determines whether the associated job code falls under regular labor or provider labor. However, there may be instances where your institution wants to use a modified distribution for specific departments. For example, in some cases, you may need to use the same job code on the ProviderComp tab for same departments, but on the **JOB**CODE tab for other departments. Prior to this feature, you had to either build in two stages or assign a pseudo job code.

NOTE: For those who do not need this feature, continue to use **KHAInt** as you have been; including assigning the job code to "Provider" or "JobCode".

KHAInt	PhyInt
JobCode	NA
JobCode	NA
JobCode	NA
Provider	NA
JobCode	NA
JobCode	NA

You can use the new **PhyInt** column in the **JOB**CODE dimension table in the Dimension Maintenance Utility to create a modified labor designation different from the standard designation in the **KHAInt** column for a specific job code by double clicking the associated folder icon.



The value for the cell in the **PhyInt** column will remain as NA. The update occurs automatically in the KHAInt column. As a result, you do not need to modify the JobcodeDimGrp column values in the DEPT dimension when using the Dimension Maintenance utility.

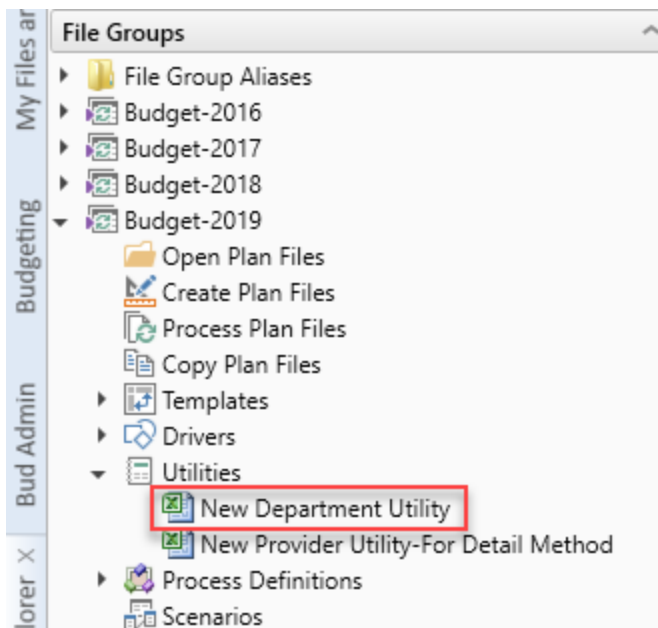
For more information, see "Modifying job code designations for a department" in the Axiom Software online help.

New department enhancements overview

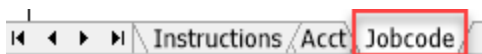
We have made it easier for you to add new departments and to copy accounts and job codes in bulk from an existing department to a new one. With this change, we have created a New Department Utility, added a column to the ACCT dimension, and created a new rule for an existing column in the DEPT dimension.

► New Department Utility

The New Department Utility allows you to copy accounts from an existing department to a new department and to add additional accounts to your new department.



You can also review and add new job codes to the department using the Jobcode tab in the New Department Utility.



For instructions, see "Adding a new department" in the Axiom Software online help.

► New column in the ACCT dimension

We added the NewDeptStdLine column to the ACCT dimension table. Use this column to set or update the calc method for each department.

BPCategory	NewDeptStdLine	
NA	NA	
NA	NA	
NA	NA	
NA	NA	
NA	NA	

► New rule for KHACDimGRP column in DEPT dimension

Before you copy account data from one department to a new department using the New Department Utility, you will need to set the department up in the DEPT dimension table. When doing this, the cell

value for that department in the KHACDimGRP column must be NewDeptStdLine.

Maintenance

Dimension : Dept

DataSet filter : (DataSetName IN ('General','BP') OR DataSetName = '')
 (*) the column is duplicate. Only the first instance will be saved back

Dept	Description	KHACMDimGrp	JobcodeDimGrp
19250	EHS Performance Improvement	NewDeptStdLine	KHAInt
19370	EHS Risk Management And Safety	KHACStdLine	KHAInt
20000	EMC Balance Sheet	KHACStdLine	KHAInt
21010	EMC Physician Acquisition	KHACStdLine	KHAInt

Values for taxes and retirement in Labor Config Driver pre-populate

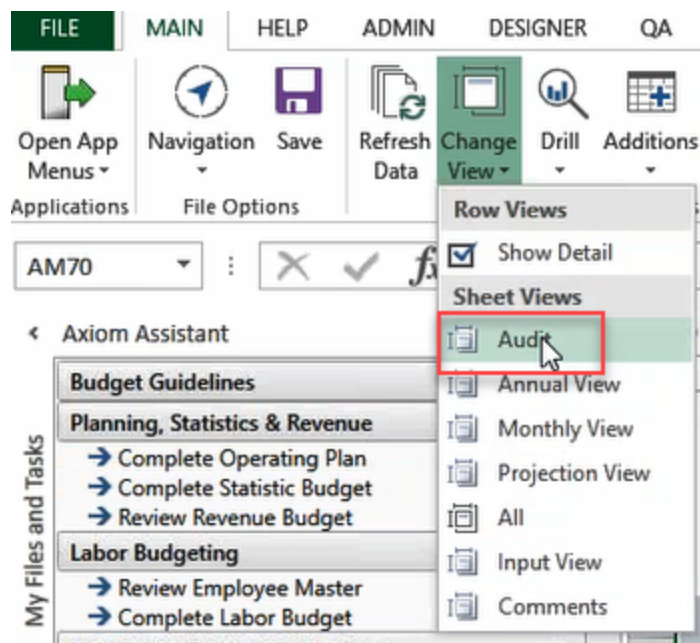
The Axiom Budgeting and Performance Reporting Budget Labor Configuration driver now populates the payroll tax data and the retirement data in new budget group exceptions automatically. When you create a new budget group exception, the payroll tax fields will be the same as those in the Global Setup section of the driver so that you do not need to enter new values each time. However, you can still edit the cells if needed.

Budget Workbook Labor Configuration Settings

Global Setup		Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl
Activate Dept Based Pay?		Default JobCode: 0 0							
Save	Global (Drivers)	Global							
	Global Hours per FTE Convention	Default	2086						
	Global Calendar Days	366	365	365	31	334		365	365
	Global Work Days in Period	261	261	260	173	87		260	276
	Global Hours in Period	2,091	2,086	2,086	177	1,909		2,086	2,086
	Global Number of Holidays				4	2		6	6
Labor Configuration									
% of Staffing Change with Volume		5.0%							
Medicare Tax		1.0% 4.0%							
Current FICA Rate		3.0% 5.0%							
Current FICA Limit		\$10 \$20							
Retirement Below FICA limit		10.0% 12.0%							
Retirement Above FICA limit		15.0% 18.0%							
Retirement Max Limit		\$100,000 \$150,000							

Audit View on Stat_Rev and Expense tabs

When in a plan file, you can now use **Audit View** in the **Change View** menu on the **Main** ribbon tab for the Stat_Rev and Expense tabs to view all hidden columns and formulas in those tabs. You can read, but not edit, the additional columns displayed in this view.

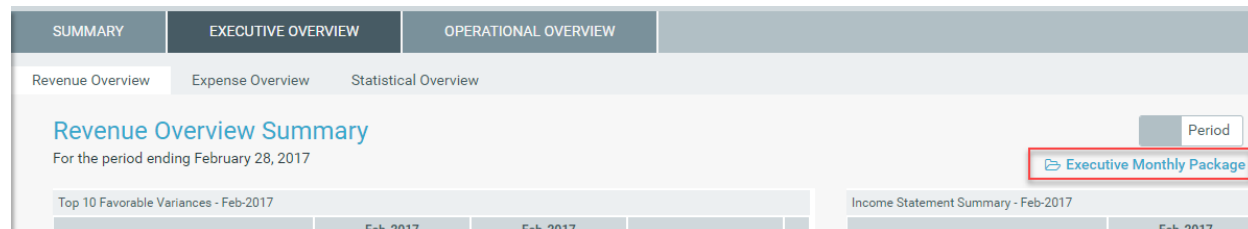


Monthly Review Dashboard updates

We made several updates to the Executive Overview and Operational overview sections of the Monthly Review Dashboard.

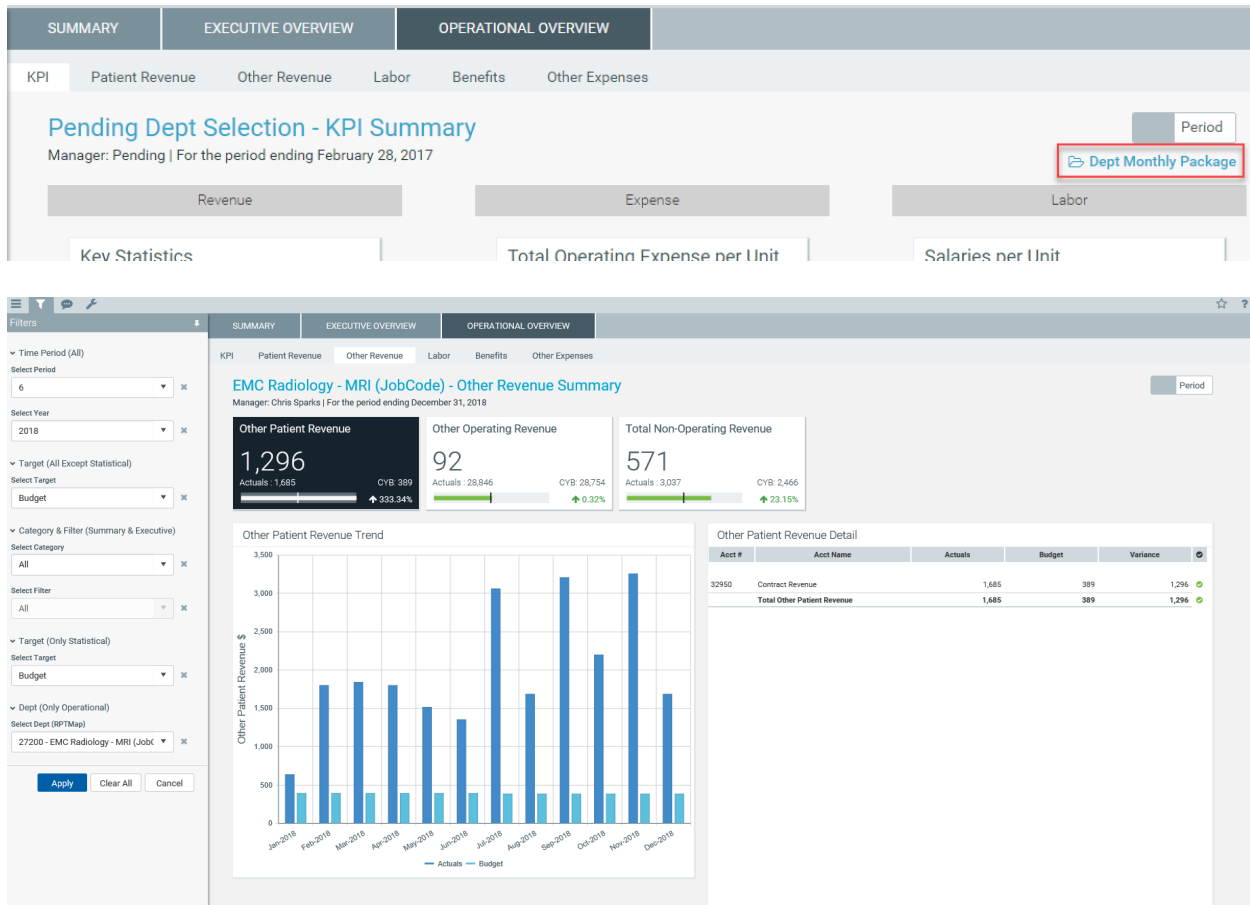
► Executive Overview section updates

We added a link to the Executive Monthly Package in the Revenue Overview and Expense Overview tabs.



► Operational Overview section updates

We added a link to the Dept Monthly Package in the KPI tab and added an Other Revenue tab to this section.



For more information, see "Understanding the Month End Review Dashboard" in the Axiom Software online help.

Variance Comments Collection tab on Month End Review Dashboard

You can activate a new Variance Comments Collection tab on the Month End Review Dashboard. The tab allows you to create variance comments and enter action plans directly in the dashboard. Clients who need, or currently have, custom filters should continue to use the Excel Client to enter variance comments, however.

IMPORTANT: Do not activate this feature if you have, or need, custom filters for Variance Comments Collection as these customizations will not appear in the Month End Review dashboard. Improvements were made to this asset and, as a result, you may see differences as compared to the Dept Variance report in the Variance Comments Collection. Please be aware that the Standard Variance Comments Collection report located at \Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\Dept Variance.xlsx as well as the related drill reports will be sunset with release 2019.1 and will no longer be supported.

SUMMARY

EXECUTIVE OVERVIEW

OPERATIONAL OVERVIEW

KPI

Patient Revenue

Other Revenue

Labor

Benefits

Other Expenses

Variance Comments Collection

Variance Comments Collection Summary

Save

Vice President: Sally Klein | Director: Yolanda Dean | Manager: Yolanda Dean | Period ending February 28, 2018

Month-End Variance Explanation - Feb-2018

	Q	Account	Description	Feb-2018 Actual	Feb-2018 3 Mth Avg	Variance	Variance %	3 Mth Avg Alert	Variance Explanation (max char 500)	Action Plan (max char 500)	Rate Volume Variance		
											Rate	Volume	Efficiency
▼		Volume & Revenue Summary											
		700000	Key Volume Statistics	867	843	24	2.89%	🟢			0	24	
🔍		730000	Patient Revenue	271,087	265,669	5,418	2.04%	🟢			(2,253)	7,672	
			Other Operating Revenue	0	0	0	0.00%	🟢			0	0	
			Non-Operating Revenue	0	0	0	0.00%	🟢			0	0	
▼	🔍	760000	Paid Hours	7,518	8,059	541	6.71%	🟢			774	(233)	
			FTEs	47.12	50.51	3.39	6.71%						
			Hours Per Unit of Service	8.67	9.56	0.89	9.33%						

Axiom Budgeting and Performance Reporting will not display the Variance Comments Collection tab automatically. You will need to activate the tab using the **Update VCC Threshold Table** utility.

Tolerance Level for Alerts

Custom Filter for Alert Processing:

Comparison Time Series:

Revenue & Usage Comparison:

Flag Max Positive Variances as Required:

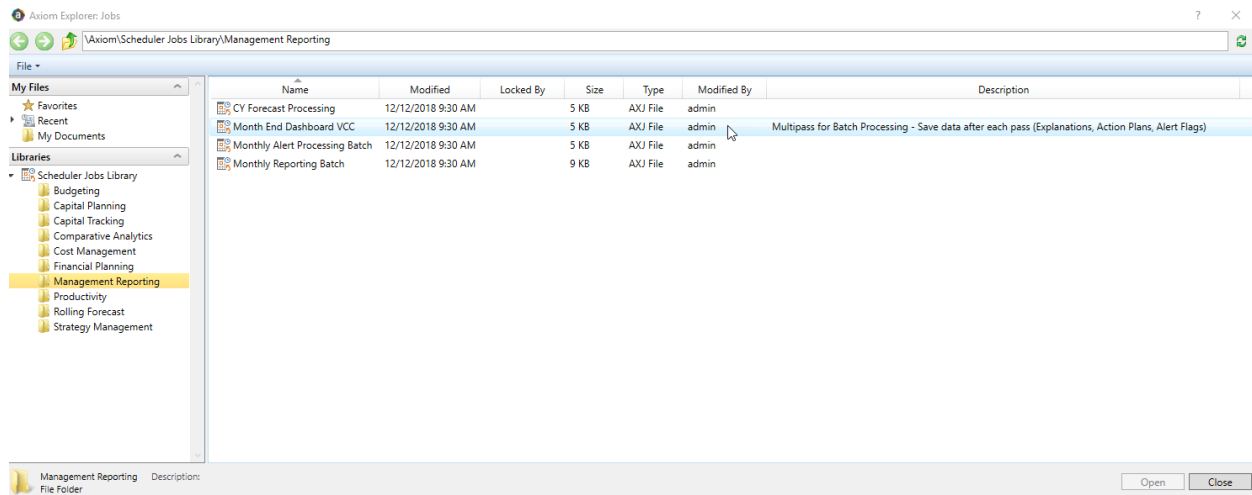
Use H_JCHours for Paid Hours filter:

Activate Variance Comments Collection tab on Month End Review Dashboard:

FSSummary	Min	Max	Threshold	Level of
Groups	Yellow	Red	Red	Comments

A new Scheduled job has been created to run the Variance Comments Collection tab multi-pass and is located at \Axiom\Scheduler Jobs Library\Management Reporting\Month End Dashboard VCC.axj.

IMPORTANT: You must use this scheduled job with the new dashboard to receive the appropriate results in reports.



Improved performance by batching database queries

We improved the performance of opening and refreshing plan files by batching database queries and reordering when tabs are processed by the system. By batching non-related queries, calls can be made to the database 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.

Issues resolved in 2018.4

The following tables list the resolutions for issues addressed in 2018.4, released on December 17, 2018:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-05421 - Inability to change calc methods on Labor Tab [TFS 12007]	<p>Symptom: Users could not change calc methods on Labor tab without the admin checkbox activated.</p> <p>Resolution: Several important changes to behavior of changing calc methods on labor tabs.</p> <p>(1.) The ability to change a SINGLE line calc method has been granted to Budgeting Admin and Budgeting Analyst roles. (Previously, the admin box needed to be checked for this to be allowed). For Labor methods of Jobcode, Staffing, Employee, the following calc methods may be changed:</p> <ul style="list-style-type: none">• AvgPerPaidHr• AvgPerProdHr• Dept_AvgPerProdHr• Dept_InputMonthly• Dept_InputTotal• Holiday <p>Input_Monthly For the HHLabor method, the following calc methods may be changed:</p> <ul style="list-style-type: none">• AvgPerPaidHr• AvgPerProdHr• Dept_AvgPerProdHr• Dept_InputMonthly• Dept_InputTotal• Holiday• Input_Monthly• MileageReimb <p>(2) The single line “Dollars” only calc methods have also been enhanced so that when changing the calc method, the pay type is automatically retained and is now also always displayed.</p>

Location	Description
PFB-05504 - Budget Paid Hours Budget column total [TFS 12583]	<p>Symptom: The Total Paid Hours summary rows in column CE on the Expense tab will not refresh after user builds the plan file.</p> <p>Resolution: Corrected by having the Paid Hours subtotal row reference column CQ instead of CE.</p>
PFB-05518 - Lump Sum Paytype should be a Dollars Only Paytype [TFS 15646]	<p>Symptom: YTD hours are being double counted to Lump Sum when the LumpSum pay type used was the same as the pay type for "Regular" row.</p> <p>Resolution: Corrected by removing the criteria to allow hours into the LumpSum location.</p>
PFB-05797 - Jobcode filter is not working in Add New Jobcode calc method [TFS 16497]	<p>Symptom: When inserting a job code into a plan file, the available list of job codes was not being filtered when the Jobcode Dropdown filter was configured. This made all job code available instead of a filtered list.</p> <p>Resolution: Corrected by updating the Refresh Variable to recognize the Jobcode Dropdown filter if configured.</p>
PFB-05837 - Budgeting: Budget Assumptions Driver file formula issue [TFS 16648]	<p>Symptom: Column U of the "Budget Group" calc method has an error in it that is not referencing the applicable Budget Group location within the calc method.</p> <p>Resolution: Corrected by updating formula in column U to anchor the formula to the budget group field.</p>
PFB-06303 - URGENT Provider tab Add New Provider CM inaccurate [TFS 21056]	<p>Symptom: On the Provider tab, when adding a new Provider, using Provider Summary method, the visits and volume rows may not total up correctly on the Stat_Rev tab in the top summary section.</p> <p>Resolution: Corrected by modifying Column AO (CPT column) for the Volume and Visit rows. The hardcoded "NA" was removed and update with the formula to recognize the CPT Summary code used.</p>
PFB-06324 - ProviderComp - ProviderList Manual Refresh [TFS 26270]	<p>Symptom: If user makes an update to the comp method and ProviderList, saves and then Refreshes the open Plan File, the method is not refreshed.</p> <p>Resolution: Corrected by updating the AQ that updates this to be Refresh on Open.</p>

Location	Description
PFB-06430 - Detail Method - Budget Method label [TFS 26248]	<p>Symptom: Current labeling is confusing when using hide detail view.</p> <p>Resolution: Corrected by moving current labels and modifying hide row logic for Detail_CYB calc method.</p>
PFB-06451 - URGENT Formula error in Jobcode Calc Method on Employee tab [TFS 23182]	<p>Symptom: When using the Rolling12 option for PTO % on the Employee tab, lump sum hours were erroneously included.</p> <p>Resolution: Corrected by modifying the for Rolling 12 PTO calculation to exclude those hours.</p>
PFB-06645 - Changed a calc method to FixedRevenue for IP Revenue and the IP % per the driver did not flow in [TFS 25601]	<p>Symptom: A dynamic formula is needed so that regardless of revenue type the correct corresponding % change from the driver flows into plan files using this calc method.</p> <p>Resolution: While not a defect, the Fixed Revenue and Add New Fixed Revenue calc methods have been enhanced so that they can now be used in the Patient Revenue sections of the Stat_Rev so that values entered in the Revenue Adjustments driver will now be recognized.</p>
PFB-06659 - Add New Input Monthly does have Dept_PtRev tag in column AS on Stat Rev tab [TFS 26077]	<p>Symptom: When using the Add New Input Monthly SPM on revenue accounts on the Stat Rev tab, the tagging in column AS that the Input Monthly SPM has, is not present. The issue impacts the Deduction calculation.</p> <p>Resolution: Corrected by adding a formula to column AS so that the Deduction calculation can now find the correct lookup values.</p>

Drivers

Location	Description
PFB-04131 - Statistics for Budget Groups using a different Budget Time period [TFS 6165]	<p>Symptom: Statistics that pull in from the Statistics driver are from the Global Statistics time period instead of from the time period the budget group has defined in their Configuration driver.</p> <p>Resolution: Enhanced the Statistics driver for the YTD column (AG) to now be configurable to the period set for the related Budget Group in the Configuration driver. Additionally, Calendars Days displayed in the Statistics driver are now added automatically from the Configuration driver.</p>

Location	Description
PFB-05574 - Labor Rates Driver Month Column not hidden [TFS 15133]	<p>Symptom: Month column in Labor Rates driver is not hidden and is confusing to clients.</p> <p>Resolution: Corrected by hiding column AD, which is a default date display only and displays in the “Use” column AE if no dates are configured.</p>
PFB-05696 - Provider GlobalVolChg Hide Row Logic [TFS 15639]	<p>Symptom: Adding volume to providers without any historical volume was difficult because those providers were hidden.</p> <p>Resolution: Corrected by modifying hide logic in column W to not hide the row when a provider with no prior volume is added.</p>
PFB-05957 - Budget Revenue Deductions Header title incorrect [TFS 17336]	<p>Symptom: Budget Revenue Deductions header for Projected Year is referencing the wrong cell in the variables tab.</p> <p>Resolution: Updated formula reference.</p>

Not Specified

Location	Description
PFB-06384 - Master Template\Stat_Rev and Expense Tabs. Urgent Budget Plan file Hide Projected Column [TFS 22864]	<p>Symptom: When Selecting "Yes" to Hide the Projected column the column is not hidden in the plan files.</p> <p>Resolution: Corrected by modifying formulas based from AQ4 that reference the hide column options from the Configuration driver.</p>
PFB-06529 – Report: Worked Hours Per Unit by Department by JobCode \Axiom\Reports Library\Budgeting Reports\Payroll Analysis\Worked Hours Per Unit by Department by JobCode [TFS 24125]	<p>Symptom: Worked hours per units of service do not calculate for the other job codes in that department. Hardcoded reference to BUD_ Pay12_2016 table.</p> <p>Resolution: Corrected by modifying formula in cell O3 to be dynamic.</p>
PFB-06667 - Master Template\Summary tab. Include PaidHoursPhy and PaidhoursMld in the Total Productive Hours [TFS 26015]	<p>Symptom: The formula for Total Productive Hours is including Q77 (Total Paid Hours), but it does not include the Paid Hours Physician or Midlevel.</p> <p>Resolution: Corrected by modifying multiple cell formulas in Summary tab for the Total Productive Row to include Paid Hours Physician and Midlevel.</p>

Location	Description
PFB-07043 - Master Template L2A Interface [TFS 30095]	<p>Symptom: Stat_Rev and Expense tabs allowed interfaced into “Two Years Ago” (i.e. L2A) when configured to hide.</p> <p>Resolution: While this is not a defect, we have enhanced the logic of the Master template for Stat_Rev and Expense to now prevent the interfacing of data into the “Two Years Ago” (i.e. L2A) columns when configured to hide on the Configuration driver.</p> <p>IMPORTANT: This must be configured PRIOR to building plan files.</p>

Reports

Location	Description
PFB-05789 - Budget Income Summary Drill [TFS 16153]	<p>Symptom: Drill Path on Budget Income Summary is not granted to default roles for Budget Admins.</p> <p>Resolution: Corrected by changing access for Budgeting Subsystem, Budgeting User, and Budgeting Analyst.</p>
<p>PFB-05799 - Budget Process Management Report currently doesn't filter based on user's security [TFS 16498]</p> <p>\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Budget Process Management Report</p>	<p>Symptom: Budget Process Management Report does not filter based on user's security role.</p> <p>Resolution: Corrected by modifying AQ1 to use the BUDGETYYYY table as the primary table so the user's table security is inherited.</p>
<p>PFB-06312 - Global Depr/Exp/Rev Reconciliation Reports are not filtering by BudgetGroup [TFS 21424]</p> <p>\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Global Depreciation Reconciliation Report,Global Expense Reconciliation Report,Global Revenue Reconciliation Report</p>	<p>Symptom: Global Reconciliation reports are not filtering by the budget group parameter and displaying department rows for other budget groups.</p> <p>Resolution: Corrected by adding Dept.BudgetGroup formula logic to the data filters in AQ2 and AQ3.</p>

Location	Description
<p>PFB-06356 - BP Budget Income Summary missing R_NonOpOther [TFS 29748]</p> <p>\Axiom\Reports Library\Budgeting Reports\Budget Statements\Budget Income Summary.xlsx</p>	<p>Symptom: Report section missing.</p> <p>Resolution: Corrected by making changes to report data filter.</p>
<p>PFB-06445 - Drill by Dept.Entity on Budget Income Summary yields incorrect results [TFS 26249]</p> <p>\Axiom\Reports Library\Budgeting Reports\Budget Statements\Budget Income Summary</p>	<p>Symptom: If you choose to drill on one of the lines by Dept. Entity, the report brings in other entities and the total for the drill differs from the line you drilled on.</p> <p>Resolution: Corrected by adding Quick Filter to the report tab from the variable tab to match the filter used from Quick Filter.</p>
<p>PFB-06499 - Provider Volume By Specialty_Monthly Incorrect Formula [TFS 25533]</p> <p>\Axiom\Reports Library\Management Reporting\Provider Analysis\Provider Volume By Specialty_Monthly</p>	<p>Symptom: The 'Provider Volume By Specialty_Monthly' report has an error in a vlookup formula resulting in the incorrect data table reference.</p> <p>Resolution: Corrected by modifying cell H24 in Report tab for the Range Lookup setting.</p>
<p>PFB-06607: Budget Dept Audit Report needs to be refreshed twice [TFS 25199]</p> <p>\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Budget Department Audit Report.xlsx</p>	<p>Symptom: When opening the report and selecting Issues Only, it seems like there are no issues because nothing populates.</p> <p>Resolution: Corrected by updating the AQs1-3 to Refresh On Open.</p>
<p>PFB-06609 - BP Reconcile GL Revenue to Provider calc error [TFS 25200]</p> <p>\Axiom\Reports Library\Budgeting Utilities\Provider Utilities\Reconciliation\Reconcile GL Revenue to Provider.xlsx</p>	<p>Symptom: Error in calculation in computing Fin Vs Provider "Difference" columns in both columns J and N.</p> <p>Resolution: Corrected by modifying calc method rows J4 and N4 for Report tab AQ1: GL Departments. Change now includes adding R_OPRev+R_OthPtRev together.</p>

Location	Description
PFB-06832 - Salaries do not Match.xlsx formula issues [TFS 29740]	Symptom: Multiple formula issues in spreadsheet resulting in incorrect pay type descriptions and/or GL Accts displaying on report.
Asset: \Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Salaries Do Not Match.xlsx	Resolution: Corrected by making formula changes and updating control sheet.

Tables

Location	Description
PFB-04849 - KHABgtTemplate Validation Table Too Many Variables [TFS 9812]	Symptom: The column in the DEPT dimension, Dept.KHABgtTemplate contains values in the validated dropdown list that are not relevant. Resolution: As part of the installation process, a KHABgtTemplate Check utility will be run against the column noted above to remove invalid entries.
PFB-05576 - Acct.KHASTdLine Validation table PctofNetRevenue [TFS 15134]	Symptom: PctofNetRevenue should be removed from the validation table. Resolution: Corrected by removing PctofNetRevenue from the validation table.
PFB-06088 - GlobalAmt calc method in Acct.KHASTdLine validation table [TFS 19235]	Symptom: In the ACCT dimension table KHASTdLine column the entry of GlobalAmt is a valid entry in the validation table, however no calc method exists in the Expense or Stat_Rev calc method library. Resolution: Corrected for new customers only by removing 'GlobalAmt' from Acct_KHASTDLINE, Acct_PHYSTDLINE, and Acct_CMSTDLINE.
PFB-06134 - SaveTagCustom Act_Pay27 [TFS 29171]	Symptom: SaveTagCustom data length is limited to 25; not long enough for some clients. Resolution: Corrected by updating string length to 100 for Act_Pay27_ for 2017-2019 actual tables.
PFB-06135 - Grade Employee Roster [TFS 29209]	Symptom: Grade column data length in Employee_Roster table is limited to five; not long enough for some clients. Resolution: Corrected by updating string length to 25.

Location	Description
PFB-06621 - Incorrect FinClass Ref on Add New Provider and Copy from Existing blocks [TFS 25487]	<p>Symptom: When using the Add New Provider Detail or Copy from Existing Provider Detail blocks on the Provider plan file there is an incorrect reference causing #ERR in the Description column (D).</p> <p>Resolution: Changed the cell reference for the FinClass description to row 11 from row 13.</p>
PFB-06687 - BP Benchmark Table save error [TFS 26322]	<p>Symptom: When leaving multiple empty rows in the Benchmark driver, there is a save error due to a default zero value for department number.</p> <p>NOTE: This is the Benchmark table for Management Reporting at \Axiom\Reports Library\Management Reporting Utilities\System Setup\Benchmark.xlsx</p> <p>Resolution: Corrected by adding a formula to column A for all existing formatted rows that if department in column B are left blank, then the value in column A is blank.</p>
PFB-06688 - BP Benchmark Table builds with demo data [TFS 26324]	<p>Symptom: New system for 2017.3.3 is populated with KHA demo data.</p> <p>Resolution: Corrected by removing demo data except for '0' as default.</p>
PFB-06795 - Location of KHABgtCode and KHABgtMap columns in DEPT table [TFS 29737]	<p>Symptom: In the DEPT dimension, the system displays four columns between the KHABgtCode and KHABgtMap columns.</p> <p>Resolution: Corrected by moving the columns next to each other.</p>

Tasks

Location	Description
Standard Recalc Job Aqs not activated for Refresh on Open [TFS 29718]	<p>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.</p> <p>Resolution: Corrected by updating the Recalc Scheduler job to run the identified Axiom queries to Refresh on Open.</p>

Templates

Location	Description
PFB-03839 - CDM Revenue Tab in Budget needs Key and Non Key section labels [TFS 5216]	<p>Symptom: CDM Tab does not contain labeling to clearly identify the Key and Non-Key sections.</p> <p>Resolution: Corrected by adding the labels to CDM tab to identify Key and Non-Key CDM sections.</p>
PFB-04553 - Employee List Tab pulling wrong JobCode Description [TFS 8006]	<p>Symptom: The Employee List is pulling the wrong descriptions when multiple JobCodes were mapped to JobCode.KHABgtCode.</p> <p>Resolution: Updated cell D13 on Empl_List tab to include KHABgtCode.</p>
PFB-05474 - Budget Contract Labor Rate Calculation [TFS 12956]	<p>Symptom: The labor \$ rate calc for contract labor expense does not look at history for hours and dollars and always defaults to the rate entered on Labor Config.</p> <p>Resolution: Corrected by changing formula in column F rows 95:101 to first look to the Expense tab to calculate the contract labor rate. If rate is not available then the calculation will default to the rates entered on the Labor Configuration driver.</p>
PFB-06071 - Self-Balancing to Target Formula on Employee tab [TFS 18463]	<p>Symptom: The Employee tab does not display the Target Adjustment row in the plan file when configured on the Budget Labor Benchmark driver when using the self-balancing option.</p> <p>Resolution: Corrected by modifying the Employee tab cell DO81 to change the Target Type reference from "Both" to "FTE" as typically the configuration on the Labor Benchmark driver for fixed job codes will only use "FTE".</p>
PFB-06406 - URGENT Historical Seasonality not populating for provider workbook [TFS 22843]	<p>Symptom: AQ13 in the provider tab of the budget workbook doesn't pull in historical information for all 12 months, resulting in inaccurate seasonality factor being applied to the projections and next year budget.</p> <p>Resolution: This was resolved with two changes. One was to use the total row for the key provider stat to bring in the total seasonality for the provider v. adding up the individual CPT rows. Second resolution was as a part of the overall template performance improvement where the Control_Sheet tab order was arranged in a more optimized manner.</p>

Location	Description
PFB-0652 - URGENT KHA Summary Tab not bringing in Total Productive Hours or Ttl Prod Hrs/Un [TFS 23877]	<p>Symptom: The Summary tab of the plan file was missing formulas to calculate Total Productive Hours and Total Productive Hours/Unit in the Initiative column (U).</p> <p>Resolution: Corrected by adding the two needed formulas on Summary tab for the Initiatives column.</p>
PFB-06629 - Empl_List Format for Scheduled FTEs [TFS 25475]	<p>Symptom: The format of the Scheduled FTEs in column Y on the Empl_List should be 2 decimal places.</p> <p>Resolution: Corrected by modifying column Y of the single line CM to format to 2 decimal places.</p>
PFB-07015 - Budget Initiatives do not get incorporated into metrics [TFS 29643]	<p>Symptom: When adding an initiatives to the Initiatives tab to reduce FTEs, the total reduction does not get incorporated into the Dept total or the Productive Hours per unit on the JobCode tab.</p> <p>Resolution: Corrected by updating calculations in cell CO102 and CP102.</p>

Utilities

Location	Description
PFB-05913 - Labor Non-Matched missing rows that should have been flagged [TFS 17097]	<p>Symptom: The Labor Non-Matched Report Sum By is missing JobCode.KHABgtCode.</p> <p>Resolution: Added Jobcode.KHABgtCode to the SumBy of AQ1.</p>
PFB-05992 - Budget Balance Sheet and CF SaveTag [TFS 17936]	<p>Symptom: The SaveTag for the utility is a reference to the sheet name only. What this means is that if you save multiple versions of the report, the save to database logic is only using one common save tag so when the results save, it will overwrite the data previously saved. For example, if you saved and filtered the report as Entity 1 and then saved and filtered the report as Entity 2, the values from Entity 2 would overwrite what was previously Entity 1.</p> <p>Resolution: Corrected by creating a refresh variable where the user is required to enter in a save tag value on refresh. This will make the save tags unique so data in the table will be unique.</p>

Location	Description
PFB-06264 - Budget Security Driver Update utility format fix for UserID to text [TFS 20980]	<p>Symptom: Budget Security Utility is not working correctly when UserID contains leading zeros.</p> <p>Resolution: Corrected by formatting cell D4 to Text format so user IDs with leading zeros will now save successfully from the utility.</p>
PFB-06317 - Salaries Do Not Match report not returning BUD2019 values [TFS 21427]	<p>Symptom: AQ2 on the Salaries Do Not Match Report is not returning the GL Accts configured when using PayrollGLMapping.</p> <p>Resolution: Corrected by TFS 29740 and by adding fully qualified columns to AQ5 and AQ6 so the accounts from PayrollGLMapping display correctly.</p>
PFB-06632 - Can't save changes to names/emails in Budget Security Update [TFS 25474]	<p>Symptom: First name, Last name, and email can be changed and updated, however, these fields alone will not trigger the save tag to activate.</p> <p>Resolution: Corrected by adding columns to SecurityUpdate sheet to test for changes in these fields. If there is a change in the comparison column, the Save tag will activate allowing record to be updated.</p>

Report updates

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	<p>Issue: PFB-04249 - Budget Variance by Department report not set to print in native Excel [TFS 6439]</p> <p>Symptom: The file processing creates snapshots of the report using the Default view. None of the [Print settings are for the Default view.</p> <p>Resolution: Corrected by creating a new Print Option for Default.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p>Issue: PFB-04868 - Dept Monthly Package Chart tab prints graphs across pages [TFS 9814]</p> <p>Symptom: In the 'Dept Monthly Package' the Chart tab prints graphs across pages. It needs to be formatted to print each graph all on one page.</p> <p>Resolution: Corrected by changing page breaks.</p>

Location	Description
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Pay By Employee ID.xlsx	<p>Issue: PFB-05666 - Productivity Pay By Employee ID report not showing all Employee names (descriptions) [TFS 15137]</p> <p>Symptom: Some of the EMPIDs in the report did not have an employee name associated with it. This occurred in situations where the report columns spanned two different budgeting years (e.g. ACT_PAY27_2017, ACT_PAY27_2018).</p> <p>Resolution: Corrected by bringing in the EMPID Desc.</p>
\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Hours by JobClass.xlsx	<p>Issue: PFB-05853 - Daily Hours by JobClass will not provide ProdDept list [TFS 16650]</p> <p>Symptom: Report does not provide a drop down list on the Refresh Variables in which to select a department. The error on this is the report Refresh Forms Run Behavior is set to OnManualRefreshAndOpen.</p> <p>Resolution: Corrected by updating the Refresh Variable to be Grid Based.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p>Issue: PFB-05984 - Dept Monthly Package issues bucket [TFS 18049]</p> <p>Symptom: Multiple issues with output files, BudVar and JC tabs.</p> <p>Resolution: Corrected by updating references and changing print range on the Charts tab.</p>
\Axiom\Reports Library\Management Reporting\Payroll\Overtime Analysis.xlsx	<p>Issue: PFB-06053 - Overtime Analysis not including FTE [TFS 18281]</p> <p>Symptom: The data filter in the Overtime Analysis report should be: PAYTYPE.FTE = 'Yes' and PAYTYPE.PAYDETAIL='Overtime'</p> <p>Resolution: Corrected by changing the filter.</p>
\Axiom\Reports Library\Management Reporting Utilities\System Setup\Caldate Update Utility.xlsx	<p>Issue: PFB-06087 - Error refreshing CalDate utility [TFS 20182]</p> <p>Symptom: Invalid field definition column 'CalYrMth' in cell 'N3'. Column was not found error.</p> <p>Resolution: Corrected by adding CalYrMth, FiscalMth, FiscalYrMth, and SerialDate to the CalData Table. Added refresh variable to start adding values based on the last date in the table. New implementations will have to add one row of data in this table to use this report for the first date they want to begin daily productivity.</p>

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\MM Distribution Report.xlsx	<p>Issue: PFB-06089 - Sheet Protection turned off during SnapShot of MM Distribution Report [TFS 18651]</p> <p>Symptom: The system delivers the sheet unprotected in snapshot.</p> <p>Resolution: Corrected by updating the sheet protection toggle during snapshot.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	<p>Issue: PFB-06131 - FTEs section of report displays as whole numbers - no decimal places [TFS 19049]</p> <p>Symptom: The FTEs section of the Budget Variance report by Department does not display as two decimal places.</p> <p>Resolution: Corrected by updating FTEs to two decimal places.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06165 - Incorrect formula for CapBud Method on CYF Utility [TFS 19179]</p> <p>Symptom: When using the Current Year Forecasting Utility and employing the CapBud method for forecasting uses an incorrect formula.</p> <p>Resolution: Corrected by updating formulas in the utility to CAP forecasted months at total Budget.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Adjustments\Monthly Forecast Adjustments.xlsx	<p>Issue: PFB-06181 - Budgeting: Monthly Forecast Adjustments quick filter issue [TFS 20176]</p> <p>Symptom: Per the instructions tab there is a 'quick filter' option but it is not enabled for this report.</p> <p>Resolution: Corrected by disabling the Quick filter.</p>
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input BiWeekly Contract Labor	<p>Issue: PFB-06249 - Input Biweekly contract labor report is hardcoded with BUD_PAY27_2014 [TFS 29745]</p> <p>Symptom: There is a column in the report that is hardcoded to refer to BUD_PAY27_2014 table.</p> <p>Resolution: Corrected by updating InputBiWeeklyCL!I3.</p>

Location	Description
\Axiom\Reports Library\Management Reporting\Financial Statements\Income Statement\Income Statement Projection.xlsx	<p>Issue: PFB-06359 - BP Income Statement Projection missing R_NonOpOther [TFS 29751]</p> <p>Symptom: Report missing section for R_NonOpOther</p> <p>Resolution: Corrected by adding R_NonOpOther between R_NonOpRev and R_NonOpInvest. The description is "Non Operating Revenue - Other". Also changed R_NonOpRev's description to "Non Operating Revenue", It was "Other NonOperating Revenue\Expense".</p>
\Axiom\Reports Library\Management Reporting\Financial Statements\Income Statement\Income Statement Multi-year.xlsx	<p>Issue: PFB-06360 - BP Income Statement MultiYear missing R_NonOpOther [TFS 29752]</p> <p>Symptom: Report missing section for R_NonOpOther</p> <p>Resolution: Corrected by resolution in PFB-06819.</p>
\Axiom\Reports Library\Management Reporting\Financial Statements\Income Statement\Income Statement By Entity.xlsx	<p>Issue: PFB-06361 - BP Income Statement By Entity missing R_NonOpOther [TFS 29753]</p> <p>Symptom: Report missing section for R_NonOpOther</p> <p>Resolution: Corrected by resolution in PFB-06819.</p>
\Axiom\Reports Library\Management Reporting\Financial Statements\Income Statement\Forecast Scenario Comparison.xlsx	<p>Issue: PFB-06363 - BP Forecast Scenario Comparison missing R_NonOpOther [TFS 29755]</p> <p>Symptom: Report missing section for R_NonOpOther</p> <p>Resolution: Corrected by resolution in PFB-06819.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Pay Summary by Dept.xlsx	<p>Issue: PFB-06367 - Pay Summary by Dept formula error [TFS 29798]</p> <p>Symptom: The quotes around CODE in the GetData portion result in a #ERR result.</p> <p>Resolution: Corrected by updating the formulas in cells J5:O5.</p>
\Axiom\Reports Library\Management Reporting Utilities\Flex Budget\FlexCalculator by Month.xlsx	<p>Issue: PFB-06552 - FlexCalculator by Month Running Multipass [TFS 28402]</p> <p>Symptom: Client reported that when running the utility in Multipass, it stored information into the FLX2018 table for only departments where Dept.FlexDept=Yes.</p> <p>Resolution: Corrected by updating the Control_Sheet tab to filter of Dept.FlexDept=Yes or Dept.FlexDept=No.</p>

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input BiWeekly Contract Labor.xlsx	<p>Issue: PFB-06584 - Input BiWeekly Contract Labor producing save errors. [TFS 29846]</p> <p>Symptom: Packaged security is configured to give users read/write access only when DEPT <> 0 and the utility is trying to save to DEPT 0, causing an error.</p> <p>Resolution: Corrected by updating formulas.</p>
\Axiom\Reports Library\System Files\Home Files\Management Dashboard.xlsx	<p>Issue: PFB-06614 - PR Management Dashboard DEPT filter not by DEPT.RptMap [TFS 30032]</p> <p>Symptom: When filtering this report by department, the system displays DEPT.DEPT as opposed to DEPT.RptMap.</p> <p>Resolution: This dashboard has been removed from the package and replaced by Month End Dashboard.</p>
\Axiom\Reports Library\System Files\Home Files\Management Dashboard.xlsx	<p>Issue: PFB-06615 - Management Dashboard Variance display incorrect [TFS 25709]</p> <p>Symptom: When you select a single Expense line item to review, the section that displays the variances calculates the variance in the incorrect manner.</p> <p>Resolution: This dashboard has been removed from the package and replaced by Month End Dashboard.</p>
Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06624 - Need to adjust MATCH() function in Monthly Forecast Utility [TFS 25489]</p> <p>Symptom: When selecting Entity 25 in the refresh variable the KEY stat results are incorrect which is caused by the formula referencing an incorrect row.</p> <p>Resolution: Updated formula to reference the appropriate row.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\04_Labor.xlsx	<p>Issue: PFB-06642 - Incorrect formula in Month End Review Dashboard [TFS 25710]</p> <p>Symptom: The Paid Hours per UOS line uses Hours instead of Salaries.</p> <p>Resolution: Corrected by adjusting formulas for multiple cells.</p>

Location	Description
\Axiom\Reports Library\System Files\Home Files\Management Dashboard.xlsx	<p>Issue: PFB-06717 - Management Dashboard Table Year [TFS 30072]</p> <p>Symptom: The formula in cell V11 in the data sheet of the Management Dashboard resolves in the wrong year.</p> <p>Resolution: This dashboard has been removed from the package and replaced by Month End Dashboard.</p>
\Axiom\Reports Library\Management Reporting\Financial Statements\Balance Sheet & Cash Flow\Balance Sheet and Cash Flow.xlsx	<p>Issue: PFB-06726 - Row headings in Balance Sheet and Cash Flow report. [TFS 29735]</p> <p>Symptom: Row 69 should display "Third Party Payables" and row 70 should display "Other Accrued Liabilities" to match the Acct.FSDetail in column A.</p> <p>Resolution: Corrected by moving column names.</p>
\Axiom\Reports Library\Productivity Utilities\Daily\System Setup\Daily Avg Hrs per Day.xlsx	<p>Issue: PFB-06801 - Daily Avg Hrs per Day table Dept desc length [TFS 29738]</p> <p>Symptom: In the DEPT table we allow descriptions to be 100 characters, but in this table we only allow 50.</p> <p>Resolution: Corrected by updating column length to 100.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06819 - Monthly Forecast Utility - AQ2 always forecasts on KeyIP even for OP/Oth rows [TFS 29814]</p> <p>Symptom: OP rows pulled into the query forecasted based on the KeyIP stat and not KeyOP, as the user expected.</p> <p>Resolution: Corrected by updating formula in AA6 calc row, and updating columns N through X.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06831 - Monthly Forecast Utility should use CYFTE instead of NYFTE [TFS 29808]</p> <p>Symptom: When reviewing the FTE in the Monthly Forecast Utility, it references the NYFTE instead of the CYFTE.</p> <p>Resolution: Corrected by changing GetData formula in N17 through X17.</p>

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Adjustments\Dept Specific Forecast Adjustments.xlsx	<p>Issue: PFB-06903 - Bad AQ filter in Dept Specific Forecast Adjustments report. [TFS 28744]</p> <p>Symptom: In the Dept Specific Forecast Adjustments report, cell B75 on the DeptSpecificFcstAdj tab displays "Deductions", which is then referenced in the query range filter as ACCT.BudgetType="Deductions". However, in the ACCT table, the valid selection in the BudgetType column is "Deduction" (no "s").</p> <p>Resolution: Corrected by changing cell B75 in the DeptSpecificFcstAdj sheet to from "Deductions" to "Deduction".</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p>Issue: PFB-06906 - Summary Accounts don't populate on VarAlert Tab in Dept Monthly Package (2018.4) [TFS 28746]</p> <p>Symptom: When using the Dept Monthly Package, the Var Alert tab does not populate with summary accounts (if you are reporting variances at a Summary Account level) which leads to users not knowing they variances they need to report on.</p> <p>Resolution: Corrected by adjusting the query to reference the dynamic AlertFlag logic, which did not have any dependencies and removed the static text.</p>
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\Variance Review.xlsx	<p>Issue: PFB-06908 - Bad Alert Filter on Variance Review Report (2018.4) [TFS 28745]</p> <p>Symptom: When using the Variance Review report, the query filter is set to use a hard coded reference in cell C12 to only bring back accounts that have alert flag>=1.</p> <p>Resolution: Corrected by adjusting the AQ1 to reference the dynamic AlertFlag logic, which did not have any dependencies and removed the static text.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06919 - Monthly Forecast Utility- AQ2 (Revenue) on the CYF Utility incorrectly uses inpatient stats for OP Revenue [TFS 29809]</p> <p>Symptom: When using the CYF Utility, the revenue section includes an incorrect formula that uses IP stats for OP Revenue forecast calculations.</p> <p>Resolution: Corrected by resolution to PFB-06819.</p>

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p>Issue: PFB-06951 - Incorrect formula on JC tab of Dept Monthly Package [TFS 29710]</p> <p>Symptom: With the formula in the current state, the result always resolve to 27. If the client does not have 27 pay periods, then the dates are thrown off with the period number.</p> <p>Resolution: Corrected by updating JC tab J5-O5 rows with a new formula.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	<p>Issue: PFB-06958 - Monthly Forecast Utility MATCH() array range issues [TFS 29705]</p> <p>Symptom: When filtering this report by department, the system displays DEPT.DEPT as opposed to DEPT.RptMap.</p> <p>Resolution: Corrected by updating multiple formulas.</p>
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Adjustments\Dept Specific Forecast Adjustments.xlsx	<p>Issue: PFB-06991 - Dept Specific Forecast Adjustments Calc Method [TFS 29707]</p> <p>Symptom: In the Dept Specific Forecast Adjustments utility, the calc method in row 6 for columns N-Y will always, if recomputing variable costs, pull from Inpatient Statistics in row 23—even if the system should pull from Outpatient or Other.</p> <p>Resolution: Corrected by updating the formula in row N-Y to pull the appropriate statistic.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	<p>Issue: PFB-06995 - Dept Monthly Package Scorecard Charts [TFS 29699]</p> <p>Symptom: The charts in the Scorecard sheet of the Dept Monthly Package do not display data when refreshed.</p> <p>Resolution: Corrected by allowing the charts to reference hidden data</p>
\Axiom\Reports Library\Management Reporting\Analysis\MultiYear Statistic Review.xlsx	<p>Issue: PFB-06999 - Multi-Year Statistic Review - increase width for acct [TFS 29701]</p> <p>Symptom: ACCT column (P) in this report is too small.</p> <p>Resolution: Corrected by updating column width to 10.49.</p>

Location	Description
\Axiom\Reports Library\Management Reporting\Analysis\Key Dept Ratios.xlsx	<p>Issue: PFB-07000 - Key Dept Ratios, Accts are presenting in scientific notation [TFS 29700]</p> <p>Symptom: The column width in column F is too narrow. Accts display incorrectly.</p> <p>Resolution: Corrected by updating the control sheet and updated column F to 10.49.</p>
\Axiom\Reports Library\Management Reporting Utilities\System Setup\YearPeriod.xlsx	<p>Issue: PFB-07031 - Urgent: CYFTE uses 2086 instead of 2085.71 [TFS 29931]</p> <p>Symptom: In the Period table, the Current Year FTE could be 2085.71 instead of rounded to 2086. This was because it was the sum of the FTE of each month.</p> <p>Resolution: Corrected by updating the value to use 2085.71 when the 2086 option is selected.</p>

Issues resolved in 2018.4.1

The following tables list the resolutions for issues addressed in 2018.4.1, released on January 7, 2018:

Driver, template, calc method, and other updates

There were no issues addressed for these features in this release.

Report updates

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC.xlsx	<p>Issue: '#N/A' displays for several variance calculations when H_JCHours used; save error thrown if threshold level is 'Summary' [TFS 30581]</p> <p>Symptom: When a user sets the 'Use H_JCHours for Paid Hours filter' VCC threshold setting to 'Yes' and views the VCC for a department that is entering H_JCHours comments at the detail level, the system displays '#N/A' errors for several of the variance calculations. Any comments entered for an H_JCHours account are not saved. If the user views the VCC for a department that is entering H_JCHours comments at the summary level, the system displays '#N/A' errors for several of the variance calculations. If the user attempts to save comments for any account, the system displays a save validation error.</p> <p>Resolution: Corrected by adjusting the logic to look to the VCC_Threshold table to use H_JCHours option appropriately.</p>

Issues resolved in 2018.4.2

The following tables list the resolutions for issues addressed in 2018.4.2, released on January 28, 2018:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-06843 - Red Flag Popup doesn't work on Detail Methods [TFS 30888]	<p>Symptom: When a user activated the Red Flag pop up upon save on the BudgetConfiguration Driver during this Budget cycle, it was noticed that the Detail calc method does not allow comments to clear the flag. This created an issue with saving changes data to the database.</p> <p>Resolution: Corrected by updating calc methods in the Expense and Stat_Rev calc method library.</p>

Tables

Location	Description
PFB-07185 - ColumnSequenceItem when upgrading Budget and PR products to 2018.4 [TFS 31227]	<p>Symptom: When upgrading a system from 2018.2 to 2018.4, the system generates ColumnSequenceItem errors.</p> <p>Resolution: Corrected by adding the FT1 and FTYTD1 column sequences to the Budget Alternate FTE license.</p>

Templates

Location	Description
PFB-07068 - Provider Comp PayrollGLMapping [TFS 30876]	<p>Symptom: In the ProviderComp tab, some queries are set to inactive due to formulas that reference an incorrect row.</p> <p>Resolution: Corrected by updating the queries so that they reference the correct cells.</p>
PFB-07188 - Employee level hours and dollars not interfacing into employee rows [TFS 31245]	<p>Symptom: When processing the Employee labor method, the hours and dollars for the individual employee no longer display on the employee row. Instead, they now default to the Float/Inactive row.</p> <p>Resolution: Corrected by updating the batch number in the query for the Employee labor method.</p>

Report updates

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: PFB-07159 - Month End Review dashboard produces inaccurate data [TFS 31111]</p> <p>Symptom: The summary form for the Month End dashboard is producing inaccurate results.</p> <p>Resolution: Corrected by adjusting several Variables tab formulas.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: VCC - H_JCHours summary account comment and action plan for current period cleared when multipass ran [TFS 31148]</p> <p>Symptom: When a user saves a comment and action plan for the H_JCHours summary account, the comment and action plan save successfully in the ACT table. But, after running the Process Month End VCC Alerts - Dashboard Only job, the system removes the comment and action plan from the ACT table. As a result, no comment or action plan display in the VCC when the report is refreshed.</p> <p>Resolution: Corrected by adjusting the save logic.</p>
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package.xlsx	<p>Issue: PFB-07047 - Executive Monthly Package - Variance Overview tab: no summary data [TFS 31209]</p> <p>Symptom: The Executive Monthly Package displays zero instead of data for the Last Year, Last Month, and 3MthAvg selections for summary accounts.</p> <p>Resolution: Corrected by adding missing logic to the LastMth, SameMthly, and 3MthAvg cell formulas.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: Month End Dashboard - Benefits tab - Summary row target data doesn't match headers in a couple scenarios [TFS 30761]</p> <p>Symptom: The target data for several summary rows in the Benefits Detail grid does not match the displayed header. This affects the top three summary rows (Total Salary Expense, Total Key Statistics, and Total FTEs); target data for other rows update when the variables are changed.</p> <p>Resolution: Corrected by adjusting the total row cell references in the Total Salary Expense, Total Key Statistics, and Total FTEs rows.</p>

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: Month End Dashboard - Multiple Tabs - Summary rows target data doesn't match headers in a couple scenarios [TFS 31290]</p> <p>Symptom: Various total rows display differently from the total rows that sum dynamic (query-related) line item data. These fixed total rows reference data in the dev work area that relates the chart data.</p> <p>Resolution: Corrected by adjusting the total row cell references in the Total Other Key Stats row of the Revenue and the Total Key Statistics row of the Other Expenses tab.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: Month End Dashboard - Statistical Overview, Variance Comments Collection tabs - Refresh variables not applied if selection edited while viewing different tab [TFS 31442]</p> <p>Symptom: While viewing a tab other than Statistical Overview or Variance Comments Collection in the Month End Dashboard, a user edits a selection for a refresh variable. When the user navigates to one of the aforementioned tabs, the system does not apply their new refresh variable selection, and the user needs to click the Apply button again in the Filters panel to see it.</p> <p>Resolution: Corrected the Variance Comments Collection tab to refresh with the correct variables selected by the user in the Filter panel.</p> <p>IMPORTANT: When making variable changes in the Filter panel of the Revenue Overview and/or Expense Overview tabs, users must click Apply in the Filter panel of the Statistical Overview tab to update the values for this tab with the new variables. The Statistical Overview tab DOES NOT automatically update with variable changes made by the user.</p>

Issues resolved in 2018.4.3

The following tables list the resolutions for issues addressed in 2018.4.3, released on February 18, 2018:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-07204 - Other Dollar Paytypes not coming into the ProviderComp tab [TFS 31802]	<p>Symptom: When using the Provider Comp tab, if you are using a KHABGTMapped department, additional Other Pay does not come into the PC block.</p> <p>Resolution: Corrected by updating the ProviderComp and Add New Provider calc method.</p>

Templates

Location	Description
PFB-07214 - Batch Sequence causing database omission on recalc for ProviderComp and Provider [TFS 31619]	<p>Symptom: When recalculating a provider plan file, the values in the plan file did not update to the BUD2020 table.</p> <p>Resolution: Corrected by modifying query batch sequences in the Provider tab.</p> <p>NOTE: This primarily was an issue when using the PayrollGLMapping configuration on initial plan file build prior to plan files being opened by end users.</p>

Report updates

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input BiWeekly Contract Labor.xlsx	<p>Issue: PFB-06561 - Input BiWeekly Contract Labor gives warning about cannot change protected cells [TFS 32088]</p> <p>Symptom: In the Input BiWeekly Contract Labor report, the bottom section displays a message suggesting that you can edit departments that have already been input, but the cells are protected by default.</p> <p>Resolution: Corrected by updating the formatting.</p>

Location	Description
<p>\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Batches\Biweekly Productivity Reports Batch.xlsx</p> <p>\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend with Graph.xlsx</p>	<p>Issue: PFB-06939 - Productivity Trend with Graph Report [TFS 31496]</p> <p>Symptom: The Productivity Trend with Graph report does not include a batch variable for Select Target Source, so when the batch is run, the Productivity with Graph report does not include a Target line. In addition, on the Biweekly Productivity Reports Batch, a refresh variable needs to be added for the Target (Budget/Benchmark) so that it is added to the Batch Variables column.</p> <p>Resolution: Corrected by including the Target variable for the file processing in the report and the batch file - Biweekly Productivity Reports Batch.</p>
<p>\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report</p>	<p>Issue: PFB-07117 - Productivity Trend Report - Formula Error [TFS 31972]</p> <p>Symptom: The Productivity Trend report includes a formula error in the YTD Total Row, in columns L, M, O, and R.</p> <p>Resolution: Corrected by updating the formulas in L55, M55, R55, and O55.</p>
<p>\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC.xlsx</p>	<p>Issue: PFB-07221 - Month End Dashboard VCC.axj delivered with Dept specific filter [TFS 32043]</p> <p>Symptom: The Scheduler job was delivered with an incorrect filter, which caused the standard job to error out. As a result, the user needs to override the filter.</p> <p>Resolution: Corrected by adjusting the "Limit Multipass iterations by this filter" formula.</p>

Issues resolved in 2018.4.4

The following tables list the resolutions for issues addressed in 2018.4.4, released on March 11, 2018:

Driver, template, calc method, and other updates

No issues were addressed with this release.

Report updates

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC_KHA_Drill03Employee.xlsx	<p>Issue: Month End VCC Employee Drill 3Mo Avg doesn't tie and zero row showing [TFS 32719]</p> <p>Symptom: In the Month End VCC dashboard, when a user drills from the Jobcode tab to the Employee tab with the 3-month average as your target, the dollars do not match.</p> <p>Resolution: Corrected by updating the formula logic and filters in cell J21.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	<p>Issue: PFB-07260 - Month End Review - YTD toggle showing inflated total FTEs [TFS 32834]</p> <p>Symptom: Updated various tabs on the dashboard to utilize YTD FTE variables in their FTE calculations when 'YTD' is enabled.</p>
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\ExpenseOverview	<p>Issue: Expense Overview tab - Target FTE divisor formula looking to wrong field to assess target [TFS 33206]</p> <p>Symptom: It appears that the formula to determine the target FTE divisor on the Expense Overview tab is looking to the wrong field to determine the target selection. This results in the formula always returning the 'ELSE' value of the current period's FTE divisor.</p> <p>Resolution: Corrected by updating the logic for "time comparison" or target FTE calculation to reference the correct cell to identify the target selected from the Axiom.FiltersPanel.</p>

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\05_ Benefits.xlsx	<p>Issue: PFB-07285 - Benefit Graph on Operational Review of Month End Dashboard showing wrong data [TFS 33306]</p> <p>Symptom: When using the Month End Dashboard report, the graph on the Benefits tab of the Operational Overview area shows salary data even though the graph is labeled Benefits.</p> <p>Resolution: Corrected by extending the query to retrieve data for the column chart data, and incorporated Total line for charts and redirected references for the column chart to the Benefits total.</p>

Manual configuration instructions

- A. During installation of your 2018.4 upgrade, a utility was run to review the validated entries in the DEPT dimension for Dept.KHABgtTemplate. If any invalid entries were found in this column, they were replaced with NA.

As a result, review your Dept.KHABgtTemplate for NA entries to ensure that this is still the intended state.

- Valid entries are:
 - Master
 - NA
 - NoBudget
- Invalid entries removed and replaced with NA, if located:
 - Forecast
 - MasterCDM
 - MasterPC
 - MasterProvider
 - RollingForecast

- B. The New Department Utility contains three columns that you will need to configure. Please see "Adding a new department" in the online help for the complete set of instructions. During installation of your 2018.4 update, two new dimension columns were added that you need to configure before using.

- **Acct.NewDeptStdLine:** This column is used to assign the calculation methods to be use when processing a new department. The values in this column will initially contain NA until configured.
- **Paytype.NewDeptStdLine:** This column is used to assign the calculation methods to be used when processing a new department for labor. The values in this column will initially contain NA until configured.
- **Dept.KHACMDimGrp:** This is an existing column in the DEPT dimension that you need to configure for the value of NewDeptStdLine for any department you select to process from the New Department Utility.

Known issues

The following table lists the known issues in this release:

Driver

Issue	Description
12 Budget Revenue GlobalRev [TFS 26089]	<p>Symptom: Records in driver that should be filtered out.</p> <p>Explanation: Data Filter for AQ2 needs to be updated for include Dept.KHACMDimGrp. Will be fixed in a future release.</p>
22 Budget Labor ADCCConfig [TFS 29925]	<p>Symptom: Admin is prevented from updating shifts in Shift 2 and Shift 3 sections due to locked cells.</p> <p>Explanation: This will be fixed in a future release.</p>

Plan File

Issue	Description
Staffing tab [TFS 16501]	<p>Symptom: Rate for Dollars Only paytypes may be appx half of Year-to-date rate.</p> <p>Explanation: This may occur if LumpSum is configured and assigned to the same paytype as the Regular paytype. The hours for regular are interfacing a second time into the LumpSum row in column DB. This will be fixed in a future release.</p>
Stat_Rev tab [TFS 25516]	<p>Symptom: When using the Bad Debt calc method, budget groups configured on the Deductions driver are not being recognized.</p> <p>Explanation: The Budget Group reference was not locked in the formula causing the issue. Will be fixed in a future release.</p>
Stat_Rev tab [TFS 26267]	<p>Symptom: Thresholds for red flag variances for statistic rows are based on revenue thresholds due to erroneous cell reference.</p> <p>Explanation: This will be fixed in a future release.</p>
Expense tab [TFS 26267]	<p>Symptom: Thresholds for red flag variances for hours rows are based on expense thresholds due to erroneous cell reference.</p> <p>Explanation: This will be fixed in a future release.</p>

Issue	Description
Initiatives tab [TFS 25522]	<p>Symptom: When using KHABgtMap departments, only the host department is available when setting up an Initiative.</p> <p>Explanation: This will be fixed in a future release.</p>
Expense tab Drill to detail [TFS 24968]	<p>Symptom: When using Windows client and drilling from Expense tab to GL Detail, the column will not contain column filters.</p> <p>Explanation: This will be fixed in a future release.</p>
Expense tab Drill to detail [TFS 30235]	<p>Symptom: When drilling from Expense tab to GL Detail, the description may not be correct when using KHABgtMap.</p> <p>Explanation: This will be fixed in a future release.</p>
ProviderComp [TFS 25520]	<p>Symptom: Contract Provider FTEs on rows 123-125 are not editable to enter FTEs.</p> <p>Explanation: Will be fixed in a future release.</p>
Employee tab [TFS 26082]	<p>Symptom: Description of “Earned-PTO” will display when EPTO is not configured. Should display as “Accrued PTO Rate from Configuration”.</p> <p>Explanation: This will be fixed in a future release.</p>
Employee tab [TFS 29945]	<p>Symptom: When adding a new employee to an existing interfaced employee job code, the added employee may not reference the same labor rate exceptions as the interfaced employees.</p> <p>Explanation: This will be fixed in a future release.</p>
Employee tab [TFS 26696]	<p>Symptom: When adding a new employee to an existing interfaced employee jobcode, the added employee may not reference the same labor rate exceptions as the interfaced employees.</p> <p>Explanation: This will be fixed in a future release.</p>
Jobcode tab [TFS 26060]	<p>Symptom: When using Jobcode method and inserting Add New Jobcode, the job code is tagged as “Fixed” instead of looking to the Jobcode dimension to determine if Fixed or Variable. This could impact use of target setting feature.</p> <p>Explanation: This will be fixed in a future release. .</p>

Issue	Description
CDM tab [TFS 25476]	<p>Symptom: Output from printing is missing the Non-Key section.</p> <p>Explanation: This will be fixed in a future release. .</p>
Provider tab [TFS 30192]	<p>Symptom: When using the Provider Detail calc method, the Projected FTE located in column K is referencing the budget FTE from ProviderComp.</p> <p>Explanation: This will be fixed in a future release.</p>

Report

Issue	Description
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Budget Department Audit Report.xlsx [TFS 25198]	<p>Symptom: When using the Budget Audit Report and selecting “Issues” from the Refresh Variable, some rows are hidden when they should be displayed. Issue is the Hide Row logic is not evaluation all needed columns.</p> <p>Explanation: This will be fixed in a future release.</p>
\Axiom\Reports Library\Management Reporting\Provider Analysis\Provider Productivity [TFS 26694]	<p>Symptom: Graphs for the coding distribution reference incorrect data series.</p> <p>Explanation: This will be fixed in a future release.</p>
\Axiom\Reports Library\Management Reporting\Payroll\Overtime Analysis.xlsx [PFB-07073]	<p>Symptom: When the percentage is keyed in, it shows as 100X the input.</p> <p>Explanation: Percentage must be keyed in with appropriate decimal places (ex: 5%=.05)</p>
\Axiom\Reports Library\Management Reporting Utilities\Data Input\Input Monthly Statistics.xlsx [PFB-07074]	<p>Symptom: The cell reference for AQ1 Primary Table needs to be set to the refresh variable selection and not the system current year. Otherwise, AQ1 is bringing in acct/dept combinations that may not exist in the actuals table that the user selected to save to.</p> <p>Explanation: Will fix in future release.</p>
\Axiom\Task Panes Library\Management Reporting\Mgmt Reporting Admin.axl [PFB-06925]	<p>Symptom: When opening the Payroll_Dates utility from the Mgmt Reporting Admin task pane, it opens as the spreadsheet rather than the form.</p> <p>Explanation: Open the utility using Explorer, right-click, open in browser. Will fix in future release.</p>

Issue	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\Dept Variance.xlsx	<p>Symptom: The Target column equals the Actual column in the excel version. In addition, it does not account for "LastMth" and "SameMthLY".</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\Dept Variance.xlsx	<p>Symptom: Column "YTD Variance" is different from the YTD section "Favorable/(Unfavorable) Variance in that is it should handle time series variables "3MthAvg, SameMthLY, LastMth" as "Current Period Last Year" and should retrieve data for a specified period instead of just "YTD".</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Input\Dept Variance.xlsx	<p>Symptom: Summary Level trends in Section 1 seem to reference incorrect slope formulas versus referencing already calculated equivalent sections by two rows and relate to the "12 Mo. Alert" column.</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill02JobCode.xlsx	<p>Symptom: Hours AQ columns require filter "Paytype.FTE=Yes". Hours Target not handling "SameMthLY" and "LastMth". The "JobCode" drill will not change to a different year due to not referencing the period (AT7), similar to the Employee. This would be the inaccuracy with the 3MthAvg (AV4) for the "JobCode" drill. There is an inaccuracy with the "Dollars" section for the "LastMth" due to an errant formula in AS6. There is a conditional formula in BB4 that if "LastMth" then reference another cell for the AQ control row.</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill03Employee.xlsx	<p>Symptom: Hours AQ columns require filter "Paytype.FTE=Yes". Hours Target not handling "SameMthLY" and "LastMth".</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>

Issue	Description
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill05RevUsage.xlsx	<p>Symptom: The "Monthly Average" columns calculate to "YTD". Due to the dynamic year and period variables passed from the VCC, concatenated the {CurrentPeriod}</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill11PhysicianDetail.xlsx	<p>Symptom: Column references are not always Period specific (e.g. ACT_PROV_XXXX.CUR, ACT_PROV_XXXX.YTD).</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>
\Axiom\Reports Library\System Files\VCC Drills\KHA_Drill12PhysicianCPT.xlsx	<p>Symptom: Error message appears because the ACT_PROV table does not identify with the BUD_PROV table without columns added to the data retrieval in the control_row.</p> <p>Explanation: Adjusted in the Variance Comments Collection in the Month End Dashboard.</p>

Table

Issue	Description
Data Set Assignment [TFS 25716]	<p>Symptom: When creating a new grouping column the ability to assign the column to a Data Set is not editable.</p> <p>Explanation: This will be fixed in a future release.</p>

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.4 Release Notes** for additional known issues that have a suite-wide impact.