



## **Axiom Financial Planning 2018.4**

### **Release Notes**

Last Updated: 2/18/2019

# *KaufmanHall*

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

Support email: [support@kaufmanhall.com](mailto: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: 2018.4.3

Updated: 2/18/2019

# Contents

Summary .....	1
Product upgrade notes .....	2
New features summary .....	3
Updated Fitch health care median ratios .....	3
Add custom statistic codes to a node .....	3
Limit control panel display of historical years for non-historical node types .....	4
Add benefits codes to eliminations .....	5
Shift payor volume mix from the baseline assumptions driver .....	6
Gain or loss on disposal of fixed assets moved to Operating Expenses .....	7
Plan file performance improvement .....	8
Issues resolved in 2018.4 .....	9
Issues resolved in 2018.4.1 .....	11
Issues resolved in 2018.4.2 .....	12
Issues resolved in 2018.4.3 .....	13
Manual setup instructions .....	14
Known issues .....	15

# Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Financial Planning. 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](mailto: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](mailto: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](http://www.kaufmanhall.com).

# Product upgrade notes

When upgrading to the 2018.4 version of Axiom Financial Planning, 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 of the new features and enhancements included in this release.

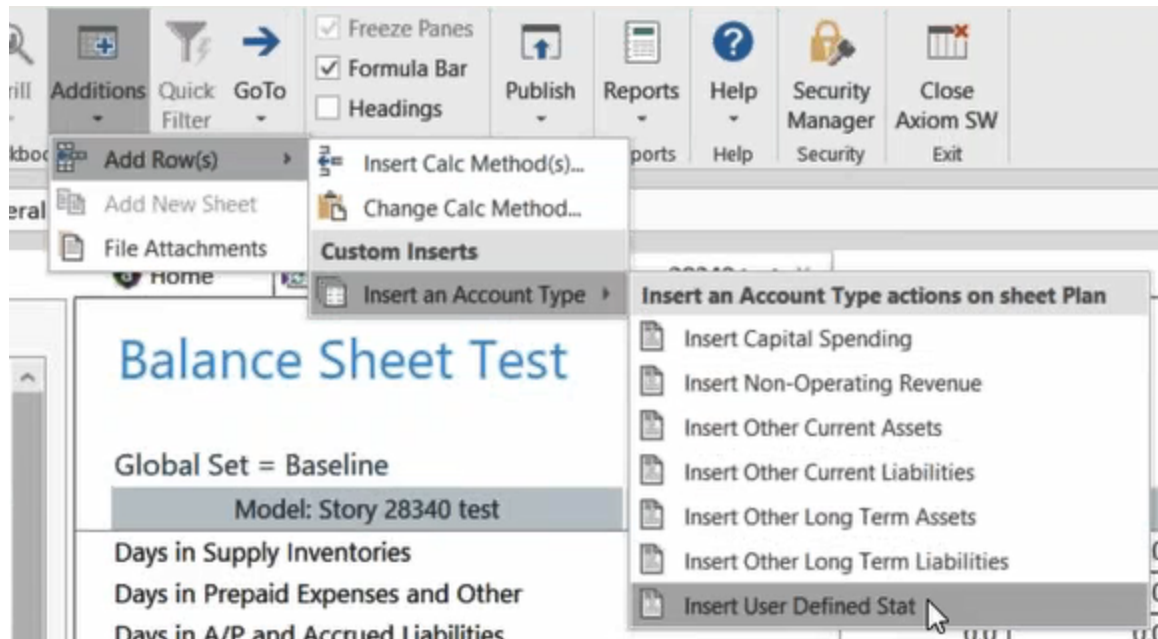
## Updated Fitch health care median ratios

The Rating Agency Medians driver for Fitch has been updated with the most current values. You can now open a report and select medians with the latest data.

## Add custom statistic codes to a node

Three user-defined statistic codes are provided at the bottom of new nodes you create. The additional 20 added in the 2018.3 release have been removed because you can now add up to 50 custom statistic codes, as needed.

To add a custom code row to the Other Statistics (User Defined) section of a node, select **Insert User Defined Stat** from the Additions menu as shown in the following example.



For details, see “Adding custom stat codes to a node” in the online help.

# Limit control panel display of historical years for non-historical node types






The Control Panel to Manage Nodes no longer displays Historical Year drop-down options for node types that do not contain history. The following node types do not contain history: Initiative, New Debt, Capital Project. New Debt nodes also do not have projection years.

Control Panel






Financial Planning Model Configuration

Double Click to Launch Consolidation Report

Double Click to Recalculate

	Node	Node Description
	2	BalanceSheet
	27	HomeHealth
	26	Hospital
	15	Hospital Volume transfer
	28	Psych

Initiatives:

	54	Cardiology Physician Recruitment
	18	Hospital Expansion
	1	Proj_OR_Suite
	5	SupplyChainInit
	21	New Debt

Model: FP\_CityHlth\_Main - City Health - Main

Model Available

Double Click to Launch Consolidating Report

< < == NOTE: Perform changes then SAVE. Select "Double Click to Rec

Node Type	Integrated	Historical Years	Projection Years
Balance Sheet	Yes	3	5
Operations	Yes	3	5
Operations	Yes	3	5
Operations	No	3	5
Operations	Yes	3	5

Initiative	Yes		5
Initiative	No		5
Initiative	Yes		5
Initiative	Yes		5
New Debt	No		

Financial Planning Control Panel to Manage Nodes screen

Likewise, in the New Node Setup dialog, the Years of History drop-down displays “N/A” for these node types. For New Debt type nodes, the Projection years drop-down also displays “N/A.”

New Node Setup

**KaufmanHall**

Properties for: Node 5 - WFP\_DebtOption

**General**

Global set:  
Baseline

Node is integrated?  
Yes

Apply Node defaults?  
Yes

**Years**

Projection years: N/A

Years of history: N/A

First forecast year: 2025

**Expense Drivers**

This node does not have expense drivers.

OK

Financial Planning New Node Setup dialog for a New Debt node

## Add benefits codes to eliminations

To improve your ability to map and load data to Eliminations nodes and add appropriate detail, all benefit options are now available for selection in Eliminations nodes, as shown in the following example.

KH Medical Center Cardiology						
Global Set = Baseline						
Model: Service Line Model	2017	2018	2019	2020	2021	2
Contract Labor	0	0	0			
Total Salaries & Wages	0	0	0	0	0	
<b>Total FTEs</b>						
Variable FTEs	0.0	0.0	0.0	0.0	0.0	
Fixed FTEs	0.0	0.0	0.0	0.0	0.0	
Total FTEs	0.0	0.0	0.0	0.0	0.0	
<b>Total Salaries and Wages (with Contract)</b>	0	0	0	0	0	
<b>Benefits</b>						
Benefits Based on Salaries	0	0	0			
Physician Benefits Based on Salaries	0	0	0			
Benefits Based on FTEs	0	0	0			
Physician Benefits Based on FTEs	0	0	0			
Benefits Flat Amount	0	0	0			
Physician Benefits Flat Amount	0	0	0			



# Shift payor volume mix from the baseline assumptions driver

A new section, Payor Mix, added to the baseline assumptions driver in the 2018.4 release allows FP administrators to shift payor volume mixes in the driver and have those changes automatically propagate to nodes that use the driver. Administrators can shift the payor volume mix for Inpatient Discharges, Outpatient Visits, Physician Visits, and Mid Level Visits.

You can also add new payor rows.

Global Set						
	Baseline	2019	2020	2021	2022	2023
Mid Level Provider Visits (Fee For Service)			0.00%	0.00%	0.00%	0.00%
Payor Mix						
<b>Inpatient Discharges</b>						
Medicare			(8.50%)	(8.50%)	(8.50%)	(8.50%)
Medicaid			6.00%	6.00%	6.00%	6.00%
Self Pay			2.00%	2.00%	2.00%	2.00%
Commercial			0.50%	0.50%	0.50%	0.50%
<b>Outpatient Visits</b>						
Medicare			0.05%	0.05%	0.05%	0.05%
Medicaid			(1.52%)	(1.52%)	(1.52%)	(1.52%)
Self Pay			1.50%	1.50%	1.50%	1.50%
Commercial			(0.03%)	(0.03%)	(0.03%)	(0.03%)
<b>Physician Visits</b>						
Medicare			(7.90%)	(7.90%)	(7.90%)	(7.90%)
Medicaid			0.60%	0.60%	0.60%	0.60%
Payor 8			0.30%	0.30%	0.30%	0.30%
Payor 81			7.00%	7.00%	7.00%	7.00%
<b>Mid Level Visits</b>						
Medicare			(5.35%)	(5.35%)	(5.35%)	(5.35%)
Medicaid			2.00%	2.00%	2.00%	2.00%
Payor 8			0.02%	0.02%	0.02%	0.02%
Payor 81			3.33%	3.33%	3.33%	3.33%

*Baseline assumptions driver example*

For more information, see “Set payor volume mix in the baseline assumptions driver” in the online help.

# Gain or loss on disposal of fixed assets moved to Operating Expenses

GAAP changes require moving Gain or Loss on Disposal of Fixed Assets from non-operating expenses to operating expenses. This is adjusted in Acute, Physician, Research, and Health Plan templates. You can enter data into the first two years; the value should populate in years three and beyond when the assets are disposed of.

<b>Gain Loss</b>					
Global Set = Baseline					
Model: _Sample_Model		2017	2018	2019	2020
Dollar Adjustment					0
Total Purchased Services		0	0	0	0
Total Purchased Services		0	0	0	0
<b>Other Expense</b>					
<b>Insurance</b>					
Equiv Pt Days < Variable Exp Driver					
Inflation Rate (Fixed Percent Change)					0.00%
Global Inflation Assumption					0.00%
Gain Loss Infl. Assumption					0.00%
Total Inflation Rate			0.00%	0.00%	0.00%
Variable Expense (Equiv Pt Days)	0.00%	0	0	0	0
Fixed Expense	100.00%	0	0	0	0
Dollar Adjustment					0
Total Insurance		0	0	0	0
Gain or Loss on Disposal of Assets		500	600	(10,000)	(1,000)
Gross Dollar Expense		0	0	0	0
Total Other Expense		500	600	(10,000)	(1,000)
Total Non-Capital Operating Expenses		500	600	(10,000)	(1,000)

## Plan file performance improvement

Improve performance of opening and refreshing plan files by batching database queries so that calls to the database can be made together. This allows queries not related to each other to run together, helping speed up processing time.

# Issues resolved in 2018.4

The following table lists the resolutions for issues addressed in 2018.4, released on December 17th, 2018:

Issue Description	Description
PFB-06752 - Initiative Node does not save when using three projection years [TFS 27564]	<p><b>Summary:</b> When using three forecast years for an Initiative node, the node does not save successfully because the formulas for the third projection year row are incorrect. The formulas in those cells needs to be updated.</p> <p><b>Resolution:</b> Corrected by updating the formulas in the third year row cells.</p>
PFB-06900 - Physician Entity Node [TFS 28710]	<p><b>Summary:</b> Users should be able to adjust the interest income rate for both Trusted Assets and Unrestricted Cash. Currently, users can update the line for the interest income rate, but it actually references the global driver. Users also cannot make changes to the Interest Income Rate because it is a calculated amount.</p> <p><b>Resolution:</b> Corrected by adding two new rows between the Interest Income Rate - Global Inflation Assumption row and the Interest Earned on Unrestricted Cash row. The first row, named "[NodeName] &amp; Infl. Assumption," allows users to manually enter amounts in each column. The second row, named "Interest Income Rate," totals the amounts from the Interest Income Rate - Global Inflation Assumption row and the user-added amounts from the Infl. Assumption row.</p>
PFB-06916 - Initiative node roll forward [TFS 28891]	<p><b>Summary:</b> When setting the copy years 2019 through 2028 on the control worksheet in the Annual Roll Forward Utility, data is missing when the plan file is rolled forward.</p> <p><b>Resolution:</b> Corrected by switching the row order so that the calc method inserts work correctly. Also added a payor value to each Fixed Expense, corresponding with 10000+last digit of code used. Added a new tab to separate Initiative node types, and added modeling to convert data from the old Initiative node format to the new format.</p>
PFB-06937 - Financial Planning: 2 Scenario Comparison incorrect formula [TFS 29039]	<p><b>Summary:</b> The formula in Report H214 is incorrect, so the report is not calculating as expected.</p> <p><b>Resolution:</b> Corrected to match the formula in J214, so the report calculates correctly.</p>

Issue Description	Description
PFB-06940 - Corporate Allocation Driver [TFS 29141]	<p><b>Summary:</b> The descriptions on the Corporate Allocation driver file need to be updated to better reflect the populated data. For example, when mapping allocation codes, the code column includes Allocation Description. Need to change the title to Allocation Code for clarity.</p> <p><b>Resolution:</b> Corrected by updating the headers names to “Code” and “Allocation description,” and G to “Allocation ID.” Added help text in column H.</p>

# Issues resolved in 2018.4.1

The following table lists the resolutions for issues addressed in 2018.4.1, released on January 7th, 2019:

Issue Description	Description
Clone node does not display node options [TFS 30790]	<p><b>Summary:</b> When cloning a node, the node type should display all of the node types within the originating node's template. It appears that the node value is not passing to the form properly.</p> <p><b>Resolution:</b> Corrected by fixing the code so the query runs as expected.</p>
Default data missing save tag for code 726841 [TFS 30961]	<p><b>Summary:</b> Default data is missing the save tag because Layer3Dim tab cells CN942 and CQ942 have the wrong code.</p> <p><b>Resolution:</b> Corrected by copying the save tag code from the cells with correct code to the Layer3Dim tab cells CN942 and CQ942.</p>

# Issues resolved in 2018.4.2

No issues were addressed in 2018.4.2, released on January 28th, 2019.

# Issues resolved in 2018.4.3

The following table lists the resolutions for issues addressed in 2018.4.3, released on February 18th, 2019:

Issue Description	Description
Baseline Driver Mid Level Visit Growth Error [TFS 31844]	<p><b>Summary:</b> The Medicare visits formula extends to include IP and OP inflation. The formula should only extend to row 57.</p> <p><b>Resolution:</b> Corrected by adjusting the formula to only include the Midlevel Visits and not extend as far down as it did previously.</p>
BS Node Processing Issue (related to batching) [TFS 31850]	<p><b>Summary:</b> When processing plan files, the BS node fails. This error appears to be related to query batching. When removed from the template, it processes correctly.</p> <p><b>Resolution:</b> Corrected by updating the batch queries logic.</p>
Other Expense CM Insert Gives Error [TFS 32128]	<p><b>Summary:</b> When adding an Other Expense to a template, the system displays an error. When the Gain/Loss of Disposal of Fixed Assets was added, the system did not update the offset in column A.</p> <p><b>Resolution:</b> Corrected by updating formulas in the following templates:</p> <ul style="list-style-type: none"><li>• Acute template - A734</li><li>• Physician template - A902</li><li>• Research template - A486</li><li>• Health Plan template - A485</li></ul>



# Manual setup instructions

There are no manual setup or configuration steps required for this release.

# Known issues

The following table lists the known issues in this release.

Issue Description	Description
Some reports are not formatted for drilling [TFS 14163]	<b>Symptom:</b> When drilling in some of the reports, the results may not have the correct formats. <b>Explanation:</b> Will be fixed in a future release.
Consolidated Node error when nodes have been deleted [TFS 11242]	<b>Symptom:</b> If the last node in the node table has been deleted, the integration utilities assign the next available node based on the current max node number, not accounting for the deleted nodes. When saving the utility, the system returns an error that the node cannot be found. <b>Explanation:</b> Create a manual node from the task pane (you can add it to the sample model), then refresh the utility, and save it. Creating a new node manually creates a new max node value and resolves the missing last node error.

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