



Axiom Rolling Forecast 2018.4

Release Notes

Last Updated: 3/11/2019

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Summary

Kaufman Hall is pleased to announce the 2018.4 release of Axiom Rolling Forecast. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions. Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **Back up Axiom database** – Kaufman Hall will confirm that you have a current backup of your Axiom database before applying the upgrade.
4. **Apply upgrade** – Arrange with your IT staff on an agreeable time for scheduled downtime to apply the program and product upgrade. This includes any post-upgrade hot-fix files that need to be copied into the system to address any post-release known issues that have been resolved.
5. **Complete manual updates** – After installing the upgrade, if needed, review any manual configuration steps needed to enable features for this version.

IMPORTANT: Complete the [Manual configuration instructions \(page 19\)](#) if you are using the Drivers form for the first time.

Support

As always, we appreciate your support of Kaufman Hall and look forward to continuing to meet your financial management needs. If you have any questions about your upgrade, contact Kaufman Hall Software Support at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our customers. These courses are part of your maintenance agreement and are free of charge. We strongly urge you to take advantage of all training options, including:

- Self-help videos
- Recorded webinars
- Virtual training courses
- Self-help videos
- Recorded webinars
- Virtual training courses

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

Product upgrade notes

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

When upgrading to the 2018.4 version of Axiom Rolling Forecast, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

RF Driver updates include ALOS analytics

In addition to calendar-based assumptions and forecast assumptions, the Drivers form in the RF Drivers utility now includes an Average Length of Stay (ALOS) section you can use in modeling driver forecast assumptions used in plan files. The ALOS calculation is the number of days divided by the number of discharges or admissions.

In addition to ALOS forecast assumptions, you can use this tool to compare any two driver forecast assumptions as a ratio.

Active Assumptions: RFAdjustments

Rolling Forecast Adjustments Setup

Configuration ▾ Planning Questions Adjustments ▾ Drivers Stat Codes Global Data

Drivers

Use this tab to set forecast driver assumptions for Plan Files.

Show Historical Actuals & Projection Estimates? ☐ No ☒ Yes

Average Length of Stay (ALOS) ☒ Yes ☐ No

Code	Description	Apr 2018 Forecast	May 2018 Forecast	Jun 2018 Forecast	Apr-Jun 2018 Forecast
Driver Calendar-Based Assumptions					
Average Length of Stay (ALOS)					
+ Insert ALOS Ratio					
Driver Forecast Assumptions					
<input type="checkbox"/> K_Admissions	Invalid RF Stat Code will not SAVE	0	0	0	0
	Same Quarter Growth ▾	0.00%	0.00%	0.00%	0.00%
	Growth Adjustment	0.00%	0.00%	0.00%	0.00%
	Total - Invalid RF Stat Code will not SAVE	0	0	0	0
	K_Admissions Per Day	0.0	0.0	0.0	0.0
+ Amount Change					
+ Percentage Change					

For more information, see “Comparing driver forecast assumptions” in the online help.

New RF Driver statistical calc measures for analytics

The Drivers tab of the RF Drivers utility now includes new analytics that display for each statistic:

- For every Quarterly column – A row for the Quarter over Quarter amount change (Q2-Q1) and percentage change (Q2-Q1/Q1)
- For every 4th quarter column – A row for the Year over Year amount change (Y2-Y1) and percentage change (Y2-Y1/Y1)
- For monthly columns – Row for the Month Over Month amount (M2-M1) and percentage (M2-M1/M1) change
- A stat per day calculation taking the stat in the column divided by the number of days in the period

		Jan-Mar 2018	Apr-Jun 2018	Jul-Sep 2018	Oct-Dec 2018	Jan-Mar 2019	Apr-Jun 2019	Jul-Sep 2019
		Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Average Length of Stay (ALOS)								
<input type="checkbox"/>	EMC_K_Visits_OP	123519	139528	168645	203838	246375	297789	359932
	EMC_K_Admissions	1157	1166	1179	1191	1203	1215	1227
	ALOS EMC visits by admissions	106.758	119.664	143.041	171.149	204.800	245.094	293.343
<input checked="" type="radio"/>	Amount Change							
	MoM Change							
	QoQ Change	6.056	12.906	23.377	28.108	33.652	40.293	48.249
	YoY Change				34.719			
<input checked="" type="radio"/>	Percentage Change							
	MoM % Change							
	QoQ % Change	6.01%	12.09%	19.54%	19.65%	19.66%	19.67%	19.69%
	YoY % Change				34.48%			

For more information, see “Comparing driver forecast assumptions” in the online help.

Update assets with older UI to match existing KH standards

Plan file templates and calc methods are now updated to the latest KH UI standard. The following assets are included in the UI update:

- RF Plan tab-Paint entire tab and calc methods
- Summary-Paint entire tab
- Charts- Paint tab and graphs
- Provider Volume-Paint entire tab and calc methods
- Forecast-Paint entire tab and calc methods
- Notes-Paint entire tab
- RF Initiatives-Paint entire tab and calc methods
- RF History-Paint entire tab and calc methods

NOTE: Existing plan files with the old formatting can be updated by rebuilding them.

RF monthly statistics summarization report redesign

This form replaces the Excel-based stat summarization report that admins and analysts use to update the RF_Monthly table by summarizing from the ACTYYYY financial tables or through manual entry. The new form allows you to:

- Save your custom filters for each RFGroup row
- View and save values from the ACTYYYY table for the current, ultimate, and penultimate years to the corresponding time series in the RF Monthly table at the same time
- Filter the report by plan group
- Manually update statistics that do not exist in the Actual tables

Access this report from the **RF Admin Task Pane > Update Driver File > RF Input Monthly Statistics**.

Run this report after the Monthly close is completed.

IMPORTANT: For existing clients who have configured their current RF Stat summarization report, you may continue to use that report until you are ready to update the filters and codes in this report. Please ensure that the report has been saved with a different name than the standard.

RF Monthly Statistics Update Form

Save

KHA Health

Show Fiscal Years

Filter by RFPLANGROUP

☒ 2018

☒ 2017

☒ 2016

SHOW ALL

RFGroup	RFCode	Period	July	August	September	October	November	December	January	February
EMA_Exclude	EMC Physician Acquisition	2018	2,840.00	2,632.00	3,365.00	3,079.00	2,999.00	4,843.00	2,979.00	3,145.00
K_Procedures_OP		2017	2,708.00	2,620.00	3,261.00	2,924.00	3,012.00	3,204.00	3,025.00	3,003.00
Base		2016	2,050.00	2,342.00	4,025.00	3,368.00	2,747.00	2,725.00	2,455.00	2,545.00
<input type="checkbox"/> Allow manual entry for statistics that do not exist in the actual tables										
Modify Stat Filter			DEPT RFGroup='EMA_Exclude' AND ACCT RFCode='K_Procedures_OP'							
EMA_Exclude	EMC Physician Acquisition	2018	17,315.00	15,402.00	15,706.00	15,033.00	15,067.00	15,777.00	15,161.00	15,496.00
K_Visits_OP		2017	64,246.00	64,250.00	85,316.00	73,492.00	73,218.00	63,219.00	17,657.00	16,307.00
Base		2016	127,022.00	120,901.00	126,004.00	123,389.00	128,689.00	129,539.00	128,955.00	135,019.00
<input type="checkbox"/> Allow manual entry for statistics that do not exist in the actual tables										
Modify Stat Filter			DEPT RFGroup='EMA_Exclude' AND ACCT RFCode='K_Visits_OP'							

For more information, see [Using the RF Input Monthly Statistics utility \(optional\)](#).

New RF KHABgttemplate validation table

There is a new validation table for the RFGROUP.KHABgtTemplate column in the RFGROUP table.

Previously, the values in this column were validated using the same table as DEPT.KHABgtTemplate for Budgets, which resulted in non-Rolling Forecast values displaying in the Choose Value selection dialog during implementations, or when admins add a new RFGROUP. The only options for this column are now RollingForecast and NA.

Issues resolved in 2018.4

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

Issue	Description
PFB-05582 - RF_Data Summarizationnew GetData Lookup not working [TFS 13983]	<p>Summary: The RF Summarization Data utility does not populate correctly if there is no data in the current BUD (Budget) data table.</p> <p>Resolution: Corrected by changing the necessary formulas so that the tables populate correctly—even when users do not have budget data loaded.</p>
PFB-05833 - RF_EPM RF Target Variance Report revenue variance subtotals wrong [TFS 16474]	<p>Summary: In the RF Target Variance report, the subtotals in the Revenue sections and the Operating Income section are wrong.</p> <p>Resolution: Corrected by fixing the cell formulas.</p>
PFB-06704 - RF Deduction Calculator - multiple defects [TFS 27877]	<p>Summary: Multiple various issues with the RF Deduction Calculator.</p> <p>Resolution: Corrected by changing formulas where needed and by updating the code as necessary.</p>
PFB-06941 - RF Data Summarization Control Sheet filter on InitiativeID [TFS 29645]	<p>Summary: Initiatives budgeted for are not interfacing into the RF_Monthly data table because of a filter on the Control_Sheet (InitiativeID.InitiativeID=1) that impacts AQ1.</p> <p>Resolution: Corrected by changing the filter to InitiativeID.InitiativeID<>0, to include the base data plus initiatives. If the user leaves the filter blank, the job fails.</p>
PFB-05026 - RF BS and Cashflow errors on refresh [TFS 10150]	<p>Summary: The RF Balance Sheet and Cash Flow report errors out on refresh. The file is hardwired to function off of two months of actual and one month of forecast to complete the base quarter. As a result, it is misinterpreting the “Current Period” and has a mix of period 9 and 10 in that column and is trying to find a period 13 instead of 12 for December.</p> <p>Resolution: Corrected by changing formulas where needed and by updating the code as necessary.</p>

Issue	Description
<p>RF Salary Rate Analysis - various issues [TFS 12928]</p>	<p>Summary:</p> <ol style="list-style-type: none"> 1. Instructions sheet is manually hidden. 2. Variables sheet should not have freeze panes set on Control_sheet. 3. Should the formatting of the hourly rates in the Total row, cols I:L have the same numeric format as the values above in the report (currency)? 4. Formulas to calculate variances should not have *100. The percentages are too big. The cells needing to have the *100 removed: M4, N4, O4, and in the same cols on the Total row. 5. Edit Page Layout so that rows 15:19 are repeated on every page. <p>Resolution:</p> <ol style="list-style-type: none"> 1. Instructions sheet is visible upon open. 2. Removed freeze panes from the Variables Tab: WorksheetSettings. 3. Adjusted formatting of Total Row for columns I:L to match currency format of records. 4. Adjusted formulas in the CM row for AQ1 cols M:O to remove the *100. <ul style="list-style-type: none"> • Example: from: =IF(I4=0,0,(K4-I4)/I4)*100 to:=IF(I4=0,0,(K4-I4)/I4) • Same for total row. 5. Set print titles "rows to repeat top:".

Issue	Description
RF Balance Sheet Error on Refresh [TFS 13420]	<p>Summary:</p> <ol style="list-style-type: none"> 1. Error on Refresh where there appears to be a missing stop tag in at least two different places. 2. Refresh Variable is missing and include Income in balance sheet is hard coded to no. <p>Resolution:</p> <ol style="list-style-type: none"> 1. Fixed the column definition in cell RF_BalSheet_CF!G3 from Acct.FPCode to Acct.RFCode.FPCode, changed the AQ1 Sumby column from ACCT.FPCode to ACCT.RFCode.FPCode. 2. Added a StringList (Yes,No) type refresh variable on the Variables sheet, to feed the previously hard-coded value RF_BalSheet_CF!G19.
RF Income Statement Summary-12 Quarter - filter [TFS 13457]	<p>Summary:</p> <ol style="list-style-type: none"> 1. The refresh variables filter is set in the AQ filter, which means when the report is run through file processing, it will not present correct results. 2. The filter for the RFCode.FSDetail for AQ1 can stay in AQ1 data filter and the RFCode.RFCode filter for AQ2 can stay in AQ2 data filter. 3. User needs to separate the Refresh Variables filter from the AQ1 and AQ2 data filters and make it a sheet filter that can be turned off if the file is being run in multipass mode. <p>Resolution: Corrected by changing formulas where needed and by updating the code as necessary.</p>
RF Scenario - RF Consolidated Summary: Issues bucket [TFS 13938]	<p>Summary:</p> <ol style="list-style-type: none"> 1. Operating Margin % on row 81 should be =IF(H37=0,0,H61/H37) all the way across. Row 83 should be =IF(H37=0,0,H72/H37) all the way across. Row 85 should be =IF(H37=0,0,(H61+H51+H56)/H37) 2. Cell L63 and Cell M63 have misplaced formulas. 3. When file processing, The name/Filter of the Report being run in multipass does not show. <p>Resolution: Corrected by changing formulas where needed and by updating the code as necessary.</p>

Issue	Description
RF Balance Sheet and Cash Flow utility [TFS 14180]	<p>Summary:</p> <ol style="list-style-type: none"> 1. Title of RF_BalSheet_CF has (\$ in Thousands) but the numbers do not reflect that. The factor is in cell \$H\$1, which is a 1 at this time. The Title needs to change dependent on what is in that cell, either 1 or 1000. E35 needs to be a formula to add the "(\$ in Thousands)" dependent on H1. 2. There are a lot of #DIV/0 errors when the report is stored empty. This is due to getdatas that are zeroed out from the "Convert Axiom function results to zero on save" on the control sheet. 3. Since the user has Convert Axiom function results to zero on save, then the Convert Axiom Query results to zero on save should be On for RF_BalSheet_CF. 4. Some of the hyperlinks work and some do not. 5. Check entire visible worksheets for unprotected cells that should be protected. <ol style="list-style-type: none"> a. Summary sheet – The entire sheet should be cell protected since there is no input. b. RF_BalSheet_CF sheet – Protect the sheet and use the tab key to find all of the unprotected cells—protect them if they are not input cells. 6. RF_BalSheet_CF has an AQ2 that is Insert and Update but when you look in col B the contents of AQ2 are empty. 7. On the control sheet for AQ2 for the RF_BalSheet_CF, there is an "A" in Internal Data Control Column. This needs to be blanked out. AQ2 is using col B. 8. Drill should be turned off for all AQs and the Enable Drilling settings on the control_sheet. <p>Resolution:</p> <ol style="list-style-type: none"> 1. Added conditional logic to E35 title. Changed to ="RF Balance Sheet & Cash Flow "&IF(H1=1,"(\$ in Thousands)","") 2. Set the "Convert Axiom function results to zero on save" setting on the Control Sheet to "Off", when empty report did not produce #Div/0 errors. 3. Set the "Convert Axiom Query results to zero on save" to On for the RF_BalSheet_CF tab. 4. Checked the majority of the hyperlinks and adjusted the ones

Issue	Description
	<p>that produced errors or went to random locations.</p> <ol style="list-style-type: none"> 5. For worksheets: <ol style="list-style-type: none"> a. Set all cells to protected/locked on Summary tab. b. Went through the RF_BalSheet_CF tab and unprotected cells not formatted as input cells. 6. Left AQ2 in same location in parallel with AQ1 start and stop tags. Added the reference to the FSDETAIL column in AQ1 CM Row. Set cell B4 = E4. AQ2 now returns with results. 7. Removed the "A" from RF_BalSheet_CF : AQ2 Internal Data control Column. 8. Set Drills to off for AQs.
<p>RF Income Statement Reconciliation By RFGROUP errors [TFS 15257]</p>	<p>Summary: On this report there are three different areas that need correcting.</p> <ol style="list-style-type: none"> 1. Column H is shown in (000s) and it should be only if selected in the RF Assumptions driver on the RFConfig tab. Instead of dividing by 1000 as default, this should be changed to reference the value selected on the RFConfig tab. 2. This column should be hidden because it is being used in column H for comparison in the report and adds confusion. 3. Change the title of this column from Workbook Adjustments to Plan Monthly Forecast Adj Cur. <p>Resolution:</p> <ol style="list-style-type: none"> 1. Bring in Conversion Factor from RollingForecast_RFConfig Table. * added a getdata UDF to variables tab in cell I81 = =GetData("RFInput", "Code = 'RFConversionFactor'", "RollingForecast_RFConfig") * also added a get data UDF in H81 to pull in the description of how the conversion factor works. * changed formula for Report tab ,CM row for AQ1, in H3 from =IF(LEFT(E4,1)="H",M4,M4/1000) to =IF(LEFT(E4,1)="H",M4,M4/Variables!\$I\$81) to reference the value brought in on the variables tab. 2. Added a view to row 7 on the Report tab to hide column M. 3. Changed the title on column N to "Plan Monthly Forecast Adj Cur."

Issue	Description
PFB-05915 - RF Salary Rate Analysis Report issue list [TFS 16975]	<p>Summary: The report needs to add a filter that removes benefits from the total Salaries Columns in U, W, Y and AA. The Sheet filter on Report was not working correctly if the user did not select the second optional value in the Refresh Variables and create a RFGROUP.Entity IN () filter, which does not work. The formulas for sheet sort on AQ1 in Report can easily result in #N/A error the way it is currently set up. This happens if the user chooses to sort on the first Refresh Variable and then changes this to another category. If the user does this, then the Sheet sort would still show as the previous selection when that selection is now invalid. This will not happen if the user chooses FTE Effect, Rate Effect, or Variance as their selections and will only happen if they have RFGROUP, VP, Director, Manager or Division selected in the Green drop-down and then change the first refresh variable.</p> <p>Resolution: Excluded benefits for the ones that are E_Salaries on row 3 for U3, W3, Y3 and AA3 will all be updated to exclude E_Benefits. Fixed sheet filter formula to IF(N79="", "", IF(OR (\$M79=FALSE, \$N78=0, \$N78=""), "", \$H78&" IN ("&\$N79&"))). To fix the sheet sort on AQ!, added in an action copy codes that will copy the value when first refresh variable changes and is no longer a selection that should be valid but was leftover because it was the selected value for the sort (green drop-down in H18).</p>
RF Waterfall Analysis EBIDA Color Correction [TFS 18277]	<p>Summary: During repainting the conditional format for this report was not updated and it is using the old orange color to highlight the month under review. Need to update to the current standard color palette.</p> <p>Resolution: Adjusted colors to KHA standard color palette.</p>

Issue	Description
RF Consolidated Summary: Format issues bucket [TFS 18636]	<p>Summary:</p> <ol style="list-style-type: none"> 1. Current format for cells M91:BC94 is no decimal places and should be out to two decimals. There are Salaries\Benefit Cost Per CMI adjusted, Supply Cost per CMI Adjusted, Total Cost per CMI Adjusted and Net Revenue per CMI Adjusted values that are better represented as 0.00. 2. Current format for cells M104:BC106 is no decimal places and should be out to two decimals. This is for Average Length of Stay, Average Daily Census and Adjusted Patient Days that are generally represented in the HC industry as 0.00. 3. Current format for cells M108:M108 is no decimal places and should be out to two decimals. This is for CMI Adjusted that are generally represented in the HC industry as 0.00. <p>Resolution: Updated formatting for ranges mentioned above.</p>
PFB-06539 - RF Add Patient Revenue CM [TFS 25705]	<p>Summary: All initiative codes for revenue say "Inpatient Revenue" when the RFCode descriptions will be different depending on selection.</p> <p>Resolution: Cell D628 of the CM was changed from "Inpatient Revenue" to =GetData ("RFCode.Description", "RFCode="&C1628&"", "Enter RFCode").</p>
Rolling Forecast Admin task pane is pointing to the document that was removed [TFS 26303]	<p>Summary: Rolling Forecast Admin task pane is pointing to the document (om\Reports Library\System Files\Documents\Admin\Rolling Forecast\Axiom Rolling Forecasting.pdf) that was removed in TFS 25898.</p> <p>Resolution: Removed link in RF Admin Task pane.</p>
RF Income Statement Summary by Group- Refresh variable change [TFS 26567]	<p>Summary: Currently, the second refresh variable is optional. This is causing errors if the user does not select a variable.</p> <p>Resolution: Set the second refresh variable to be Required.</p>
RF - Current Quarter Monthly Adjustments not being accounted for when rolling from month to month [TFS 29633]	<p>Summary: On the forecast tab the adjustments are not being accounted for when users Forecast on a monthly basis move from month to month specific to the current quarter months columns Q and R.</p> <p>Resolution: Updated the formula to bring in adjustments where the month is either bringing in Actuals or Budget.</p>

Issue	Description
PFB-06798 - RF Dept Group Statistics Report [TFS 29840]	<p>Summary: The pick list for RF Codes when adding a new one should be based upon RFCode.KHABgtCode. It is currently using RFCode.RFCode.</p> <p>Resolution: Adjusted the CM library so that it uses RFCode.KHABgtCODE rather than RFCode.RFCode.</p>
PFB-06707 - RF - Oth Pt Revenue calc method on Forecast tab [TFS 29971]	<p>Summary: For the Global Inflation Assumption row (third row) in the Oth Pt Revenue calc method, columns X, Y, and Z have a different formula than in same cells in the IP Revenue and OP Revenue calc methods. The GetData() formula in the IP Revenue and OP Revenue CMs is correct, and this same GetData() formula should be in the Oth Pt Revenue CM.</p> <p>Resolution: Adjusted the CM on the global inflation assumption row.</p>
PFB-06718 - Formula correction on RF template, Summary tab [TFS 29972]	<p>Summary: In the RF template, Summary tab, for the expense rows (48 to 64) there is some inconsistency in the formulas for Forecast periods columns R to Y. Some rows include the corresponding forecast period from the Initiative columns (AE to AP) while others do not.</p> <p>Resolution: On summary tab: made formulas consistent in range R48 : AC64.</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
PFB-07055 - RF_Benefits_Pct Of Salaries (2018.4) [TFS 30246]	<p>Summary: Users have a choice to use monthly results for the forecasted amount, reflected in column AB (unchanged). The rest of the forecasts use quarterly numbers, and the quarterly numbers span columns AC through AN. There is an error in the CM for Percent of Salaries in columns AC:AN; they are referring to the Comments column.</p> <p>Resolution: Corrected by fixing the formulas in Columns AC through AN.</p>
PFB-07057 - RF_Benefits Pct of Salaries CM Annual Avg CM wrong (2018.4) [TFS 30266]	<p>Summary: The formula for Benefits percent of Salaries CM for the Annual Avg feature is dividing by 3, but the formula is already using the AVERAGE feature, so it is taking an average of an average.</p> <p>Resolution: Corrected by removing the “/3” from the formulas.</p>
RF Initiatives tab- error in plan file when interfacing or adding Statistic CM line (2018.4) [TFS 30627]	<p>Summary: Column BB on the one line CM Add Statistic Line needs to reference the cell below it. The error in the Template/Plan File builds is due to a #REF! error in the cell. The row below the cell was inadvertently deleted.</p> <p>Resolution: Corrected by restoring the formula reference to the cell.</p>
2018.4 Repainting RF Template (visible report views) to ensure consistency with KH standards [TFS 30691]	<p>Summary: Inconsistencies in the way that the data is presented throughout the report, and save error.</p> <p>Resolution: Corrected inconsistencies in percentage data, and corrected save error.</p>
RF Online Help is associated with the unreleased "Rolling Forecasting" license instead of the released "Rolling Forecast Quarterly" license (2018.4) [TFS 30701]	<p>Summary: Rolling Forecast online help does not display due to a license name issue.</p> <p>Resolution: Corrected by changing the online help reference from Rolling Forecasting to Rolling Forecast Quarterly.</p>

Issues resolved in 2018.4.2

The following table lists the resolutions for issues addressed in 2018.4.2, released on January 28th, 2019:

Issue	Description
Cannot link Multiple Benefits codes to the same Salary accounts [TFS 30556]	<p>Summary: The system only allows a user to link one benefits account to a single or many salary account. There are times that the system should allow the user to create multiple mappings.</p> <p>When using rate per FTE and percent of salary for a specific benefit account, the system defaults to the first option entered by the user and then displays an error when saving their changes.</p> <p>Resolution: Corrected by updating the drivers to select more than one benefits RF Code per salary RF Code. In addition, the Rate Per FTE and percentage of salary calc method for benefits has been updated to accommodate accordingly.</p>

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
PFB-07199 - RF Drivers -- should users be able to hide current month columns separately [TFS 31512]	<p>Summary: When a user alters the configurations using the RF Driver web form and wants to suppress the three actual month's columns (AMth1-AMth3) but expose the quarterly column relating to those months, the web page allows him to change the column status to "hidden" for the months. However, when the user saves the settings, the system does not retain the changes when reopening the driver.</p> <p>Resolution: No change was made to the Workbook Visibility driver as it was working as intended. When the Display Monthly Input for THIS quarter and Display Monthly input for NEXT quarter is hidden, only the quarterly option will be made available. A change was made to the Global Data and Driver tab to display the quarterly column, which was not viewable in the previous version.</p>

Issues resolved in 2018.4.4

The following table lists the resolutions for issues addressed in 2018.4.4, released on March 11, 2019:

Issue	Description
Broken help code and link in Drivers Security form [TFS 33076]	<p>Summary: Contextual help does not display when user is in the Drivers Security form screen.</p> <p>Resolution: Corrected by updating the license name in the help files so that the correct help content will display when users are in the screen.</p>
Broken help code and link in Drivers form [TFS 33077]	<p>Summary: Contextual help does not display when user is in the Drivers Security form screen.</p> <p>Resolution: Corrected by updating the license name in the help files so that the correct help content will display when users are in the screen.</p>
Need help code link in RF Input Monthly Statistics form [TFS 33085]	<p>Summary: Contextual help does not work while user is in the Input Monthly Statistics form screen.</p> <p>Resolution: Corrected by inputting the correct help file code so that the correct help content will display when users are in the screen.</p>

Manual configuration instructions

Complete the following configuration steps after Axiom Rolling Forecast 2018.4 is installed:

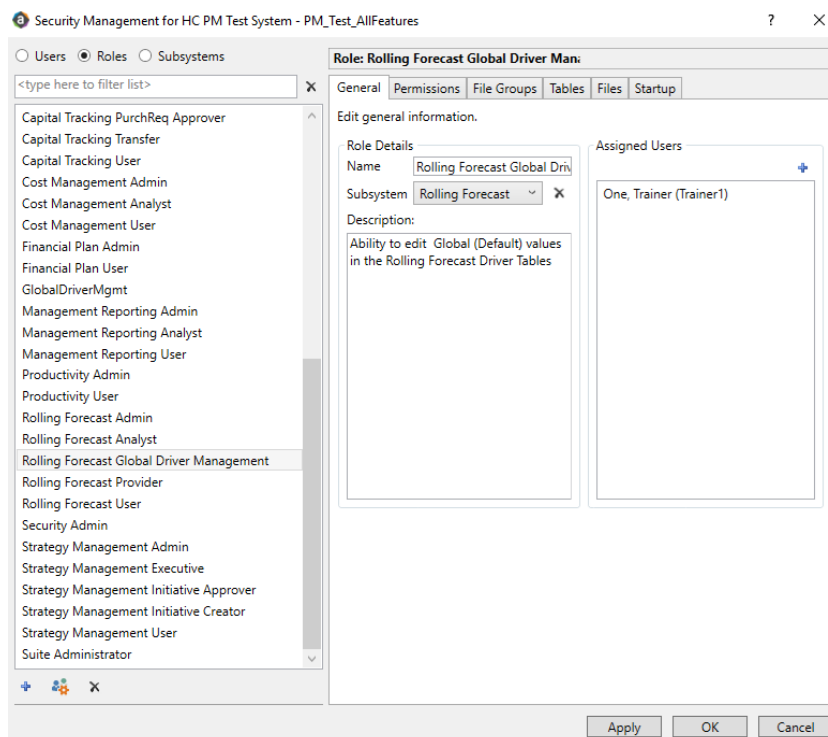
Configure Driver form security

IMPORTANT: If this is the first time your organization is using the Drivers form, you must first complete these steps.

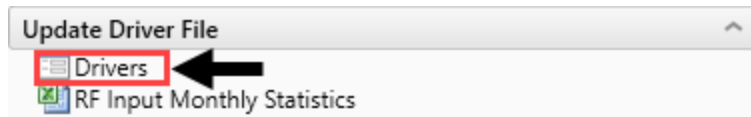
To configure Driver form security:

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

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



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



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

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

First Name	Last Name	Email Address	Member of Global Driver Management	RFConfig	RFPlanQ	RFADjustments	RFDrivers	RFStatCodes	RFGlobalData	Select RFPlanGroup Filter(s)
RF	Analyst	rfaanalyst@kaufmanhall.com	FALSE	Read Only	Ready Only	Read Only	Read Only	Read Only	Read Only	
Rolly	Forecast	Rforecast@kaufmanhall.com	FALSE	Read Only	Ready Only	Read Only	Read Only	Read Only	Read Only	'EMA','EMC','EME'

Review RFGGroup.KHABgtTemplate column for NA entries

During installation of your 2018.4 update a utility was run to review the validated entries in the RFGGroup dimension for the RFGGroup.KHABgtTemplate column. If any invalid entries were found in the column, they were replaced with NA.

1. As a result, please review your RFGGroup.KHABgtTemplate column for NA entries to ensure this is still the intended State.

Valid entries are:

- RollingForecast
- NA

Invalid entries removed and replaced with NA if found are:

- Master
- Forecast
- MasterCDM

Manual configuration instructions

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

Known issues

The following are known issues for this release.

Issue	Description
\Axiom\Reports Library\Rolling Forecasting Utilities\Calculators\RF Deductions Calculator.xlsx [TFS 29970]	<p>Symptom: When you open the utility and refresh you see all RFGroups and not the ones under the RFPlanGroup that you specified.</p> <p>Explanation: Will fix in a future release.</p>
PFG-06595 - \Axiom\File Groups\Rolling Forecast\Calc Method Libraries\RFInitiatives.xlsx [TFS 29969]	<p>Symptom: RF Initiatives tab does not zero out for the hours row in the Add Salary line calc method.</p> <p>Explanation: Will fix in a future release.</p>

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