



## **Axiom Financial Planning 2018.1**

### **Release Notes**

Last Updated: 4/2/2018

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# Summary

Kaufman Hall is pleased to announce the 2018.1 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 2018.1 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.

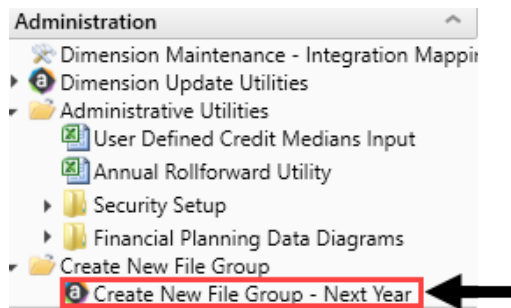
# New features summary

This section includes a description of the new features and enhancements included in this release.

## Create new file groups

In past versions of Axiom Financial Planning, we added file groups for each planning year. Now we have developed a utility that allows you to create your own file group. The Create New File Group utility automatically creates a new file group by copying specified tables and saving the drivers as well as updating the FP\_NextYear file group alias.

**NOTE:** As of Axiom Financial Planning 2018.1, the system comes preloaded with 2016-2019 file groups, but after 2019, you will need to use the Create New File Group utility to create file groups.



For instructions, see "Rolling forward to a new planning year" in the *Axiom Financial Planning 2018.1 Administrator's Guide*.

## Configure salary and FTE in the Baseline Assumptions driver

You can now make productivity changes in the Baseline Assumptions driver by entering both salary and FTE percentages, which will be helpful when making productivity assumptions as well as when creating scenarios.

## Global Set

Baseline	2019	2020	2021	2022	2023
Jess's Operating Revenue 1		0.00%	0.00%	0.00%	0.00%
Operating Expense Inflation					
<b>Salaries &amp; FTEs</b>					
Routine Salaries		0.00%	0.00%	0.00%	0.00%
Routine FTEs		0.00%	0.00%	0.00%	0.00%
Other Salaries		0.00%	0.00%	0.00%	0.00%
Other FTEs		0.00%	0.00%	0.00%	0.00%
Physicians Salaries		0.00%	0.00%	0.00%	0.00%
Physicians FTEs		0.00%	0.00%	0.00%	0.00%
Mid Level Salaries		0.00%	0.00%	0.00%	0.00%
Mid Level FTEs		0.00%	0.00%	0.00%	0.00%
Clinical Staff Salaries		0.00%	0.00%	0.00%	0.00%
Clinical Staff FTEs		0.00%	0.00%	0.00%	0.00%

For instructions, see "Configuring the Baseline Assumptions driver file" in the *Axiom Financial Planning 2018.1 Administrator's Guide*.

## Global Inflation Assumption associated with FTE

In the node plan file, the new Global Inflation Assumption row associates with the FTE. If you put a value into the Baseline driver for a productivity increase or decrease, the data pulls into the Global Inflation Assumption and will make an adjustment the FTEs.

Double Click to Change Allocation Driver:		CorpAllocation				
Salaries & Wages						
Routine FTEs	Patient Days	< Variable Exp Driver				
Variable FTE % change	0.00%	0.00%	0.00%	0.00%		
Fixed FTE % change		0.00%	0.00%	0.00%		
-Variable FTEs (Patient Days)		0.0	0.0	0.0	0.0	0.0
-Fixed FTES	100.00%	0.0	0.0	0.0	0.0	0.0
Global Inflation Assumption				0.00%	+	0.00%
FTE Adjustment						
Total Routine FTEs		0.0	0.0	0.0	0.0	0.0
Routine Salaries						
Dollar Adjustment		0	0	0	0	0
Salary / FTE		0	0	0	0	0
Global Inflation Assumption				0.00%		0.00%
Test Infl. Assumption						
Total Inflation Rate		0.00%	0.00%	0.00%	0.00%	

## Non-patient node type displays variable expense drivers

You can now drive expenses for non-patient node types by using the variable expense drivers, which used to be hidden.

## Refreshing data in the Corporate Allocation Assumptions driver

If you load data in the system, you can use the Refresh Data option to pull in allocation data into the Corporate Allocation Assumptions driver, which you can use to model out to future years. After you save the driver, the system automatically updates the Corporate Allocation area in each node.



# Issues resolved in 2018.1

The following table lists the resolutions for issues addressed in 2018.1, released on April 2, 2018:

Issue Description	Resolution
PFB-04225 - Multi Scenario Comparison Report errors [TFS 6324]	<p><b>Symptom:</b> The Multi Scenario Comparison Report is missing the headers for the charts on the Charts worksheet to describe what each chart represents.</p> <p><b>Resolution:</b> Corrected by making the following changes:</p> <ul style="list-style-type: none"> <li>Charts tab - Added titles to each of the charts. Each title is linked to the corresponding data.</li> <li>Variables tab - Changed the first Select Scenario #1 variable from optional to required.</li> </ul>
PFB-04238 - Remove project from available node-type listing [TFS 6349]	<p><b>Symptom:</b> When selecting the node type for the Project node when building a new node, an error displays.</p> <p><b>Resolution:</b> Corrected by removing the Project node type.</p>
PFB-04476 - Some reports list the long, not short model descriptions [TFS 7489]	<p><b>Symptom:</b> In the Code Comparison by Model, Code Drill Report by Model, and Consolidating by Model reports, list the long model descriptions.</p> <p><b>Resolution:</b> Corrected by changing formulas in various cells.</p>
PFB-04477 - Format the Code Comparison by Model report to be more presentable [TFS 7490]	<p><b>Symptom:</b> Format the Code Comparison by Model report to be more presentable.</p> <p><b>Resolution:</b> Corrected by updating the formatting.</p>
PFB-05339 - Bad debt as deduction or expense in driver [TFS 11292]	<p><b>Symptom:</b> In the Setup driver file, the user can treat bad debt as either a deduction or expense. However, the report treats all patient revenue bad debt as a deduction regardless of what the user selects when configuring the driver.</p> <p><b>Resolution:</b> Corrected by updating cells AK15:AK16 and E16.</p>
PFB-06049 - Financial Planning: Ratio tab formula error in Financial Statements [TFS 18164]	<p><b>Symptom:</b> In the Ratios tab of the Financial Statements report, the Days in Supply Inventories beginning in cell I205 are mismatched.</p> <p><b>Resolution:</b> Corrected by updating the formula in G205.</p>
PFB-06050 - Physician and employee benefits do not save to database [TFS 18166]	<p><b>Symptom:</b> The physician node does not save Physician Benefits (726295) and Employee Benefits (726299) data to the database. This impacts the DriverData tab in the node template and makes it hard for clients to report on these line.</p> <p><b>Resolution:</b> Corrected by making formula changes to BA1249, BA1250, and E1250.</p>

Issue Description	Resolution
PFB-06066 - Medicare does not show in Go To list [TFS 18314]	<p><b>Symptom:</b> Medicare does not show in the Go To list.</p> <p><b>Resolution:</b> Corrected by making formula changes to AJ330.</p>
PFB-06143 - Quick Filter in Dimension Maintenance Update DIM - PAYOR.xlsm [TFS 18919]	<p><b>Symptom:</b> The Quick Filter has been disabled in the Dimension Maintenance utility and the client would like it turned on for ease of use.</p> <p><b>Resolution:</b> Corrected by enabling the Quick Filter.</p>
PFB-06161 - Formula error in FP [FG2019] [TFS 19079]	<p><b>Symptom:</b> There is a formula issue in the Benefits Based on Salaries line or row 892. The formula produced the negative number of total salaries for the projection years even though this methodology was not being used.</p> <p><b>Resolution:</b> Corrected by editing several cells, formulas, and calc methods.</p>
PFB-06216 - Quick Filter disabled on various reports after 2017.3 release [TFS 19798]	<p><b>Symptom:</b> When using the reports in the Scenario Analysis directory in the Financial Planning task pane, the Quick Filter is disabled. This prevents the system from refining the data between scenarios. As a result, the scenario cannot be compared in the report.</p> <p><b>Resolution:</b> Corrected by editing several cell, formula, and calc methods.</p>
PFB-06220 - Formula error in the Financial Statement report [TFS 19919]	<p><b>Symptom:</b> The Ratio tab of the Financial Statement report includes formula errors.</p> <p><b>Resolution:</b> Corrected in an earlier product version.</p>
PFB-06250 - Inconsistent formula referencing Before to After worksheets in the Sensitivity Analysis Report [TFS 20228]	<p><b>Symptom:</b> On the Incremental tab of the Scenario Sensitivity Analysis report, the formula for calculating the difference between the Before and After balances for Other Assets is incorrect (Row 95).</p> <p><b>Resolution:</b> Corrected by modifying the formula in cell H95.</p>
PFB-06252 - Financial Statements Report: Capital Structure Ratios [TFS 20229]	<p><b>Symptom:</b> In the Financial Statements report, the formula for Debt Service Coverage Ratio, Debt Services/Revenues, and Cushion ratio is incorrect in the Report and Ratios tab for the first year.</p> <p><b>Resolution:</b> Corrected by modifying the formula in cell Y328.</p>
PFB-06260 - Error when reprocessing a scenario [TFS 20230]	<p><b>Symptom:</b> When the client reprocesses a scenario, the system displays an error, even though the scenario seems to process correctly.</p> <p><b>Resolution:</b> This issues does not occur in version 2018.1.</p>
PFB-06283 - Deleted driver still shows as an option in Scenario Manager [TFS 20718]	<p><b>Symptom:</b> When deleting a driver using the Manage Drivers utility, the deleted driver remains as a drop-down selection option within Scenario Manager.</p> <p><b>Resolution:</b> Corrected the Manage Drivers utility to not show deleted drivers as a drop-down selection option.</p>

Issue Description	Resolution
PFB-06285 - Physician revenue in the physician node [TFS 20739]	<p><b>Symptom:</b> When attempting to add physician-specific revenue to a physician node, no options display. Payors must be set to capitated in the payor table, but when payors 17-20 are set to capitated, they cannot be selected to insert as capitated payors.</p> <p><b>Resolution:</b> Corrected the Manage Drivers utility to not show deleted drivers as a drop-down selection option.</p>
PFB-06161 - Formula Error in FP [Prototype] [TFS 20863]	<p><b>Symptom:</b> There is a formula issue in the Benefits Based on Salaries line or row 892. The formula produced the negative number of total salaries for the projection years even though this methodology was not being used.</p> <p><b>Resolution:</b> Corrected by editing several cells, formulas, and calc methods.</p>

# 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	Explanation
Data not cleared from DB when node Start Year changed [TFS 8822]	<p><b>Symptom:</b> If the Start Year for a node is changed after the node has been saved with data already entered, all the data columns do not cleared from the previous year that was selected. This is also an issue with the Rebuild function if a user changes the Start Year and then decides to use the Rebuild without first opening and saving the node. (Initiative nodes do clear data when the year is changed, provided that the year is not advanced more than two years.)</p> <p><b>Explanation:</b> Open the FPDATAXXXX data table, and delete all of the records for the appropriate node. Next, open and save the node to populate the data tables properly.</p>
Some reports are not formatted for drilling [TFS 14163]	<p><b>Symptom:</b> When drilling in some of the reports, the results may not have the correct formats.</p> <p><b>Explanation:</b> Will be fixed in a future release.</p>
Consolidated Node error when nodes have been deleted [TFS 11242]	<p><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.</p> <p><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.</p>

**IMPORTANT:** Refer to the **Axiom Healthcare Suite 2018.1 Release Notes** for additional known issues that have a suite-wide impact.