



## **Axiom Rolling Forecast 2018.1**

### **Release Notes**

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# Summary

Kaufman Hall is pleased to announce the 2018.1 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](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

**IMPORTANT:** After you apply this update, ensure that you perform all manual steps in chronological order from intermediate releases starting with 2017.3.

When upgrading to the 2018.1 version of Axiom Rolling Forecast, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, 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 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.

## Rebuildable RF Deductions Calculator

We have redesigned the RF Deductions Calculator report so that it is now rebuildable and updated with the standard Kaufman Hall color palette. This new format allows you to save and retrieve data by RFPlangroup.

The report opens as read-only, but it allows you to save the data for your RFPlangroup. The new read-only functionality allows for simultaneous use by multiple users. Please keep in mind that the data will still be based on your security filter. This report replaces the existing \Axiom\Reports Library\Rolling Forecasting Utilities\Calculators\RF Deductions Calculator.xlsx. Because the data saves to the table and retrieves your previously saved data, we can replace this report as needed during updates and patches without concern for losing information.

If you have an existing deduction report saved under a different name that has been configured to meet your specific needs, you may continue to use that report until you are ready to move to the new model. However, once you make the switch, you can only use one model. If you are using a deduction model with the exact same name in the exact same location, save that report under a different name to preserve it.

**NOTE:** We identified areas of improvement just prior to the release of this update, which we will address in an upcoming patch.

You can also now set the default forecast method for all payors, and you can select a forecast method individually for each payor.

The following are some highlights of the report as well as a reference to more documentation on the new report.

Default Forecast Method:					
<div> <div>LastQuarter</div> <div> LastQuarter  SameQuarter  AnnualAvg  Last2Quarters </div> </div>					
FY2017	FY2017		FY2017	FY2017	FY2017
Dec	Oct-Dec		Jan	Feb	Mar
2016	2016	Forecast	2017	2017	2017
0.00%	0.00%	LastQuarter	0.00%	0.00%	0.00%
0.00%	0.00%	LastQuarter	0.00%	0.00%	0.00%
0.00%	0.00%	LastQuarter	0.00%	0.00%	0.00%
0.00%	0.00%	LastQuarter	0.00%	0.00%	0.00%

You can bring in the historical values (formulas) or bring in the values that were last saved.

## Deductions

For The Period Ending January 31, 2018

RFPlanGroup ID =>

NA

NA

FY2015

FY2016

Apr-Jun

Jul-Sep

2015

2015

Consolidated	RFCode	Actual	Actual
Patient Volume			
Inpatient Volume	0		
Total IP 0 - RFDriver	NA_K_0	0	
		0	
% 0 by Payor			
Medicare	History	0.00%	
Medicaid	History	0.00%	
Commercial	History	0.00%	

For more information, see "Using the RF Deductions Calculator" in the *Axiom Rolling Forecast 2018.1 Administrator's Guide*.

# 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
<p>PFB-05402 - Monthly Payroll to GL filter error for HoursJC [TFS 11720]</p> <p>\Axiom\Reports Library\Rolling Forecasting Utilities\Payroll\RF Monthly Payroll to GL.xlsx</p>	<p><b>Symptom:</b> The Monthly Payroll to GL utility includes the wrong reference for HoursJC in cell B31.</p> <p><b>Resolution:</b> Corrected by updating the formula in cell B31 to include both acct.type for “Hours” and “HoursJC”.</p>
<p>PFB-05675 - RF Dept Group Statistics - Sum by [TFS 15194]</p> <p>\Axiom\Reports Library\Rolling Forecasting Utilities\Setup Review\RF Dept Group Statistics.xlsx</p>	<p><b>Symptom:</b> The RF Dept Group Statistics report (Rolling Forecast Utilities &gt;&gt; Setup Review &gt;&gt; RF Dept Group Statistics) includes an incomplete Sum by in AQ1. Currently it is Dept when it should be Dept.Dept; Acct.RFcode.RFCode.</p> <p><b>Resolution:</b> Corrected by Acct.RFcode.RFCode to Sum By for AQ.</p>
<p>PFB-05821 - RF_EPM RF Consolidated Summary report tied to system year not RFConfig period [TFS 16448]</p> <p>\Axiom\Reports Library\Rolling Forecasting Reports\Quarterly\Financial Statements\RF Consolidated Summary.xlsx</p>	<p><b>Symptom:</b> The Reports in Rolling Forecasting should not be tied to the system year and period, but the period settings in RFConfig.</p> <p><b>Resolution:</b> Corrected by updating the Variables tab to reference the forecast period instead of the system period.</p>
<p>PFB-05928 - Rolling Forecast Process Flow by Step [TFS 17449]</p> <p>\Axiom\Reports Library\Rolling Forecasting Reports\Process Flow\RF Process Flow by Step.xlsm</p>	<p><b>Symptom:</b> The RF Process Flow by Step report does not work.</p> <p><b>Resolution:</b> Corrected by updating cell H15 to include the RF Process Definition name in the header. Updated formulas in cells L8, N8, AW8, and AZ8. Added new cells BA8 and BB8.</p>
<p>PFB-05982 - RF_EPM Target Variance Report missing key stats [TFS 17574]</p> <p>\Axiom\Reports Library\Rolling Forecasting Reports\Monthly\Analysis\RF Target Variance.xlsx</p>	<p><b>Symptom:</b> The key stats section (AQ1) of the RF Target Variance Report is missing the key statistics because the system is hiding them using hard-coded hide logic in cell E4.</p> <p><b>Resolution:</b> Corrected by updating formulas in the Report tab.</p>
<p>PFB-05975 - RF 4 Qtr Forecast report [TFS 17808]</p> <p>\Axiom\Reports Library\Rolling Forecasting Reports\Quarterly\Financial Statements\RF 4 Qtr Forecast.xlsx</p>	<p><b>Symptom:</b> This report doubles the Benefits line.</p> <p><b>Resolution:</b> Corrected by updating filter in the detailed Salaries section of the report.</p>

Issue Description	Resolution
PFB-06021 - RF_EPM Scenario issue with GlobalData CM [TFS 18426]	<p><b>Symptom:</b> There is a problem with the calc method for GlobalData when building a scenario using the second driver RFGlobalData Allocation. The current formula does not recognize the drivers in the Scenarios with the Suffix, starting in columns X, for all forecast columns.</p> <p><b>Resolution:</b> Corrected by making changes to the Forecast calc method file for the Global Data calc method.</p>
PFB-05971 - RF - RFStat Code tab [TFS 18427]	<p><b>Symptom:</b> When defining an exception at the RFPlan Group level, the system overrides the RFGroup information.</p> <p><b>Resolution:</b> Corrected by updating the RollingForecast Template.</p>
PFB-06047 - Stats duplicate in RF_Forecast when saved from the RFInitiatives sheet [TFS 18428]	<p><b>Symptom:</b> The stats in RF_Forecast double when saving from the RF plan files.</p> <p><b>Resolution:</b> Corrected by updating several calc methods.</p>

# Issues resolved in 2018.1.1

There were no issues addressed in 2018.1.1, released on April 23, 2018.

# Issues resolved in 2018.1.2

The following tables lists the resolutions for issues addressed in 2018.1.2, released on May 14, 2018:

Issue Description	Resolution
Current Year Quarter growth adjustment does not get applied to total [TFS 23936]  \Axiom\File Groups\Rolling Forecast\Calc Method Libraries\Forecast.xlsx	<b>Symptom:</b> If you do not forecast out the Current Quarter using monthly view, the growth adjustment does not apply to the total for the IP Census calc method, IP Volume calc method, OPVolume calc method, and Oth Pt Revenue calc method.  <b>Resolution:</b> Corrected by updating the formulas for these calc methods.
RF Admin task pane includes items that are not needed [TFS 23948]	<b>Symptom:</b> On the RF Admin task pane, the Forecast Prep section includes links to drivers that are not operational.  <b>Resolution:</b> Those items were removed.

# Issues resolved in 2018.1.3

The following table lists the resolutions for issues addressed in 2018.1.3, released on June 4, 2018.

Issue Description	Resolution
RF Plan File Summary Tab does not summarize proper values (2018.1) [TFS 23279]  \Axiom\File Groups\Rolling Forecast\Templates\RollingForecast.xlsx	<b>Symptom:</b> Column R in the RF template is the Summary of the first Forecasted Quarter and has the option to pull from two different columns in the Forecast tab, depending on how they calculated the first forecasted quarter. If you forecast using the monthly option, then you would summarize using column AB, and if you don't use the monthly option, then you would summarize column AC. Currently, the formula in the summary tab in cell R7 is incorrect.  <b>Resolution:</b> Corrected by updating the formula in cell R7.

# Manual setup instructions

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

# Known issues

Please see [Rebuildable RF Deductions Calculator \(page 6\)](#).

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