Axiom Contract Management 2018.3

Release Notes

Last Updated: 9/24/2018

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Contents

Summary

Kaufman Hall is pleased to announce the 2018.3 release of Axiom Contract Management. 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 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.

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

When upgrading to the 2018.3 version of Axiom Contract Management, 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

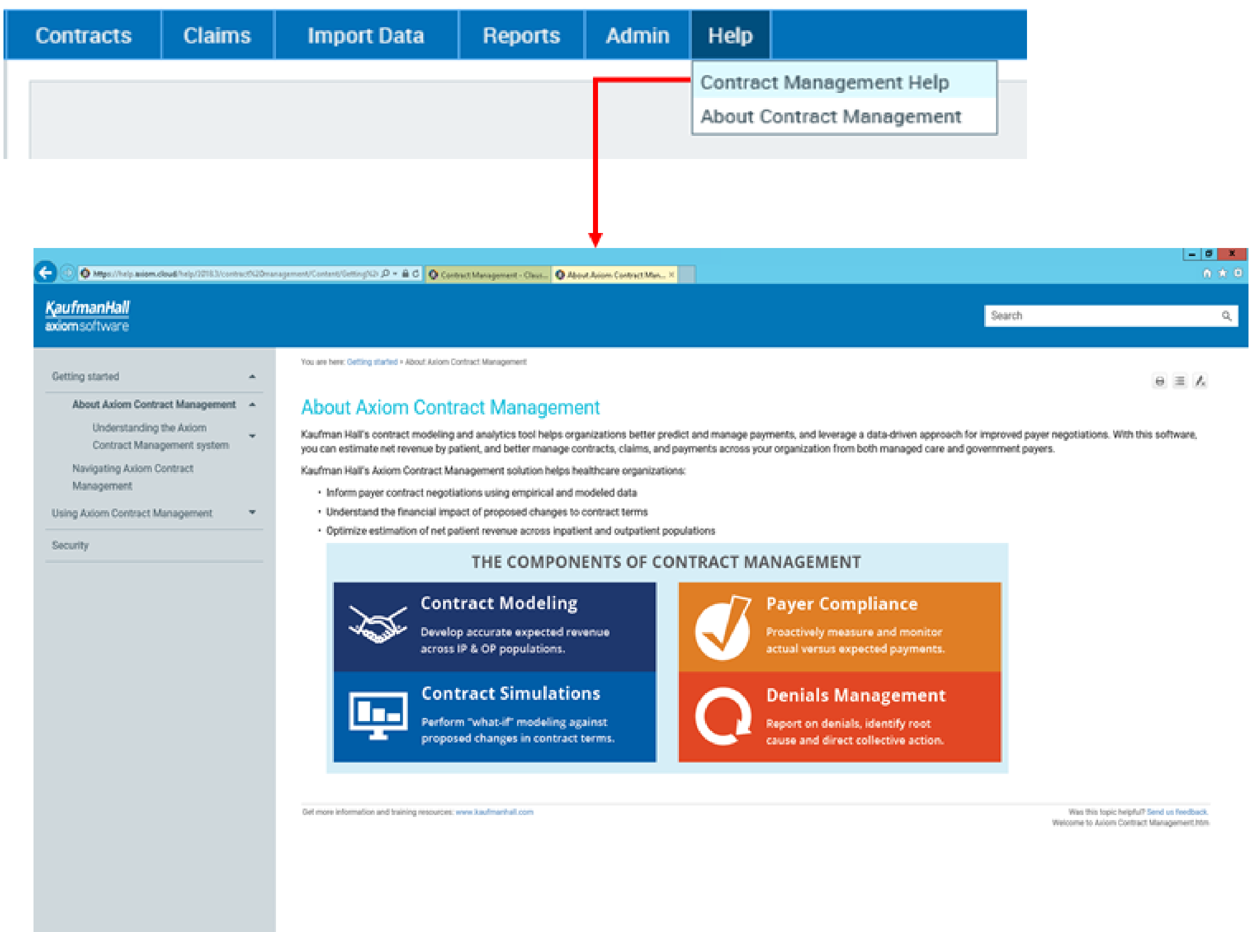
This section includes a description for each new feature included in this release.

3M July 2018 quarterly update

Each quarter 3M provides an update to the 3M GPS Grouper software integrated into Axiom Contract Management. This update includes grouping, pricing, and regulatory updates to the APC and State specific EAPG groupers.

New online help experience

This release introduces a complete refresh to the online help within the application. Please refer to the Axiom Healthcare Suite 2018.3 Release notes to learn more about the new functionality and changes made to the online help system.

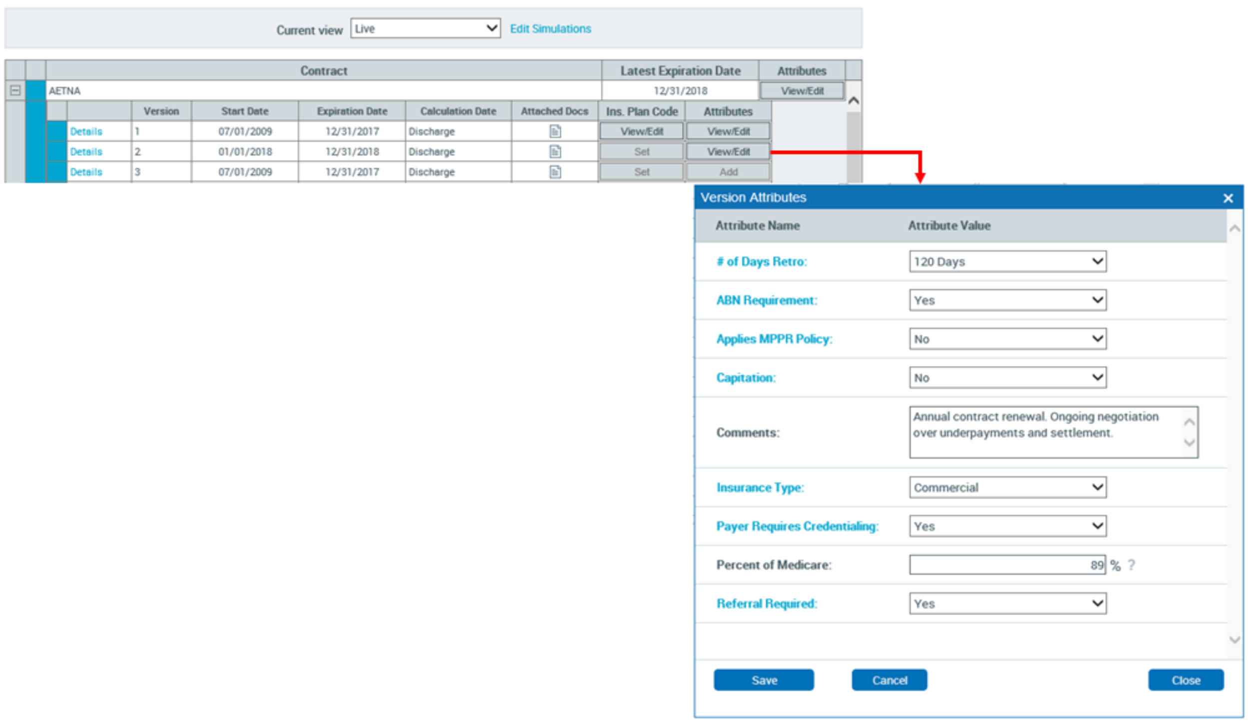


Contract attributes

This release extends the contract data model by introducing the ability to create contract attributes or tags. These attributes can be setup at the Contract, Version, Provision, and even the Clause/Term level of detail. Attributes provide a number of key benefits:

- They extend the contract data model
- They provide a new way to organize key aspects of payer contracts.
- They enhance reporting capabilities
- They ensure that key details are collected during the contract build process

Please refer to the Using Contract attributes in this document or the online help for further details on this functionality.



Operating instructions

This section includes instructions on how to use the new and updated feature for Axiom Contract Management for release 2018.3.

Using Contract attributes

About attributes

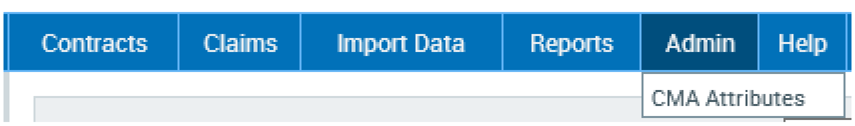
Attributes are custom tags you add to contracts and contract levels (i.e., versions, provisions, and clauses/terms) to:

- Extend the contract data model
- Provide a new way to organize key aspects of payer contracts.
- Enhance reporting capabilities
- Ensure that key details are collected during the contract build process

Attributes are applied at the contract, version, provision, and clause/term level. You can attach an attribute from the list of attributes for that contract level or you can import an attribute from another contract.

Accessing the Attributes management screen

Members of the CMAAdmin role have the ability to create, manage, and assign contract attributes. This functionality can be accessed from the Admin menu at the top of the screen as seen below:



Defining a new Attribute

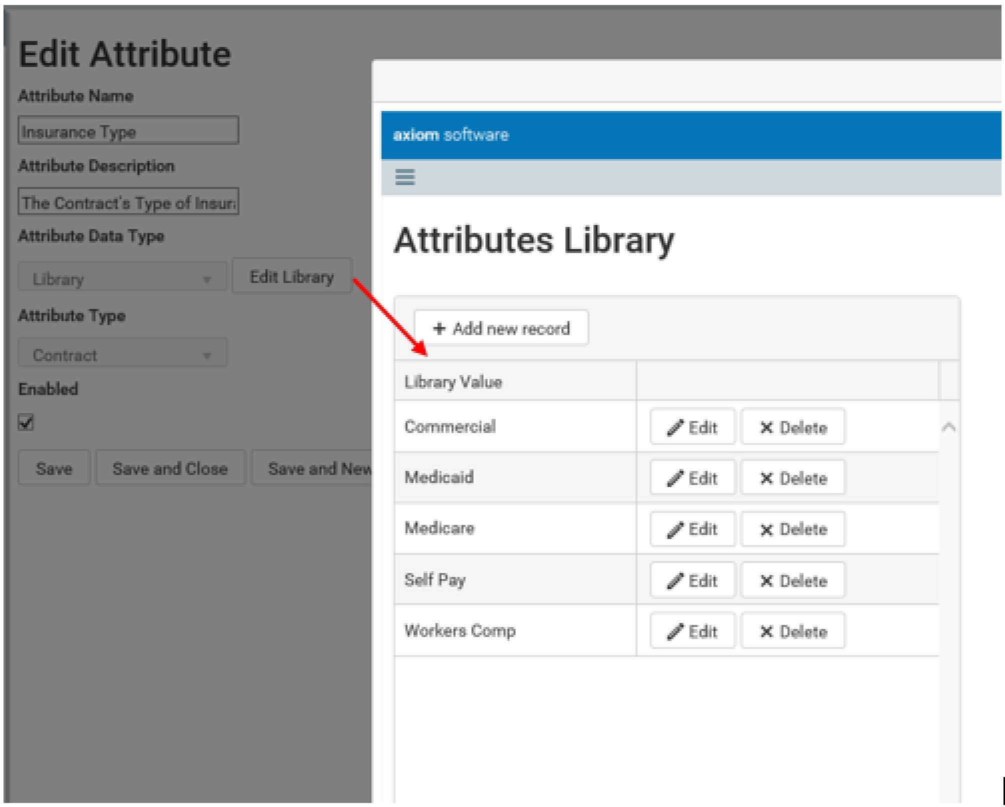
From the top right hand corner of the Attributes management screen click on the 'Create New Record' link.

- Name – Attribute's name
- Description – Explanatory information about the attribute
- Data Type – The format of the attribute's data value (i.e., text, integer, percent, etc.). For example, if the Data Type is text, then the attribute's value field accepts only text entries.
- Attribute Type – The contract level at which the attributed can be used (i.e., contract, version, provision, clause/term)
- Enabled/Disabled – Whether or not the attribute is available for use. If an attribute is disabled by the system admin, it will not display in any attribute selection lists.

Once the Attribute is defined, click the Save button to save the Attribute and remain on the Create Attribute screen, or click the Save and Close button to save the Attribute and return to the Attribute management screen, or Click the Save and New button to save the Attribute and begin work on a new one.

The Library Attribute Data Type

This type of Attribute allows the user to create a pick list of values. Instead of a free text field, the users pick from a list of values to ensure data consistency and speed during the assignment process.



Editing an Attribute

Attributes can be modified by clicking the Edit button on the Attribute Management screen. Attributes that haven't been used within contracts can be deleted. However, Attributes that are assigned to contracts need to be removed before they can be deleted. It is typically a best practice to disable the Attribute by unchecking the Enable checkbox within the Edit Attribute screen. Attributes can be re-enabled at any time. When Attributes are disabled, they will not show up within the contracts for assignment and the fields are no longer available during report creation.

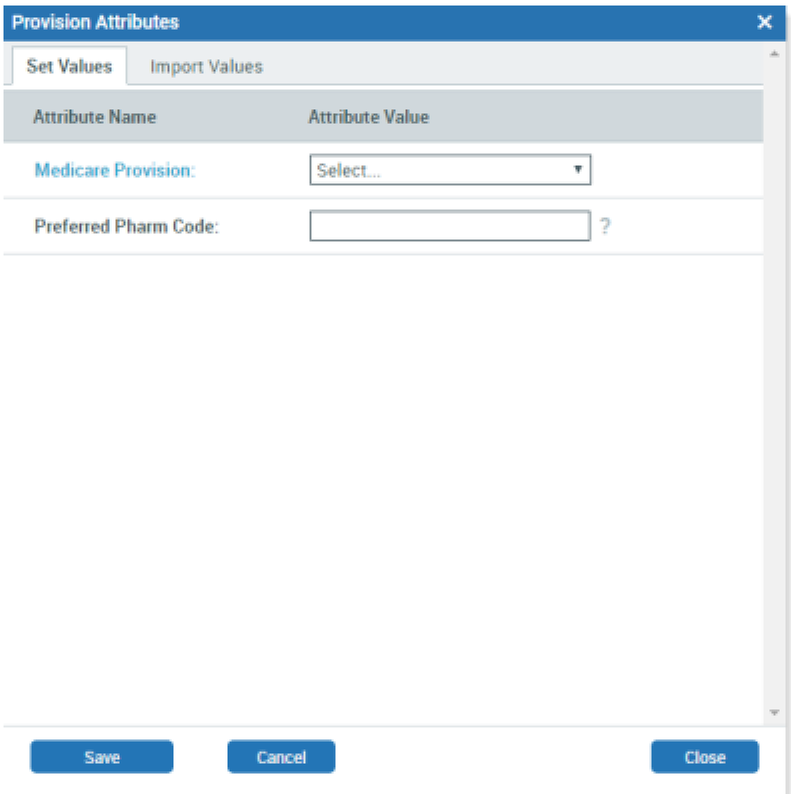
Assigning Attributes

These instructions are for adding attributes to contract levels (i.e., contract, version, provision, or clause/term). When adding attributes, you can add only attributes of the type that corresponds to the contract level. For example, you can only add version attributes to versions, and clauses/terms attributes to clauses or terms.

To add an attribute to a contract/version/provision/clause/term:

1. Navigate to the desired contract and level.
2. In the **Attributes** column for the level, click **Add**.

   A window containing available attributes for that type of contract part opens. The following example shows a selection window for a provision's attributes.

3. For the desired attribute(s), select or enter a value in the field.
4. Click **Save**, and then click **Close**.
5. Save the version.

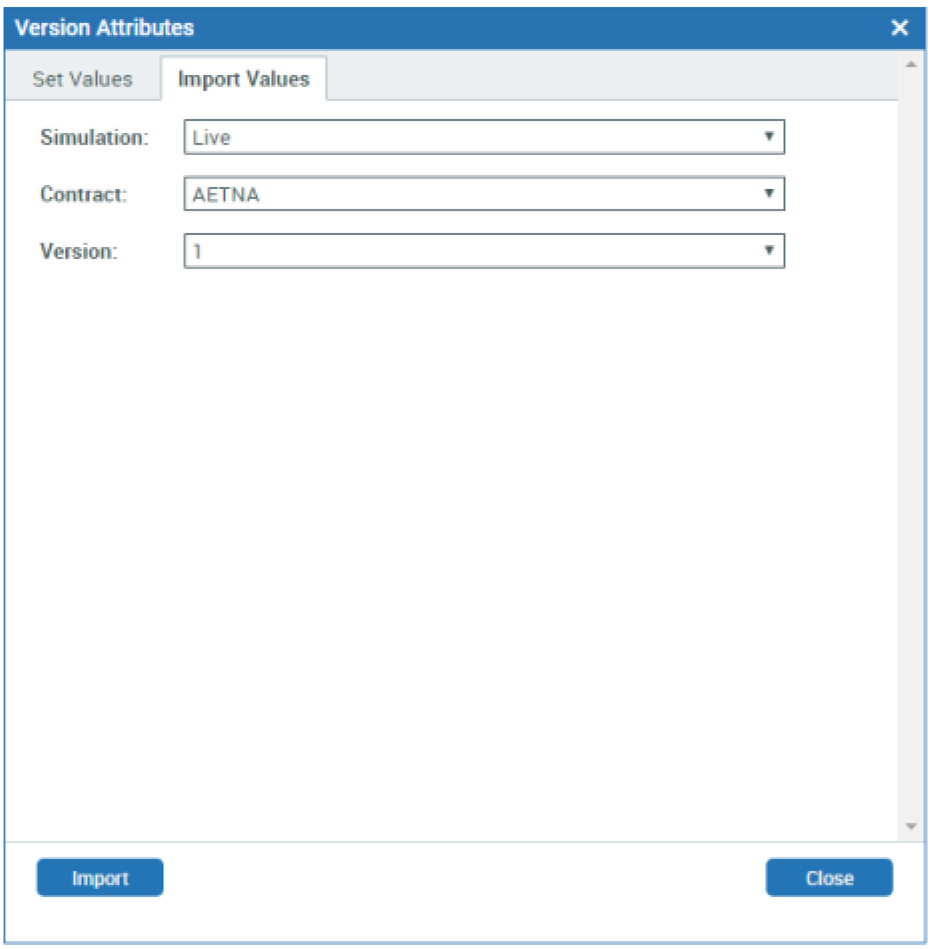
Import and copy an attribute

These instructions are for adding attributes to contract levels (i.e., contract, version, provision, or clause/term) using the import function.

To import and copy an attribute from one contract to another:

1. Navigate to the desired contract and level.
2. In the **Attributes** column for the level, click **Add**.

   A window containing available attributes for that contract level opens. The following example shows a selection window for Version attributes.
3. Click the **Import Values** tab.
4. To import from a different simulation from the one you are in, select the desired simulation from the **Simulation** drop-down.
5. From the **Contract** drop-down, select the contract that has the attribute you want to copy.
6. From the **[Level]** drop-down, select the desired item. For example, if you are copying from a version, select the version number, as shown in the following example.



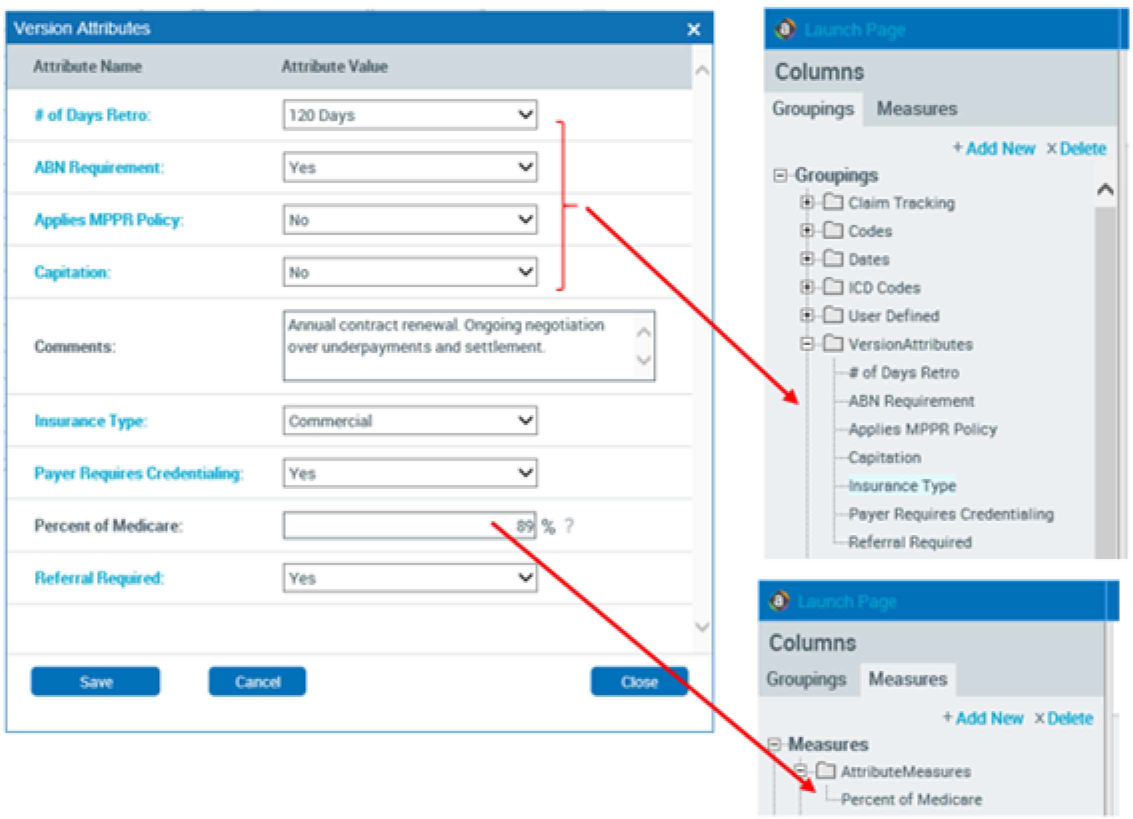
7. Click **Import**. The selected tab switches to the Set Values tab.
8. In the **Set Values** tab, for the desired attributes, you can either accept the existing values or change

them.

9. Click **Save**, and then click **Close**.
10. Save the item you added the attribute to.

Using Attributes in Drill-Down reports

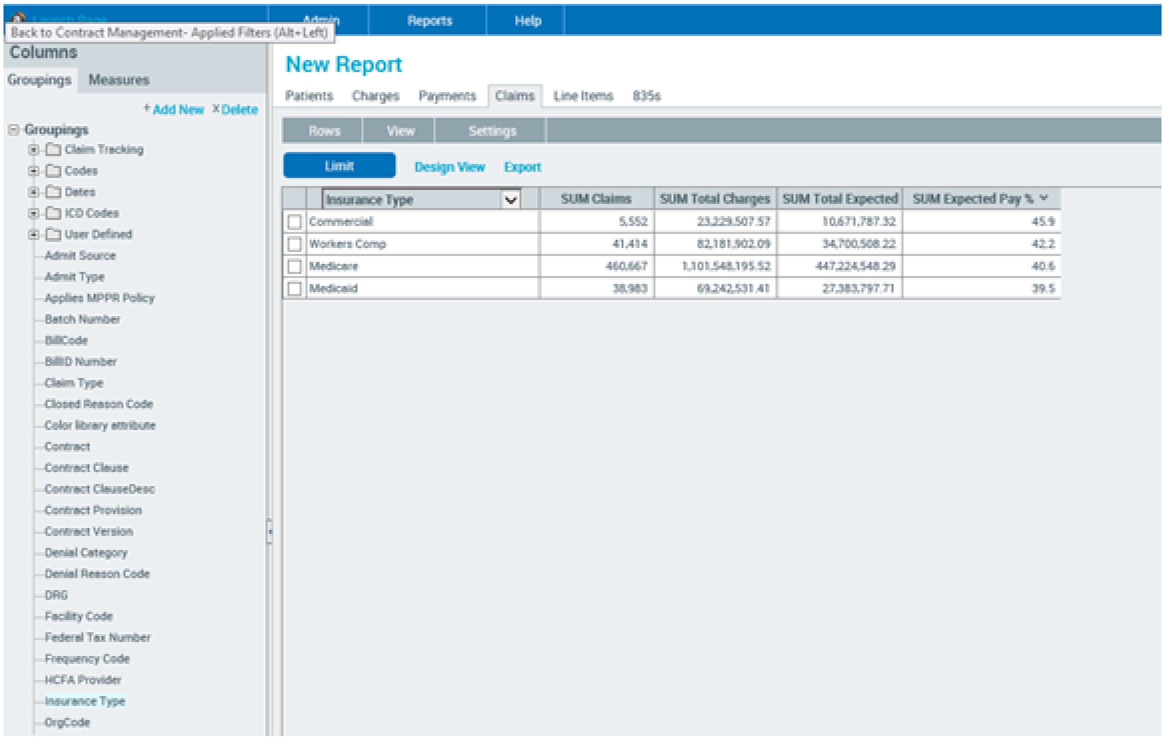
Once you have created and enabled Attributes, they are available for reporting within the Drill-Down reporting interface.



You can use Attributes within reporting to enhance analysis around contracts, calculations, and claims. Once a contract is calculated against claims, any attributes assigned to the contract at any level become available for reporting against those claims.

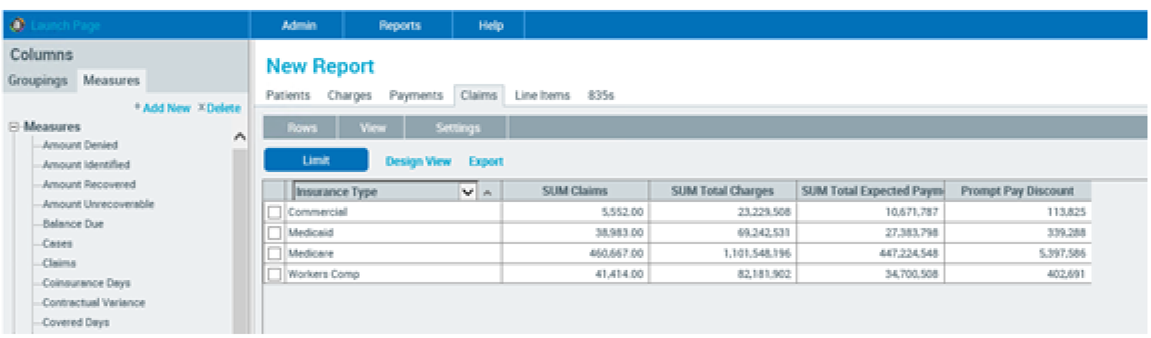
Using an Attribute as a grouping in a report

Here the Insurance Type Attribute, which was assigned at the Contract level, is selected as a grouping in the report. Notice that all calculated claims are now grouped by Insurance Type.



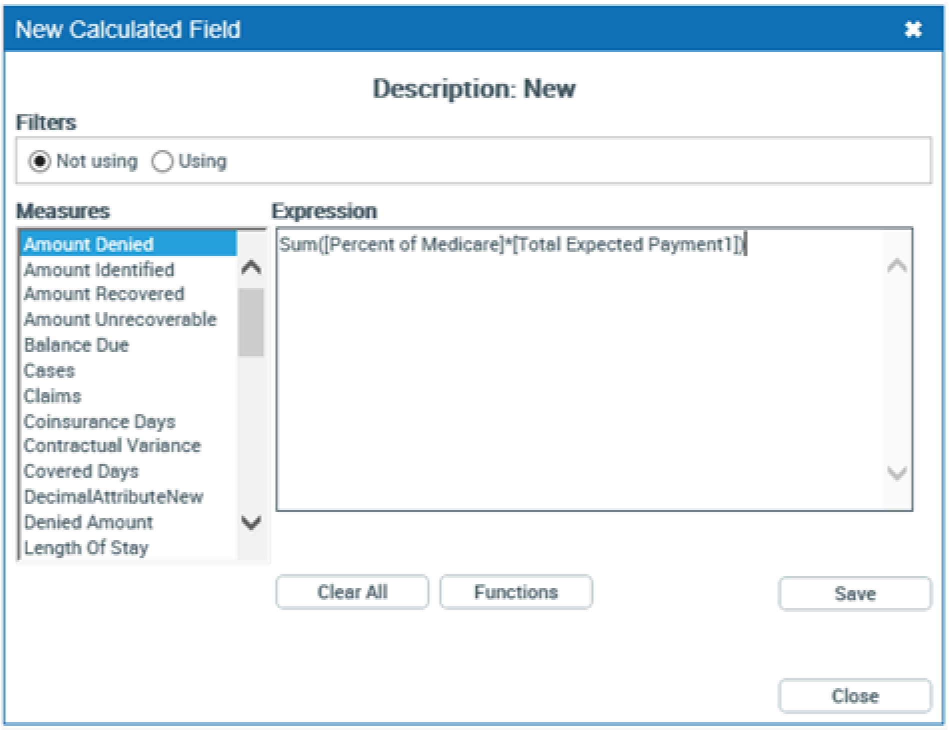
Using an attribute as a measure in a report

Here we use a Version level Attribute named Prompt Pay Discount, which is added to a report as a measure.



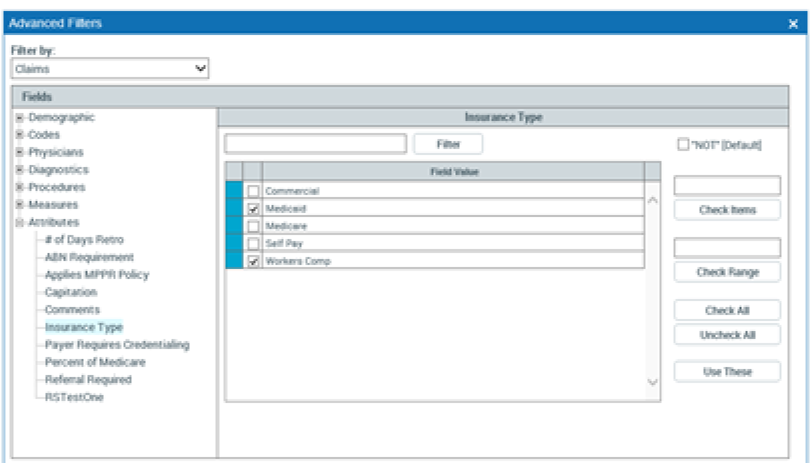
Using an attribute as a calculated field within a report

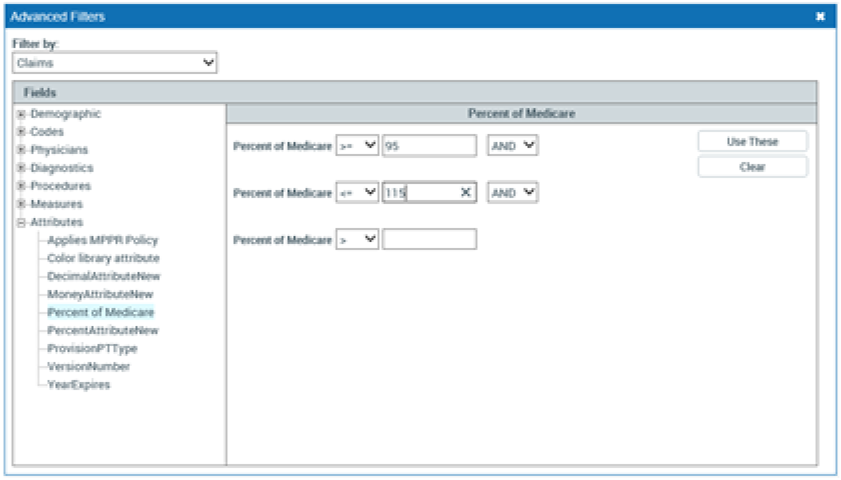
Attributes can also be used within the creation of a calculated field. Here we are multiplying an Attribute called Percent of Medicare and Total Expected Payment.



Using an attribute as a filter within a report

Finally, Attributes can be applied as filters within reports to limit results. Two examples of Attribute filters are provided below:




Advanced Filters
Filter by:
Claims
Fields
Demographic
Codes
Physicians
Diagnostics
Procedures
Measures
Attributes
Applies MPPR Policy
Color library attribute
DecimalAttributeNew
MoneyAttributeNew
Percent of Medicare
PercentAttributeNew
ProvisionPTType
VersionNumber
YearExpires
Percent of Medicare
Percent of Medicare >= 95 AND
Percent of Medicare <= 115 AND
Percent of Medicare >
Use These
Clear

Issues resolved for 2018.3

The following table lists the resolutions for issues addressed in 2018.3, released on September 24, 2018:

Issue Description	Resolution
Refresh of rates button not working [TFS 24934]	**Symptom:** The Rates button on the clauses terms screen within a provision does not refresh, therefore it does not accurately indicate when rates have been assigned to a clause or term. **Resolution:** Defect within UI was identified and updated to refresh this button appropriately.
PFB-06655 - Issue reading secondary ICD codes on Psych claims. [TFS 26549]	**Symptom:** Claims submitted with more than 12 secondary ICD diagnosis codes were missing many of the secondary ICD codes once imported into the system. The system only imported secondary codes after the 12th secondary code on the claim. **Resolution:** The 837 importer was updated to handle the looping logic and read the secondary ICD diagnosis codes as needed. Claims affected will need to be re-imported.
PFB-06677 - Unable to attach rates to the Limits on a contract clause or term. [TFS 26040]	**Symptom:** The set Rates button found within the Limits screen on a clause or term does not function properly, and therefore the user is unable to attach a rate file to the Limit. **Resolution:** UI was updated to fix the defect re-enable the attach rates functionality on Limits.
PFB-06679 - Error when trying to attach rates on random various contracts. [TFS 26067]	**Symptom:** The system displays the following error message when a user tries to attach rates to a clause or term: 'Error: Can't find the Contract Management folder in the Axiom File System.' This was typically found after a user reordered contract versions. **Resolution:** Insufficient error handling and a folder matching defect was identified and resolved. Additional logging was added. Data issues were identified and addressed in cases where version reordering created problems in the field.
Contract Name length check no longer taking place during contract save. [TFS 26796]	**Symptom:** The user is able to save a contract with a large contract names (>50 characters). Once this happens the user is unable to attach rates or see rate folders for this contract. **Resolution:** UI Defect was addressed and a double-redundant check was put in place to ensure that saved contracts couldn't exceed the naming size limitation (50 characters).

Issue Description	Resolution
PFB-06738 - Ins Plan Code button on Contracts screen not refreshing. [TFS 26866]	**Symptom:** User adds Ins plan codes to a contract version and then clicks the Save and Exit Button. When they return to the contracts screen the Ins Plan Code button doesn't change from 'Set' to 'View/Edit'. **NOTE:** This doesn't happen if the user instead clicks the 'X' to close the form. **Resolution:** UI defect was identified and addressed to ensure that the Ins Plan Code button updates as needed.
Error trying to specify a large rate file [TFS 27078]	**Symptom:** The system displays the following error when a user enters the rates specify screen after selecting a large rate file (typically > 10k records): 'Error: Could not retrieve Excel Data. ERROR: Memory stream is not expandable'. **Resolution:** Defect was found in the code used to retrieve the Excel document. Defect was corrected and code was tested with large rate files to ensure stability.
Specified rate files are no longer available for attachment to a clause or term [TFS 27236]	**Symptom:** Rate files that were specified and once available for attachment to a clause or term are no longer available after the contract is renamed. **Resolution:** Defect was identified in code used to save contracts and adjust the path to the rates file. Defect was addressed and future saves to affected contracts will fix this issue.

Manual setup instructions

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

Known issues

The following table lists the known issues for this release:

Issue Description	Explanation
PFB-06749 – Advanced filters not working within canned reports on a newly installed system. [TFS 27652]	**Symptom:** The user is unable to apply advanced filters to reports within the canned reports interface. This occurs on a new installation where there is only 1 level of report folders in the drill-down reporting interface and no subfolders with saved reports. **Explanation:** There is a defect in the advanced filter tree control when subfolders don't exist and there aren't any advanced filters to populate these subfolders. **Workaround:** New systems will be configured to include the required subfolders to ensure this situation doesn't occur.
PFB-06777 – Contract listing drop down isn't returning to the contract selected in the canned reports interface. [TFS 22257]	**Symptom:** This issue occurs once a canned report is saved and generated within the canned reports interface. If the user clicks on the Contracts dropdown, the expected behavior is that user will be brought down to the 1st currently selected contract in the list but instead the user is now brought to the top of the list of contracts. **Explanation:** This is a minor UI defect that will be corrected in the next release. **Workaround:** User will need to scroll down to currently selected contracts selected in this dropdown.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2018.2 Release Notes** for additional known issues that have a suite-wide impact.