Release Notes
Axiom Budgeting & Performance Reporting
Version 2019.2.2

KaufmanHall
AXIOM

KaufmanHall

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Contents

Summary

Kaufman Hall is pleased to announce the 2019.2.2 release of Axiom Budgeting and Performance Reporting. 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 configuration updates** – After installing the upgrade, if needed, review any manual setup steps needed to enable features for this version.

> **IMPORTANT:** Some features in this release require configuration after installation. For more information, see Manual configuration instructions.

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

> **IMPORTANT:** **You must apply the Axiom Software 2019.2 upgrade before applying any 2019.2 Axiom product upgrades.** Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2019.2 *before* the first product upgrade. Refer to the **Axiom Software 2019.2 Release Notes** and **Axiom Healthcare Suite 2019.2 Release Notes** for considerations before upgrading. Apply this update ONLY if you have already applied the release and completed all the manual setup steps from the corresponding release notes.

When upgrading to Axiom Budgeting and Performance Reporting, 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.
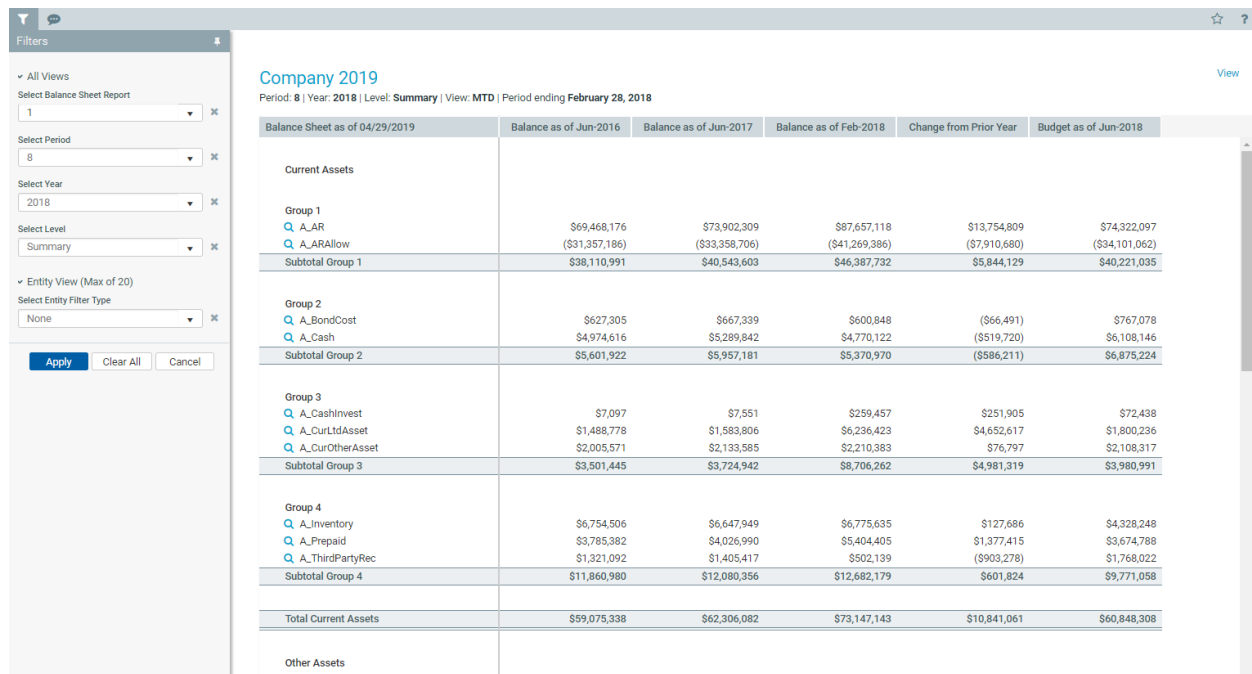
New features summary

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

> **IMPORTANT:** Some of the new features and resolved issues listed in this document have been included in the latest Prototype file group. You must create a new file group or update an existing file group to utilize the updated contents from the 2019.1 release. For instructions, see "Updating a file group" or "Rolling forward to a new budget year" in the Axiom Budgeting and Performance Reporting online help.

Configurable multiview balance sheets

The new Balance Sheet Viewer allows users to view multiple balance sheet reports from an easy-to-use utility. Users can filter the reports by selecting the report to view along with other variables, such as the period, year, and level (summary or detail). In the line item, you can then drill down to the department level and then down to the account level.

Users with PR Admin and PR Analyst roles can create the balance sheets available in the viewer by creating balance sheet templates using the Balance Sheet Template Builder.

Balance Sheet Template Builder

For more information, see the following in the online help:

- "Viewing balance sheets"
- "Working with balance sheets"
- "Creating or modifying a balance sheet template"

Enhancements to the Provider tab

The following significant enhancements have been made to the Provider tab:

▶ Detail and Summary tabs

Instead of one tab that includes both the summary and detail provider information, the Provider tab has now been split into two tabs: Provider Summary and Provider Detail. The Provider Detail tab initially displays summary information, but it also allows you to view the details of each provider.

Provider Summary tab

PROVIDER VOLUME SUMMARY
101100 - EMA Pediatrics (ProviderSummary)

Provider	Dept		FY 2019 Actual	Jun YTD Actual	Jul-Dec Projected	Manager Input	FY 2020 Projected	FY 2020 /Unit	Global Adjust	% Adjust	Amt Adjust	FY 2021 /Unit	FY 2021 Budget	Budget Method	Proj-Bud Variance Amt	%	Red Flag	Comments
		Global Provider Driver																
		Worked Days	261	173	87		260						0	Provider Driver	(260)	(100.0%)		Global Provider Driver
		Summary Department Totals																
		FTE	0.00	0.00	0.00	0.00	0.00						0.00					
		Net Production Days	0	0	0	0	0						0		0	0.0%		
		Total WRVU	0	0	0	0	0						0		0	0.0%		
		Total Worked RVUs	0	0	0	0	0						0		0	0.0%		
		Total RVUs	0	0	0	0	0						0		0	0.0%		
		Total Procedure Counts	0	0	0	0	0						0		0	0.0%		
		Total Gross Charges	0	0	0	0	0						0		0	0.0%		
		Total Payments	0	0	0	0	0						0		0	0.0%		
		WRVU Per Prod Day	0.00	0.00	0.00	0.00	0.00						0.00		0	0.0%		
		RVUs per WRVU	0.00	0.00	0.00	0.00	0.00						0.00		0	0.0%		
		Worked RVUs per WRVU	0.00	0.00	0.00	0.00	0.00						0.00		0	0.0%		
D1186	101100	Macaulay, Kelly M. MD					EmpID:	14624										
		Relative Availability	0.00	0.00	0.00		0.00						0.00					
		WRVU	0	0	0		0						0	Per Net Production Days	0	0.0%		
		Volume	0	0	0	0	0	0.000		0.00%	0.00	0.000	0	Per WRVU	0	0.0%		
		Gross Charges	0	0	0	0	0	0.000	0.0%	0.0%	0	0.000	0	Per Historic Rate	0	0.0%		
		Encounter	0	0	0	0	0	0.000	0.0%	0.0%	0.00	0.000	0	Per WRVU	0	0.0%		
D21030	101100	Suarez, Elliot D. MD					EmpID:	18195										
		Relative Availability	0.00	0.00	0.00		0.00						0.00					
		WRVU	0	0	0		0						0	Per Net Production Days	0	0.0%		
		Volume	0	0	0	0	0	0.000		0.00%	0.00	0.000	0	Per WRVU	0	0.0%		
		Gross Charges	0	0	0	0	0	0.000	0.0%	0.0%	0	0.000	0	Per Historic Rate	0	0.0%		
		Encounter	0	0	0	0	0	0.000	0.0%	0.0%	0.00	0.000	0	Per WRVU	0	0.0%		
D59902	101100	Barr, Michelle M. MD					EmpID:	18410										
		Relative Availability	0.00	0.00	0.00		0.00						0.00					
		WRVU	0	0	0		0						0	Per Net Production Days	0	0.0%		
		Volume	0	0	0	0	0	0.000		0.00%	0.00	0.000	0	Per WRVU	0	0.0%		
		Gross Charges	0	0	0	0	0	0.000	0.0%	0.0%	0	0.000	0	Per Historic Rate	0	0.0%		
		Encounter	0	0	0	0	0	0.000	0.0%	0.0%	0.00	0.000	0	Per WRVU	0	0.0%		
D79928	101100	Agrin-Silva, Rachel MD					EmpID:	19704										

Provider Detail tab

PROVIDER VOLUME DETAIL
101010 - EMA Internal Medicine (Provider Detail)

Provider	Dept		FY 2019 Actual	Jun YTD Actual	Jul-Dec Projected	Manager Input	FY 2020 Projected	FY 2020 /Unit	Global Adjust	% Adjust	Amt Adjust	FY 2021 /Unit	FY 2021 Budget	Budget Method	Proj-Bud Variance Amt	%	Red Flag
		Global Provider Driver															
	101010	Worked Days	261	173	87		260						0	Provider Driver	(260)	(100.0%)	
		Summary Department Totals															
		FTE	0.00	0.00	0.00	0.00	0.00						0.00				
		Net Production Days	8,874	5,882	2,958	0	8,840						0		(8,840)	(100.0%)	
		Total WRVU	0	45,382	22,814	0	68,196						0		(68,196)	(100.0%)	
		Total Worked RVUs	0	0	0	0	0						0		0	0.0%	
		Total RVUs	0	93,044	46,766	0	139,810						0		(139,810)	(100.0%)	
		Total Procedure Counts	0	34,559	17,376	0	51,935						0		(51,935)	(100.0%)	
		Total Gross Charges	0	10,168,348	5,111,148	0	15,279,496						0		(15,279,496)	(100.0%)	
		Total Payments	0	0	0	0	0						0		0	0.0%	
		WRVU Per Prod Day	0.00	7.72	7.71	0.00	7.71						0.00		(8)	(100.0%)	
		RVUs per WRVU	0.00	2.05	2.05	0.00	2.05						0.00		(2)	(100.0%)	
		Worked RVUs per WRVU	0.00	0.00	0.00	0.00	0.00						0.00		0	0.0%	
		Double click to collapse/expand Provider detail															
		Double click to collapse/refresh Provider summaries															
D10528	101010	Champion, Richard A. MD					EmpID:	17279									
D10528	101014	Relative Availability	2.00	2.00	2.00	0.00	2.00						0.00				
D10528	101014	Total - WRVU	0	671	336	0	1,007						0				
D10528	101014	Total - Procedure Counts	0	488	244	0	732						0				
D10528	101014	Total - Gross Charges	0	150,955	75,523	0	226,478						0				
D10528	101014	Total - RVU	0	1,366	683	0	2,049						0				
D10528	101014	Total - Encounter	0	429	216	0	645						0				
		⥥ **Double click to show detail**															
D12221	101010	Quintin, Maria L. MD					EmpID:	19452									
D12221	101010	Relative Availability	1.00	1.00	1.00	0.00	1.00						0.00				
D12221	101010	Total - WRVU	0	1,119	562	0	1,681						0				
D12221	101010	Total - Procedure Counts	0	804	403	0	1,207						0				
D12221	101010	Total - Gross Charges	0	268,793	134,781	0	403,574						0				
D12221	101010	Total - RVU	0	2,300	1,156	0	3,456						0				
D12221	101010	Total - Encounter	0	779	391	0	1,170						0				
		⥥ **Double click to show detail**															
D1406	101010	Meenan, David M.DO					EmpID:	15416									
D1406	101014	Relative Availability	2.00	2.00	2.00	0.00	2.00						0.00				
D1406	101014	Total - WRVU	0	749	377	0	1,126						0				
D1406	101014	Total - Procedure Counts	0	599	301	0	900						0				
D1406	101014	Total - Gross Charges	0	162,619	82,136	0	244,755						0				
D1406	101014	Total - RVU	0	1,533	772	0	2,305						0				
D1406	101014	Total - Encounter	0	556	280	0	836						0				
		⥥ **Double click to show detail**															

▶ ## Click-to-Expand details

The Provider Detail tab shows summary subtotal information for each provider, but you can also access the details for each provider by using the Click-to-Expand feature.

PROVIDER VOLUME DETAIL
101010 - EMA Internal Medicine (Provider Detail)

Provider	Dept		FY 2019 Actual	Jun YTD Actual	Jul-Dec Projected	Manager Input	FY 2020 Projected	FY 2020 /Unit	Global Adjust	% Adjust	Amt Adjust	FY 2021 /Unit	FY 2021 Budget	Budget Method	Proj-Bud Variance Amt		ments
	101010	**Global Provider Driver**															
		Worked Days	261	173	87		260						0	Provider Driver	(260) (100.0%)	Global Provider Driver	
		Summary Department Totals															
		FTE	0.00	0.00	0.00	0.00	0.00						0.00				
		Net Production Days	8,874	5,882	2,958	0	8,840						0		(8,840) (100.0%)		
		Total WRVU	0	45,382	22,814	0	68,196						0		(68,196) (100.0%)		
		Total Worked RVUs	0	0	0	0	0						0		0 0.0%		
		Total RVUs	0	93,044	46,766	0	139,810						0		(139,810) (100.0%)		
		Total Procedure Counts	0	34,559	17,376	0	51,935						0		(51,935) (100.0%)		
		Total Gross Charges	0	10,168,348	5,111,148	0	15,279,496						0		(15,279,496) (100.0%)		
		Total Payments	0	0	0	0	0						0		0 0.0%		
		WRVU Per Prod Day	0.00	7.72	7.71	0.00	7.71						0.00		(8) (100.0%)		
		RVUs per WRVU	0.00	2.05	2.05	0.00	2.05						0.00		(2) (100.0%)		
		Worked RVUs per WRVU	0.00	0.00	0.00	0.00	0.00						0.00		0 0.0%		
		Double click to collapse/expand Provider detail															
		Double click to collapse/refresh Provider summaries															
D12221	101010	Quintin, Maria L. MD					EmpID:	19452									
D12221	101010	Relative Availability	1.00	1.00	1.00	0.00	1.00						0.00				
D12221	101010	Total - WRVU	0	1,119	562	0	1,681						0				
D12221	101010	Total - Procedure Counts	0	804	403	0	1,207						0				
D12221	101010	Total - Gross Charges	0	268,793	134,781	0	403,574						0				
D12221	101010	Total - RVU	0	2,300	1,156	0	3,456						0				
D12221	101010	Total - Encounter	0	779	391	0	1,170						0				
		Double click to show detail															
D14201	101010	Racemark, Susan M. MD					EmpID:	20532									
D14201	101010	Relative Availability	1.0				1.00						0.00				
D14201	101010	Total - WRVU					1,306						0				
D14201	101010	Total - Procedure Counts					963						0				
D14201	101010	Total - Gross Charges	0	198,309	99,675	0	297,984						0				
D14201	101010	Total - RVU	0	1,786	898	0	2,684						0				
D14201	101010	Total - Encounter	0	599	301	0	900						0				
		Double click to show detail															

Callouts:
- Summary of all provider information
- Summary information for the specific provider
- Double-click to expand or collapse all provider detail rows
- Double-click to expand provider detail rows

The Click-to-Expand option expands the rows and inserts the calc method that includes the provider detail information such as WRVUs, gross charges, RVUs, encounters, and so on. Now you can simply scan and review the summary information for each provider without having to sort through multiple lines of details to view the information you need, and if necessary, expand the details and manage only those providers that need it.

> **TIP:** When you save the file, the system will remember which providers you have expanded the detail rows for that day. Let's say you expanded the detail rows for five providers and saved your changes, when you open the file later, the detail lines will still display for those five providers. When the plan file processes that evening, however, the system will collapse all of the detail rows so that the tab opens faster.

PROVIDER VOLUME DETAIL

101010 - EMA Internal Medicine (Provider Detail)

	FY 2019 Actual	Jun YTD Actual	Jul-Dec Projected	Manager Input	FY 2020 Projected	FY 2020 /Unit	Global Adjust	% Adjust	Amt Adjust	FY 2021 /Unit	FY 2021 Budget	Budget Method	Proj-Bud Variance Amt	%	Red Flag	Comments
Global Provider Driver																
Worked Days	261	173	87		260						0	Provider Driver	(260)	(100.0%)		Global Provider Driver
Summary Department Totals																
FTE	0.00	0.00	0.00	0.00	0.00						0.00					
Net Production Days	8,874	5,882	2,958	0	8,840						0		(8,840)	(100.0%)		
Total WRVU	0	45,382	22,814	0	68,196						0		(68,196)	(100.0%)		
Total Worked RVUs	0	0	0	0	0						0		0	0.0%		
Total RVUs	0	93,044	46,766	0	139,810						0		(139,810)	(100.0%)		
Total Procedure Counts	0	34,559	17,376	0	51,935						0		(51,935)	(100.0%)		
Total Gross Charges	0				279,496						0					
Total Payments	0				0						0					
WRVU Per Prod Day	0.00				7.71						0.00					
RVUs per WRVU	0.00				2.05						0.00					
Worked RVUs per WRVU	0.00				0.00						0.00					
Double click to collapse/expand Provider detail																
Double click to collapse/refresh Provider summaries																
Champion, Richard A. MD					EmpID:	17279										
Double click to hide detail																
Relative Availability	1.00	1.00	1.00		1.00						1.00					
Production Days	261	173	87		260						0	Global Assumptions				
Adjustment-Production Days			0		0						0					
Net Production Days	261	173	87		260						0					
Seasonality Factor			1.00													
WRVU	0	649	326	0	975						0					
WRVU Per WRVU	0.00	0.00	0.00	0.00	0.00						0.00					
RVU Per WRVU	0.00	2.04	2.03	0.00	2.04						0.00					
WRVU per Prod Day	0.00	3.75	3.75	0.00	3.75											
WRVU																
Professional Svcs-Office-Est Patient_Capitation_Office	0	310	156	0	466	1.794	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(466)	(100.0%)		
Professional Svcs-Office-Est Patient_Fee For Service_Office	0	316	159	0	475	1.828	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(475)	(100.0%)		
Professional Svcs-Office-New Patient_Capitation_Office	0	12	6	0	18	0.068	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(18)	(100.0%)		
Professional Svcs-Office-New Patient_Fee For Service_Office	0	9	5	0	14	0.055	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(14)	(100.0%)		
Surgical Services_Capitation_Office	0	1	0	0	1	0.003	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(1)	(100.0%)		
Surgical Services_Fee For Service_Office	0	1	0	0	1	0.003	0.0%	0.0%	0.00	0.000	0	Per Net Production Days	(1)	(100.0%)		
Double Click to Insert New WRVU																
Total - WRVU	0	649	326	0	975	3.751					0		(975)	(100.00%)		
Procedure Counts																
Lab Testing Services_Capitation_Office	0	18	9	0	27	0.028	0.0%	0.0%	0.00	0.000	0	Per WRVU	(27)	(100.0%)		
Lab Testing Services_Fee For Service_Office	0	15	8	0	23	0.024	0.0%	0.0%	0.00	0.000	0	Per WRVU	(23)	(100.0%)		
Professional Svcs-Office-Est Patient_Capitation_Office	0	211	106	0	317	0.680	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-Est Patient_Capitation_Office	(317)	(100.0%)		
Professional Svcs-Office-Est Patient_Fee For Service_Office	0	214	108	0	322	0.677	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-Est Patient_Fee For Service_Office	(322)	(100.0%)		
Professional Svcs-Office-New Patient_Capitation_Office	0	5	3	0	8	0.451	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-New Patient_Capitation_Office	(8)	(100.0%)		
Professional Svcs-Office-New Patient_Fee For Service_Office	0	4	2	0	6	0.418	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-New Patient_Fee For Service_Offi	(6)	(100.0%)		
Surgical Services_Capitation_Office	0	1	0	0	1	1.388	0.0%	0.0%	0.00	0.000	0	Per Surgical Services_Capitation_Office	(1)	(100.0%)		
Surgical Services_Fee For Service_Office	0	2	0	0	2	2.492	0.0%	0.0%	0.00	0.000	0	Per Surgical Services_Fee For Service_Office	(2)	(100.0%)		
Double Click to Insert New Procedure																
Total - Procedure Counts	0	470	236	0	706	0.724					0		(706)	(100.00%)		
Gross Charges			WRVU													
Lab Testing Services_Fee For Service_Office	0	570	286	0	857	0.878	0.0%	0.0%	0.00	0.000	0	Per Lab Testing Services_Fee For Service_Office	(857)	(100.0%)		
Professional Svcs-Office-Est Patient_Hybrid_Office	0	141,263	70,924	0	212,187	217.559	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-Est Patient_Hybrid_Office	(212,187)	(100.0%)	Rx	
Professional Svcs-Office-New Patient_Fee For Service_Office	0	4,767	2,551	0	7,317	510.162	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-New Patient_Fee For Service_Offi	(7,317)	(100.0%)		
Surgical Services_Fee For Service_Office	0	614	0	0	614	765.172	0.0%	0.0%	0.00	0.000	0	Per Surgical Services_Fee For Service_Office	(614)	(100.0%)		
Double Click to Insert New Revenue																
Total - Gross Charges	0	147,214	73,761	0	220,975	226.569					0		(220,975)	(100.00%)		
RVUs																
Lab Testing Services_Capitation_Office	0	3	2	0	5	0.007	0.0%	0.0%	0.00	0.000	0	Per Total - Procedure Counts	(5)	(100.0%)		
Lab Testing Services_Fee For Service_Office	0	3	1	0	4	0.005	0.0%	0.0%	0.00	0.000	0	Per Total - Procedure Counts	(4)	(100.0%)		
Professional Svcs-Office-Est Patient_Capitation_Office	0	630	317	0	947	2.031	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-Est Patient_Capitation_Office	(947)	(100.0%)		
Professional Svcs-Office-Est Patient_Fee For Service_Office	0	641	322	0	963	2.025	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-Est Patient_Fee For Service_Office	(963)	(100.0%)		
Professional Svcs-Office-New Patient_Capitation_Office	0	22	11	0	33	1.887	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-New Patient_Capitation_Office	(33)	(100.0%)		
Professional Svcs-Office-New Patient_Fee For Service_Office	0	18	10	0	28	1.937	0.0%	0.0%	0.00	0.000	0	Per Professional Svcs-Office-New Patient_Fee For Service_Offi	(28)	(100.0%)		
Surgical Services_Capitation_Office	0	3	0	0	3	4.684	0.0%	0.0%	0.00	0.000	0	Per Surgical Services_Capitation_Office	(3)	(100.0%)		
Surgical Services_Fee For Service_Office	0	2	0	0	2	2.968	0.0%	0.0%	0.00	0.000	0	Per Surgical Services_Fee For Service_Office	(2)	(100.0%)		

Callout: Double-click again to collapse the rows

Callout: Click-to-Expand shows all of the provider details

NOTE: The Summary Department Totals section at the top of the tab will not update values until you save changes to the workbook.

This new feature not only enhances the usability of the tab, but it also helps improve performance by shortening the amount of time it takes for the tab to open.

▶ Rebuildable Provider Detail tab

The content in the Provider Detail tab is now rebuildable. This means that the setup of the tab is separate from the values that display. This allows more functionality to be added to the Provider tab without affecting the data in the database.

IMPORTANT: Because the tab is rebuildable, any changes made in the Provider data tables *after* the plan file is built will be automatically updated in the plan file. These changes are commonly referred to as prior period adjustments, which will be reflected in the YTD columns in the tab.

► Updates to ProviderRev and ProviderStat calc methods

The ProviderRev and ProviderStat calc methods have been updated to look up values from the database. These calc methods no longer reference the ProviderDetail tab directly. ProviderSummary calc methods remain unchanged.

> **IMPORTANT:** As part of the ProviderDetail updates, new values were added to the DataType dimension table as noted in the following image. **Please do not modify or delete these values.**

Data Type	String	String	String	String
String Length	25	100	25	25
Description	Data Type	Description		
Delete Row	DATATYPE	Description	BudgetType	KHAIn
	ZAdjDays	AdjDays (Rebuild)	ZAdjDays	NA
	ZAdjustments	Adjustments (Rebuild)	ZAdjustments	NA
	ZAvailability	Availability (Rebuild)	ZAvailability	NA
	ZDays	Days (Rebuild)	ZDays	NA
	ZDriverStat	Driver Stat (Rebuild)	ZDriverStat	NA
	ZFTE	FTE (Rebuild)	ZFTE	NA
	ZGrossCharges	Gross Charges (Rebuild)	ZGrossCharges	NA
	ZKeyStatperDay	Key Stat Per Day (Rebuild)	ZKeyStatperDay	NA
	ZNetDays	NetDays (Rebuild)	ZNetDays	NA
	ZNonDriverStat	Non Driver Stat (Rebuild)	ZNonDriverStat	NA
	ZProcedures	Procedures (Rebuild)	ZProcedures	NA
	ZRVU	RVU (Rebuild)	ZRVU	NA
	ZSeasonality	Seasonality (Rebuild)	ZSeasonality	NA
	ZSpread	Spread (Rebuild)	ZSpread	NA
	ZWRVU	WRVU (Rebuild)	ZWRVU	NA
	ZWRVUperDay	WRVU per Day (Rebuild)	ZWRVUperDay	NA

Electronic Budget Checklist process

Axiom Budgeting and Performance Reporting walks you through the process of updating plan files for the next budgeting season with the new electronic Budget Checklist.

The Budget Checklist process displays all of the steps to complete on the left side of the window. Those steps that include sub-steps are indicated with an arrow icon, which you can click to expand or contract the list.
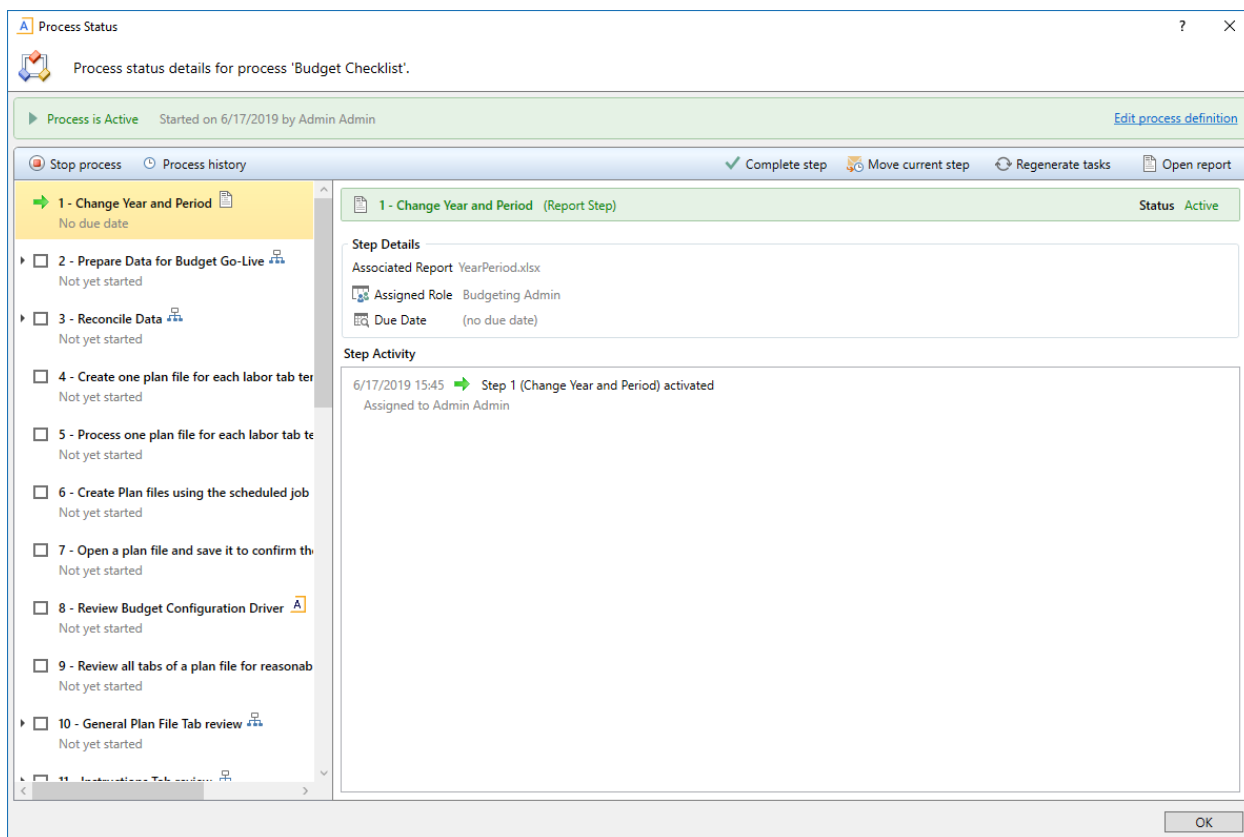
As you complete each step, you click the **Complete step** button in the upper right corner of the window. The system then displays the next step in the process.

For more information, see "Running the Budget Checking process" in the online help.

Check Current Year file alias before using the Rollover File Group utility

Before using the Rollover File Group utility, make sure to confirm or edit the **Current Year** file alias to point to the file group that you want the data (including drivers) to copy from. For example, when building a 2020 file group, you likely want to point the Current Year file alias to the 2019 file group. For instructions, see "Updating the file group aliases" in the online help.

> **NOTE:** In most cases, the Current Year alias will already be pointing to the correct file group, but we recommend that you check before running the Rollover File Group utility.

Open New Provider utility from task panes

The Add New Provider utility can now be accessed from the Budgeting and Bud Admin task panes.

Bud Admin task pane
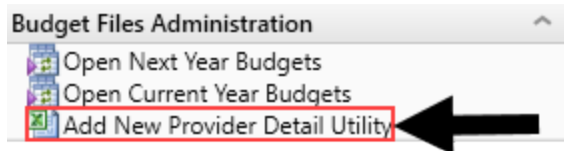
Budgeting task pane
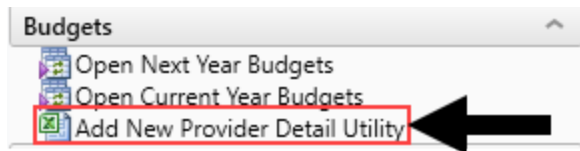
> **IMPORTANT:** When using the Provider Detail method, you can no longer add a new provider directly in the plan file. You must use the Add New Provider Detail Utility.

For instructions, see "Add a detail provider" in the online help.

13th month added to the rolling 12 charts

In the Month End Review dashboard, the rolling 12 charts now include a 13th month so that you can view and compare data from the same period last year. In the following example, the month is set to Feb 2018, so the graph displays data for each month from Feb 2018 back to Feb 2017 for a total of 13 periods.

Acct	Feb-2018 Actual	Feb-2018 Budget	Variance	
IP - Medicare	1,625,045	1,420,254	204,791	✓
IP - Medicaid	260,174	148,061	112,113	✓
IP - Blue Cross	298,711	238,652	60,059	✓
IP - Commercial	176,154	167,252	8,902	✓
IP - HMO/PPO	273,967	179,216	94,751	✓
IP - Self Pay	89,388	113,692	(24,304)	⚠
IP - Other	142,115	134,359	7,756	✓
Total	2,865,554	2,401,486	464,068	
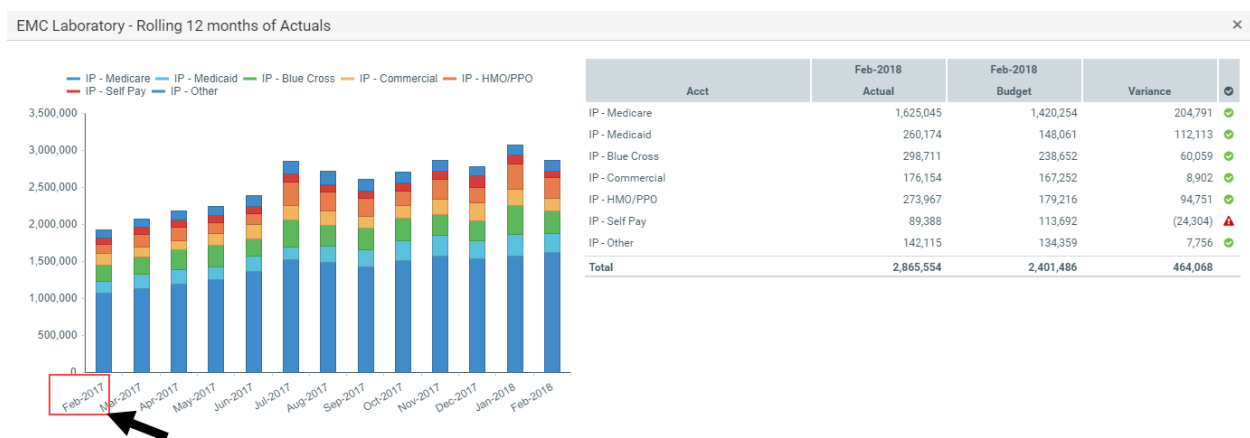
We have made these changes in the following dashboard tabs:

- Summary

- Executive Overview
  - Revenue Overview
  - Expense Overview
- Operational Overview
  - Patient Revenue
  - Other Revenue
  - Labor
  - Benefits
  - Other Expenses

Drill down available for multiple Axiom Budgeting reports

Multiple reports in Axiom Budgeting now allow you to drill down to one or more levels of detail. The following tables list the reports that now include the ability to drill and the types of drills they include:

Budget Analysis reports

Report	Drills
Budget Account Analysis	Account to department
Budget FTE Comparison	Department to account
Budget Key Statistics By Department	Department to account
Budget Salary Comparison	Department to account
Budget Summary by Dept	Department to account

Budget Statement reports

Report	Drills
Budget Income Detail	Account to department
Budget Income Scenarios	- Totals to department, and then a second drill to account - Totals to account, and then a second drill to department
Budget Income Summary	- Totals to department, and then a second drill to account - Totals to account, and then a second drill to department

Initiative Analysis reports

Report	Drills
Budget Income Summary-Initiative	• Totals to department, and then a second drill to account
Budget Income Summary-Initiative Monthly	• Totals to account, and then a second drill to department
Income Statement By Initiative ID	
Initiatives Summary	

Payroll Analysis reports

Report	Drills
FTEs By Department	• Department to job code, and then a second drill to pay type • Department to pay type, and then a second drill to job code
FTEs By Department By JobCode	To pay type
FTEs By JobCode	Job code to department, and then a second drill to pay type
Monthly FTEs by Dept	• Department to job code, and then a second drill to pay type • Department to pay type, and then a second drill to job code

The following is an example drill down in the Budget Account Analysis report:

For more instructions, see "Drilling data: Using Drill Down" in the online help.

Performance improvements to the Empl_List and JobCode tabs

We made design modifications to various filter and query functions to improve the performance of the Empl_List and JobCode tabs - especially for organization with a large number of records.

Issues resolved in 2019.2

The following sections list the resolutions for issues addressed in 2019.2, released on June 24th, 2019:

Driver, template, calc method, and other updates

Calc Methods

Location	Description
PFB-06678 - Jobcode: Incorrect Target Adj tagging on New Jobcode calc Method [TFS 26060]	**Symptom:** When using the New Jobcode calc method on the Jobcode tab, if it is marked as Variable, the system does not properly reflect the calc method. This is because "Fixed" is hard coded in the tagging prefix of column DC instead of as a reference to the fixed or variable indicator of the job code. This creates an issue when using the Adjustment to the Target functionality. **Resolution:** Corrected by updating the Add New Jobcode calc method with formula changes.
PFB-07390 - Provider Detail Calc Method is not DataType.BudgetType compliant [TFS 35182]	**Symptom:** An issue was discovered in the AQ within the provider detail methodology. Within AQ8, some of the groupings are by DataType and others are by DataType.BudgetType. This becomes an issue if a client maps their data types to the specific groupings. **Resolution:** Corrected by modifying the template, ProviderDetail tab, and ProviderSummary tab from "DataType" to "DataType.BudgetType" where applicable.
PFB-07394 - Incorrect formula for Gross Charge Account on the New Prov Block [TFS 34448]	**Symptom:** The fix made under PFB-05634 (2017.3) is no longer in place in 2018.4. When adding a new provider on the Provider tab, clients that want to use the suffix account from the Provider table do not see it come in. **Resolution:** Corrected by modifying the Add New ProviderDetail and Copy From ProviderDetail calc methods.

Location	Description
PFB-07410 - Provider calc method [TFS 34479]	**Symptom:** Save error occurs when adding a new provider. This issue is due to an incorrect cell reference to Variables tab that should reference the Finclass default value but instead referenced a secondary stat default value of typically 'CPT'. **Resolution:** Corrected by updating formulas in the following calc methods: ● Add New ProviderDetail ● Copy from Existing ProviderDetail ● Add New Encounter ProviderDetail Finclass ● Add New Procedure ProviderDetail Finclass ● Add New Revenue ProviderDetail Finclass ● Add New RVU ProviderDetail Finclass ● Add New WRVU ProviderDetail Finclass
PFB-07431 - Calc Methods on Provider tab create #REF beyond ~4500 rows [TFS 35185]	**Symptom:** The single row calc methods on the Provider tab have formulas that include an INDEX() function with range that is "locked" at a row in the 4500 to 4600 range. If a client adds providers below this row range, the formulas will fail with a #REF error. **Resolution:** Corrected by updating the Add New Revenue calc methods to look downward within that provider.
PFB-07495 - CYPMethod does not work for Input Monthly CM [TFS 35261]	**Symptom:** The CYPMethod is not recognized by the Input Monthly calc method. **Resolution:** Corrected formulas in the InputMonthly calc method. Also, the calc method was updated and annualization was removed as the default logic.

Drivers

Location	Description
PFB-06856 - GlobalDriverMgmt security in Budget Configuration Driver [TFS 30885]	**Symptom:** Assignment of the GlobalDriverMgmt role should allow administrators the right to save global driver assumptions. This role must be granted - even if the Administrator checkbox is checked. We noticed that without this role, we could save global assumptions in the 01 Budget Configuration driver, but we couldn't do this for other drivers. It appears cell D13 in the Variables tab is hardcoded to true, so assignment of the GlobalDriverMgmt role is irrelevant. Interestingly, cell E13 seems to have what should be in D13. **Resolution:** Corrected in a previous release.

Tables

Location	Description
PFB-06781 - Field length discrepancies for DEPT Description and GLOBALSUM Desc [TFS 30897]	**Symptom:** There is a discrepancy in the field length for the DEPT.Description and the driver GLOBALSUM.Desc fields. In the Department dimension, the string length for Description is 100. In the driver GLOBALSUM for field Descr, the string length is 50. This creates a save error when attempting to save the GLOBALSUM driver. **Resolution:** Corrected by increasing the Descr field size to 100 to match DEPT.Description.

Templates

Location	Description
PFB-07271 - Add New Provider - Provider Comp [TFS 33007]	**Symptom:** When using PROVIDER.VolSum="Yes" AND the client uses "Add New Provider" on the ProviderComp tab, the system does not include the physician's total WRVUs in the Total column. The calc method uses a GetData statement, which references a column that does not exist in the Budget20XX_ProviderVol table. **Resolution:** Corrected by modifying the formula in cell A2 of the Add New Provider calc method.
PFB-07281 - Budget Master Template [TFS 33289]	**Symptom:** The Master template for Budgeting includes a section at the bottom of the Instructions sheet for users to select the AXIOM ribbon to print. This should be updated to the MAIN ribbon as most Healthcare systems do not include an AXIOM ribbon for users. **Resolution:** Corrected by updating the Instruction tab.
PFB-07296 - Employee Tab AQ4 issue [TFS 33591]	**Symptom:** With this AQ processing in the third batch, the system does not bring in data into the plan file. This causes no hours to come in at the individual employee level, which results in the system dumping all of the hours into the Float line. **Resolution:** Corrected by modifying the Control_Sheet V288 from 3 to 4 (Employee column, Batch #).

Location	Description
PFB-07313 - Provider Comp Global Benefit [TFS 33596]	**Symptom:** When using the JobCode.GLAcct in the Provider Comp tab, the Global Benefit rows (2nd row) contained an incorrect reference to identify the GL Account number. **Resolution:** Corrected by updating the Provider Comp calc method.
PFB-07333 - GlobalSum calc method on Expense tab is actually Input Monthly [TFS 33999]	**Symptom:** In the Budget 2020 file group, the GlobalSum calc method on the Expense tab actually comes in as Input Monthly (is stored as Input Monthly in the calc method Library). **Resolution:** Corrected by replacing the calc method for an earlier version.
PFB-07375 - Multiplier Factor incorrect for Jobcode blocks on Employee tab [TFS 34022]	**Symptom:** When using the employee base rate as the start rate versus history in the Employee tab, there is a factor in column F that adjusts for the different pay type lines to give the proper starting rate. This is handled differently from the Jobcode tab, which causes an issue. **Resolution:** Corrected by updating the column F of the reference calc method that refers to the rate factors on the Labor Configuration driver.
PFB-07371 - Budget Driver - Labor Limits do not recognize JobCode.KHABgtCode [TFS 34047]	**Symptom:** A client set up their JobCode.KHABgtCode to map several job codes to another parent job code. The Empl_List in the plan file does not recognize JobCode.KHABgtCode and interfaced the individual job codes in error. This appears to be an issue with AQ20. **Resolution:** Corrected by updating the limit query for AQ20 to use Jobcode.KHABgtCode.
PFB-07384 - Hours Do Not Match [TFS 34225]	**Symptom:** The error message of Hours Do Not Match display even though the hours matched the Employee and ProviderComp tabs. Issue was due to the error message not recognizing use of ProviderCompHours calc method. **Resolution:** Corrected by updating the formula on cell D112 of the Expense tab to test for this calc method.
PFB-07410 - Provider Calc Method [TFS 34363]	**Symptom:** Users encounter issues when trying to save after adding a new provider block using the "Double click to add new provider" option. **Resolution:** Corrected by updating incorrect cell reference to Variables tab.

Utilities

Location	Description
PFB-07247 - FlexCalculator By Month Multipass issue if no selections are made in refresh variable [TFS 32810]	**Symptom:** The AQ on the Variables sheet that brings in the tables names from the FLEX table does not refresh before running multipass. If a user opens the utility and cancels the refresh variable to skip department selection, the utility never runs the AQ and it runs on whatever the tables were set to on the Variables sheet when the file was last saved. **Resolution:** Corrected by adjusting the parameter logic in cell F121 in the Variables column AQ1 parameter.

Report updates

Import Library

Location	Description
\Axiom\Imports Library\Productivity\BiWeekly Productivity\Load Biweekly Stats (using RevUsage).axi	**Issue:** PFB-07493 - Import - Biweekly RevUsage errors out with "Invalid object name 'ACT_PAY27_2017'" [TFS 35175] **Symptom:** In the default setup for the biweekly RevUsage import, transform #13 needs to have {} put around the data table syntax. **Resolution:** Corrected by revising step #13 by adding {} put around the data table syntax.

Management Reporting and Utilities

Location	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\Variance Review.xlsx	**Issue:** PFB-06133 - Alert flags on Dept Variance report are different than Variance Review [TFS 19050] **Symptom:** When comparing the Dept Variance report with the Variance Review report, the alert flags are different on some items even though the variance% and variance$ were the same. The user feels that the flag should be the same. **Resolution:** Corrected the difference in logic for conditional formatting between Dept Variance and Variance Review. Conditional formatting for Variance Review now matches Dept Variance for the indicators.

Location	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\Variance Review.xlsx	**Issue:** PFB-07037 - Additional records are being displayed even with the AlertFlag = 1 [TFS 30026] **Symptom:** When viewing the Variance Review report, all the comments display regardless of the filter. **Resolution:** Corrected by implementing separate AQ logic to pull CY and LY data due to the AlertFlag not being period specific.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager	**Issue:** PFB-06302 - Print Tag for the Dept Monthly Package is including row 25 on every page incorrectly [TFS 29747] **Symptom:** On the EmpID sheet, the Print Tag is set up for row 25, however the AQ1 is on row 24. Therefore, the first row of AQ1 is included on every page. **Resolution:** Corrected the output of the EmpID printed view repeats header and first row from AQ1.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\ExpenseOverview.xlsx	**Issue:** PFB-07416 - Expense Overview (managers month End - Executive Overview - KPI variance formatting) [TFS 34485] **Symptom:** On the KPIs, the colors for the variances are reversed: For Salary, the department is over budget, which is bad and should display in red. The same goes for Average Hourly Rate and Paid Hours per Unit. The Variance Amount should also be shown as a negative to be consistent with the Variance listed in the Top 10 Unfavorable as well as the detail in the account detail on the right-hand side of the Visualization. **Resolution:** Corrected the variance calculation, formatting, and indicator direction for expenses to Target-Actuals.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\06_OtherExpenses.xlsx	**Issue:** PFB-07399 - Month End review 06_OtherExpenses always pulls current year data [TFS 34271] **Symptom:** The Other Expenses tab for this dashboard pulls data for the current system year and not the year selected by the users. **Resolution:** Corrected the CY "Year" formula in the Tables section of the Variables tab to reference the shared variable for Year instead of SystemYear.

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\06_OtherExpenses.xlsx	**Issue:** PFB-07399 - Month End review 06_OtherExpenses always pulls current year data [TFS 34321] **Symptom:** The Other Expenses tab for this dashboard always pulls data for the current system year and not the year selected by users. **Resolution:** Corrected the Variables tab "Tables" section for CY "Year" formula to reference shared variable for Year instead of SystemYear.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager: • Budget Variance By Dept.xlsx • Dept Monthly Package.xlsx	**Issue:** PFB-07303 - Budget Variance by Dept Report Hours Formula Incorrect [TFS 33611] **Symptom:** In the Budget Variance by Dept report, some formulas in the Per Unit Summary section are hard coded to reference the hours section but not the 'hoursJC' section. This causes the system to display zero values when the client uses Acct.Type = 'HoursJC'. **Resolution:** Average Hourly Rate depends on a calculation for "Total Paid Hours". Total Paid Hours strictly references Hours data and requires logic to toggle JCHours, if required. Corrected to reference the setting on VCC_Threshold to use "JCHours" if selected.

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End: • 01_Navigation.xlsx • 03_Revenue.xlsx • 04_Labor.xlsx • 05_Benefits.xlsx • 06_OtherExpenses.xlsx • ExpenseOverview.xlsx • KPI.xlsx • OtherRevenue.xlsx • RevenueOverview.xlsx • StatisticalOverview.xlsx • VCC.xlsx • VCC_KHA_Drill01Transaction.xlsx • VCC_KHA_Drill02JobCode.xlsx • VCC_KHA_Drill03Employee.xlsx • VCC_KHA_Drill05RevUsage.xlsx • VCC_KHA_Drill07JE.xlsx • VCC_KHA_Drill10Physician.xlsx • VCC_KHA_Drill11PhysicianDetail.xlsx • VCC_KHA_Drill12PhysicianCPT.xlsx	**Issue:** PFB-07486 - Axiom: Month End Review dashboard sum by should be by Acct.Rptmap instead of Acct.Acct [TFS 34904] **Symptom:** The new dashboard sums by Acct.Acct, but for changes made in accounting systems and structures recently, I would like to request an enhancement so the dashboard uses or allow us to use Acct.RptMap. The same goes for the department selection. It appears the system pulls information by Dept.Dept, but it would be better to use Dept.RptMap. **Resolution:** Corrected by updating multiple formulas and logic to pull information from Acct. Rptmap and Dept.RptMap.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager: • Scorecard.xlsx • Dept Monthly Package.xlsx	**Issue:** PFB-07248 - Dept Monthly Package/Scorecard: Budget Alert column for Total Expenses on the SCDetail sheet is pointing to a cell with no formula/value in it [TFS 32837] **Symptom:** In the Scorecard report, the Budget Alert column for Total Expenses on the SCDetail sheet points to a cell with no formula/value in it, so the alert flag always displays green. **Resolution:** Corrected by removing logic and formatting from "Total Expense" line item for "Alert" column within SCDetail tab.

Location	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Budget Variance By Dept.xlsx	**Issue:** PFB-07487 - Budget Variance By Dept Select Flx/Bud [TFS 35177] **Symptom:** The Budget Variance By Dept report in the Manager Report Package is not flipping to show flex budget when user selects Flex from the refresh variables. **Resolution:** Corrected by disconnecting the combo boxes to determine the output for the workbook related to target.
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package.xlsx	**Issue:** PFB-07213 - Executive monthly package Cons-Financial sheet was not reconciling to their summary income statement [TFS 31595] **Symptom**: The Cons-Financial sheet does not reconcile to the summary income statement. Further review revealed that FS_ Detail grouping D_Baddebt is missing from the Deductions from Revenue section. This should be included so that the client's summary income statements will reconcile. **Resolution:** Made the following updates to the Cons-Financial sheet: • Added D_BadDebt to "Deductions from Revenue" section within AQ1 with description "Bad Debt" • Added R_NonOPOther to "Non-Operating" section within AQ1 with description - "Non Operating Revenue - Other" • Revised R_NonOpRev - "Non Operating Revenue" • Moved R_NonOPOther directly under R_NonOpRev
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Top 10 Variances.xlsx	**Issue:** PFB-07588 - Column O within the Top 10 Variances report is hardcoded with BUD [TFS 35972] **Symptom:** The Top 10 Variances report allows users to select either Bud or FLX for the refresh variables. However, column O in the Summary sheet does not update accordingly. **Resolution:** Corrected by making the AQ field def column dynamic based on BUD or FLX selection from Refresh Variables.

Location	Description
\Axiom\Reports Library\Management Reporting\Payroll\Overtime Alert.xlsx	**Issue:** PFB-07073 - Overtime Alert report, entering 5 for threshold uses 500% [TFS 30572] **Symptom:** When a user enters the percentage, the system shows it as 100X the input. Should the input be a whole number or a decimal? It might be helpful to add an example to the Refresh Variable. Otherwise, fix the format on the report. **Resolution:** Corrected by adjusting the logic to handle whole number Refresh Variable inputs.
\Axiom\Reports Library\Management Reporting Utilities\Payroll\Monthly to GL.xlsx	**Issue:** PFB-07304 - Monthly to GL is saving Dept.RptMap to Act {Year}.Dept [TFS 33612] **Symptom:** The Monthly to GL accrual utility saves the DEPT.RptMap to the ACT{Year}.DEPT column. This prevents a user from reporting on individual departments within a given RptMap. **Resolution**: Corrected by converting DEPT.RPTMap to DEPT.Dept.
\Axiom\Reports Library\Management Reporting Utilities\Payroll\Monthly to GL.xlsx	**Issue:** PFB-06639 - Paytype not dynamic in Definition row on Monthly to GL Report [TFS 34064] **Symptom:** When using the Monthly to GL report, if a pay type is mapped to another one that is listed in the PayrollGLMapping table, the report does not pick up those accounts when transferring the hours from the ACTPay12_20XX table to ACT20XX. **Resolution:** Corrected by updating the report logic.
\Axiom\Reports Library\Management Reporting Utilities\System Setup\VCC_ Payroll_Mapping.xlsx	**Issue:** PFB-07312 - VCC_Payroll_Mapping AQ2 data filter to exclude benefits [TFS 33614] **Symptom:** For the VCC_Payroll_Mapping setup table, AQ2 is using the FSSummary column and filtering on E_Salaries which pulls in benefits in addition to salaries. **Resolution:** Corrected by updating cell H21 in the GLPayrollMapping worksheet.

Location	Description
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx	**Issue:** PFB-06530 - Modifications to Monthly Forecast Utility [TFS 34061] **Symptom:** The queries are set to sum by ACCT.BudgetType;ACCT.KHABgtCode;ACCT.ACCT, which is fine if the utility were running multipass by DEPT (or DEPT.KHABgtCode). But, if the requirement is that it cannot be run using multipass, then the queries should also sum by DEPT.KHABgtCode (or DEPT.DEPT). Entity is the only required refresh variable (DEPT is optional). When run by Entity - and not summing by DEPT - the ACCT rows will summarize to one of the DEPTs in the Entity, and it will not save to each DEPT separately. **Resolution:** Corrected by doing the following: • Added a custom save-tag section to Variables tab in G68:I69. • Set [IsRequired] to TRUE for the "Select Default Dept:" refresh variable. • Updated Instructions tab to remove language that says the file is not designed to work with Process File Multipass.
\Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Processing\Monthly Forecast Utility.xlsx \Axiom\Reports Library\Management Reporting Utilities\Current Year Forecast\Forecast Adjustments\Dept Specific Forecast Adjustments.xlsx	**Issue:** PFB-07437 - Monthly Forecast Utility: Update AQ1 to include Acct.BudgetType OthStat [TFS 34757] **Symptom:** The Monthly Forecast Utility includes the following filter in AQ1: ACCT.BudgetType IN ('KeyIP', 'KeyOP', 'KeyOth'). A client has requested that we add OthStat to the filter so they could use the utility to forecast their OthStat accounts. **Resolution**: Corrected by adding 'OthStat' in the AQ data filter.

Productivity Reporting and Utilities

Location	Description
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend with Graph.xlsx	**Issue:** PFB-06712 - Productivity Trend with Graph Rpt with Graph - Formatting [TFS 29813] **Symptom:** The BiWeekly Productivity Trend Report with Graph reflects inconsistent date formats as headers. **Resolution:** Corrected by updating the date for column far right is single digit for month, if less than the 10th month.

Location	Description
\Axiom\Reports Library\Productivity Utilities\BiWeekly\Report Packages\Biweekly Executive Productivity Package.xlsx	**Issue:** PFB-06833 - Incorrect link in Biweekly Executive Productivity Package report [TFS 34418] **Symptom:** In the Biweekly Executive Productivity Package report, on the FileCollect tab, in rows 16 ("Subject Text") and 33 ("Output file name (no extension)"), the formulas include an incorrect link. **Resolution:** Corrected formulas that included references to detached workbook.
\Axiom\Reports Library\Productivity Utilities\Daily\Data Input\Input Daily Productivity Contract Labor.xlsx	**Issue:** PFB-05854 - Daily Productivity Contract Labor Data Entry Date Filter [TFS 31765] **Symptom:** Currently this utility does not allow for a filter by date. When you open the utility, you receive all of the dates in the data table to edit. **Resolution:** Corrected by incorporating the CalDate refresh variable"calendar" - similar to Daily Hours by JobClass.xlsx - to filter or populate Dept list.
\Axiom\Reports Library\Productivity Utilities\Daily\Data Input\Input Daily Productivity Statistics.xlsx	**Issue:** PFB-05850 - Daily Productivity Statistics Data Entry Date Filter [TFS 31766] **Symptom:** Currently this utility does not allow for a filter by date. When you open the utility, you receive all of the dates in the data table to edit. **Resolution:** Corrected by incorporating the CalDate refresh variable"calendar" - similar to Daily Hours by JobClass.xlsx - to filter or populate Dept list.
\Axiom\Reports Library\Productivity Reporting\Daily Productivity\Department\Daily Hours by JobClass.xlsx	**Issue:** PFB-07445 - Daily Hours By Jobcode Workload Multipass [TFS 34747 and 34773] **Symptom:** The system does not feed the current value in the Workload Statistic in cell G31 when multipass is run. Cell G20 looks to G19 for the stat, but the system returns nothing if the user runs multipass. The multipass current value is pulled into G15, but the system is not using it. **Resolution:** Corrected by adjusting the logic for the single department selection from the refresh variables or multipass.

System Files

Location	Description
\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly- SingleDept.xlsx	**Issue:** PFB-05659 - Productivity- BiWeekly-SingleDept Dashboard Staffing Detail not Payperiod sensitive [TFS 15170] **Symptom:** When a user changes the pay period within the Staffing Detail tab of the Biweekly Payroll dashboard, the data within the tab does not update. The reported data remains at the current system payroll period, and does not change with the on-demand change in pay period. **Resolution:** Corrected by refactoring visualizations and data to depend on the period combo box.
\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly- SingleDept.xlsx	**Issue:** PFB-06879 - Productivity - BiWeekly-SingleDept Hours analysis form's graphs is not period sensitive **Symptom:** The graphs for this form can sometimes include the wrong data. **Resolution:** Corrected by verifying that the ACT_PAY27 data columns were set-up correctly to be dynamic based on the SystemYear and the table period for ACT_PAY27, but we identified that the former setup depended on a fixed period structure (i.e. select period 18 and data retrieved column 18). Due to the dynamic period change, several areas required further refactoring. The proper data exists, but the indexing was off. The selected period will now always be to the far right of each dataset. We traced all dependencies to the selected period and adjusted accordingly.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\01_ Navigation.xlsx	**Issue:** PFB-07319 - Filter for Summary Section of Month End Review Dashboard [TFS 33615] **Symptom:** When filtering by Dept.RPTMap, the Description pulls Dept.Description, so it does not pull the correct description. **Resolution:** Corrected by updating the Refresh Variable to display DEPT correctly.

Location	Description
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End	**Issue:** PFB-07486 - Month End Review dashboard Sum By should be by acct.rptmap instead of acct.acct [TFS 34910] **Symptom:** The new dashboard sums by Acct.Acct, which is probably fine normally, but for those of us that have made changes in accounting systems and structures recently, I would like to request an enhancement so it will use (or allow us to use) Acct.RptMap. Same thing for the department selection. The system appears to pull the information by Dept.Dept. It would be better to use Dept.RptMap. **Resolution:** Corrected by using acct.rptmap for the dashboard on the Executive Summary, Operation Overview, and VCC tabs.
\Axiom\Reports Library\System Files\VCC Drills: • KHA_Drill02JobCode.xlsx • KHA_Drill03Employee.xlsx	**Issue:** PFB-06932 - JobCode and Employee Drills needed an additional filter on ActPay12 hours column [TFS 34178] **Symptom:** The Jobcode and Employee drills need an additional filter on the ActPay12 Hours column to limit to FTE related pay types. **Resolution:** Corrected by adjusting the column filters for Hours to include concatenated Paytype.FTE='Yes'.

Tables

Location	Description
\Axiom\Table Library\Budgeting\Payroll\ {2017-2021} \Axiom\Table Library\Management Reporting\Actuals\Payroll\{2017-2020}	**Issue:** PFB-05568 - Reduce the size of the EmplID Desc size in the Employee Roster table to be consistent and avoid a potential save error [TFS 13388] **Symptom:** The EmpID Desc column in the Act_Payroll table and Bud_payroll tables include a string limit of 100 characters. However, the Employee Roster table includes a character size limit of 150. This currently hasn't been a problem, but it could quickly turn into one if the Employee Roster table were to exceed 150 characters, If the client uses the Employee Labor Method, the plan file would not save as a result of the size limitation in the budget table. **Resolution:** Corrected by increasing max string length for EmpIdDESC column in tables.

Task Panes

Location	Description
\Axiom\Task Panes Library\Management Reporting\Mgmt Reporting Admin.axl	**Issue:** PFB-06925 - Payroll_Date utility not launching as form when launched from System Setup folder off of Mgmt Admin task pane [TFS 30568]
	Symptom: The entire folder contents should not be set to show as selectable.
	Resolution: The directory from the Admin task pane is a mix of Excel assets and forms-based assets. Corrected so that if a user launches a forms-based asset, then the system launches it in browser.

Issues resolved in 2019.2.1

The following sections list the resolutions for issues addressed in 2019.2.1, released on July 22nd, 2019:

Driver, template, calc method, and other updates

No issues were addressed in this release.

Report updates

Dashboards

Location	Description
\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly-SingleDept.xlsx	**Issue:** BiWeekly-SingleDept - ProdMap Compliance [TFS 36802] **Symptom:** Review for ProdMap compliance instead of RPTMap and RPTMap.Description. **Resolution:** Corrected by doing the following: • Reduced the static values for RPTMap to a single reference on each applicable worksheet. • Converted RPTMap to ProdMap. • Control_Sheet - data filters already had references to single reference; adjusted "Sum by" parameters for each applicable AQ. • Adjusted Description to DEPT.ProdMap.Description.
\Axiom\Reports Library\System Files\Forms\Management Reporting\Managers Month End\VCC.xlsx	**Issue:** Month End Dashboard VCC Stats Drilling to Transaction [TFS 36803] **Symptom:** In the VCC Summary tab, the detail stat accounts drill to the transaction drill. This row should not include a drill. **Resolution:** Corrected by adjusting the logic for drill button visibility to be hidden if the section is Key Statistics - S_KeyStat.

Management

Location	Description
Axiom\Reports Library\Management Reporting Utilities\System Setup\YearPeriod.xlsx	**Issue:** FTE Calculation for Leap Year is not calculating properly in YearPeriod form [TFS 36972]
	Symptom: The two FTE hours standards (2080 and 2086) result in inconsistent calculations. The decision has been made to have the leap year adjustment fall entirely in the February time period. No changes need to be made for a selection of 2086 standard hours, but for the choice of 2080 hours, the leap year value of 2088 should fall 100% in February rather have the bulk of the difference in February and the remainder spread throughout the remaining months.
	Resolution: Corrected by updating the formulas in cells AG35:AI46.
	NOTE: When selecting 2086 (cell D4), the daily rate remains the same, meaning (40/7) times the number of days in month. The leap year adjustment is automatic. When selecting 2080 (2088 hours per leap year), the system calculates based on a 365 day year and adds the difference (8 hours) in February. The remaining months remain unchanged.

Productivity

Location	Description
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report.xlsx	**Issue:** Productivity Trend Report has 160 GetDatas while it should be using AQs to improve performance with batch processing & eliminate List tab [TFS 36936] **Symptom:** This defect includes the following issues: • The Productivity Trend Report is based entirely on GetData UDFs. This needs to be rewritten in such a way that the report leverages querys to speed up performance. • Consider eliminating the List tab and use the standard refresh variable options to provide a department picklist. **Resolution:** Corrected by the following: • Streamlined the primary sheet, formerly called Variables, and renamed it to Setup. All extra/unneeded data points were removed. • Created a new sheet named Data with a single AQ. When using single pass, the system filters for the selected department. When using Multipass, the system brings in all the departments at once and then turns off. Then, formulas are used to grab the correct data. • Altered the file processing setup to filter using the same criteria as the single pass with the refresh variables. Instead of using DEPT, the system uses the ACT_PAY27 table. Also, the PAYTYPE fields were incorporated into the processing criteria.
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Department\Productivity Trend Report.xlsx	**Issue:** Productivity Trend Report: The listing for depts that are processed when running multipass is different than the refresh variable picklist of depts [TFS 37055] **Symptom:** Productivity Trend Report: The listing for depts that are processed when running multipass is different than the refresh variable picklist of depts. **Resolution:** Corrected by changing the data table and filters to match the refresh variable input, reducing the total number of iterations to complete the Multipass processing significantly

Tables

Location	Description
\Axiom\Table Library\Management Reporting\Income Statement\ISTemplateBuilder_Code	**Issue:** PFB-07728 - Custom IS column string length cannot exceed 25 if using the IS builder [TFS 36871] **Symptom:** While using the IS builder, the client's IS categories are limited to a string length of 25. You can create the custom column in the ACCT dimension table and define the string length to be greater than 25, however, while in the template / builder, if you try to save the IS categories in step 3 of the builder, you encounter an error letting you know that the string length cannot exceed 25. **Resolution:** Corrected by increasing the "Max String Length" for "Code" column in anticipation for custom columns utilized by the user.

Issues resolved in 2019.2.2

The following sections list the resolutions for issues addressed in 2019.2.2, released on August 19th, 2019:

Driver, template, calc method, and other updates

No issues were addressed in this release.

Report updates

Dashboards

Location	Description
\Axiom\Reports Library\System Files\Home Files\Productivity- BiWeekly-SingleDept.xlsx	**Issue:** PFB-07891 - Productivity Biweekly Dashboard includes Non Prod hours in WHPUOS calc [TFS 37999] **Symptom:** The Productivity Dashboard produces different results for WHPUOS than the VCC or standard packages. **Resolution:** Corrected by updating the query filter and logic for the calc method in the Actual Efficiency section to exclude NonProd Hours.

Manual configuration instructions

A. **Budget Checklist** - The Process Owner has been defaulted to Budgeting Admin. Update Process Owners as required.

B. **DataType Dimension** – In the Issues Resolved section above, the resolution for PFB-07390 [TFS 35182] noted that selected AQs for Provider Detail were updated to include DataType.BudgetType where previously there were DataType only. With this update, we can now allow for optional configurations where statistics on can be mapped together.

For example, suppose that WRVUs are imported with two distinct data types but the preference is to combine these for budget planning purposes. By updating BudgetType with "WRVU" and noted in the following image, the value of "WRVU" and "QAWRVU" would be summarized in the plan file on the ProviderDetail tab.

Should you desire to make this type of configuration, update DataType.BudgetType to map as needed.

C. As part of the development of future report tools and utilities, data needs to be standardized across accounts, departments, and so on. Part of this process includes mapping these items in your organization to KHA Standard Class codes.

> **NOTE:** This process will benefit your organization in the future by providing more detailed data and reporting capabilities. Once complete, you should only need to update these reports when you add new accounts, departments, etc. If you did not upgrade to 2019.1, then please complete these steps.

To map KHA Standard Class codes:

a. In the **Mgmt Admin** task pane, in the **Data Maintenance** section, click **Data Reconciliation**, and double click one of the following:

> **NOTE:** The results returned depend on the user's write filter on the dimension table as established when using the Dimension Maintenance Security utility.

- Acct Standards Review
- Dept Standards Review
- Entity Standards Review
- Jodcode Standards Review
- Paytype Standards Review
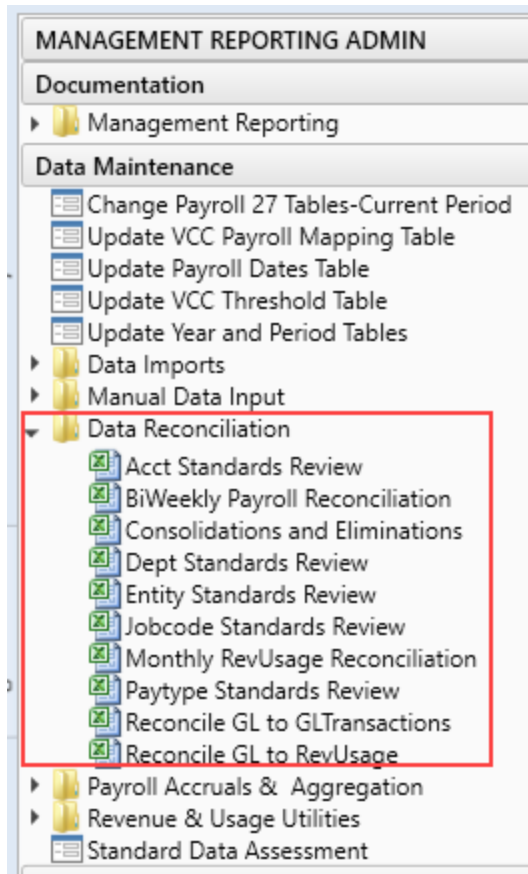
b. In the **Refresh Variables** dialog, you can optionally filter the data in the report by KHA Standard Class and/or State by clicking **Choose Value**, select the values to filter by, and click **OK**.

> **NOTE:** To view all of the items (accounts, departments, etc.) in the report, click **OK**.

c. In the report, do the following:

> **NOTE:** These following steps depend on the asset opened in Step 1. Other than the KHA Standard Classification column, the fields to update are not the same in each report.

     a. In the **KHA Standard Classification** column, double-click the folder icon next to the field.

     b. From the **Choose Value** dialog, select the codes group together, and click **OK**.

     c. In the **Medicare Provider Number** column, type the MPN number, as needed.

     d. In the **Active** column, identify which entity is active by doing one of the following:

        • To activate the code, click TRUE.

- To deactivate the code, click FALSE.

  d. After making your changes, in the **Main** ribbon tab, click **Save**.

The information you enter saves back to the corresponding dimension table. For example, after mapping your accounts, the system saves your changes to the ACCT dimension table.

Known issues

The following table lists the known issues in this release:

Calc Methods

Issue	Description
Stat_Rev tab, Add New Fixed Revenue CM is not picking up Global exceptions when Dept exceptions don't exist [TFS 30183]	**Symptom:** In the Stat_Rev tab, the Add New Fixed Revenue calc method does not pick up Global exceptions when department exceptions do not exist. When department exceptions exist, the calc method picks them correctly. **Explanation:** Under consideration for future patch or release.

Drivers

Issue	Description
Budget Global Data drivers now allow custom filters but users are able to insert records outside of the filter [27860]	**Symptom:** By now allowing users to define a filter for their four global data drivers, a user can insert records that fall outside of the filter. For example, if my filter says Acct.khabgtcode=123456, I can insert AND SAVE to a record where the acct.khabgtcode is not 123456. Consequently, I am introducing records in the underlying table and other than using OTIS, I have no way of seeing or updating those records (leaving the filter as-is in the driver). **Explanation:** Under consideration for future patch or release.
PFB-06218 - Budget Admin Expense Adjustments Issue with percentages [TFS 20767]	**Symptom:** When entering a percentage in the Admin Expense Adjustment driver, the note displays "10=10%", but when looking at the plan file after making the adjustment, it appears that 10=1000%. **Explanation:** Under consideration for future patch or release.
PFB-07581 - BP-Budget Statistics Driver not ACCT.KHABgtCode Compliant [TFS 35867]	**Symptom:** The Budget Statistic driver is NOT ACCT.KHABgtCode Complaint. **Explanation:** Under consideration for future patch or release.

Issue	Description
PFB-07545 - 38 Budget Provider Driver - orphan records [TFS 35319]	**Symptom:** A provider that started out as VolSum = yes, but switch the provider to no after initial plan file processing. On the initial process of the 38 Provider Vol driver, WRVUs were stored in BUDGET2020_Provider Vol for this provider. The Provider_Comp tab used the Global configuration to process WRVUs. When the client changed PROVIDER.VolSum for this provider to No, the driver correctly did not include this provider in refresh results. However, there is no zero-on-save logic in 38 Provider Vol, so the WRVU record for this provider remained orphaned in the BUDGET2020_Provider Vol table. The user expected the WRVU method on the Provider_Comp table to switch to "Provider Tab," but it remained "Global" because of the orphaned record. **Explanation:** Under consideration for future patch or release.
PFB-06816 - YTD Col in Stat and Stat Supplement Driver are not Budget Group compliant [TFS 29946]	**Symptom**: If a client has budget groups that will use different financial and payroll periods for YTD, the Statistics and Statistics Supplement driver are not budget group specific and use the YTD from the Global level in the Configuration driver. This causes the remaining projected and budget amounts to be skewed, causing major issues in budgeting. **Explanation:** Under consideration for future patch or release.
Revenue_Stat Calc method is not returning expected data from the Budget Revenue Adjustments Driver due to incorrect coding in the formula in col BB [TFS 23491]	**Symptom**:A few issues were uncovered related to using the Revenue_Stat calc method along with Budget Revenue Adjustments driver on the Stat_Rev tab. • The Revenue_Stat calc method looks for a column name of OthPtRev, which does not exist in the Budget Revenue Adjustments driver. • When adding the Calc Method Revenue_stat in the plan file in the Stat_Rev tab, when using column BD is OPRev, column BB should return the Eff Mth from the Budget Revenue Adjustments driver (a column named OPMth). However, the formula appears to not have the correct column name (it says OPMonth instead of OPMth) and, therefore, the system does not return the effective month in the case of OPRev. **Explanation:** Under consideration for future patch or release.

Reports

Issue	Description
\Axiom\Reports Library\Budgeting Reports\Initiatives Analysis\Income Statement By Initiative ID.xlsx	**Issue:** Income Statement by Initiative ID- drill data not matching source report [TFS 34613] **Symptom:** When drilling into this report, the data is NOT coming into the drill columns M:O from the source report. **Explanation:** Under consideration for future patch or release.
\Axiom\Reports Library\Management Reporting\Provider Analysis\Provider Productivity.xlsx	**Issue:** PFB-06699 - Provider Productivity Summary: Coding Distribution Charts reference incorrect data ranges [TFS 26694] **Symptom:** The two Coding Distribution charts in this report reference incorrect data ranges. **Explanation:** Under consideration for future patch or release.
\Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\Budget Department Audit Report.xlsx	**Issue:** PFB-06608 - Budget Dept Audit Report does not flag all issues [TFS 25198] **Symptom:** The HideRow logic is not taking issues flagged in columns Z, AA, and AB. Currently, the HideRow logic only looks for issues in Column T and U. **Explanation:** Under consideration for future patch or release.
Axiom\Reports Library\management Reporting Utilities\Dimension system Strucutre Reports\System Structure Accounts	**Issue:** PFB-06516 - System Structure Accounts-Pulling in PHYStdLine for Non Provider Clients [TFS 25514] **Symptom:** In the System Structure Accounts report, all of the AQs (AQ 1 through 9) list ACCT.PHYSTDLINE as one of the sum-by criteria, but a client does not have this Dimensions field. The needs to account for clients without the Provider module. **Explanation:** Under consideration for future patch or release.
\Axiom\Reports Library\Budgeting Reports\Budget Analysis\Budget Salary Rate Analysis.xlsx	**Issue**: PFB-07466 - Budget Salary Rate Analysis Report & potentially other budget reports need to be updated to use correct Salaries criteria [TFS 34926] **Symptom:** The Budget Salary Rate Analysis report uses Acct.FSSummary='E_Salaries' to define the dollars to pull into the report. This includes benefits and contract labor for many clients. A better filter would be Acct.FSDetail='E_Salaries'. **Explanation:** Under consideration for future patch or release.

Security

Issue	Description
InitiativeID Dimension table: Bud Analyst does not have access to update the Profile column [TFS 33738]	**Symptom:** A user with the Bud Analyst role should be able to open the InitiativeID dimension table in (OTIS), and update the Profile column for an initiative. This is not the case since the analyst does not have access to this table. **Workaround:** At this time, only a user with the Bud Admin or Local Admin role can update this column in the InitiativeID dimension table. **Explanation:** This will be fixed in a future release.

Templates

Issue	Description
PFB-07626 - Incorrect formula on Jobcode tab for Target setting rows for GLAcct [TFS 35994]	**Symptom:** When using the target setting rows, the GLAcct lookup in column CK contains an error in the formula, causing the GL Acct not to populate. **Explanation:** This will be fixed in a future release.

Utilities

Issue	Description
INITIATIVEID: Allow OTIS Read/Write for InitiativeID for BP Admins/Analysts roles or Update DIM- INITIATIVEID to add new col [TFS 33732]	**Symptom:** Initially, users were unable to access the INITIATIVEID dimension using the Dimension Maintenance Utility because no manual intervention was required in this table. In the rare event when the initiative description or one of the other attributes changed, users were expected to use the Update DIM-INITIATIVEID utility. Now that the Admins and Analysts are expected to update the Profile column, these users now need access to this table. **Explanation:** This will be fixed in a future release.
PFB-06472 - Budget GlobalExpense Reconciliation\GlobalRevenue Reconciliation - update filter [TFS 25560]	**Symptom:** The AQ2 filter needs to be updated to include a filter for Dept.BudgetGroup. Otherwise, all Driver table records are pulled, and the AQ ignores the Refresh Variable selection. **Explanation:** This will be fixed in a future release.

> **IMPORTANT:** Refer to the **Axiom Software 2019.2 Release Notes** and the **Axiom for Healthcare Suite 2019.2 Release Notes** for additional known issues that have a suite-wide impact.