



Release Notes  
Axiom Comparative Analytics  
Version 2019.2

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KaufmanHall

**AXIOM**

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# Summary

Kaufman Hall is pleased to announce the 2019.2 release of Axiom Comparative Analytics. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

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

## Support

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

## Training

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

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

For a complete listing of our courses, please visit [www.kaufmanhall.com](http://www.kaufmanhall.com).

# Product upgrade notes

**IMPORTANT: 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 2019.1 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.

When upgrading to Axiom Comparative Analytics 2019.2, 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.

## New user roles

We added two new user roles:

- Comparative Analytics Admin - Can perform both the Peer Group request and the peer group category update, but does not give access to any other assets. To access the other assets, this role needs to be combined with other roles.
- Peer Group Request - Can create peer group requests, but this role does not give access to any other assets. To access other assets, this role needs to be combined with other access roles. The table below illustrates minimum role combinations required for creating peer group requests:

Comparative Analytics Peer Group Request role	Comparative Analytics Admin role	Comparative Analytics Entity role
X		X
	X	X

## Entity Performance

We made several changes to Entity Performance as follows:

### ► Profitability tab

The Entity Performance Profitability tab displays basis points figures when you set the **Show** toggle to Amount.

Entity Performance - Profitability Show:  Amount

Period: Nov - 2018 | Variance Threshold: -5%

Entity Desc ↑	EBIDA Margin (Basis Points)			Operating Margin (Basis Points)		
	Bud Var	MoM	YoY	Bud Var	MoM	YoY
KH University	5,827	6,346	5,567	6,135	6,636	5,866
KH Medical Center	6,016	5,832	6,028	6,500	6,253	6,538
Rehabilitation Care Hospital	5,545	5,339	5,698	5,643	5,438	5,812
KH General Hospital	988	120	1,850 ●	1,246	299	2,191 ●
Alliance Hospital	595	800	880	426	650	704
Axiom General Hospital	-1,163 ●	-947 ●	-1,199 ●	-965 ●	-772	-950 ●
Skokie General Hospital	-13	-286 ●	229	-64 ●	-457 ●	254 ●

### ► Other Expense tab

The Other tab is now named **Other Expense**.

# Entity Performance - Profitability

Period: Nov - 2018 | Variance Threshold: -5%



Profitability | Volume | Revenue | Expense | **Other Expense**

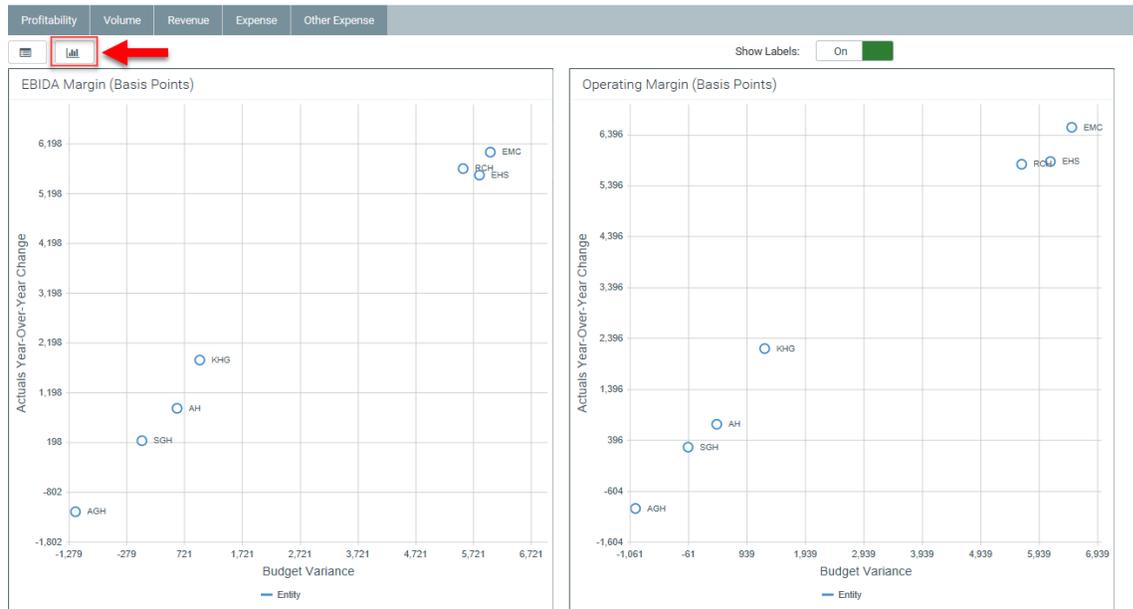
☰ | 📊

## ► Display charts

For all Entity Performance tabs, the **Display Charts** icon displays charts with Budget Variance on the X-axis and Year-Over-Year change on the Y-axis. All entities are displayed by default. Click the Show Labels toggle to hide the entity labels. Use the Filter icon to customize the data displayed.

### Entity Performance - Profitability

Period: Nov - 2018 | Variance Threshold: -5%



Use the Chart Configuration section of the Filter menu to exclude entities or to include peer groups.

**NOTE:** You can only include peer groups if the Change Period selection is set to the most recent monthly period available in the system.

### Comparative Analytics

Filters

▼ Data Filters

Entity KHASStandardClass  
Choose a value for KHASStanc ▼ ✕

Set Variance Threshold  
-30% -18% -6% 6% 18% 30%

Change Period  
Nov - 2018 ▼ ✕

Select Analysis  
Budget ▼ ✕

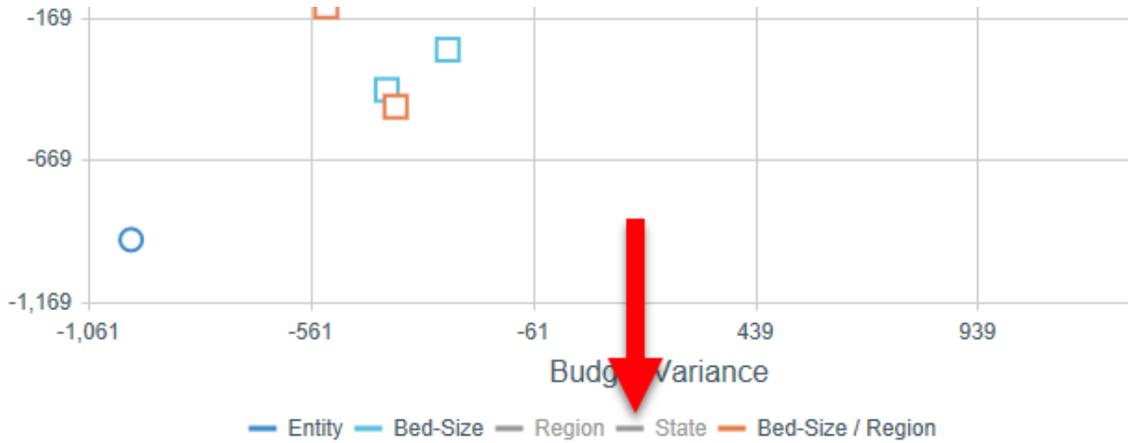
▼ Chart Configuration

Entities to Exclude  
Choose a value for Entity. ▼ ✕

Peer Groups to Include (recent period only)  
Choose a value for PEERGRO ▼ ✕

Apply Clear All Cancel

Click an entity or peer group in the chart legend to temporarily hide items from that group in the chart.

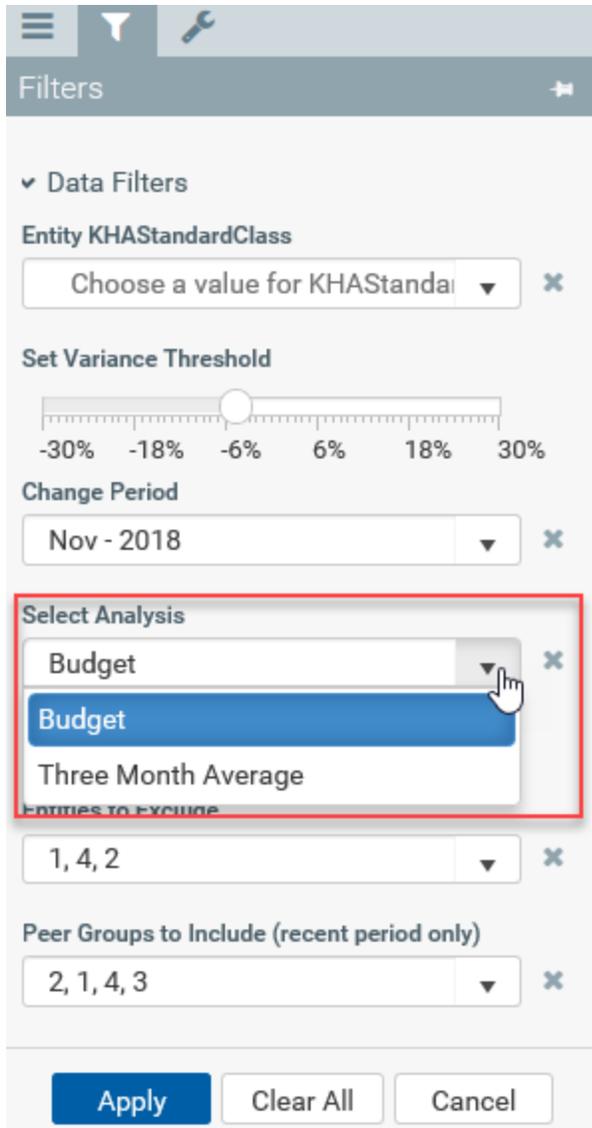


## Three Month Average and Budget variance

We added a Three Month Average analysis to all Comparative Analytics assets. Additionally, Budget variance analysis only displays if you have a Budget license. This information is presented differently across each asset.

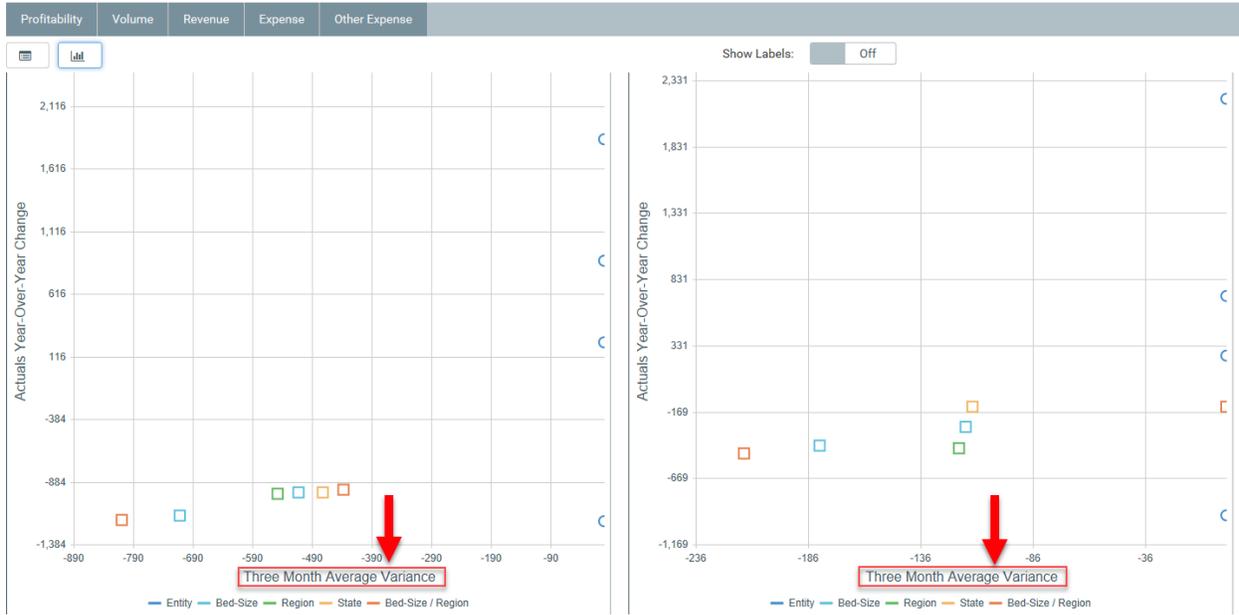
### ► Entity Performance

Select the Three Month Average option from the **Select Analysis** drop-down in the filter menu.



If you do not have a Budget license, the **Select Analysis** drop-down will not display. Three Month Average data will display in the dashboard by default. If you have a Budget license, you can select either Three Month Average or Budget in the **Select Analysis** drop-down.

After you select Three Month Average, Axiom Comparative Analytics will display the Three Month Average Variance on the X-axis of all displayed charts or add Three Month Average Variance column to the displayed table.



### Entity Performance - Profitability

Period: **Nov - 2018** | Variance Threshold: **-5%**

Entity Desc ↑	EBIDA Margin (Basis Points)			Operating Margin (Basis Points)		
	3 Mo Avg Var	MoM	YoY	3 Mo Avg Var	MoM	YoY
KH University	7,155	6,346	5,567	6,998	6,636	5,866
KH Medical Center	7,535	5,832	6,028	7,337	6,253	6,538
Rehabilitation Care Hospital	6,044	5,339	5,698	5,943	5,438	5,812
KH General Hospital	1,792	120	1,850 <span style="color:red">⬇️</span>	1,419	299	2,191 <span style="color:red">⬇️</span>
Alliance Hospital	1,194	800	880	737	650	704
Axiom General Hospital	-230	-947 <span style="color:red">⬇️</span>	-1,199 <span style="color:red">⬇️</span>	-879	-772	-950 <span style="color:red">⬇️</span>
Skokie General Hospital	878	-286 <span style="color:red">⬇️</span>	229	94	-457 <span style="color:red">⬇️</span>	254 <span style="color:red">⬇️</span>

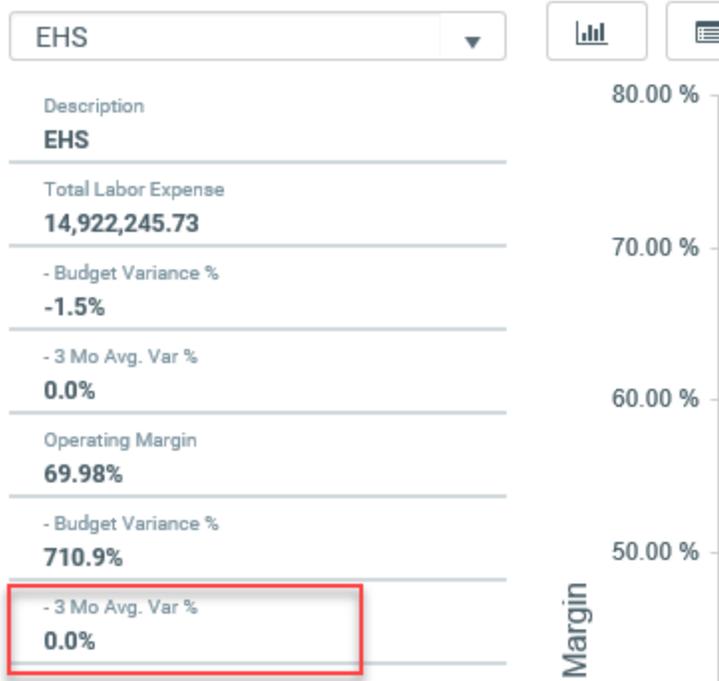
#### ► Peer Explorer

The Three Month Average displays by default in the Peer Explorer.

In the Chart view, Three Month Average displays in the Locator on the left-hand side of the page. Budget Variance will only display if you have a Budget license.

# Peer Explorer

by Total Labor Expense and Operating Margin



In table view, Three Month Average is displayed as amount and percentage columns. Budget columns will only display if you have a Budget license.

## Peer Explorer

by Total Labor Expense and Operating Margin

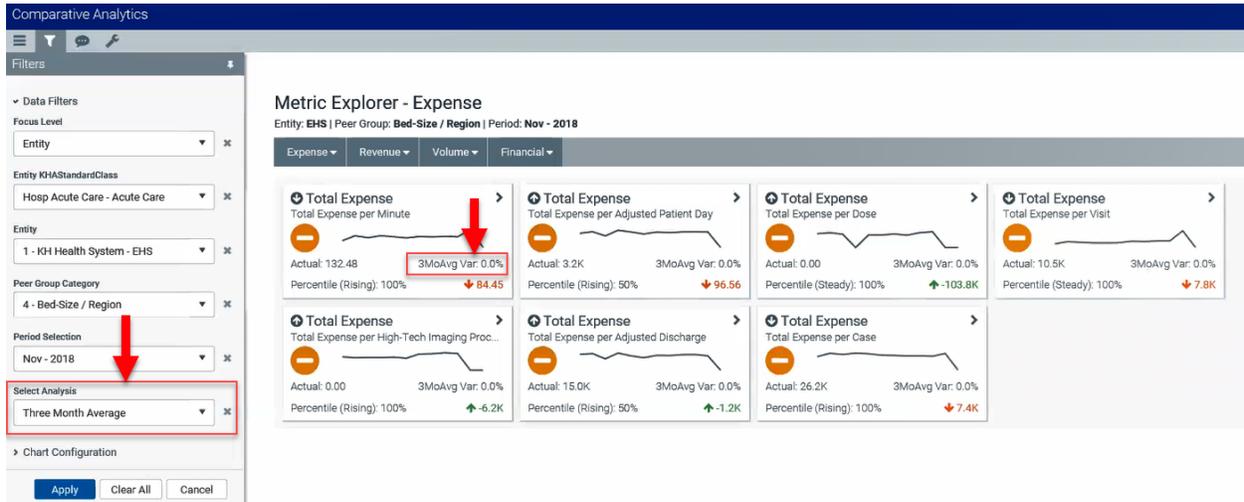
		Total Labor Expense			
Entity ↑	Actual	3 Mo Avg	3 Mo Avg Var	3 Mo Avg Var %	Budget
EHS	14,922,245.73	0.00	-14,922,245.73	0%	15,156,405.09
EMC	10,043,321.14	0.00	-10,043,321.14	0%	10,583,055.43
KHG	3,829,969.87	0.00	-3,829,969.87	0%	3,940,755.11

### ► Metric Explorer

Select the Three Month Average option from the Select Analysis drop-down in the filter menu.

If you do not have a Budget license, the **Select Analysis** drop-down will not display. Three Month Average data will display in the dashboard by default. If you have a Budget license, you can select either Three Month Average or Budget in the **Select Analysis** drop-down.

After you select Three Month Average, Axiom Comparative Analytics will display the Three Month Average Variance in each KPI box instead of Budget variance.



## ► Data Explorer

In the Data Explorer, Three Month Average is displayed by default as amount and percentage columns. Budget columns will only display if you have a Budget license. There are no filter selections to display Three Month Average.

### Data Explorer

To begin click the **Filters** (T) button, select the filters and click **Apply**

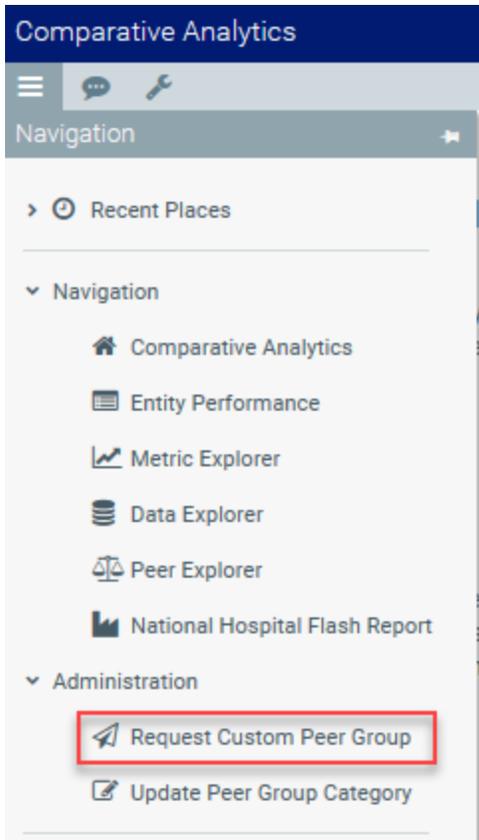
Entity ↑	Dept ↑	Measure ↑	Period ↑	Actual	Budget	Bud Var %	3 Mo Avg	3 Mo Avg Var %
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## Request Custom Peer Group

Use the Peer Group Request utility to create custom peer group requests. Access the Request Custom Peer Group utility from the [updated homepage](#) or click the **Navigation** menu.

Axiom Comparative Analytics includes five peer group categories: Bed Size, State, Region, Bed Size & Region, and National. This release includes the ability for your organization to design new peer groups based on select criteria; Geography, Net Patient Revenue, CMI, Adjusted Wage Index, Facility type, etc. This feature allows you to define up to five new Peer Group Categories and, within each Category, apply the proper definitions to each of your entities.

Kaufman Hall Data Services will capture your request/definition, process, and deliver all requested peer group data as part of the monthly run.

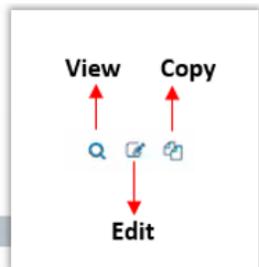


**NOTE:** You will only see links to Request Custom Peer Group if you have the Comparative Analytics Peer Group Request or Admin roles.

## Peer Group Request

For a Peer Group Request to be considered for the next month, you must submit it by the 15th of the current month.

	Request Name	Last Modified	Request Owner	Peer Group Category	
<a href="#">+ Add New Request</a>					
<input type="checkbox"/>	[Redacted]	06/07/2019	oramos	6 - Academic Medical Center	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="checkbox"/>	[Redacted]	06/07/2019	oramos	6 - Academic Medical Center	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="checkbox"/>	[Redacted]	06/06/2019	CA_PGReq	6 - Academic Medical Center	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="checkbox"/>	[Redacted]	06/05/2019	EKlein	6 - Academic Medical Center	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Copy</a>
<input type="checkbox"/>	[Redacted]	06/07/2019	oramos	7 - Childrens Hospitals	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Copy</a>

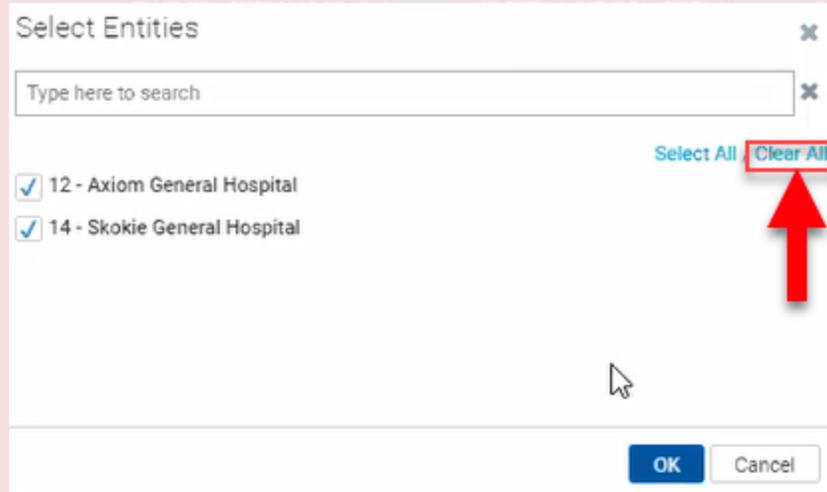


**NOTE:** If you only have the Peer Group Request role, you can only edit the requests that you are assigned to.

Click the **Copy** icon corresponding to an existing peer group request to create a new peer group request based on that peer group request.

**NOTE:** You cannot have entities for a peer group request that have already been used for a peer group request within the same category.

**IMPORTANT:** Before you pick new entities for a copied request, click **Clear All** in the upper-right of the **Select Entities** display. We will resolve this issue in a future release.



To add a new request without copying an existing request, click **+ Add New Request**. You must click the **New Request** link in the **Add Peer Group Request** dialog that displays to assign a name to the request. The name must be unique and cannot match the name of an existing request.

Add Peer Group Request
✕

Input	New Value
Request Name:	<a href="#">✎ New Request</a>
Peer Group Category:	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">           Select Peer Group Category ▼         </div> <span style="color: red; font-weight: bold; margin-left: 5px;">!</span>
Entities:	
Entity Type:	
Bed Size:	
Geography:	
Net Operating Revenue:	
Case Mix Index:	
Area Wage Index:	
Population:	0

**NOTE:** Only a Peer Group Request with a Population of 5 or greater will be accepted.

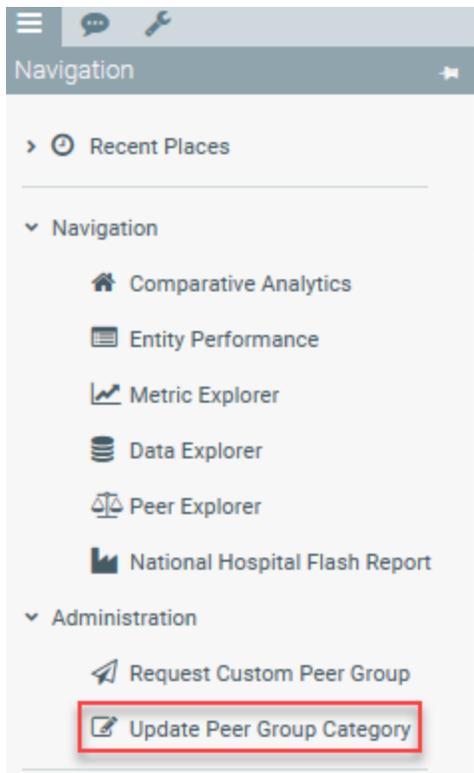
Save
Close

## Update Peer Group Category

Use the Update Peer Group Category utility to name up to five custom peer groups.

Access the Update Peer Group Category from the [updated homepage](#) or click the **Navigation** menu.

**NOTE:** This utility is only visible to users with the new Comparative Analytics Admin role.



The name you assign to the peer group category should describe the type of peer groups you want to have. For example, if you are requesting Academic Medical Centers for some of your entities, then one of the categories should be named Academic Medical Centers. Any request for peer groups related to Academic Medical Centers will select this category when submitting a request.

### Peer Group Category Update

This form is used to name the peer group categories that will be used to organize your peer groups. There are five custom peer groups available and these category names should explain the type of peer groups you want. For example, if you are requesting Academic Medical Centers for some of your entities then one of the categories should be named Academic Medical Centers and any request for peer groups related to Academic Medical Centers would select this category when submitting a request.

Peer Group Category	Description	Active For Request	Active for Dashboards
6	Academic Medical Centers	Yes ▼	No ▼
7	Custom 2 Not Used	No ▼	No ▼
8	Custom 3 Not Used	No ▼	No ▼
9	Custom 4 Not Used	No ▼	No ▼
10	Custom 5 Not Used	No ▼	No ▼

In the **Active For Request** column, click the drop-down and then click **Yes** to make the peer group active in the request form.

In the **Active for Dashboards** column, click the drop-down and then click **Yes** to make the associated peer group category active for selection. The peer group category will display in all Axiom Comparative Analytics assets.

**NOTE:** We suggest that you only enable Active for Dashboards after data for the selected category has been calculated and supplied by Kaufman Hall.

## Homepage update

The Comparative Analytics homepage includes links to the new Request Custom Peer Group and Update Peer Group Category assets as well as the National Hospital Flash Report.

Access to Request Custom Peer Group and Update Peer Group Category assets is restricted to users with certain user roles. As a result, not all users will see these links. For more information on these assets, see [Request Custom Peer Group \(page 13\)](#) and [Update Peer Group Category \(page 16\)](#).

## Comparative Analytics Home

 ENTITY PERFORMANCE	Analyze profitability, volume, revenue and expense across entities.	 REQUEST CUSTOM PEER GROUP	Request custom peer group for any entity.
 METRIC EXPLORER	Review performance of key metric areas for any selected business segment.	 UPDATE PEER GROUP CATEGORY	Update Peer Group Categories for custom peer groups. Customize peer groups and organize up to 5 different categories for your organization.
 DATA EXPLORER	Ad-hoc data analysis for any measure at any level in a tabular format.		
 PEER EXPLORER	Compare the correlation and performance between two key metrics against multiple internal and external peers.		
 NATIONAL HOSPITAL FLASH REPORT	Monthly digital publication providing healthcare leaders a deeper understanding of the current state of hospitals to drive performance improvement and ultimately improve healthcare nationally.		



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