Release Notes

Axiom Financial Planning

Version 2019.3.1

KaufmanHall AXIOM

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Contents

Summary

Kaufman Hall is pleased to announce the 2019.3.1 release of Axiom Financial Planning. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Contact support@kaufmanhall.com or your implementation consultant, and they will confirm an installation period with you.
3. **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 Client Success at 1-888-543-6833 or support@kaufmanhall.com.

Training

Kaufman Hall offers multiple training options for our clients. 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 2019.3.1 upgrade before applying any 2019.3.1 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 2019.3.1 before the first product upgrade. Refer to the **Axiom Software 2019.3.1 Release Notes** and **Axiom Healthcare Suite 2019.3 Release Notes** for considerations before upgrading.

When upgrading to the 2019.3.1 version of Axiom Financial Planning, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- KHA delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

New features summary

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

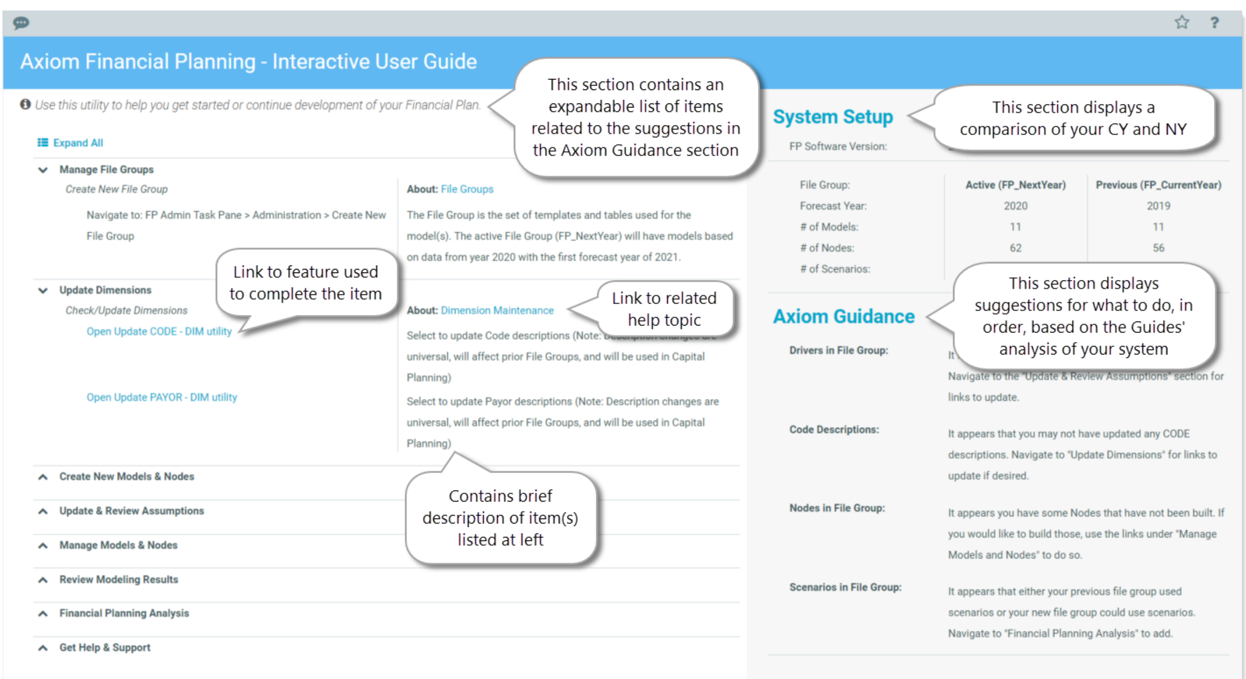
New Axiom Financial Planning Interactive User Guide

The FP Interactive User Guide helps Axiom Financial Planning administrators develop their financial plans by guiding them through the process.

This utility analyzes your Axiom Financial Planning system (files groups, drivers, dimensions, scenarios, nodes, etc.) and determines what needs to be updated, and then displays a list of suggested items on the right.

Review the analysis on the right side of the utility (under Axiom Guidance), and then see the items listed on the left. The utility also provides links to assets used in each part of the process and links to related help topics. The list on the left does not change, but the items under Axiom Guidance update based on where you are in the process.

You can use this utility at any point in the plan development process because it performs a new analysis each time you open it.



To use the interactive user guide:

1. In the Fin Plan Admin task pane, in the **Interactive User Guide** section, double-click **FP Interactive User Guide**.

2. On the right side of the page in the **System Setup** section, review the information.
3. In the **Axiom Guidance** section, review the first suggested item. The instructions "Navigate to..." tell you what section on the left corresponds to the item. On the left side of the page, expand the corresponding section. Use the links to open the tools needed to complete the item. If you need additional help, click the link to the related help topic.
4. When finished with the first item, continue to the next one listed in the **Axiom Guidance** section.

> **TIP:** After completing any of the items, you can stop, close the utility, and return later. When you reopen the utility, the list updates to reflect any work you have already done. To get an updated list at any time while working through the utility, close and reopen the utility.

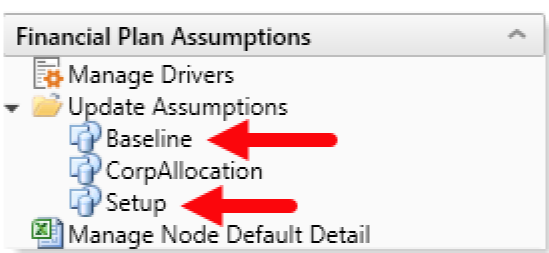
Copy driver file data for the annual roll forward

When preparing to roll data forward from one year to the next, you can now copy data from the prior file group for the Setup and Baseline drivers. You can also copy driver data for custom drivers once you recreate them for your new file group set. The copy action copies the driver data and also insert calc method data, so be aware that it will override any existing data in the drivers created for the Current Year file group.

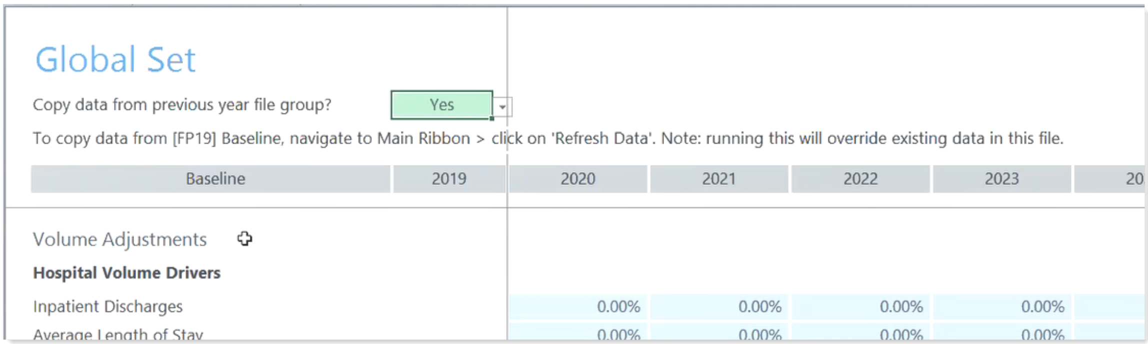
> **NOTE:** These instructions are for new File Groups created from the Create New File Group - Next Year function. Create your new File Group before updating your driver files, and then perform the annual roll forward. You can update driver growth rates at any time.

To copy driver file data for a driver:

1. In the Fin Plan Admin task pane, in the **Financial Plan Assumptions** section, expand **Update Assumptions**.
2. Double-click the desired driver (Setup or Baseline).



3. At the top of the driver, the **Copy data from previous year file group?** button reads "No." Click the drop-down arrow to the right and select **Yes**.

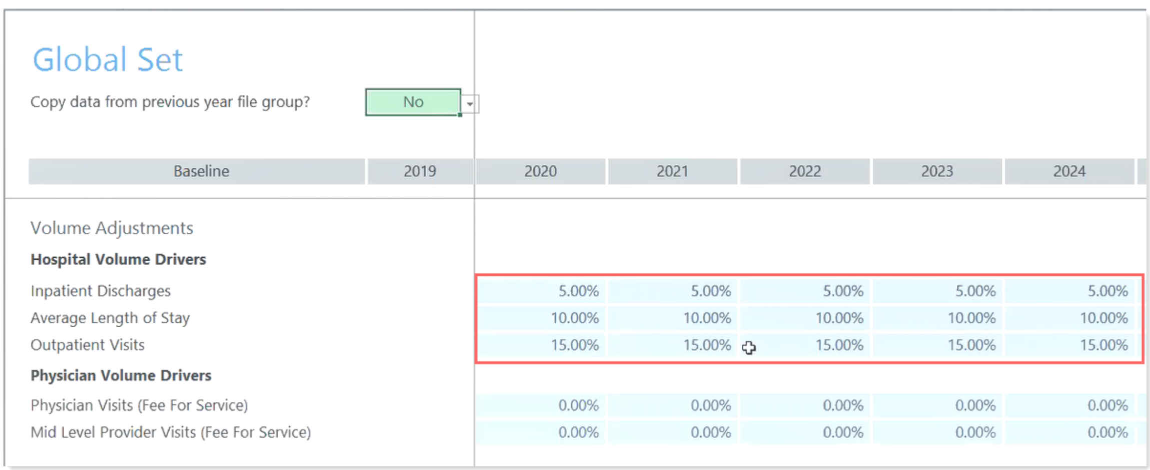


IMPORTANT: Before bringing in data from the previous year, be aware that all data will be overwritten with prior file group data and any formulas will be overwritten.

4. In the **Main** ribbon tab, click **Refresh Data**. This runs a query that pulls in values (if there are any) from the previous year's driver of the same name.

   NOTE: The driver names for both the driver being copied from and the driver being copied to must be identical. If they are not, the copy button does not display.

   After the data copies over, the copy data button resets to No.



   NOTE: The Supplemental Detail section is not populated, with the exception of the Federal Medicare Adjustment (Dollar Amount). This is a known limitation.

5. Save the driver.

To copy a custom driver:

1. Re-create your custom driver using the Manage Drivers utility in the Financial Plan Assumptions section. See "Creating or deleting Assumption driver files" in the online help for details. Make sure that you give the new driver the exact name as the one from the prior year. If the names are not

identical, the copy button does not display.

2. At the top of the new driver, click the drop-down arrow to the right of the **Copy data from previous year file group?** button and select **Yes**.
3. In the **Main** ribbon tab, click **Refresh Data** to bring in data values and calc methods from the prior year driver.
4. Save the driver.

Updated Annual Rollforward Utility

Axiom Financial Planning administrators now have a better way to roll forward annual financial planning data. This updated form-based utility available from the Fin Plan Admin task pane replaces the old Excel-based utility of the same name.

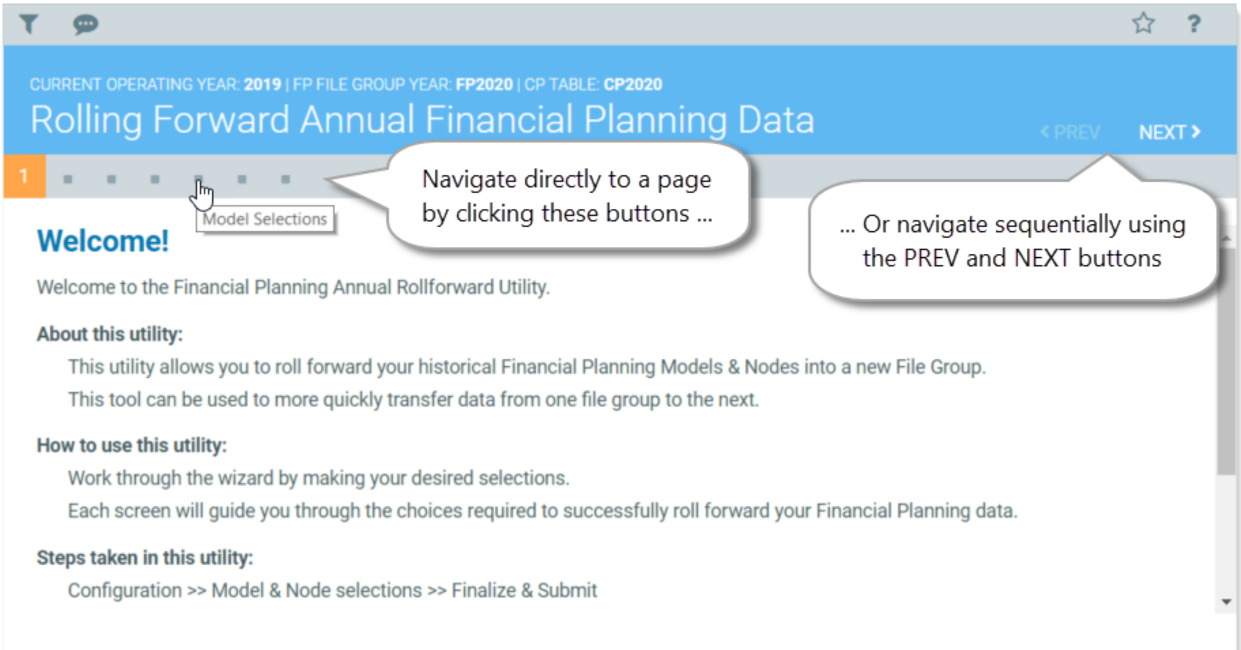
The new utility includes all the functionality in the old utility but presents it in a user-friendly wizard that walks you step-by-step through the process of pulling data from the Current Year file group and importing it to the Next Year file group.

In addition to the new format, updates include:

- Fewer steps with no need to open and close multiple tools
- No need to update File Group aliases
- No need for code conversion
- Ability to create new nodes and rebuild existing nodes from within the utility
- Option to build nodes at a later time

The utility consists of three main parts:

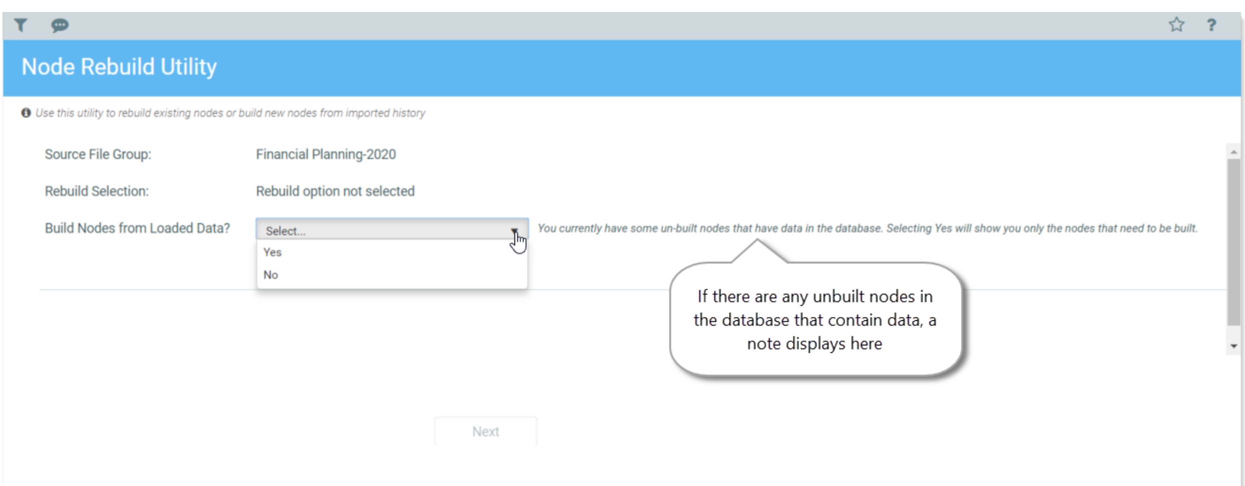
- Configuring data sources and years
- Selecting models and nodes
- Finalizing and submitting



For more information, see "Using the Annual Rollforward Utility" in the online help.

New Node Rebuild Utility

Users who build nodes from imported data or rebuild existing nodes can now use a single utility. The Node Rebuild Utility replaces the Rebuild Node from Imported History utility and the Rebuild Node utility. This new utility includes all the functionality in the old utilities but presents it in a more user-friendly way that guides you through the process of creating nodes or rebuilding existing nodes.



Select which function to perform, and the utility provides the appropriate options. For example:

- When you select to build nodes from loaded data, the utility checks for any nodes that have data but no plan files, and then recommends they be built.
- When you select to rebuild nodes, the utility displays a list of all existing nodes that can be rebuilt.

Additionally, a built-in filters panel lets you filter lists of models by model, node type, and template.

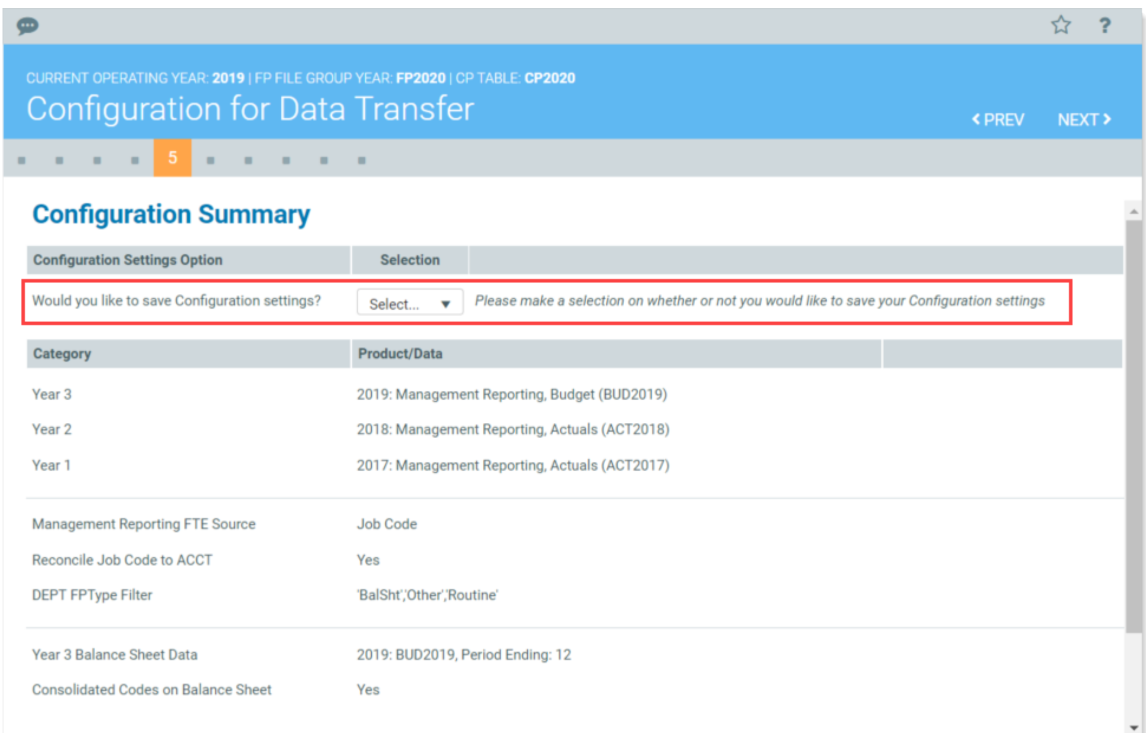
For more information, see the following in the online help:

- “Rebuilding a node”
- “Building nodes from imported history and other data”

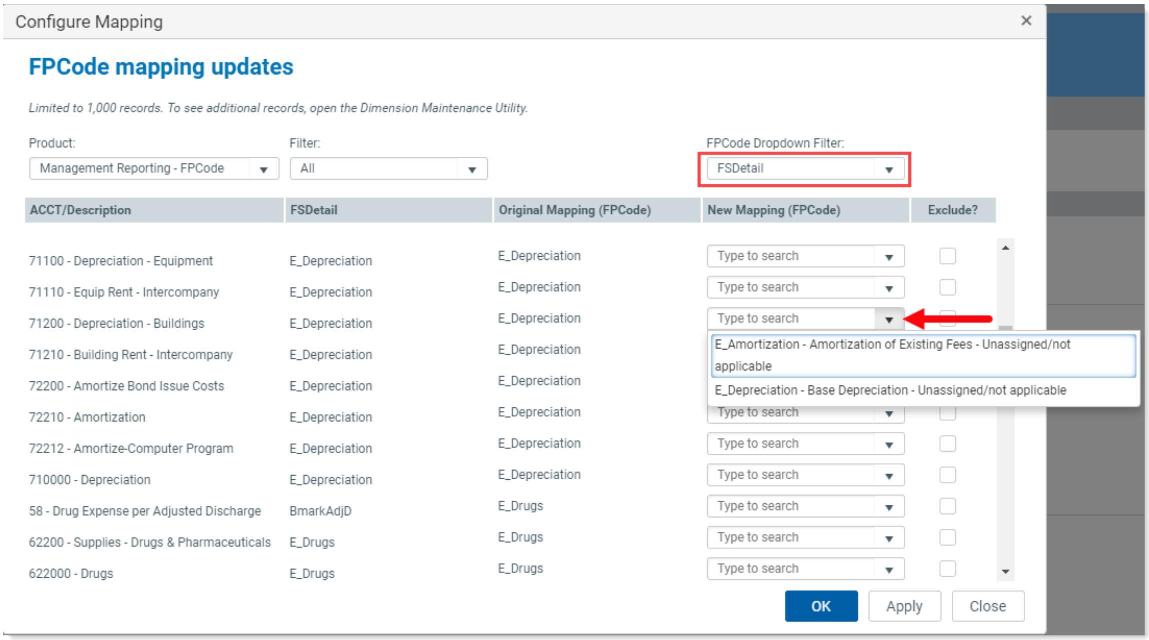
Transfer to Financial Planning utility enhancements

Improvements to the Transfer to Financial Planning utility for this release include the following:

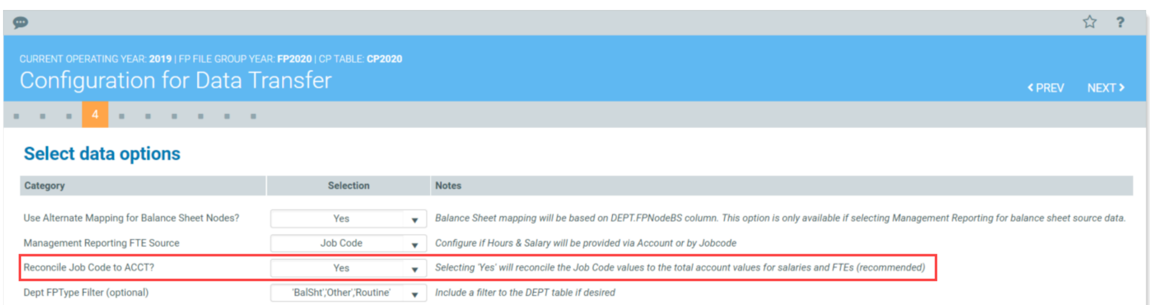
- The Configuration Summary page has new option to save configuration settings. If you select Yes, all your selections from the previous pages will be saved when you exit the utility. If you select No, all items will revert to the default settings the next time you open the utility.



- The Configure Mapping tool has a new FPCode drop-down filter for filtering the list of valid mapping codes. The default, FSDetail, restricts mapping selection choices to those in the FSDetail category. To see the unrestricted list, change the drop-down to All.



- When configuring data, if you select Job Code as the source for Management Reporting FTEs, you now have the option to automatically reconcile Job Code values to the total account values for salaries and FTEs. Yes is selected by default but you can change this to No if you want to reconcile manually.



Issues resolved in 2019.3

The following table lists the resolutions for issues addressed in 2019.3, released on September 16, 2019:

Issue Description	Description
DMU- error on refresh --> FP as the product and RFCODE or RFGroup is selected [TFS 34364]	**Summary:** For systems that do not include Axiom Rolling Forecast, the RFCODE and RFGroup options are available to select as dimensions in the Dimension Maintenance Utility. If the user selects either of these, they receive an error. **Resolution:** Corrected by adjusting the code to first check if the RF tables exist. If they do not, the RFCODE and RFGroup options are not available for selection.
PFB-07631 - Consolidating by Node Report Quick Filter cell formula [TFS 36223]	**Summary:** The formula for cell F37 in Consolidating by Node report is incorrect. When the user selects a quick filter, the formula references an empty cell. **Resolution:** Corrected by fixing formula to point to correct cell.
PFB-07668 - Equiv P Days listed twice on F/S with Detail Report [TFS 36411]	**Summary:** When using the F/S with Detail report, Equiv Patient Days is listed twice in the Key Ops Stats section, which produced a duplicate heading row. The first entry should be Adjusted Patient Discharges. **Resolution:** Corrected by moving cells C816 and F816 to bring in the Code.Description for Equivalent Patient Days to the correct row, and also changed 1815 to "Adjusted Patient Discharges."
HP Template double counts medical expense [TFS 36424]	**Summary:** The HP template is double counting medical expenses on the balance sheet node type. **Resolution:** Corrected by updating template so that the formula in cell F870 is correct, then copied the correction across all projection years.
PFB-07825 - Capitated Payors do not have Contractual Blocks in Rolled Forward Nodes [TFS 37680]	**Summary:** If a user is using capitated payors on their nodes, after the annual roll forward, the contractual allowance sections do not get created when the node is created. **Resolution:** Corrected by updating the Acute.xlsx template, the Plan.xlsx calc method, and the Practice.xlsx calc method.

Issue Description	Description
PFB-07906 - MR Variance Analysis Dashboard Errors [TFS 38054]	**Summary:** The Management Reporting Variance Analysis dashboard - AQ1 in the AdditionalLists tab is creating an error. The message is "Table with name _RFConfig does not exist." The Variables are looking to the SuiteVariables, but the field does not exist, even though the table being looked for does. **Resolution:** Corrected by modifying AnalysisGrids!AQ2 to turn off when Budgeting is not present; updated Management Reporting Variance Analysis.xlsx.
PFB-07914 - Update DIM - CODE utility needs to refresh on open. [TFS 38056]	**Summary:** One of the Axiom queries (AQ3) that is supposed to run when the Update DIM-CODE utility opens is not running. This causes changes made to not update, and additionally, when saving, it overwrites changes made again. **Resolution:** Corrected by adjusting the code so that AQ3 refreshes when the utility is opened, and by setting AQ4 to 0 (zero) on Update.

Issues resolved in 2019.3.1

The following table lists the resolutions for issues addressed in 2019.3.1, released on October 14, 2019:

Issue Description	Description
Transfer to FP Patch 1 Items [TFS 38998]	**Summary:** Two issues: 1. The Rolling Forecast file group name is causing an error when opening the Transfer to Financial Planning utility. 2. If a previously saved configuration included *jobcode* as the selection for Management Reporting FTE Source on page 4 of the utility and the user changes the file source selection to Rolling Forecast, errors result because jobcode is not a selectable option when Rolling Forecast is selected as the file source. The save function on the configuration tab is not active when Rolling Forecast is selected. **Resolution:** Corrected the first issue by changing the code in the Configuration tab so that the utility first verifies that the file group name is correct. Corrected the second issue by adjusting the code so that configuration settings are reset when a saved data source is changed.
Transfer to Financial Planning bucket list [TFS 39602]	**Summary:** Clients with Performance Reporting but not Budgeting are unable to use the utility. **Resolution:** Corrected by changing C27 on the Navigation tab from Budget Planning to Performance Reporting. Corrected utility name issue to display the correct name: Node Rebuild Utility.
Transfer to FP - Product check is looking for 'Rolling Forecasting' rather than 'Rolling Forecast Quarterly' (and a couple more items) [TFS 39824]	**Summary:** During product check, the Transfer to Financial Planning utility is looking for the wrong product name: “Rolling Forecasting” instead of “Rolling Forecast Quarterly.” **Resolution:** Corrected by adjusting the lookup to look for “Rolling Forecast Quarterly” instead of “Rolling Forecasting.”

Manual setup instructions

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

Known issues

The following table lists the known issues in this release.

Issue Description	Description
Some reports are not formatted for drilling [TFS 14163]	**Symptom:** When drilling in some of the reports, the results may not have the correct formats. **Explanation:** Will be fixed in a future release.
PFB-07322 - Clone node & refresh history [TFS 34016]	**Symptom:** Historical data does not populate when a node is cloned and the setup driver's "Update Historical Data when opening plan files" setting is set to YES. **Explanation:** Will be fixed in a future release. Template will be updated to turn off update history AQ when a node is cloned. **Workaround:** History does populate correctly when the setting is set to NO. Change setting "Update Historical Data when opening plan files" in the Setup driver to NO.

IMPORTANT: Refer to the **Axiom for Healthcare Suite 2019.3 Release Notes** for additional known issues that have a suite-wide impact.