Release Notes
Axiom Decision Support
Version 2019.3

KaufmanHall
AXIOM

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Summary

Kaufman Hall is pleased to announce the 2019.3 release of Axiom Decision Support. 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:

NOTE: The upgrade process listed below only applies to on-premise installations and not cloud products.

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

Support

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

Training

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

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

Product upgrade notes

IMPORTANT: You must apply the Axiom Software 2019.3 upgrade before applying any 2019.3 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 *before* the first product upgrade. Refer to the **Axiom Software 2019.3 Release Notes** and **Axiom Healthcare Suite 2019.3 Release Notes** for considerations before upgrading. Apply this update ONLY if you have already applied the 2019.3 release and completed all the manual setup steps from the corresponding release notes.

When upgrading to the 2019.3 version of Axiom Decision Support, keep in mind the following:

- This product upgrade contains new tables, columns, updated templates, reports, scripts/imports 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 you moved to a new location since the last upgrade 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

Axiom Decision Support 2019.3 provides the tools you need to assist with the timely analysis needed to make data-driven decisions regarding your service lines. The new 2019.3 features provide a mechanism to easily monitor service line performance to help drive strategic expansion and go-forward business decisions. They also provide accurate and timely cost accounting information to drive efficiencies.

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

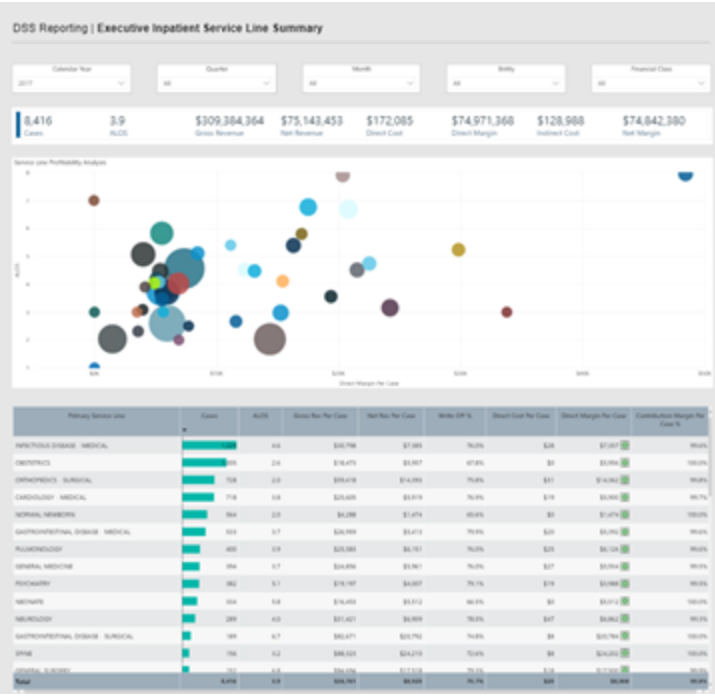
Role-based dashboards

The new Axiom Intelligence Service Line Dashboard reports provide insight into services to help you manage your business and maximize performance across the continuum, ensuring the proper care at the rate place, time, and by the correct provider.

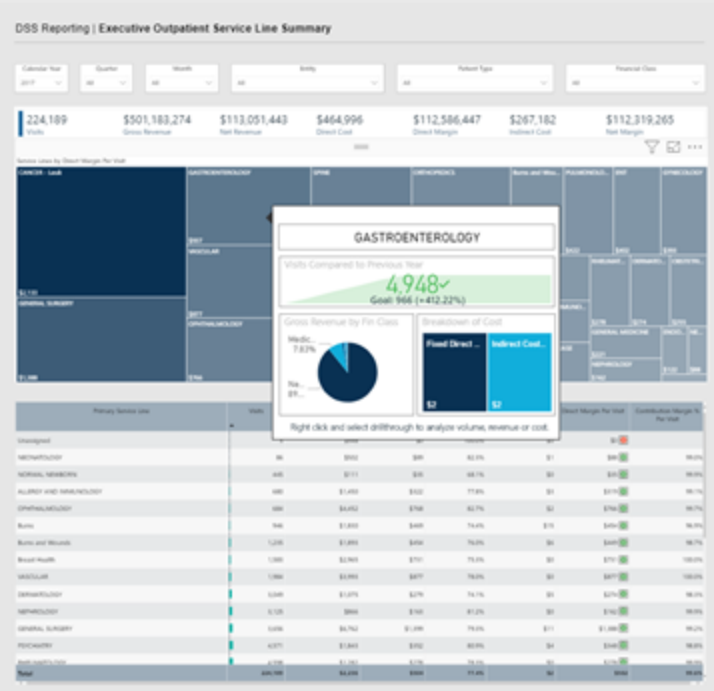
Axiom Decision Support includes three dashboards that are organized into service lines across three major patient types:

NOTE: Click the link for each dashboard to see details about each.

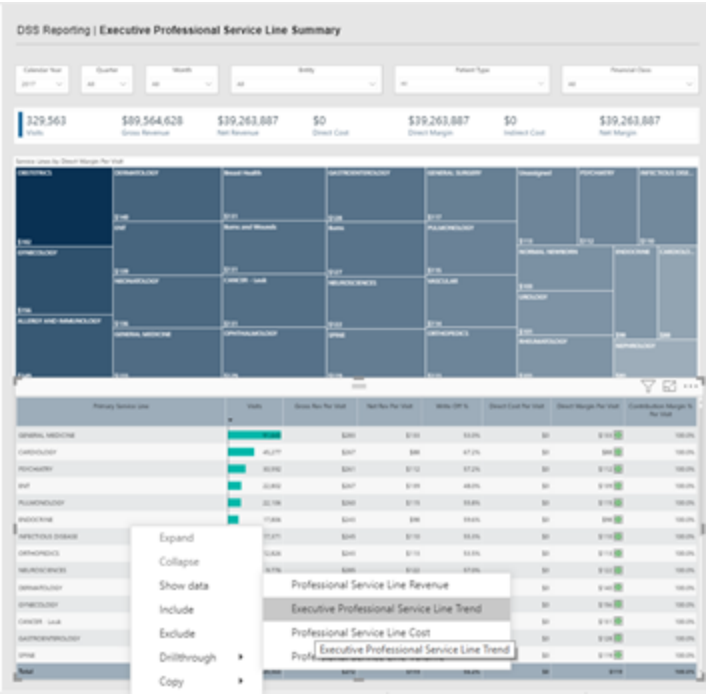
- Inpatient Service Line Dashboard



- Outpatient Service Line Dashboard



- Professional Billing Service Line Dashboard



Along with the dashboards listed above, the system also comes with five example reports that are used as part of the video training series.

TIP: The online help home page also provides links to these videos.

For more information on managing the Service Line Dashboard reports, see Reporting mode and the list of Reporting Mode - Web Tutorials in this document.

Inpatient Service Line Dashboard

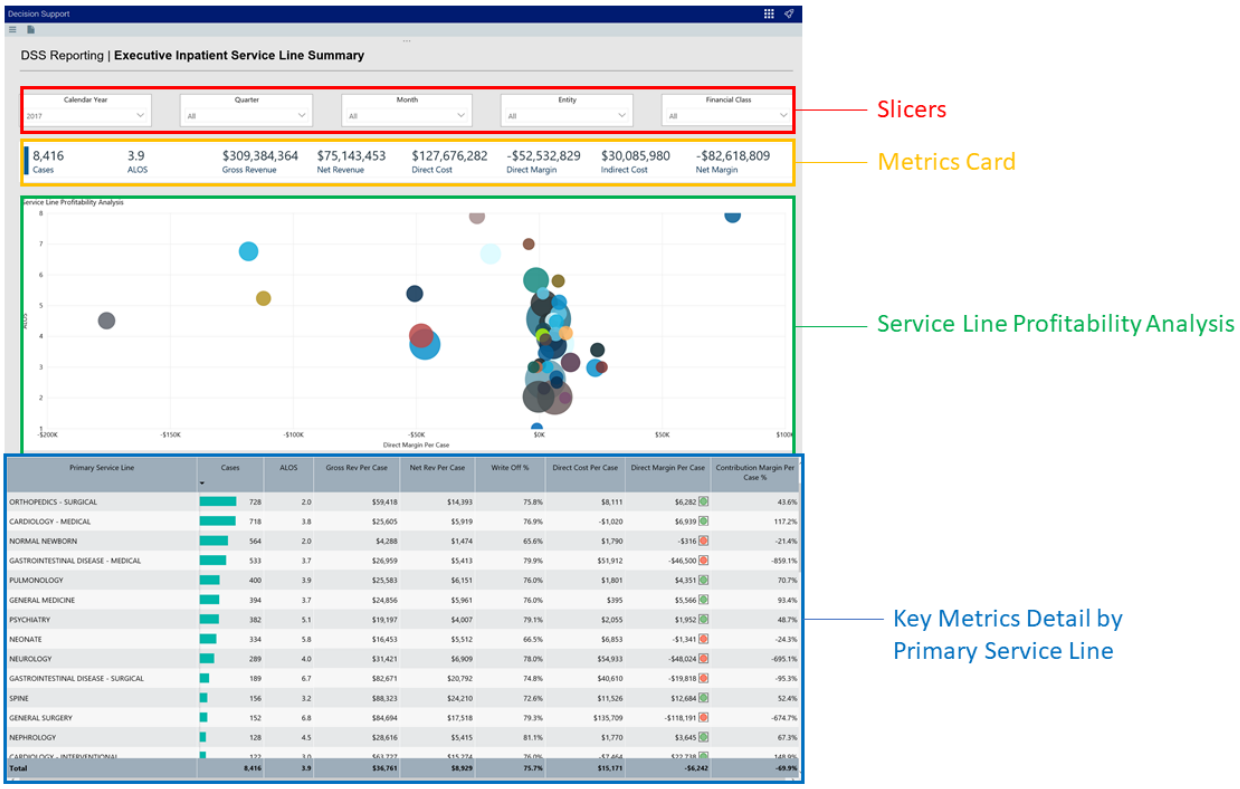
The Inpatient Service Line Dashboard displays a view of all the service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

NOTE: Requires that your organization uses DSS PtType, and Service Line uses PrimaryService.name.

Executive Inpatient Service Line Summary page

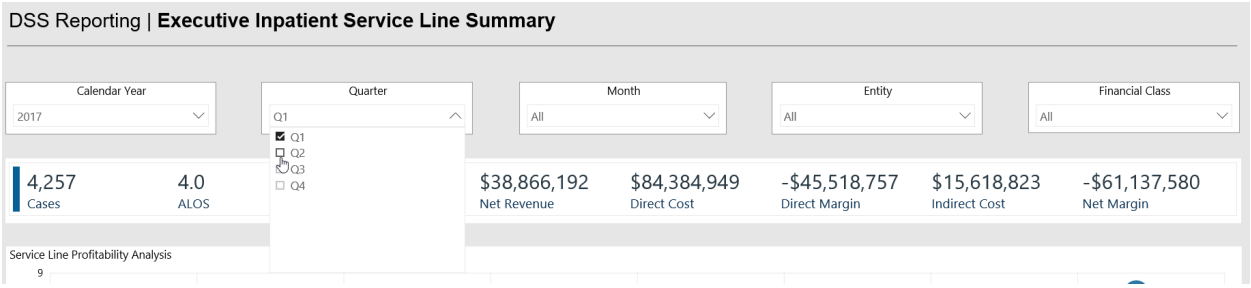
The Executive Inpatient Service Line Summary page serves as the main home page for the dashboard and includes the following sections:

- Slicers - Allows you to filter data by time (calendar year, quarter, month), entity, and financial class
- Metrics Card - Displays KPI data for cases and ALOS, gross and net revenue, direct and indirect cost, and direct and net margin
- Service Line Profitability Analysis - Displays a profitability visualization of the direct margin per case vs. the average length of stay
- Key Metrics Detail by Primary Service Line - Displays the values related to profitability for each service line.



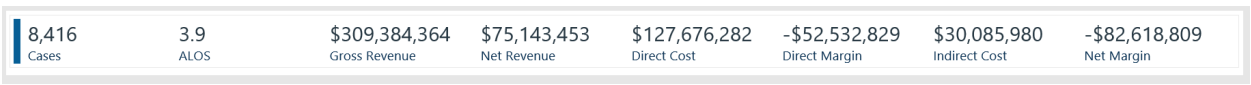
Slicers

From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.



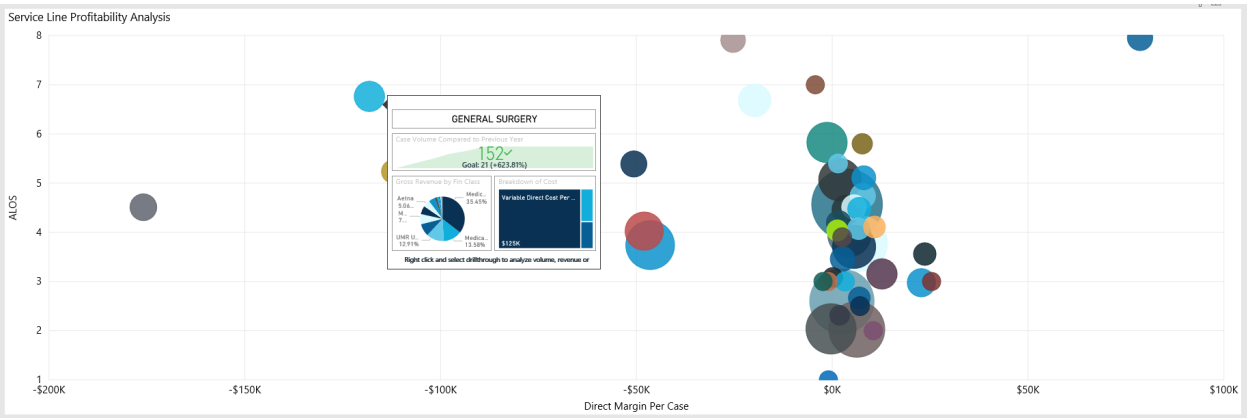
Metrics Card

As you select the different options from the slicer drop-downs, the totals in the Metrics Card adjust accordingly.

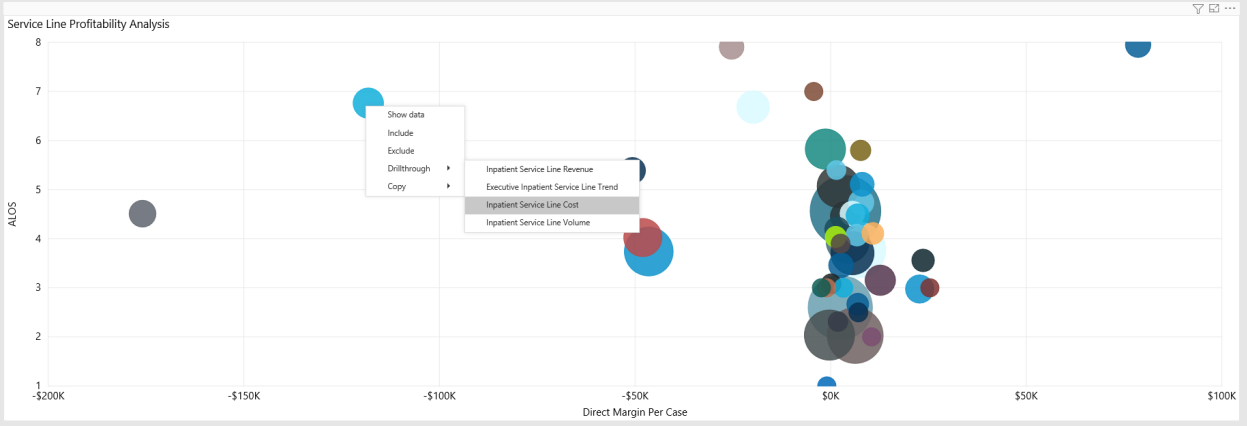


Service Line Profitability Analysis

The Service Line Profitability Analysis section provides a visualization of your profitability across service lines. You can view details about a specific service line by placing your cursor on a circle. The system displays a tool tip that provides information on the case volume compared to the previous year, the gross revenue by financial class, and a breakdown of costs.



You can drill down further by right-clicking the dot, and from the menu, selecting the drillthrough reports to display.

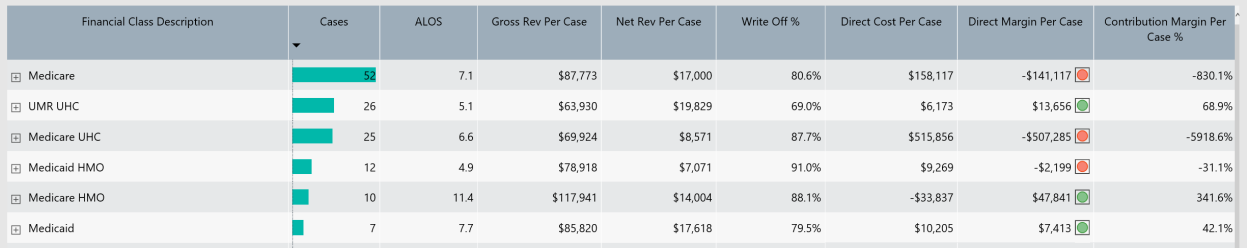


The available drillthrough reports include the following:

- Executive Inpatient Service Line Trend
- Inpatient Service Line Revenue
- Inpatient Service Line Cost
- Inpatient Service Line Volume

Key Metrics Detail by Primary Service Line

The Key Metrics Detail table shows information regarding the details of the key metrics.



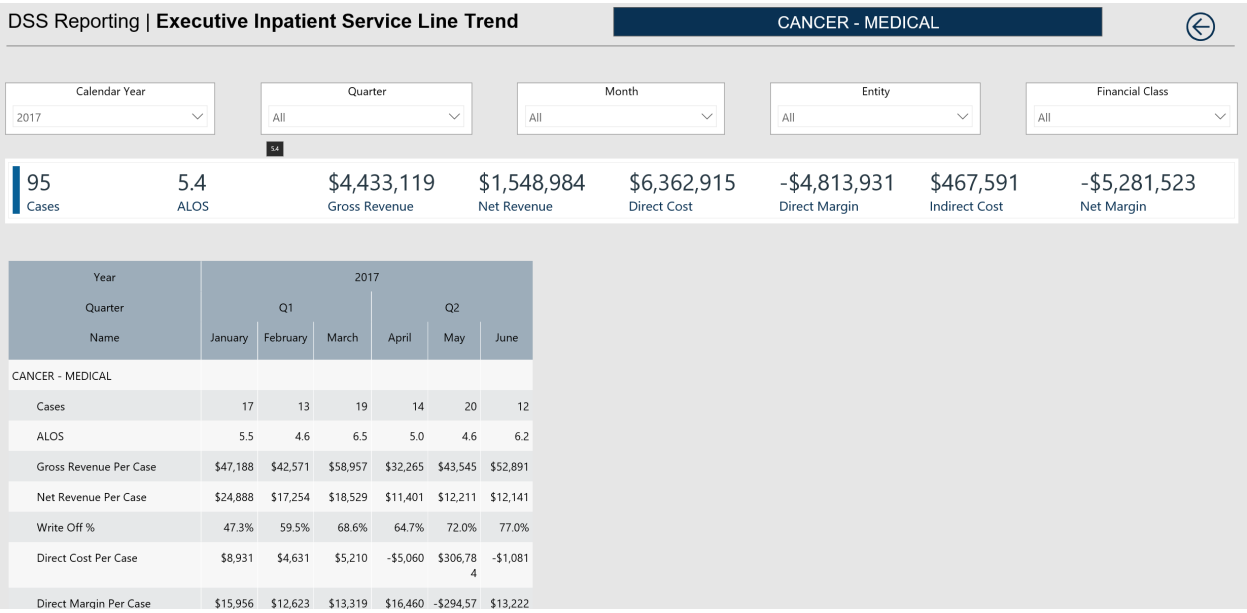
Financial Class Description	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
Medicare	52	7.1	$87,773	$17,000	80.6%	$158,117	-$141,117	-830.1%
UMR UHC	26	5.1	$63,930	$19,829	69.0%	$6,173	$13,656	68.9%
Medicare UHC	25	6.6	$69,924	$8,571	87.7%	$515,856	-$507,285	-5918.6%
Medicaid HMO	12	4.9	$78,918	$7,071	91.0%	$9,269	-$2,199	-31.1%
Medicare HMO	10	11.4	$117,941	$14,004	88.1%	-$33,837	$47,841	341.6%
Medicaid	7	7.7	$85,820	$17,618	79.5%	$10,205	$7,413	42.1%

Inpatient Service Line Dashboard - Drillthrough reports

This section includes the drillthrough reports available in the Service Line Profitability Analysis section of the Inpatient Service Line Dashboard.

Executive Inpatient Service Line Trend

This page displays the key metrics trend by service line.

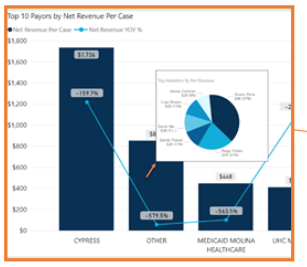


Year	2017					
Quarter	Q1			Q2		
Name	January	February	March	April	May	June
CANCER - MEDICAL						
Cases	17	13	19	14	20	12
ALOS	5.5	4.6	6.5	5.0	4.6	6.2
Gross Revenue Per Case	$47,188	$42,571	$58,957	$32,265	$43,545	$52,891
Net Revenue Per Case	$24,888	$17,254	$18,529	$11,401	$12,211	$12,141
Write Off %	47.3%	59.5%	68.6%	64.7%	72.0%	77.0%
Direct Cost Per Case	$8,931	$4,631	$5,210	-$5,060	$306,784	-$1,081
Direct Margin Per Case	$15,956	$12,623	$13,319	$16,460	-$294,57	$13,222

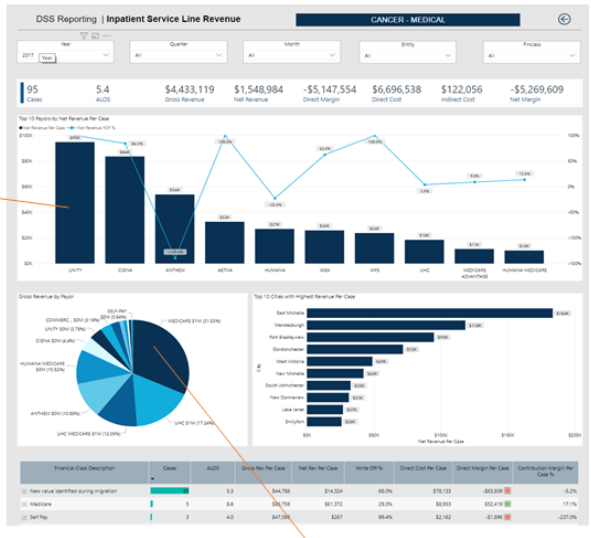
Inpatient Service Line Revenue

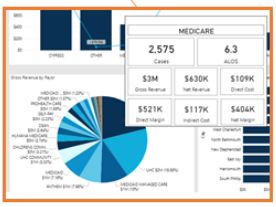
This page displays the following:

- Top 10 Payors by Net revenue Per Case
  - Includes Inpatient Revenue Bar Chart tool tip
- Gross Revenue by Payor
  - Includes Inpatient Revenue Pie Chart tool tip
- Top 10 Cities with Highest Revenue Per Case
- Revenue Details by Financial Class



Tool Tip: Inpatient Revenue Pie Chart





Tool Tip: Inpatient Revenue Bar Chart

Inpatient Service Line Cost

This page displays the following:

- Top 10 MSDRGs by Total Cost Per Case
- Variable Direct Cost Per Case by Financial
- Admitting Provider Comparison Cost Per Case ALOS Variable Direct Cost Per Case
    - Inpatient Cost Scatter Chart tool tip
- Variable Direct Cost Per Case by Day of Stay
    - Inpatient Cost Tree Map tool tip
- Cost Per Case Detail

Inpatient Service Line Volume

This page displays the following:

- Top (N) MSDRGs by Cases with YOY Growth
  - Inpatient Volume Bar Chart tool tip
- Cases by Financial Class Description
  - Tool Tip: Inpatient Revenue Pie Chart tool tip
- Discharges by Day of Week
- Cases by Discharge Status
- Cases by Zip Code

Tool Tip: Top (N) MSDRGs by Cases with YOY Growth

Tool Tip: Cases by Financial Class Description

Outpatient Service Line Dashboard

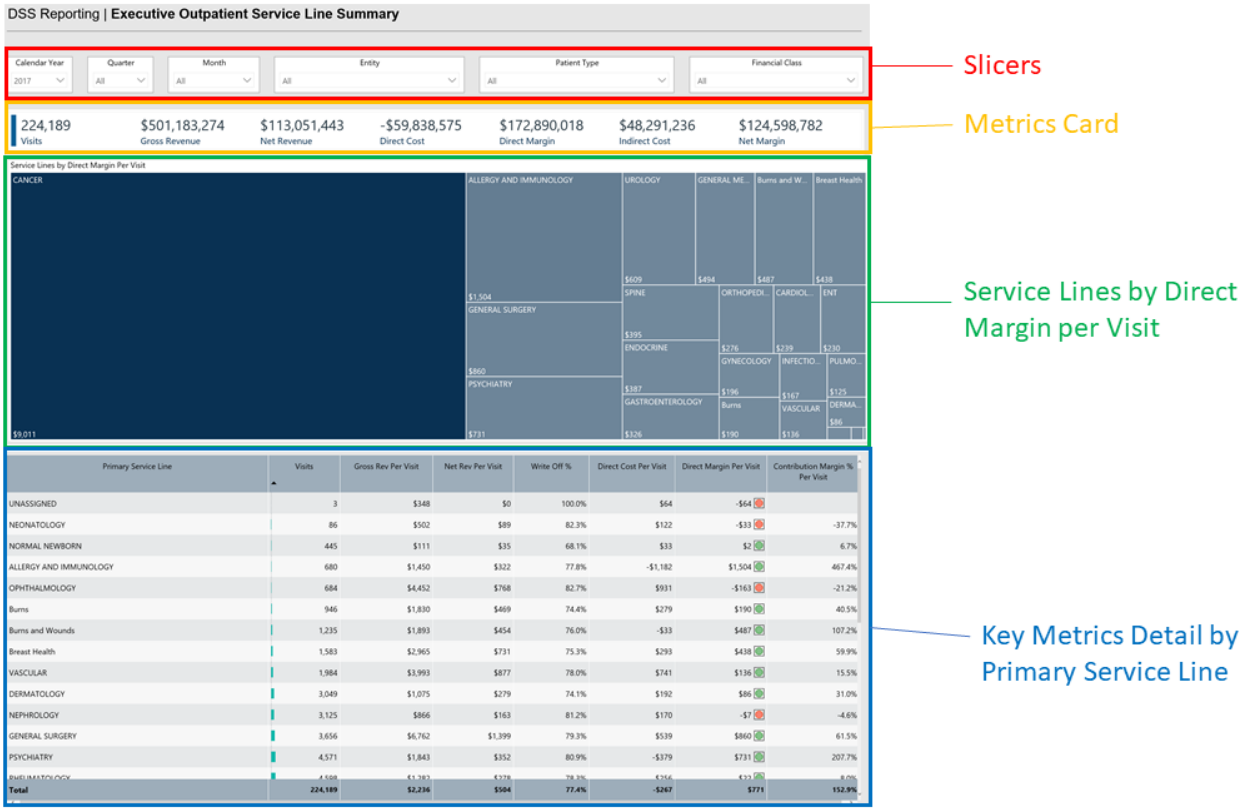
The Outpatient Service Line Dashboard displays a view of all the service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

NOTE: Requires that your organization uses DSS PtType, and Service Line uses PrimaryService.name.

Executive Outpatient Service Line Summary page

The Executive Outpatient Service Line Summary page serves as the main home page for the dashboard and includes the following sections:

- Slicers - Allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class
- Metrics Card - Displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin
- Service Lines by Direct Margin Per Visit - Displays a visualization of the direct margin per visit for each service line
- Key Metrics Detail by Primary Service Line - Displays the values related to profitability for each service line



Slicers

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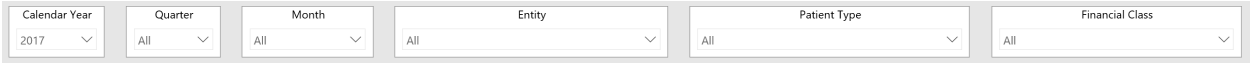
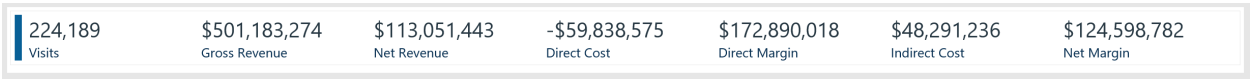


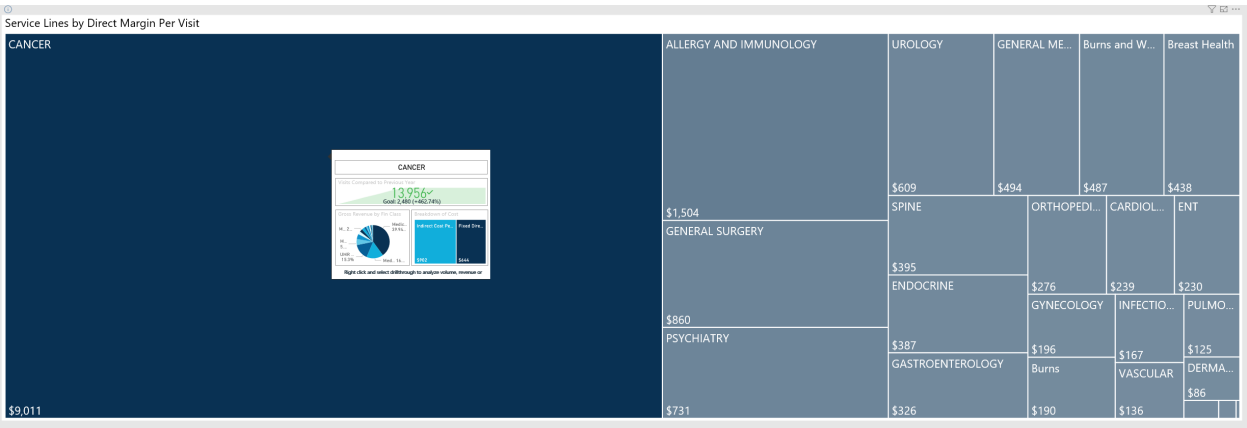
Metrics Card

As you select the different options from the slicer drop-downs, the totals in the Metrics Card adjust accordingly.

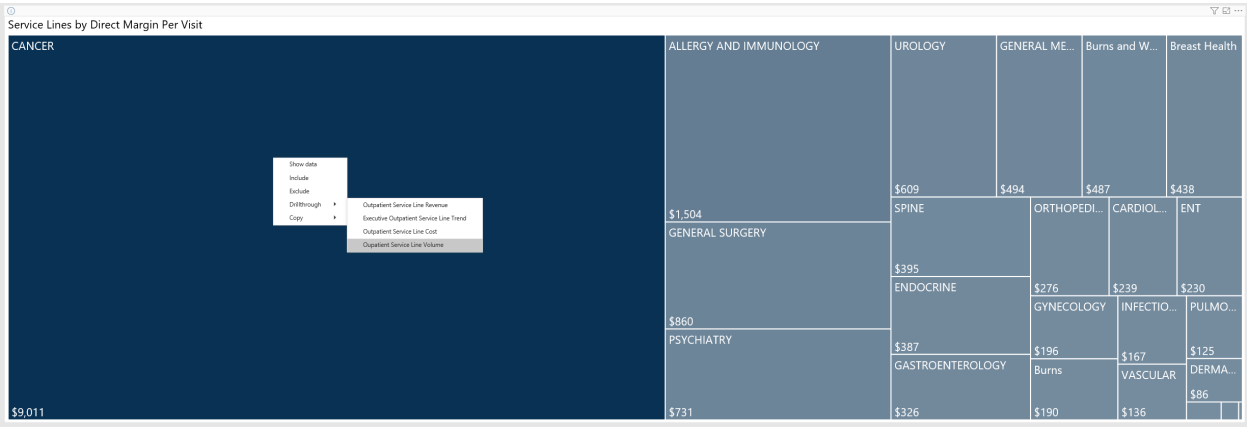


Service Lines by Direct Margin Per Visit

The Service Lines by Direct Margin Per Visit section provides a visualization of your direct margin for each visit across service lines. You can view details about a specific service line by placing your cursor on a square. The system displays a tool tip that provides information on the number of visits compared to last year, the gross revenue by financial class, and a cost breakdown.



You can drill down further by right-clicking a square, and from the menu, selecting the drillthrough reports to display.



The available drillthrough reports include the following:

- Executive Outpatient Service Line Trend
- Outpatient Service Line Revenue
- Outpatient Service Line Cost
- Outpatient Service Line Volume

Key Metrics Detail by Primary Service Line

The Key Metrics Detail table shows information regarding the details of the key metrics.

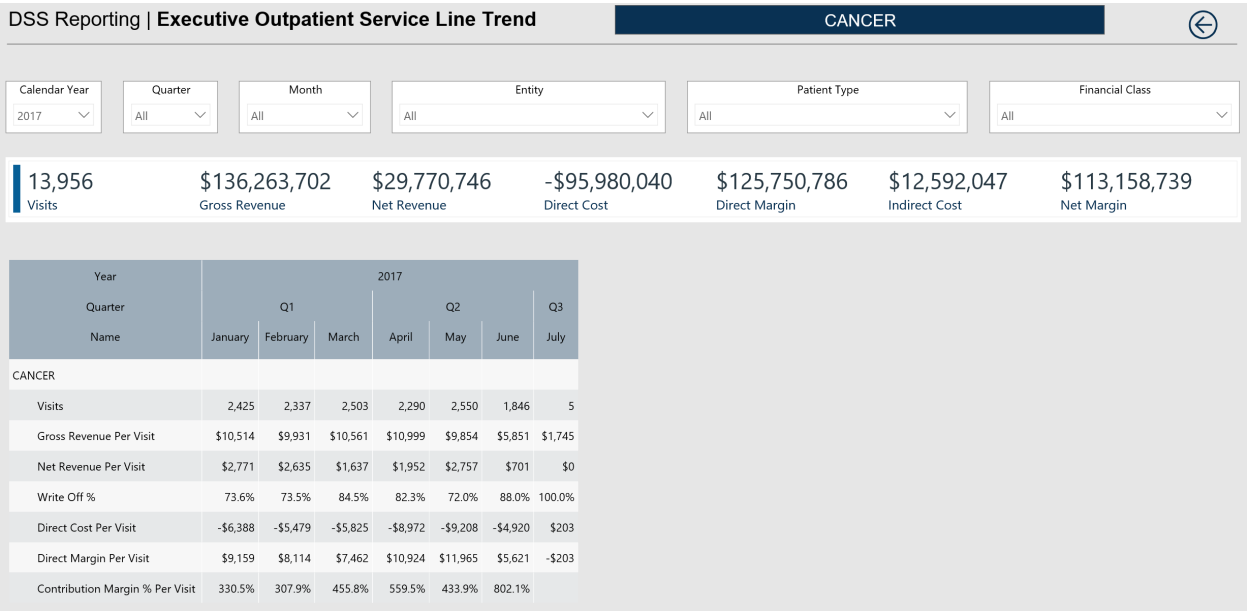
Primary Service Line	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
VASCULAR	1,984	$3,993	$877	78.0%	$741	$136	15.5%
DERMATOLOGY	3,049	$1,075	$279	74.1%	$192	$86	31.0%
NEPHROLOGY	3,125	$866	$163	81.2%	$170	-$7	-4.6%
GENERAL SURGERY	3,656	$6,762	$1,399	79.3%	$539	$860	61.5%
PSYCHIATRY	4,571	$1,843	$352	80.9%	-$379	$731	207.7%
RHEUMATOLOGY	4,598	$1,282	$278	78.3%	$256	$22	8.0%
GASTROENTEROLOGY	4,948	$3,834	$940	75.5%	$614	$326	34.7%
ENT	5,038	$1,669	$404	75.8%	$174	$230	56.8%
UROLOGY	6,085	$2,444	$519	78.8%	-$90	$609	117.4%

Outpatient drillthroughs

This section includes the drillthrough reports available in the Service Lines by Direct Margin Per Visit section of the Outpatient Service Line Dashboard.

Executive Outpatient Service Line Trend

Displays the key metrics trend by service line.



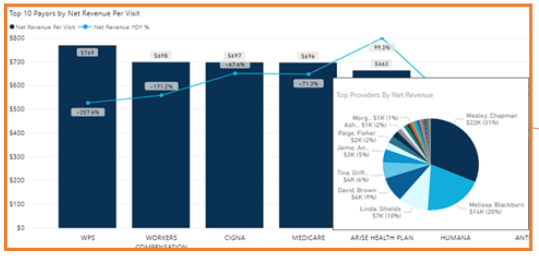
Year	2017						
Quarter	Q1			Q2			Q3
Name	January	February	March	April	May	June	July
CANCER							
Visits	2,425	2,337	2,503	2,290	2,550	1,846	5
Gross Revenue Per Visit	$10,514	$9,931	$10,561	$10,999	$9,854	$5,851	$1,745
Net Revenue Per Visit	$2,771	$2,635	$1,637	$1,952	$2,757	$701	$0
Write Off %	73.6%	73.5%	84.5%	82.3%	72.0%	88.0%	100.0%
Direct Cost Per Visit	-$6,388	-$5,479	-$5,825	-$8,972	-$9,208	-$4,920	$203
Direct Margin Per Visit	$9,159	$8,114	$7,462	$10,924	$11,965	$5,621	-$203
Contribution Margin % Per Visit	330.5%	307.9%	455.8%	559.5%	433.9%	802.1%	

Outpatient Service Line Revenue

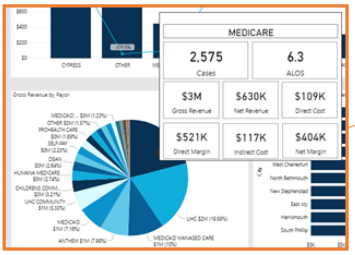
This page displays the following:

- Top 10 Payors by Net Revenue Per Case
  - Outpatient Revenue Bar Chart tool tip
- Gross Revenue by Payor
  - Outpatient Revenue Pie Chart tool tip

- Top 10 Cities w/ Highest Revenue per Visit
- Revenue Detail by Financial Class / Payor



Tool Tip: Top 10 Payors by Net Revenue Per Visit

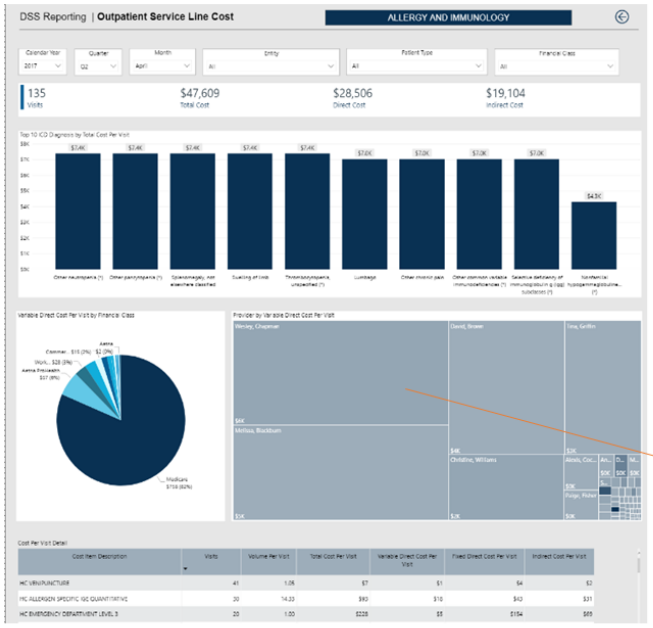


Tool Tip: Gross Revenue by Payor

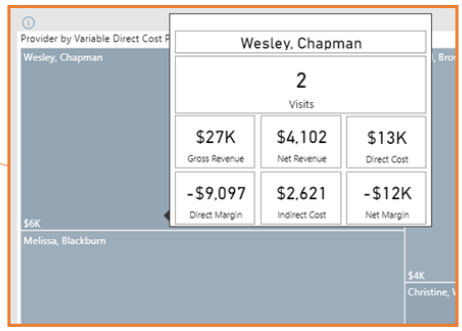
Outpatient Service Line Cost

This page displays the following:

- Top 10 ICD Diagnosis by Total Cost Per Visit
- Variable Direct Cost Per Case by Financial Class
- Provider by Variable Direct Cost Per Visit
    - Outpatient Cost Tree Map tool tip
- Cost Per Visit Detail



Tool tip: Provider by Variable Direct Cost Per Visit

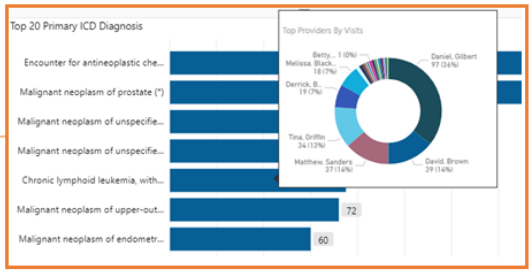


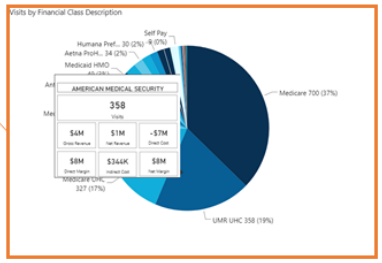
Outpatient Service Line Volume

This page shows the following:

- Top (N) Primary ICD Diagnosis
  - Outpatient Volume Bar Chart tool tip
- Visits by Financial Class Description
  - Outpatient Revenue Pie Chart tool tip
- Visits by Day of Week
- Visits by Discharge Status
- Visits by Zip Code

Tool Tip: Top (N) Primary ICD Diagnosis





Tool Tip: Visits by Financial Class Description

Professional Billing Service Line Dashboard

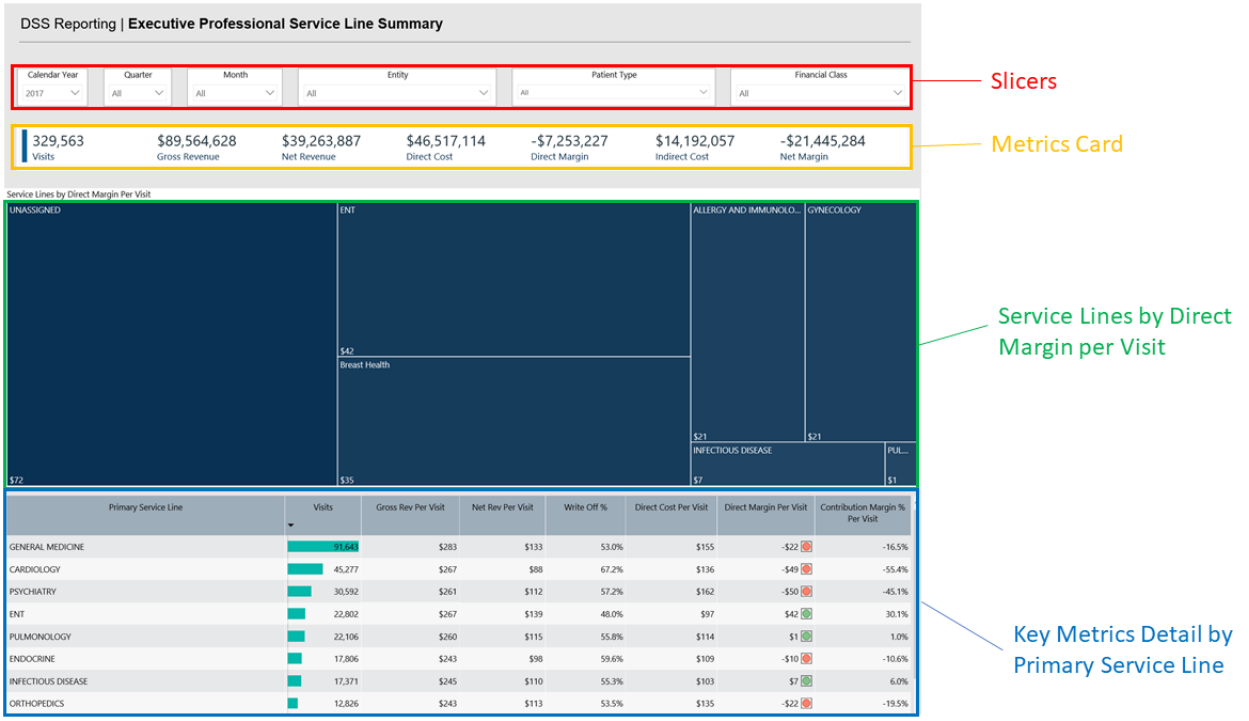
The Professional Billing Service Dashboard displays a view of all the service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view and cost view.

NOTE: Requires your organization to use DSS PtType, and Service Line to use PrimaryService.name.

Executive Professional Service Line Summary page

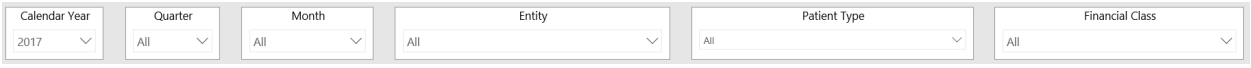
The Executive Professional Billing Service Line Summary page serves as the main home page for the dashboard and includes the following sections:

- Slicers - Allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class
- Metrics Card - Displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin
- Service Lines by Direct Margin Per Visit - Displays a visualization of the direct margin per visit for each service line
- Key Metrics Detail by Primary Service Line - Displays the values related to profitability for each service line



Slicers

From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.

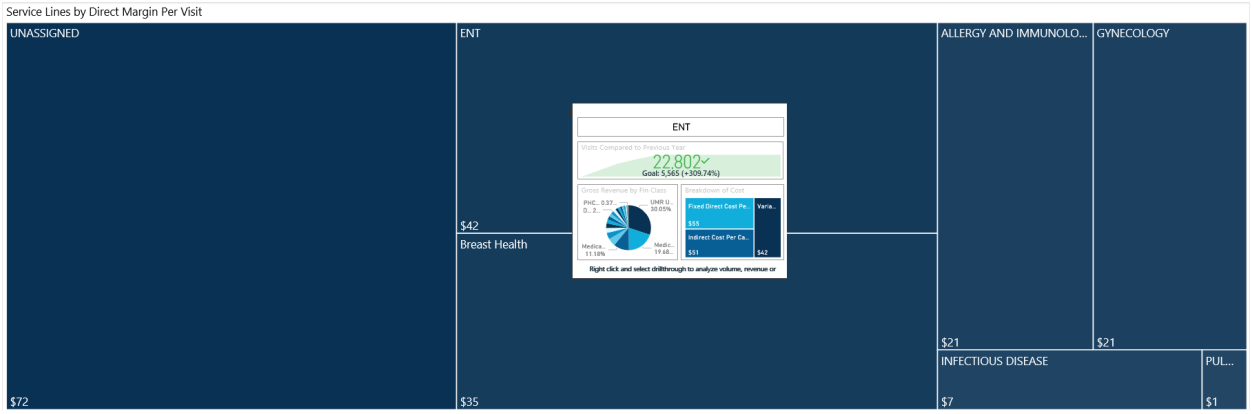


Metrics Card

As you select the different options from the slicer drop-downs, the totals in the Metrics Card adjust accordingly.

Service Lines by Direct Margin Per Visit

The Service Lines by Direct Margin Per Visit section provides a visualization of your direct margin for each visit across service lines. You can view details about a specific service line by placing your cursor on a square. The system displays a tool tip that provides information on the number of visits compared to last year, the gross revenue by financial class, and a cost breakdown.



You can drill down further by right-clicking a square, and from the menu, selecting the drillthrough reports to display.

The available drillthrough reports include the following:

- Executive Outpatient Service Line Trend
- Outpatient Service Line Revenue
- Outpatient Service Line Cost
- Outpatient Service Line Volume

Key Metrics Detail by Primary Service Line

The Key Metrics Detail table shows information regarding the details of the key metrics.

Primary Service Line	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
GENERAL MEDICINE	91,643	$283	$133	53.0%	$155	-$22	-16.5%
CARDIOLOGY	45,277	$267	$88	67.2%	$136	-$49	-55.4%
PSYCHIATRY	30,592	$261	$112	57.2%	$162	-$50	-45.1%
ENT	22,802	$267	$139	48.0%	$97	$42	30.1%
PULMONOLOGY	22,106	$260	$115	55.8%	$114	$1	1.0%
ENDOCRINE	17,806	$243	$98	59.6%	$109	-$10	-10.6%
INFECTIOUS DISEASE	17,371	$245	$110	55.3%	$103	$7	6.0%
ORTHOPEDICS	12,826	$243	$113	53.5%	$135	-$22	-19.5%

Professional Billing Services Dashboard - Drillthrough reports

This section includes the drillthrough reports available in the Service Lines by Direct Margin Per Visit section of the Professional Billing Services Dashboard.

Executive Professional Service Line Trend

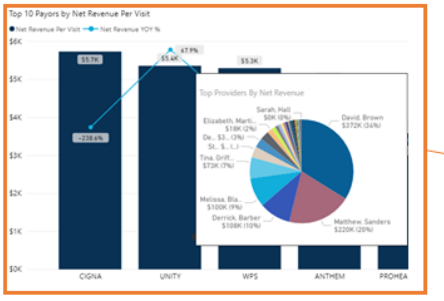
Displays the key metrics trend by service line.

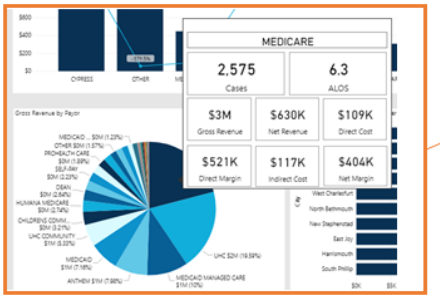
Professional Service Line Revenue

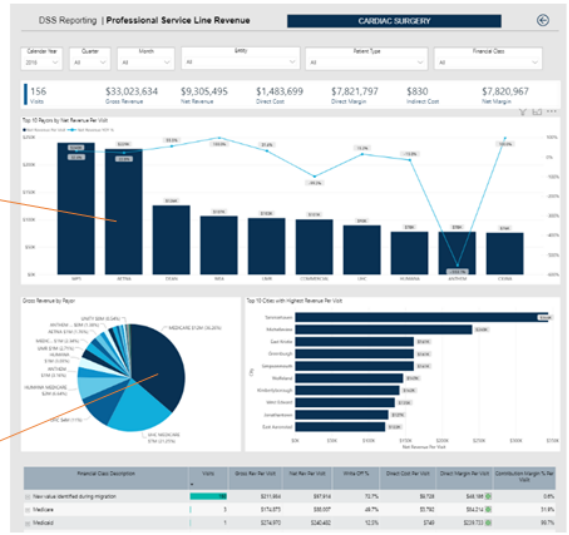
This page displays the following:

- Top 10 Payors by Net Revenue Per Case
  - Professional Revenue Bar Chart tool tip
- Gross Revenue by Payor
  - Professional Revenue Pie Chart tool tip
- Top 10 Cities w/ Highest Revenue per Visit
- Revenue Detail by Financial Class / Payor

Tool Tip: Top 10 Payors by Net Revenue Per Visit





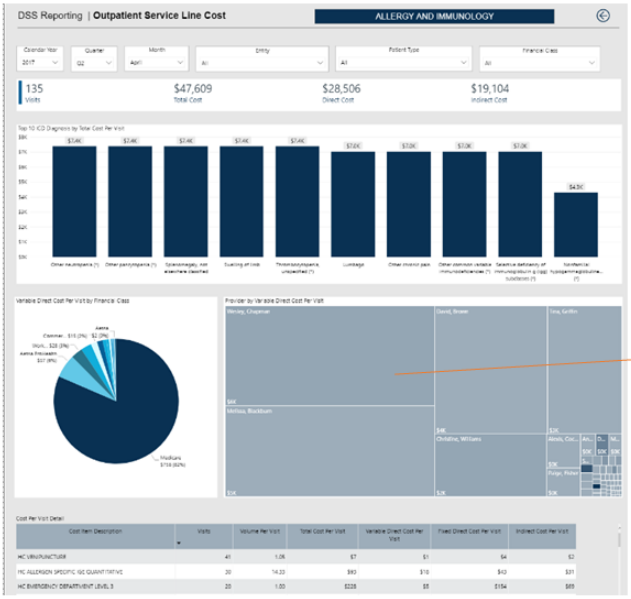


Tool Tip: Gross Revenue by Payor

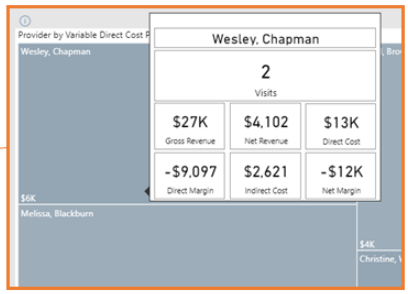
Professional Service Line Cost

This page displays the following:

- Top 10 ICD Diagnosis by Total Cost Per Visit
- Variable Direct Cost Per Case by Financial Class
- Provider by Variable Direct Cost Per Visit
    - Professional Cost Tree Map tool tip
- Cost Per Visit Detail



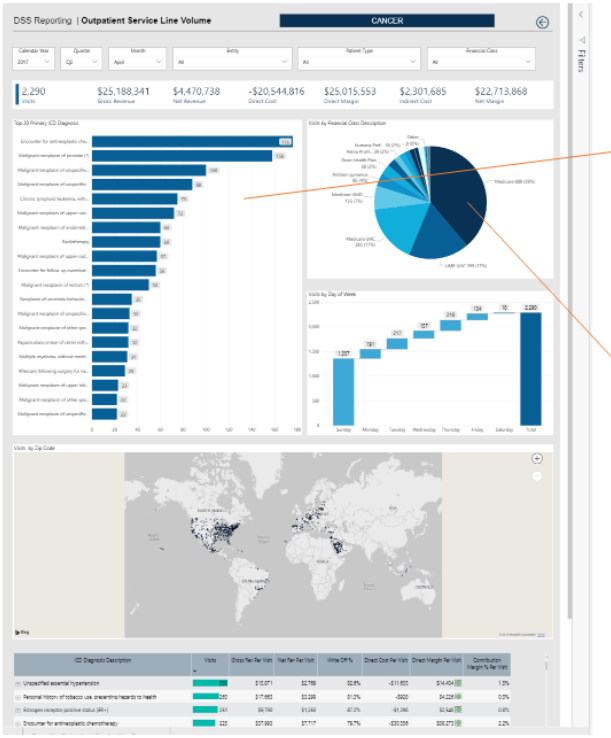
Tool Tip: Provider by Variable Direct Cost Per Unit

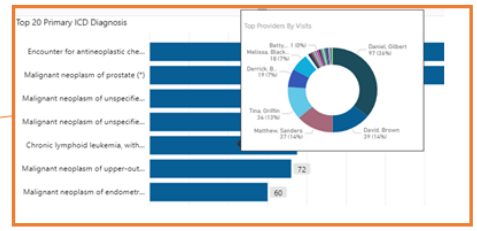


Professional Service Line Volume

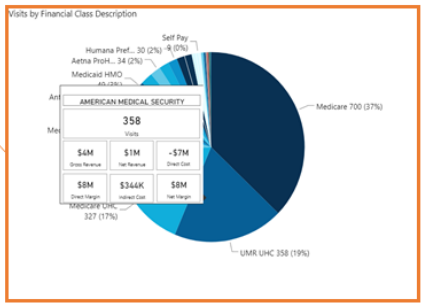
This page displays the following:

- Top (N) Primary ICD Diagnosis
    - Professional Volume Bar Chart tool tip
- Visits by Financial Class Description
    - Professional Revenue Pie Chart tool tip
- Visits by Day of Week
- Visits by Discharge Status
- Visits by Zip Code





Tool Tip: Top (N) Primary ICD Diagnosis

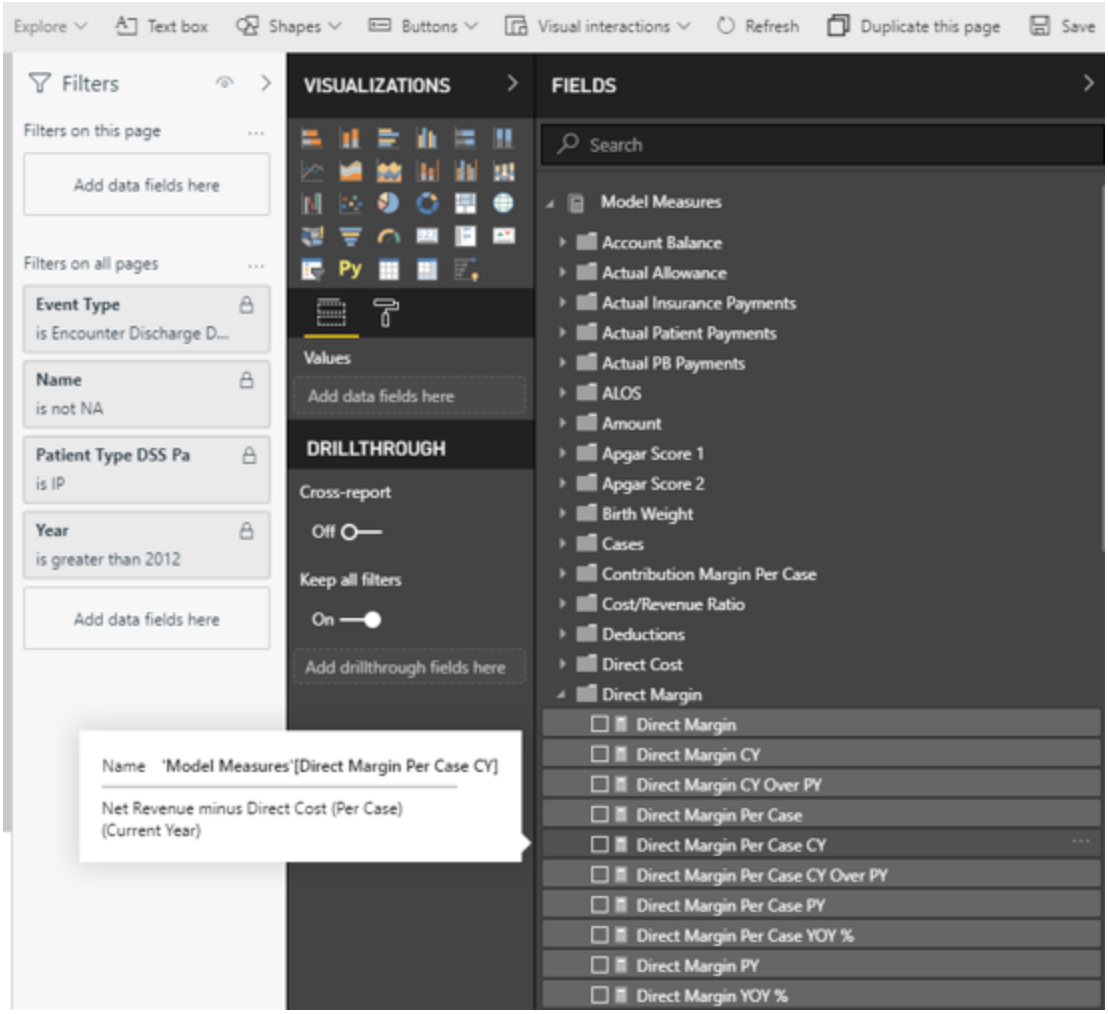


Tool Tip: Visits by Financial Class Description

Axiom Intelligence enhancements

The following enhancements have been made to the Axiom Intelligence functionality to help improve user experience:

- **Measure descriptions** - When hovering over a field within the model measures folder of the DSS Axiom Intelligence data model, a tool tip now displays a description of the measure.

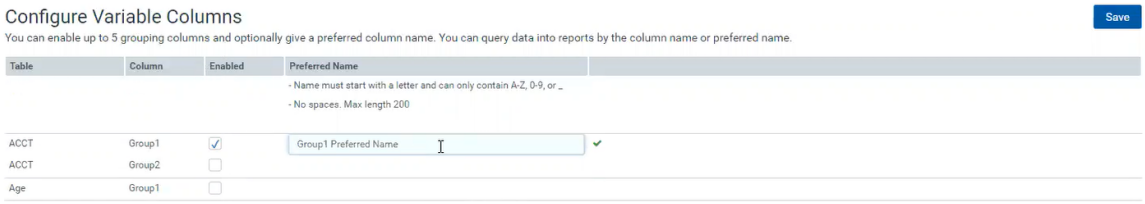


- **Fiscal year configuration** - You can now set the fiscal year for Axiom Intelligence in the SystemConfigurationTemplate. For instructions, see Setting the fiscal year for Axiom Intelligence in this document.

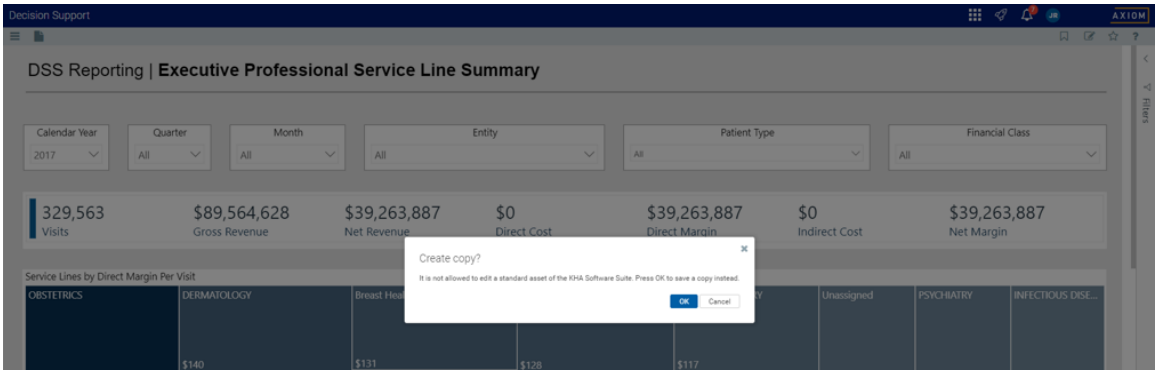
SystemConfiguration - AQ Example

	Default	Configured	Modify
AdoNetBatchSize	100	100	
AllowAmbiguousAlternateAggregationAndColumnFilterFieldDefinitions	FALSE	FALSE	
AllowBlanksToBeDataRowSeparatorsInAQDataUpdate	TRUE	TRUE	
AllowShowExcel	TRUE	TRUE	
AllowShowPowerPoint	TRUE	TRUE	
AllowShowWord	TRUE	TRUE	
AuthenticationDomainSelectionListRequired	FALSE	FALSE	
AutoCastFloatColumnsDuringAggregation	TRUE	TRUE	
AutoUpdateProcessTaskPane	TRUE	TRUE	
AxiomSignalRServerAddress			
BI_FiscalYearStartMonth	1	1	
ClickOnceClientNameExcel	Axiom Excel Client	Axiom EPM Excel Client	
ClickOnceClientNameWindows	Axiom Windows Clien	Axiom EPM Windows Client	
ClickOnceShortcutLocation	DesktopAndStartMenu	DesktopAndStartMenu	

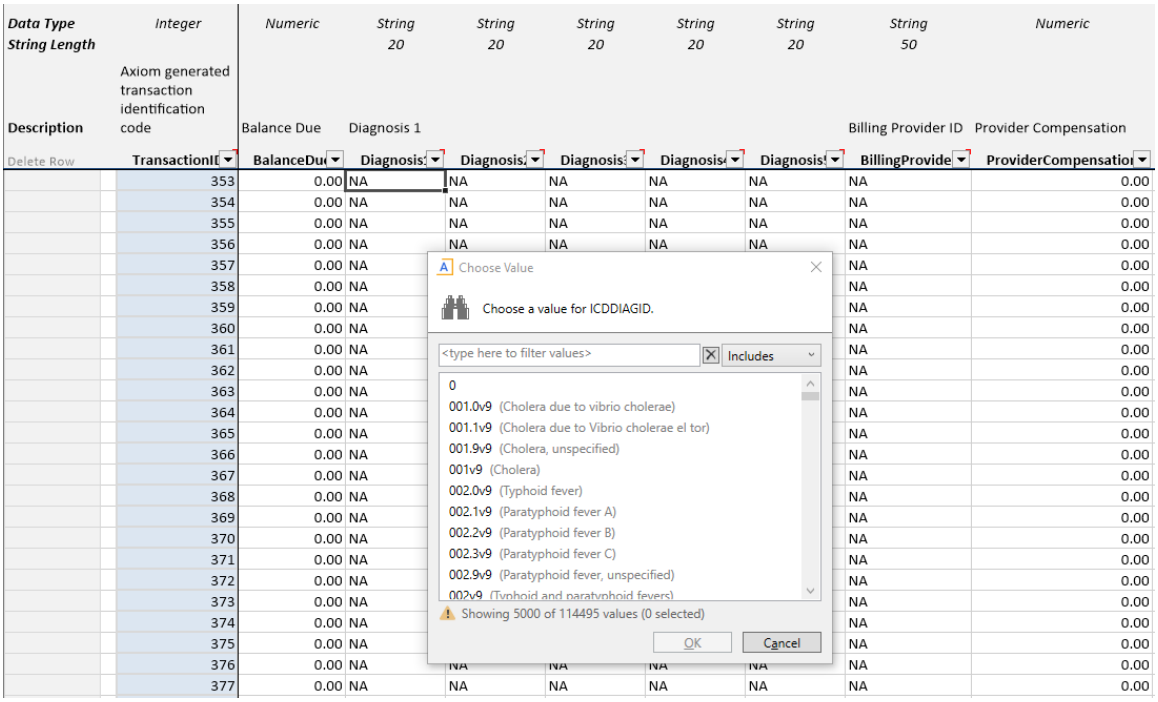
- **Variable columns** - Some dimension tables allow you to add additional custom columns. These "grouping" columns allow you to customize the data you want to query into reports. For instructions, see Creating or modifying custom columns in dimensions in this document.



- **Security enhancements** - A Save As prompt is now included in standard content prior to entering the author mode. When entering authoring mode in a standard asset, a prompt displays to save a copy of the report.



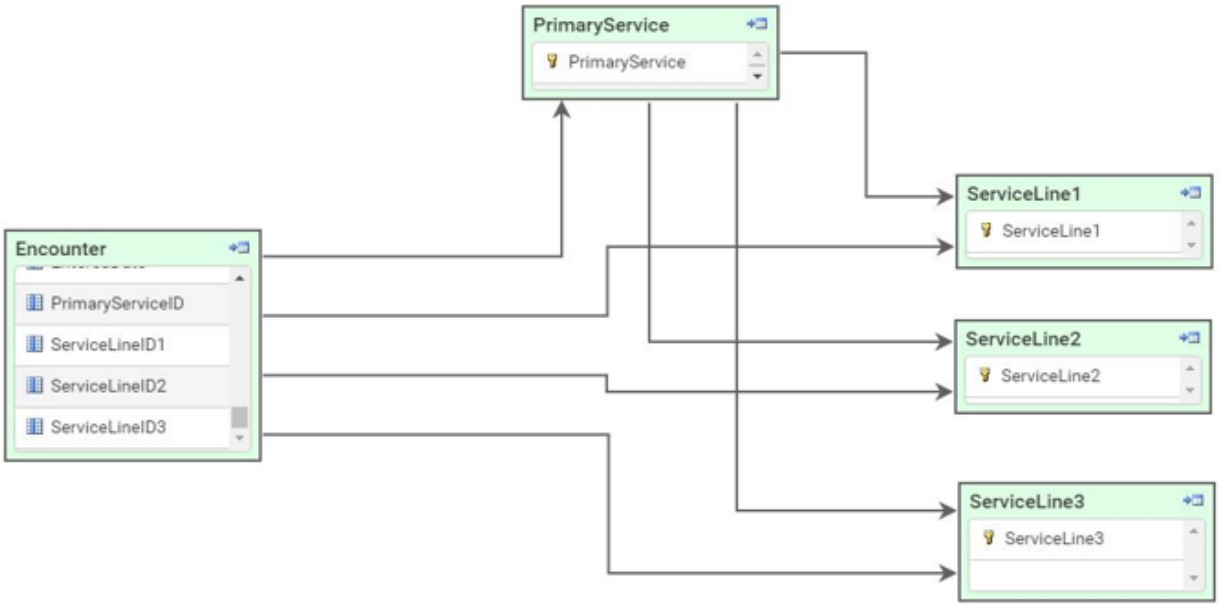
- **ICD Diag 1-5 Cost Detail lookup** - These columns have been configured to lookup to reference tables. The corresponding scripts have also been upgraded.



Data Type / String Length		Integer	Numeric	String 20	String 20	String 20	String 20	String 20	String 50	Numeric
Description		Axiom generated transaction identification code	Balance Due	Diagnosis 1					Billing Provider ID	Provider Compensation
Delete Row		TransactionID	BalanceDue	Diagnosis	Diagnosis	Diagnosis	Diagnosis	Diagnosis	BillingProvide	ProviderCompensatio
		353	0.00	NA	NA	NA	NA	NA	NA	0.00
		354	0.00	NA	NA	NA	NA	NA	NA	0.00
		355	0.00	NA	NA	NA	NA	NA	NA	0.00
		356	0.00	NA	NA	NA	NA	NA	NA	0.00
		357	0.00	NA					NA	0.00
		358	0.00	NA					NA	0.00
		359	0.00	NA					NA	0.00
		360	0.00	NA					NA	0.00
		361	0.00	NA					NA	0.00
		362	0.00	NA					NA	0.00
		363	0.00	NA					NA	0.00
		364	0.00	NA					NA	0.00
		365	0.00	NA					NA	0.00
		366	0.00	NA					NA	0.00
		367	0.00	NA					NA	0.00
		368	0.00	NA					NA	0.00
		369	0.00	NA					NA	0.00
		370	0.00	NA					NA	0.00
		371	0.00	NA					NA	0.00
		372	0.00	NA					NA	0.00
		373	0.00	NA					NA	0.00
		374	0.00	NA					NA	0.00
		375	0.00	NA					NA	0.00
		376	0.00	NA					NA	0.00
		377	0.00	NA	NA	NA	NA	NA	NA	0.00

Modifications to the service line data model

The enhanced data model now supports four service line schemas with three grouping levels. The data model also now includes identity key vs. string data type for services lines.

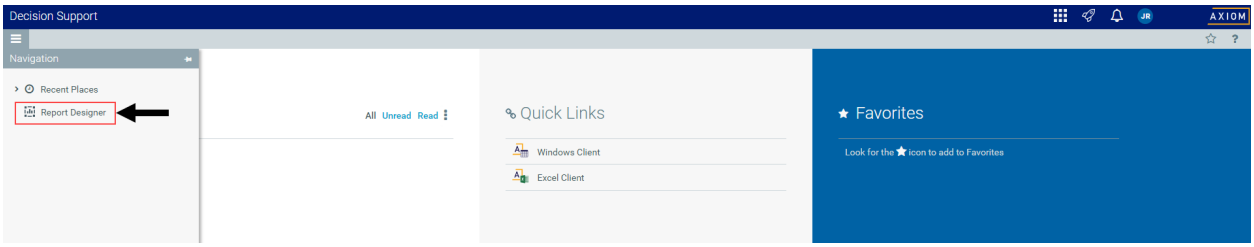


The following enhancements were made to the data model:

- Implemented service line ID columns on encounter table; string columns still exist, but they will eventually be deprecated
- Added four new tables: PrimaryService, ServiceLine1, ServiceLine2, and ServiceLine3
- Updated scripts
- Added the new Service Line Assignment utility that assigns an identity value to the new column
- Updated reports

Reporting mode

This new Axiom Intelligence browser-based reporting tool is available for all Axiom Decision Support cloud customers to author Decision Support reports and dashboards by using Microsoft Power BI embedded technology. You can access these reports by clicking **Report Designer** in the **Navigation** panel.

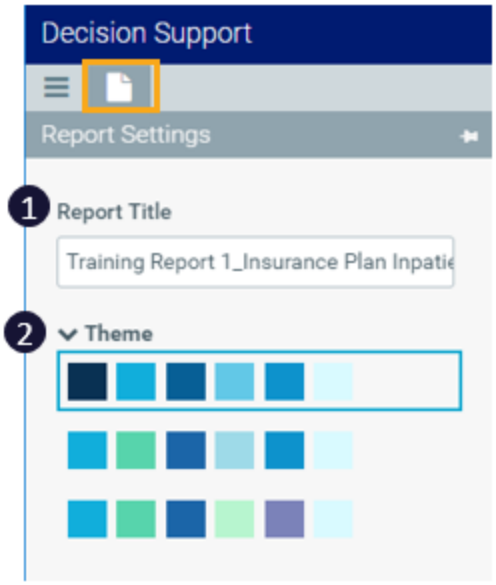


The data model delivered in 2019.2 for Axiom Intelligence Reporting is built around the encounter table and those tables that the encounter table references.

The four icons located on the Global Navigation Bar each represent a key function or feature within Axiom Intelligence Reporting.

1. Open the bookmark panel in authoring mode.
2. View the report into preview mode. The eye icon changes to the pencil icon to indicate that you are report authoring mode. The icons switch back and forth depending on which mode you are in.
3. Add the report to your favorites.
4. Open help.

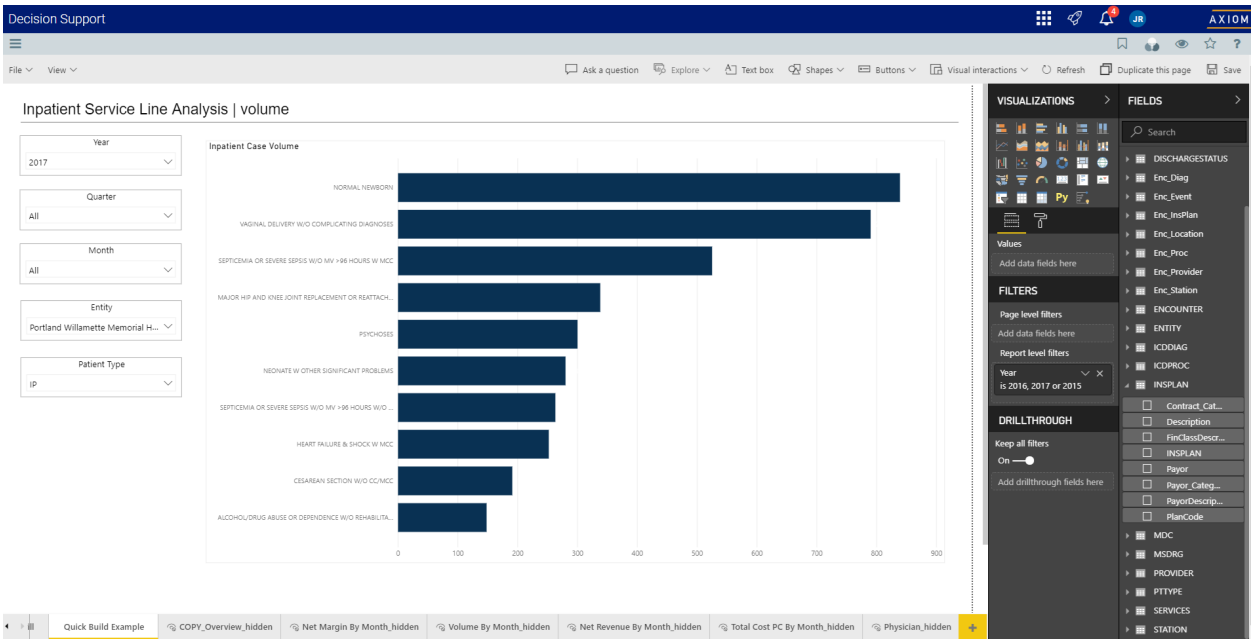
On the Global Navigation Bar, when opened in authoring mode, click the white report icon to access additional key features and functions.



From this location, you can do the following:

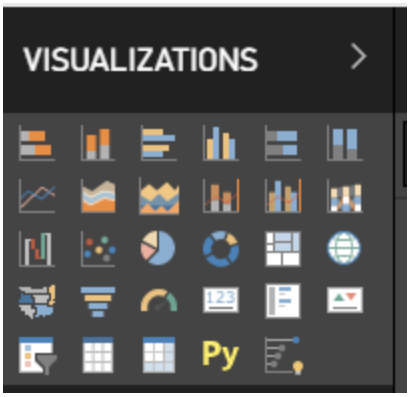
1. Review and change the report title.
2. Change the look and feel of the report by selecting a color palette.

The following screen shot is example of an Axiom Intelligence Report with standard embedded Microsoft Power BI features described below.



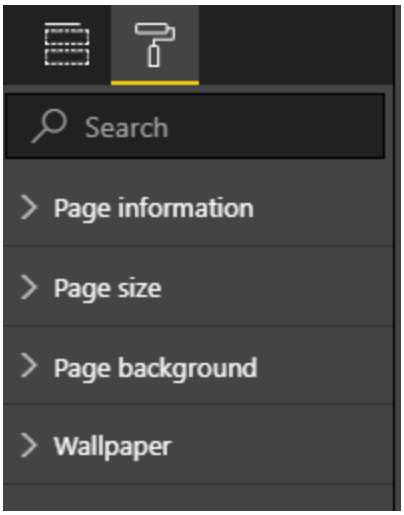
Visualizations

Each of these icons represents a type of visualization that can you can use in a report or dashboard to visually interact with your data. You can drag and drop one of these icons onto your white page to build out your report.



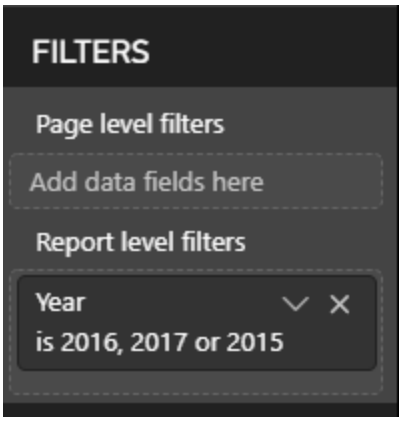
Paint Roller

You can customize any of your visual components by selecting the Paint Roller icon.



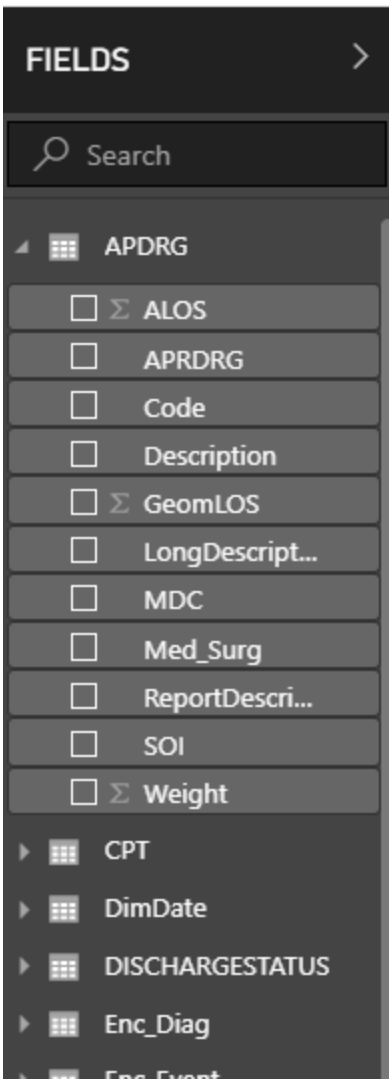
Filters

Using the Filters section, you can apply filters to a specific visual, the page, or the entire report. There are basic and advanced filtering options available.



Fields

The fields columns stores the data included in the model. The data is organized by tables, which you can expand to see the dimensions and measures available to use when creating reports.



Web tutorials

In 2019.1, Kaufman Hall introduced Axiom Intelligence to provide our clients with industry-leading, advanced reporting and dashboard authoring tools as part of Axiom Decision Support. In the future, Kaufman Hall will leverage these tools to deliver new content in upcoming releases. In this release, the focus was on providing training in the form of example reports and corresponding on-demand web tutorials. This six-lesson series is designed to meet specific learning objectives.

Each lesson and the corresponding report are described below. We recommend that you use the Save As feature to create a copy of each report. This preserves the provided example reports for future reference.

You can access these tutorials and their corresponding PowerPoint documents from the Tutorial Videos page in the online help.

- **Lesson 1 - The Basics and the Navigation Bar**

  This lesson provides an overview of the general navigation features, including task panes, report filters, and available visualization components. This lesson uses Example Report #1 – Insurance Plan Inpatient Analysis to introduce how you can interact with report slicers and different visual components.

- **Lesson 2: Drilling Into Data**

  This lesson reviews the interactive report filtering and drilling capabilities of Axiom Intelligence. The lesson uses Example Report #2 – Patient Type Analysis to highlight the set up of a data grid and drill paths can be defines for users, including the fields used for summarization and their sequence.

- **Lesson 3: Creating a Tooltip**

  This lesson introduces the tooltip feature, which you can tailor by component, and allows you to provide additional and related information for a specific data point. To illustrate this feature, this lesson uses Example Report #3 – MDC Inpatient Margin Analysis.

- **Lesson 4: Using Bookmarks**

  This lesson covers using bookmarks. This useful feature allows you to save the filters and drills applied to a given report. This lesson uses Example Report #4 - Major Diagnostic Category Inpatient Analysis to walk through using bookmarks, including how to tag and name a bookmark reference.

- **Lesson 5: Applying Filter and Using Slicers**

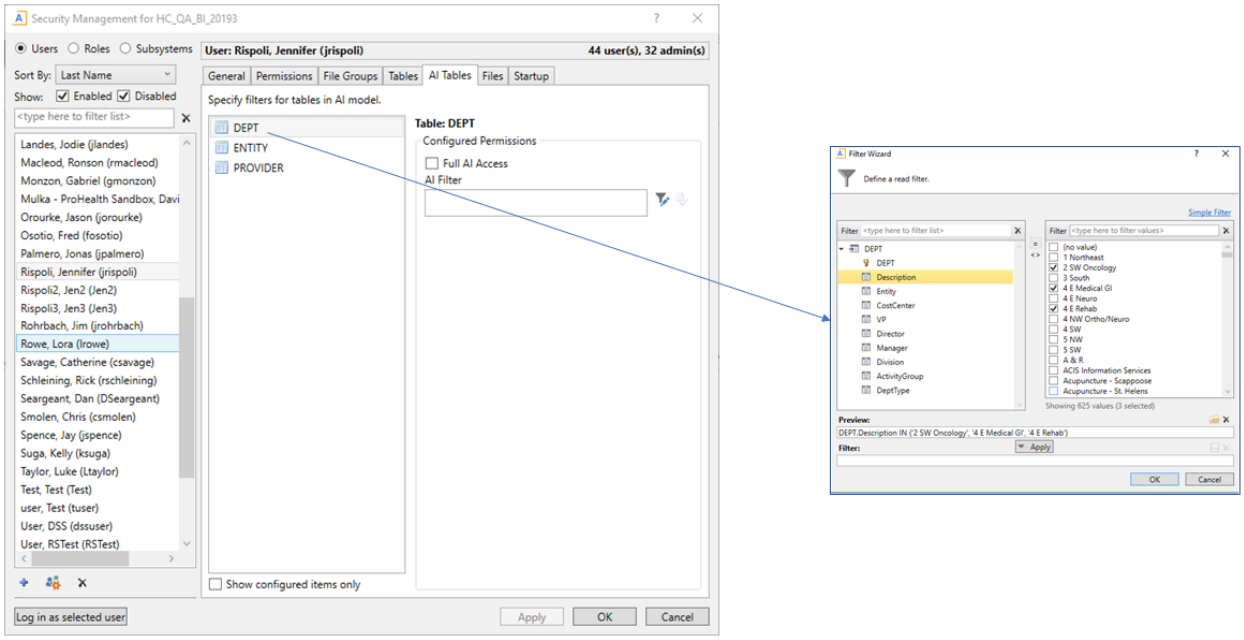
  The power of Axiom Intelligence is the ease by which a User can interact with data filters and drilling features to support root cause analysis. This lesson will use Example Report #5 - Inpatient Admitting Provider Utilization Analysis illustrate how to configure and use slicers.

- **Lesson 6: Syncing the Model and Security**

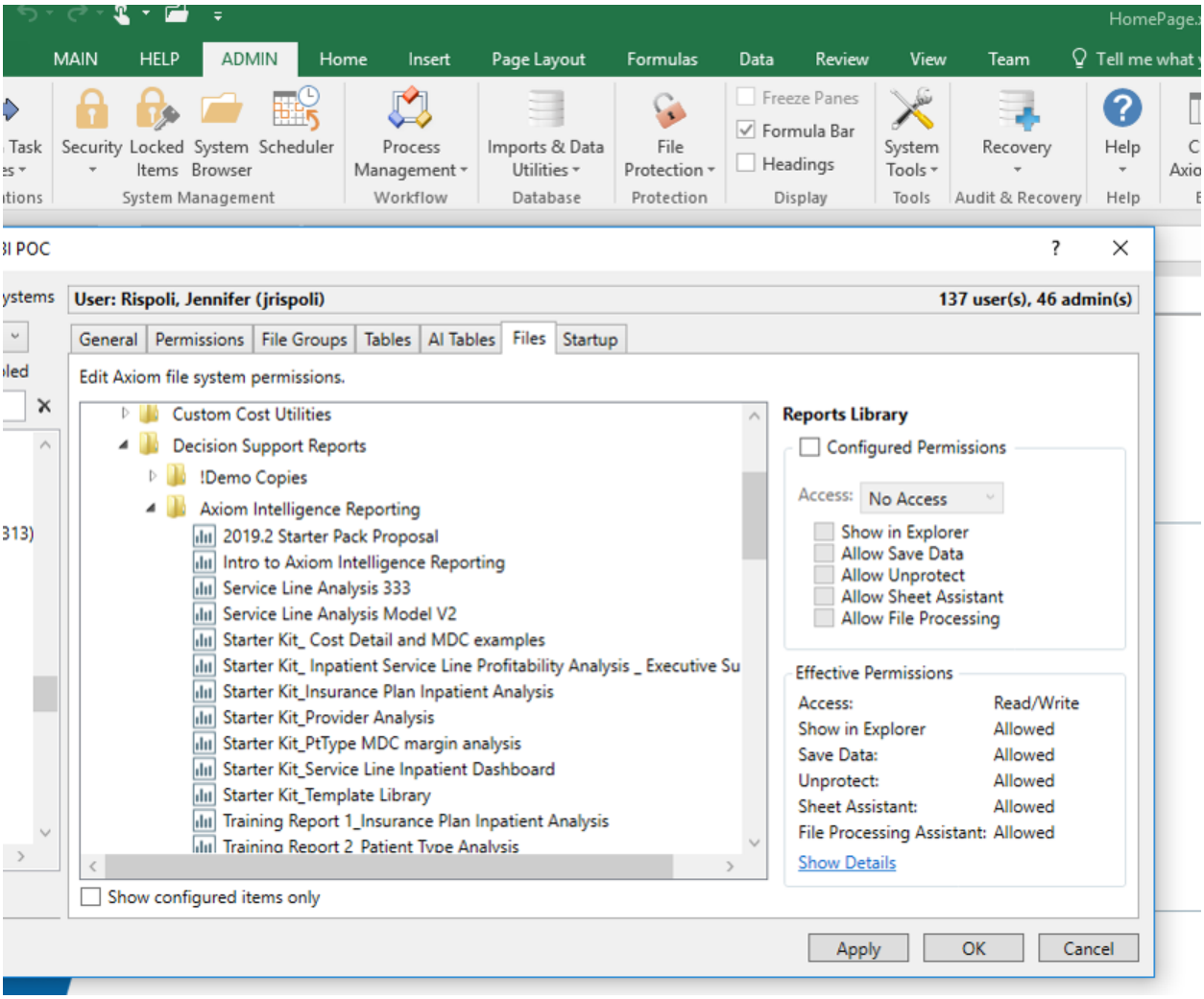
  This lesson focuses on two aspects of system setup and administration, including the simple process of syncing the data model that is utilized by Axiom Intelligence, as well as the administrative features and considerations related to security for Axiom Intelligence.

Security

The Security Manager allows you to manage Axiom Intelligence Reporting security while you can manage access to tables from the AI Tables tab.



In the Configured Permissions section of the Files tab, you can manage access to Axiom Intelligence Reports by setting the permission level for a specific file as No Access, Read, or Read/Write.


MAIN
HELP
ADMIN
Home
Insert
Page Layout
Formulas
Data
Review
View
Team
Security
Locked Items
System Browser
Scheduler
System Management
Process Management
Workflow
Imports & Data Utilities
Database
File Protection
Protection
Freeze Panes
Formula Bar
Headings
Display
System Tools
Tools
Recovery
Audit & Recovery
Help
Help
POC
User: Rispoli, Jennifer (jrispoli)
137 user(s), 46 admin(s)
General
Permissions
File Groups
Tables
AI Tables
Files
Startup
Edit Axiom file system permissions.
Custom Cost Utilities
Decision Support Reports
!Demo Copies
Axiom Intelligence Reporting
2019.2 Starter Pack Proposal
Intro to Axiom Intelligence Reporting
Service Line Analysis 333
Service Line Analysis Model V2
Starter Kit_ Cost Detail and MDC examples
Starter Kit_ Inpatient Service Line Profitability Analysis _ Executive Su
Starter Kit_Insurance Plan Inpatient Analysis
Starter Kit_Provider Analysis
Starter Kit_PtType MDC margin analysis
Starter Kit_Service Line Inpatient Dashboard
Starter Kit_Template Library
Training Report 1_Insurance Plan Inpatient Analysis
Training Report 2_Patient Type Analysis
Show configured items only
Reports Library
Configured Permissions
Access:
No Access
Show in Explorer
Allow Save Data
Allow Unprotect
Allow Sheet Assistant
Allow File Processing
Effective Permissions
Access: Read/Write
Show in Explorer Allowed
Save Data: Allowed
Unprotect: Allowed
Sheet Assistant: Allowed
File Processing Assistant: Allowed
Show Details
Apply
OK
Cancel

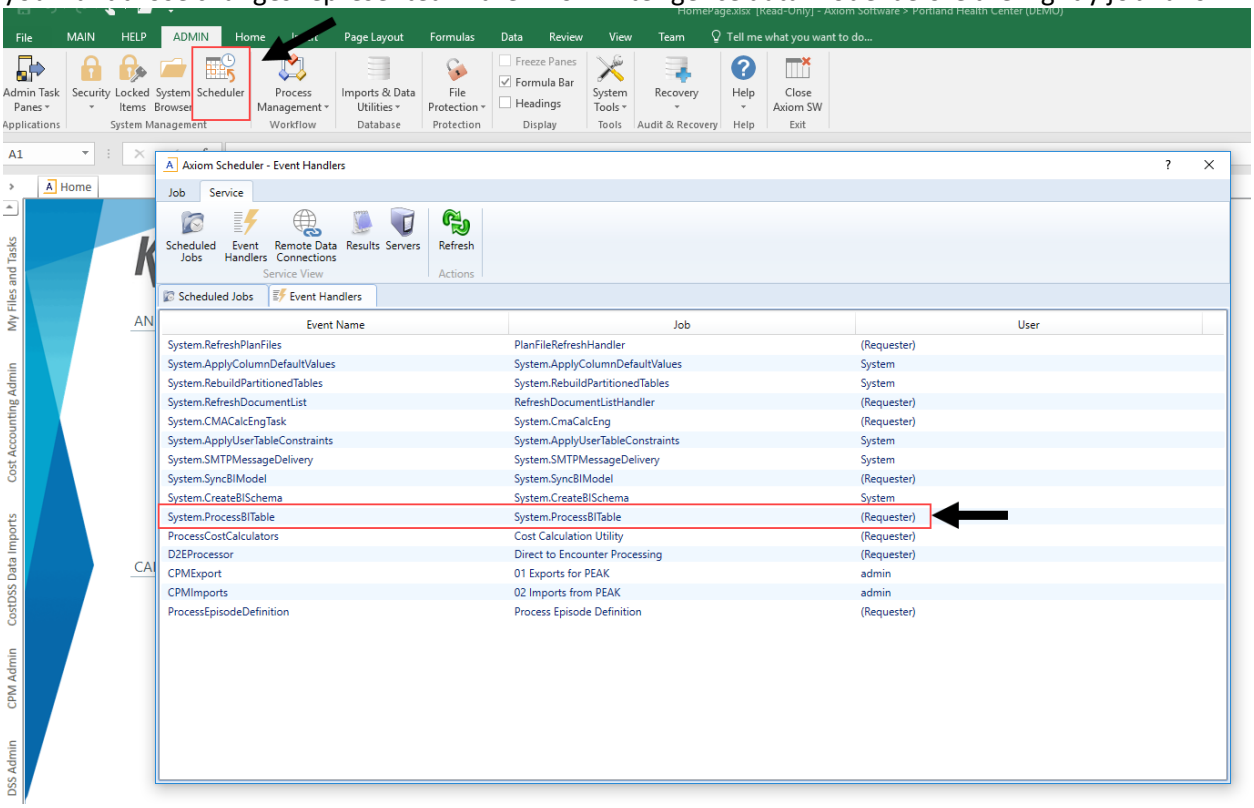
Issues resolved in 2019.3

The following table lists the issues resolved in 2019.3, released on September 16th, 2019:

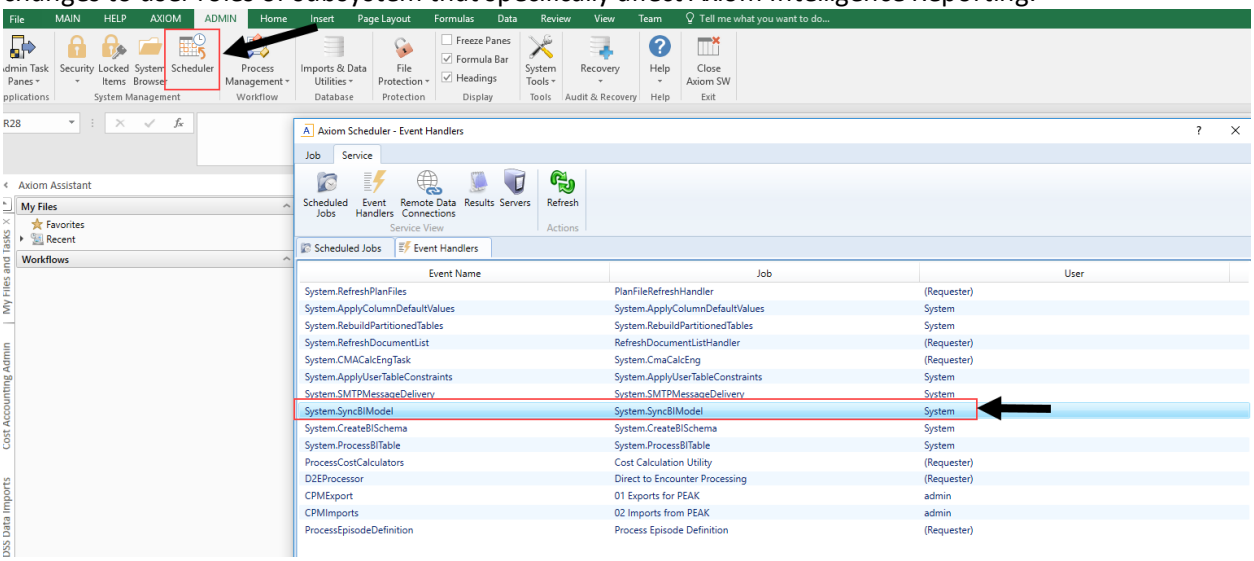
Issue	Description
PFB-07225 - Encounter/ Patient Viewer Incorrect Heading [TFS 34227]	**Symptom:** In the Launch Encounter /Patient Viewer, when you create an Encounter list and drill on a specific encounter, on the main page for the encounter selected, the sub-title for the cost information displays "Total Charges". It should display "Total Costs". **Resolution:** Corrected by changing the title from "Total Charges" to "Total Costs".
PFB-07832 - Increase Character Limit Service Line Def [TFS 37953]	**Symptom:** Recommend increasing character limit of the following columns: • SERVICELINEDEF.LIMITQUERYFILTER from String(250) to String(500) • SERVICE_SCHEMA_DEF.DEFCODE from String(20) to String(50) **Resolution:** Corrected by making the recommended updates to the referenced table and columns.

Manual setup instructions

The System.SyncBIModel job runs nightly on a scheduled job to ensure that the Axiom database and Axiom Intelligence Reporting database stay in sync. If you modify a table in Axiom that is part of the Axiom Intelligence Reporting data model, you will need to run the job named **System.ProcessBITable** if you want those changes represented in the Axiom Intelligence data model before the nightly job runs.



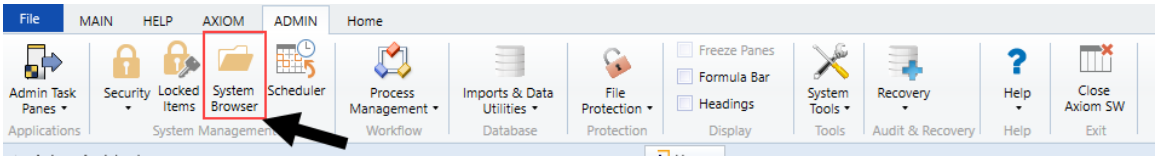
You will also need to run the job named **System.SyncBIModel** when you want to apply or edit security changes to user roles or subsystem that specifically affect Axiom Intelligence Reporting.



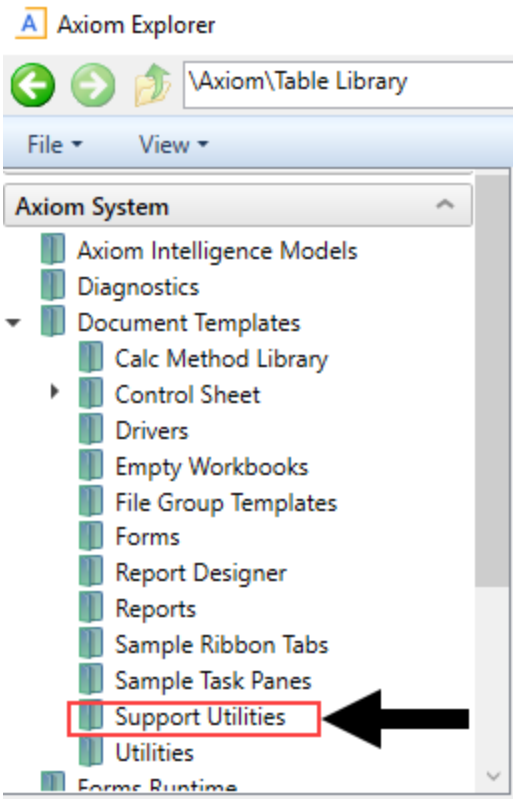
Setting the fiscal year for Axiom Intelligence

To set the fiscal year for Axiom Intelligence:

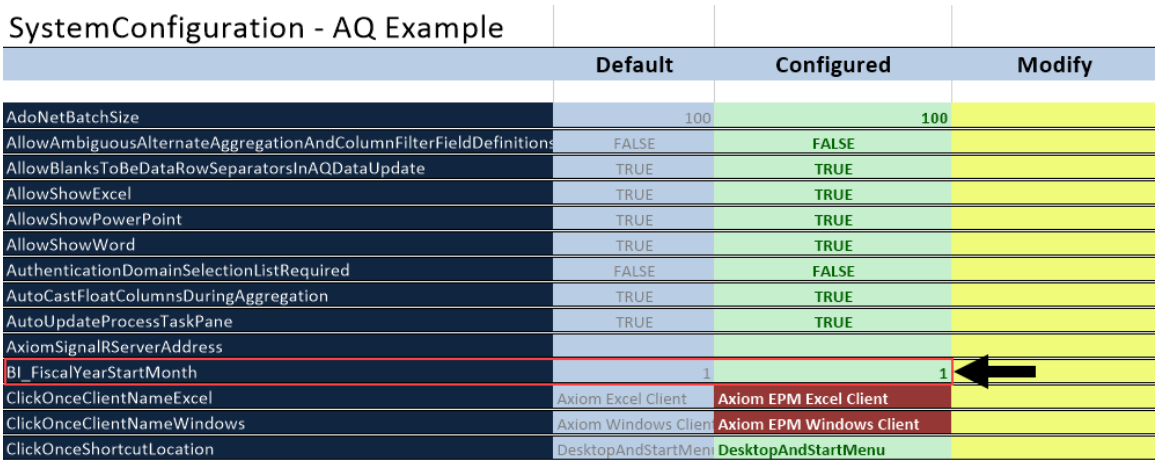
1. In the **Admin** ribbon tab, click **System Browser**.



2. In the **Axiom System** area, click **Document Templates > Support Utilities**.



3. Double-click **SystemConfigurationTemplate**.
4. In the **Main** ribbon tab, click **Refresh Data**.
5. In the **BI_FiscalYearStartMonth** row (row 20), type the number for the corresponding fiscal year start month.



SystemConfiguration - AQ Example

	Default	Configured	Modify
AdoNetBatchSize	100	100	
AllowAmbiguousAlternateAggregationAndColumnFilterFieldDefinitions	FALSE	FALSE	
AllowBlanksToBeDataRowSeparatorsInAQDataUpdate	TRUE	TRUE	
AllowShowExcel	TRUE	TRUE	
AllowShowPowerPoint	TRUE	TRUE	
AllowShowWord	TRUE	TRUE	
AuthenticationDomainSelectionListRequired	FALSE	FALSE	
AutoCastFloatColumnsDuringAggregation	TRUE	TRUE	
AutoUpdateProcessTaskPane	TRUE	TRUE	
AxiomSignalRServerAddress			
BI_FiscalYearStartMonth	1	1	
ClickOnceClientNameExcel	Axiom Excel Client	Axiom EPM Excel Client	
ClickOnceClientNameWindows	Axiom Windows Client	Axiom EPM Windows Client	
ClickOnceShortcutLocation	DesktopAndStartMenu	DesktopAndStartMenu	

6. In the **Main** ribbon tab, click **Save**.
7. In the **Admin** ribbon tab, click **Scheduler**.
8. Manually run the **SyncBIModel** event scheduler to complete the process.

Creating or modifying custom columns in dimensions

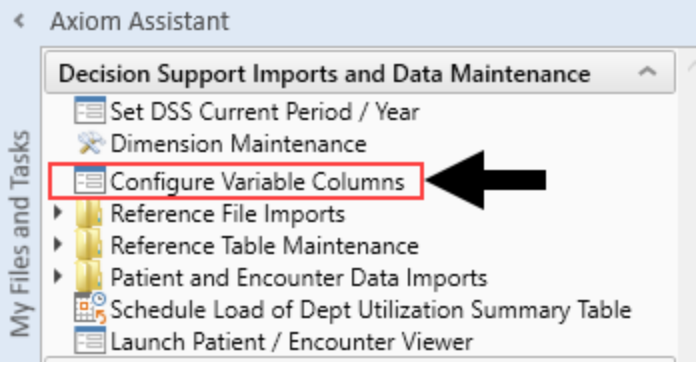
Some dimension tables allow you to add additional custom columns. These "grouping" columns allow you to customize the data you want to query into reports. You can add up to five grouping columns to the following dimensions:

- Accounts
- Age
- Cost Categories
- CPT Codes
- Departments
- Revenue Codes

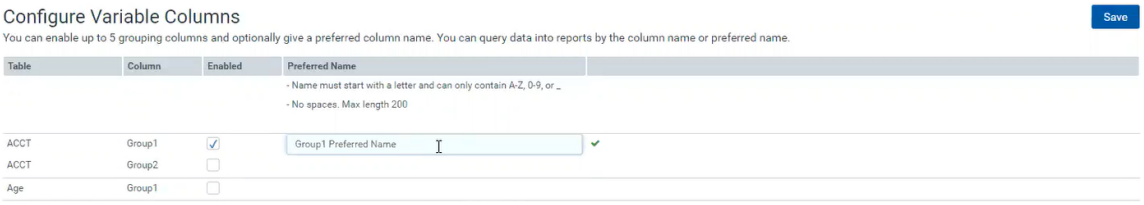
NOTE: Only users with Admin role profiles can make changes to this page.

To create or modify custom columns in dimensions:

1. In the **DSS Admin** task pane, in the **Decision Support Imports and Data Maintenance** section, double-click **Configure Variable Columns**.



2. In the **Configure Variable Columns** page, in the **Enabled** column, click the check box next to the column to use.



3. In the **Preferred Name** field, type a name for the column that makes sense for reporting purposes.

> **NOTE:** The column name must start with a letter. The name can only include letters A-Z, 0-9, and/or an underscore (_), and can only include up to 200 characters. The system displays a check mark next to the name if it is allowed by the system; otherwise, it displays an **x**. The system will not allow you to save your changes until the check mark displays.

4. When you are done making changes, in the **Main** ribbon tab, click **Save**.
5. In the **Admin** ribbon tab, click **Scheduler**.
6. In the **Service** tab, run the **System.SyncBIModel** job.

After you save the changes, the system updates the appropriate dimension tables with the new columns. You then update the columns with the appropriate records.

Known issues

The following table lists known issues regarding this release:

Issue	Description
Any table column that is Date data type cannot be edited and saved from the dimension maintenance page [TFS 36259]	**Issue:** In the APRDRG.EffectiveFromDate, APRDRG.EffectiveToDate, and CostItem.CreateDate columns in the APRDRG tabe, the system displays an error when a user edits the date. **Resolution:** Enter a two-digit year, and not a four-digit year. For example, enter as 1/1/20 or 01/01/20 - not 1/1/2020.
PFB-07007 - REPORT DEFECT - 2018.3 - DSS - Inpatient Period Comparison [TFS 31178]	**Issue:** The header highlighted in this report should toggle/update between Actual and Estimated Net Revenue, as selected in the refresh variables, but says Estimated no matter the choice. **Resolution:** The data does update correctly, it's just a header issue.
PFB-07494 - PatientID Field [TFS 35256]	**Issue:** PATIENTID on Enc_Patient is a string field. If the ID has leading zeros the Patient ID will not show up on the Encounter viewer for the patient list. It will show up on the Encounter List because that references the encounter ID, but it will not show up for Patient List. **Resolution:** The current solution is to concatenate alpha character to the Patient ID on Enc_Patient.

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