

Release Notes

Axiom Financial Planning
Version 2019.4

AXIOM

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Summary

Syntellis is pleased to announce the 2019.4 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

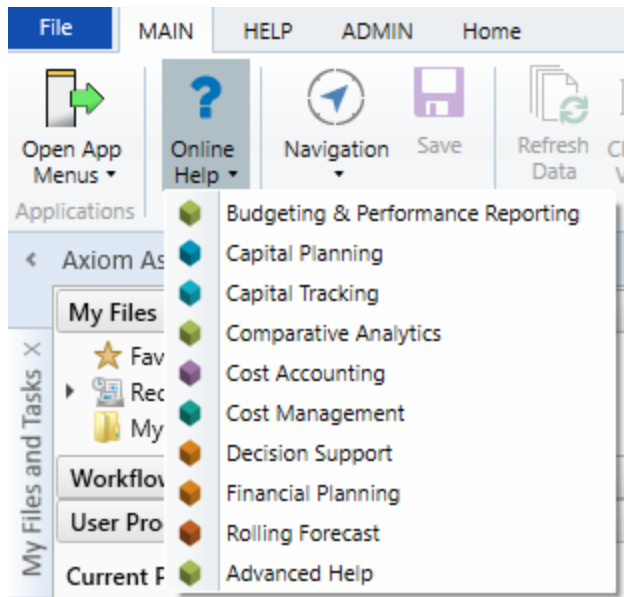
As always, we appreciate your commitment to Syntellis. If you have any questions about your upgrade, please contact us by logging into Axiom, navigating to the online help for your product, and clicking the **Axiom Support** link at the top of the home page.

Training

Syntellis provides world-class resources at your fingertips directly within the Axiom system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Online help** - From the Main, Help, or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

NOTE: The online help will only open for products you are licensed to use.



- **Contextual help** - Form/web-enabled features include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.



Product upgrade notes

IMPORTANT: You must apply the Axiom 2019.4 upgrade before applying any 2019.4 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2019.4 before the first product upgrade. Refer to the **Axiom 2019.4 Release Notes** and **Axiom Healthcare Suite 2019.4 Release Notes** for considerations before upgrading.

When upgrading to the 2019.4 version of Axiom Financial Planning, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- Syntellis 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 Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis 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.

Transfer to Financial Planning utility enhancements

Improvements and additions to the Transfer to Financial Planning utility for the 2019.4 release include the following:

► Assign defaults for Model and Node Type selections

You can designate columns in the DEPT table to use as the default sources for Model selection and Node Type selection on the Model & Node Selections page (page 9).

Two new options on the Configuration for Data Transfer page (page 4) let you select columns from the DEPT table.

NOTE: This screen is read-only if you selected Rolling Forecast as the source for any included years on page 2 of the utility.

Category	Selection	Notes
Use Alternate Mapping for Balance Sheet Nodes?	No	Balance Sheet mapping will be based on DEPT.FPNode column. This option is only available if selecting N...
Management Reporting FTE Source	ACCT	Configure if Hours & Salary will be provided via Account or by Jobcode
Default DEPT Table Column for Model selection (optional)	None	This option will...
Default DEPT Table Column for Node Type selection (optional)	None	This...

Select NEXT > to continue

On the Model & Node Selections page, the Model and Node Type columns are pre-populated with entries from the DEPT table columns you selected on page 4.

CURRENT OPERATING YEAR: 2019 | FP FILE GROUP YEAR: FP2020 | CP TABLE: CP2020

Model & Node Selections

Select which nodes to include, which model you want to save data to, and the node type

Include?	Node	FP Node	Node Description	Model (required)	Node Type (required)
<input checked="" type="checkbox"/>	ALL NODES				
<input checked="" type="checkbox"/>	New	BS	BS	EMA Balance Sheet	B
<input checked="" type="checkbox"/>	New	CPN_IncomeStatement	CPN_IncomeStatement	EPN Vacant MD	Support
<input checked="" type="checkbox"/>	New	EHS	EHS	Forecast - EHS Property M...	NA
<input checked="" type="checkbox"/>	New	EMC	EMC	Forecast - EMC Clinics	NA
<input checked="" type="checkbox"/>	New	Exclude	Exclude	No Budget Depts	
<input checked="" type="checkbox"/>	New	MHS_BME	MHS_BME	EME Senior Care Centers ...	Other
<input checked="" type="checkbox"/>	New	MHS_Clinics	MHS_Clinics	EPG Phys Clinic-West	Other
<input checked="" type="checkbox"/>	New	MHS_Elim	MHS_Elim	ELM Balance Sheet	BalSht
<input checked="" type="checkbox"/>	New	MHS_HealthSystem	MHS_HealthSystem	EHS Trust	Other
<input checked="" type="checkbox"/>	New	MHS_HomeHealth	MHS_HomeHealth	EMC Home Health-North	Ancillary
<input checked="" type="checkbox"/>	New	MHS_IncomeStatement	MHS_IncomeStatement	EMC Balance Sheet	B
<input checked="" type="checkbox"/>	New	MHS_MedBldg	MHS_MedBldg	EHS Bldg-West	Other
<input checked="" type="checkbox"/>	New	MHS_MMC	MHS_MMC	New Radiology Department	Support
<input checked="" type="checkbox"/>	New	MHS_MNC	MHS_MNC	ENC Balance Sheet	BalSht

Model and Node Type columns display defaults populated from DEPT table columns

When sourcing from the DEPT table, the utility pulls from the designated column the item that matches the node included in the transfer:

Data Type	Integer	String	String	String
String Length		100	50	10
Description	Department	Description	Financial Planning Node	Financial Planning Node Type
Delete Row	DEPT	Description	FPNode	CM_BMarkStatu
				FPTyp
	0	EME Balance Sheet	MHS_BME	BalSht
	2	EME Clinton Assisted Living	MHS_BME	Other
	5	EME Clinton Retirement Properties	MHS_BME	Other
	1	EME Healthcare Financial Services	MHS_BME	Other
	13	EME Home Medical Services (FIXED)	MHS_BME	Other
	3012	EME Medical Practice Solutions	MHS_BME	Other
	501	EME Ridgeland Assisted Living	MHS_BME	Other
	58020	EME Senior Care Centers Of IL	MHS_BME	Other
	60000	ENC Balance Sheet	MHS_MNC	BalSht
	67887	ENC Phys Clinic-Neurosurgeon	MHS_Clinics	Ancillary
	67872	ENC Women's Heart Clinic	MHS_Clinics	Ancillary
	30000	EPG Balance Sheet	MHS_Clinics	Other

Designated source column

Column entry that matches the node

One of the nodes included in the transfer

Even with prepopulated columns, you can still make selections from the drop-down menus. The Model drop-downs come from the Model column in the Model table, and the Node Type drop-downs are populated from the Node_Type column of the Node_Type table.

NOTE: Models selected from the DEPT table must be valid models that exist in the Models table, and Node Types must be valid note types that exist in the NODE_TYPE table.

For more information, see “Step 4: Select Management Reporting data options” in “Select years, sources, and data” in the online help.

► Filter the list of models and nodes

If your organization has a large number of models or nodes, use the new Filters panel to filter the lists on the page to display only the models and nodes you want.

The screenshot shows the 'Model & Node Selections' window. On the left, there are two filter panels. The top panel is for 'MR: Model & Node Filters' and the bottom panel is for 'RF: Model & Node Filters'. Both panels have a 'FPNode' section with a 'Choose a value for FPNode' dropdown and an 'FPType' section with a 'Choose a value for FPType' dropdown. The 'FPType' dropdowns are highlighted with red boxes. Callouts point to these dropdowns with the text: 'Select filters from this section to filter the list of FPNode values from the DEPT table' (pointing to the top FPType dropdown) and 'Select filters from this section to filter FPNode values from the RFGROUP table' (pointing to the bottom FPType dropdown). Another callout points to the 'FPType' dropdown in the top panel with the text: 'New location of FPType filter (moved from Select Data Options page)'. The main area of the window displays a table of nodes with columns for 'Include', 'Node Description', 'Model (required)', and 'Node Type (required)'. The table lists various nodes such as BS, CPN_IncomeStatement, EHS, EMC, Exclude, MHS_BME, MHS_Clinics, MHS_Elim, MHS_HealthSystem, MHS_HomeHealth, MHS_IncomeStatement, MHS_MedBldg, MHS_MMC, MHS_MNC, MHS_RCHS, MMA_HealthSystem, and Support.

For more information, see “Select nodes, models, and node types” in the online help.

► Save data to existing nodes

Previously, the Transfer to Financial Planning utility could only create new nodes, but now it can save new data to existing nodes. This gives you flexibility when sourcing data for your selected years. For example, you can use the utility in tandem with the Annual Rollforward Utility if you want to roll forward one or two years and then use the Transfer to Financial Planning utility to populate data for the other years.

CURRENT OPERATING YEAR: 2019 | FP FILE GROUP YEAR: FP2020 | CP TABLE: CP2020

Model & Node Selections

Select which nodes to include, which model you want to save data to, and the node type

Include?	Node	FP Node	Node Description	Model (required)	Node Type (required)
<input checked="" type="checkbox"/>	ALL NODES			FP_CityHlth_Main	
<input checked="" type="checkbox"/>	New	CPN_IncomeStatement	CPN_IncomeStatement	FP_CityHlth_Main	B
<input checked="" type="checkbox"/>	New	EHS	EHS	MasterFacilityPlan	EN
<input checked="" type="checkbox"/>	New	EMC	EMC	FP_CityHlth_Main	HPENT
<input checked="" type="checkbox"/>	New	Exclude	Exclude	FP_CityHlth_Main	EL
<input checked="" type="checkbox"/>	New	MHS_BME		Eastside Internal Medicine	EN
<input checked="" type="checkbox"/>	76	MHS_Clinics		Eastside Internal Medicine	HPREV
<input checked="" type="checkbox"/>	77	MHS_Elim		Eastside Internal Medicine	EL
<input checked="" type="checkbox"/>	78	MHS_HeatmSystem		Eastside Internal Medicine	HP
<input checked="" type="checkbox"/>	New	MHS_HomeHealth		FP_CityHlth_Main	O
<input checked="" type="checkbox"/>	79	MHS_IncomeStatement		Eastside Internal Medicine	B
<input checked="" type="checkbox"/>	New	MHS_MedBldg		Eastside Internal Medicine	E
<input checked="" type="checkbox"/>	New	MHS_MMC		FP_CityHlth_TwinRivers	

If a node already exists, the system displays the node number

If a model or node type is invalid, the utility displays a warning icon

The utility determines if a node already exists based on the FPNode and Description combination. If those are the same as an existing node in the database, then the utility uses the existing node. If the description changes for a node that was previously listed as matching, then the utility creates a new node.

For more information on selecting models and nodes, see “Select nodes, models, and node types” in the online help.

► Fix FPCode mapping errors

New functionality in the **FPCode mapping updates** dialog provides more help with resolving code mismatches. Features include:

- New FSDetail Filter column:
 - **Management Reporting - FPCode** – Narrows the list of values displayed from the ACCT table’s FSDetail column. You can use these FSDetail codes as a guide when determining what FPCode you should select for the New Mapping (FPCode) column.
 - **Rolling Forecast - FPCode** – Narrows the list of RFCODE.FSDetail values.
- FPCode Filter:
 - New filter option **Potential Mismatches** – Filters the list to display what the utility determines to be potential mismatches between FPCodes. For Management Reporting, this compares what is in the ACCT table’s FSDetail column with what is in ACCT_FPCODE validation table’s FSDetail column for any given FPCode. Entries that do not match are displayed in this list.
For example, if a code has an FSDetail = R_NonOpRev, and the code is mapped to an FPCode that has an FSDetail = E_Salaries, this would be a mismatch.
 - Column renamed for clarity from “Filter.”

- FPCode Drop-down Filter renamed to “Limit FPCode Selections.”

Configure Mapping

FPCode mapping updates

Limited to 1,000 records. Use filters to reduce list to targeted group of codes. To see all records, open the Dimension Maintenance Utility.

NOTE: values listed as "NA" will be excluded from the transfer to Financial Planning

Product: Management Reporting - FPCode FSDetail Filter: Type to search FPCode Filter: Potential Mismatches Limit FPCode Selections: All

ACCT/Description	FSDetail	Current Mapping (FPCode)	New Mapping (FPCode)	Exclude?
50 - ...	A_AR	A_AR	Type to search	<input type="checkbox"/>
66 - ...	A_AR	A_AR	Type to search	<input type="checkbox"/>
89 - ...	A_AR	A_AR	Type to search	<input type="checkbox"/>
70 - ...	A_Cash	A_Cash	Type to search	<input type="checkbox"/>
13600 - Due From 3rd Party Payors	A_CurOtherAsset	A_CurOtherAsset	Type to search	<input type="checkbox"/>
59 - Non Medical Supply Expense per Adjusted Discharge	BmarkAdjD	A_Inventry	Type to search	<input type="checkbox"/>
68 - Equipment Maintenance Expense per Adjusted Discharge	BmarkAdjD	A_Inventry	Type to search	<input type="checkbox"/>
67 - Insurance Expense per Adjusted Discharge	BmarkAdjD	A_LTA10	Type to search	<input type="checkbox"/>
30 - Total Non Labor Expense as % of Net Operating Revenue	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>
31 - Professional Services Expense as % of Net Operating	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>
32 - Purchased Services Expense as % of Net Operating	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>
33 - Total Other Expense as % of Net Operating Revenue	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>
34 - Utility Expense as % of Net Operating Revenue	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>
35 - Lease and Rent Expense as % of Net Operating Revenue	BmarkNOR	BmarkNOR	Type to search	<input type="checkbox"/>

OK Apply Close

- **Code mapping suggestions** – Now the FPCode mapping tool provides code mapping suggestions to help you resolve code mapping issues. For the most common mappings, the system displays suggestions in the far-right column.

Configure Mapping

FPCode mapping updates

Limited to 1,000 records. Use filters to reduce list to targeted group of codes. To see all records, open the Dimension Maintenance Utility.

NOTE: values listed as "NA" will be excluded from the transfer to Financial Planning

Product: Management Reporting - FPCode FSDetail Filter: A_AR/A_ARAllow/A_LTN... FPCode Filter: All Limit FPCode Selections: All

ACCT/Description	FSDetail	Current Mapping (FPCode)	New Mapping (FPCode)	Exclude?	Suggested
13854 - Trust	A_LTNotesRec	A_CurOtherAsset	Type to search	<input type="checkbox"/>	Suggested: A_LTOtherAsset
13855 - Due From Prof Liab Ins Trust	A_LTNotesRec	A_CurOtherAsset	Type to search	<input type="checkbox"/>	Suggested: A_LTOtherAsset
40000 - Capitation Adjustment	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50000 - Medicare Allowance Adjustment	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50050 - Home Health Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50100 - Mcare - Inpatient Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50150 - Mcare - Outpatient Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50164 - Mcare - Other Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50170 - Mcare - Administrative Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50190 - Mcare - SNF Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50500 - Medicaid Allow Adjustment	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50505 - Mcaid - Home Health Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50520 - Mcaid - Inpatient Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction
50530 - Mcaid - Outpatient Discount	D_Contractual	D_IPDeduction1	Type to search	<input type="checkbox"/>	Suggested: D_IPDeduction or D_OPDeduction

OK Apply Close

For more information on resolving code mapping issues, see “Fix FPCode data mapping errors” in “Fix node and code mapping errors” in the online help.

► Select Data Options page is read only for Rolling Forecast

The Select data options page (page 4) is no longer hidden when you select Rolling Forecast as a data source. Instead, the page displays as read only for pagination consistency in the utility.

CURRENT OPERATING YEAR: 2019 | FP FILE GROUP YEAR: FP2020 | CP TABLE: CP2020

Configuration for Data Transfer

4

Select data options


Category	Selection	Notes
Use Alternate Mapping for Balance Sheet Nodes?	No	Balance Sheet mapping will be based on DEPT.FPNode column. This option is only available if selected.
Management Reporting FTE Source	ACCT	Configure if Hours & Salary will be provided via Account or by Jobcode
Default DEPT Table Column for Model selection (optional)	None	This option will set the Model for each Node in Step 9 based on the column mapping selected here
Default DEPT Table Column for Node Type selection (optional)	None	This option will set the Node Type for each Node in Step 9 based on the column mapping selected here

Select NEXT > to continue

Redesigned Home page for Windows and Excel clients

The default home page used in the Windows and Excel clients has been updated with the current Axiom logo and a new look-and-feel.

Home


Welcome: Jodie Landes

ANNOUNCEMENTS

- Management Reports are distributed 12th of each month.
- E-mail notifications will be sent when reports are available
- Comments and Action Plans are required for outliers

CONTACTS

PHONE

CALENDAR

- Budget Preparation Meetings begin: 04/10/2016
- Capital Input Requests can now be entered: 04/15/2016

DASHBOARDS

KEY REPORTS

Issues resolved in 2019.4

The following table lists the resolutions for issues addressed in 2019.4, released on December 16, 2019:

Issue Description	Description
PFB-07667 - OP RVUs not showing in Key Op Stats on F/S Reports [TFS 36410]	<p>Summary: Users who select Outpatient Revenue/Visit units (RVUs) on nodes such as Operations do not see an Outpatient RVUs line displayed in the statistics sections of the Financial Statements or the Financial Statements with Detail reports.</p> <p>Resolution: Corrected by adding OP RVUs to the appropriate section in both reports.</p>
Annual Rollforward Utility Model Description error [TFS 39061]	<p>Summary: In the Model Selections page (page 5) of the Annual Rollforward Utility, the Description column is displaying node descriptions instead of model descriptions.</p> <p>Resolution: Corrected by adjusting the code so that it pulls in the correct information for the model description.</p>
Management Reporting Variance Analysis Report generates error upon launch [TFS 39075]	<p>Summary: The Management Reporting Variance Analysis report produces an error when launched if the SuiteVariables for RActiveFileGroup has a space in the name.</p> <p>Resolution: Corrected in the Variables tab by changing the formulas in the appropriate cells to remove spaces in the RActiveFileGroup name.</p>
DMU ACCT Selection requires refresh twice to display FPCode [TFS 39088]	<p>Summary: When opening the Dimension Maintenance utility (DMU), if the user selects the ACCT dimension, no columns display until the user refreshes the data after the DMU opens.</p> <p>Resolution: Corrected by updating Axiom Query 1 to refresh automatically on open.</p>
PFB-08042 - Scenario Review [TFS 39583]	<p>Summary: The GETDOCUMENT link Go To Capital Analysis in the Scenario Review report does not work if the target sheet is hidden.</p> <p>Resolution: Corrected by changing the Capital sheet to Visible on the report's Control Sheet.</p>
Transfer to Financial Planning bucket list [TFS 39732]	<p>Summary: Clients who have Performance Reporting but not Budgeting are unable to use the Transfer to Financial Planning utility.</p> <p>Resolution: Corrected by changing "Budget Planning" to "Performance Reporting" on the Navigation tab.</p>

Issue Description	Description
<p>Transfer to FP - Product check is looking for 'Rolling Forecasting' rather than 'Rolling Forecast Quarterly' (and a couple more items) [TFS 39825]</p>	<p>Summary: In the first Configuration for Data Transfer page (page 2), of the Transfer to Financial Planning Utility, when a user tries to select Rolling Forecast as a file source option, either Rolling Forecast is not listed as an option, or selecting Rolling Forecast causes an error.</p> <p>Resolution: Corrected by adjusting the formulas on the Variables tab to add the missing space. Added a check on the AdditionalLists tab to verify that the RF table exists.</p>
<p>Interactive User guide defects [TFS 40627]</p>	<p>Summary: Links to the online help in the Interactive User Guide are hard coded and therefore break when the related help topics are moved or changed within the Financial Planning online help.</p> <p>Resolution: Corrected by changing the hard-coded links to dynamic links using aliases.</p>

Manual setup instructions

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