2019.3 Healthcare Budgeting Release
Frequently Asked Questions (FAQS)

Why should I take the 2019.3 version and when will it be released?
With the 2019.3 version, the budget template has been completely redesigned to significantly reduce plan file open and save times. This was released on September 16, 2019.

- All standard template clients should plan to take this update or a later version prior to starting their next budget cycle.
- If you cannot take this upgrade because you're in an active budget cycle, please plan on taking the latest KH-released version prior to starting your next budget process so you can take advantage of the improved plan file open and save times.

If I have already started my budget process for this year, can I take your latest update?
It depends on where you are in your process.

- If you're currently in the testing phase and plan files have not been released to your users, then yes, you can upgrade and should upgrade.
    - If you're a June 30th fiscal year-end, we encourage you to take this update and not use a previous year template.
- If you have already released plan files this year or are almost done with your budget process, our recommendation is to wait until the budget is completed and upgrade in advance of your next budget cycle.

We don't want to do anything to your current budget process that might jeopardize the results of your budget.

Is there downtime required to take the upgrade?
Most upgrades should take an hour or less to complete.

- We recommend a one-hour window of time when requesting the upgrade to be applied.
- Please select a window of time during business hours that you are available just in case we have any questions.
- You will be provided a confirmation email once the upgrade is complete.
- Many of our clients have a Sandbox environment which is updated first to review and test. Then we apply the update to your Production system. Keep this in mind for planning purposes.

What are the technical requirements for me to upgrade to 2019.3 or higher?
The upgrade requires Microsoft .Net 4.6.1 or higher. Most computers already have this from Windows updates. If you are unsure, please contact your IT staff.

2019.3 Healthcare Budgeting Release
Frequently Asked Questions (FAQS)

What should I expect to see in terms of plan file open times after I upgrade or build my new file group?
You should see open/save times significantly reduced for any plan file part.

- Our testing has shown a 65-75% reduction in file open times and 75-80% reduction in file save times from previous versions when you use Windows client to open budgets.
- Excel client is no longer supported for opening budgets.
- You can continue to use Excel to set up drivers and to write reports.

How do I know if I have any "custom features" in my plan files?
During your product implementation or after you have used the Budgeting solution, has any KH consultant, Support member, or anyone at your organization changed the KH master template, calculations methods or drivers delivered with a product update?

- If **No**, then you can take any KH update for the Budgeting product.
- If **Yes**, we need to understand what those changes are so we can work with you to determine the best upgrade path in the future.
- You can also look in Axiom Explorer for the template and calculation methods to check if they were modified since the last software update.

For any custom types of calculations methods, please submit those through KH support as future enhancements so we can suggest another calculations method that might work or can evaluate adding a future calc method to the standard library.

I have "custom" report updates or save to database report utilities. Does that stop my ability to upgrade?
No, as long as those reports or utilities were named with a new name and not named the same as a Kaufman Hall standard delivered report, we won't overwrite that during a product update.

Is there retraining needed after I take the update?
You can expect very limited retraining that primarily relates to how to navigate and complete the budget.

- The core budget plan file remains the same with Summary, Stat_Rev, Expense and Labor.
  - The add-on tabs of the template such as Provider & ProviderComp, Initiatives and Plan are now stand-alone tabs.
  - The contents of each tab have remained the same.
  - New features on some tabs add "click to expand" sections
- Our written and video training materials will help with training at your organization.

2019.3 Healthcare Budgeting Release
Frequently Asked Questions (FAQS)

Have the Excel capabilities been enhanced in the Windows client? Why do I have to use the Windows client with the 2019.3 release?

With the 2019.3 release, in order to take advantage of the performance improvements and efficiencies, you must use the Windows client to open plan files.

- If you try to use the Excel client to open plan files, you will see a message instructing you to use the Windows client.
- You can continue to use the Excel client for all other activities like opening driver files or writing/running reports.
- There have been no further updates to the Windows client with this release.

The Labor tabs now uses Click To Expand sections to summarize JobCodes. Is there an expand all option on that tab?

- In our research, we found that the typical Labor tab had about 12-13 JobCodes in it, so felt that Expand All was not currently needed on the labor tabs.
- The purpose of the click to expand sections was to minimize large amounts of data that the user had to scroll through, so we are trying to minimize the Expand All option.
- The expand all option is currently only available on the Provider budget tabs.

Is the Notes tab available in the new template version? I used to have custom calculations on the Notes tab. Can I still use those?

- The Notes tab has been removed from the template.
- In our review, we found that most of our clients were using the Notes tab for communicating and sharing notes between users.
- A new feature has been added called Message Stream which allows any user to make and save comments with every plan file.
- Message Stream will allow you to tag specific individuals who will be notified that you left a message for them.
- Message Stream can only currently be viewed when you are in each plan file.
- There is no reporting currently available to write reports displaying Message Stream results.
- You can still upload file attachments within the document to store calculations.

Can I still use and paste Excel formulas into blue cells?

- You can still copy and paste when using the Windows client in blue cells and put formulas in those cells. However, those formulas will only calculate a value and will not be saved when the plan file is saved.
- Now that the budget plan file is rebuildable, the plan file will only save the results of that formula back to the database. It will bring back the last computed value from the database when the plan file is opened.

KaufmanHall AXIOM

2019.3 Healthcare Budgeting Release Frequently Asked Questions (FAQS)

How many plan files can I have opened at once?

- Though there is no limit, there is a practical limit to how many tabs you have open across the top section of your screen and still have them make sense. The practical limit is probably 2-3 plan files and plan file parts open at the same time, but again, the system will not stop you from opening more plan files.
- Remember, the color coding around the plan file tab at the top is designed to show you which plan files and plan file parts go together and they will also open side by side to each other.

Can I still Archive my plan files?

Yes, plan files can still be archived using the same process available in previous versions.

Can I still open a prior year plan file?

Yes, any plan file from any file group can still be opened. You most likely will want to open those in the Windows client since any plan files produced with or after the 2019.3 version will have to be opened in Windows client.

Can I add additional tabs and calc methods to the Standard template?

- No, you should not be adding tabs or calculations methods on your own.
- The design of the new template includes rebuildable fields which might be broken by adding additional things and should be evaluated by KH first.
- Please contact KH if you have things to add so we can evaluate those as future standard product features or help you safely add custom changes to your template.

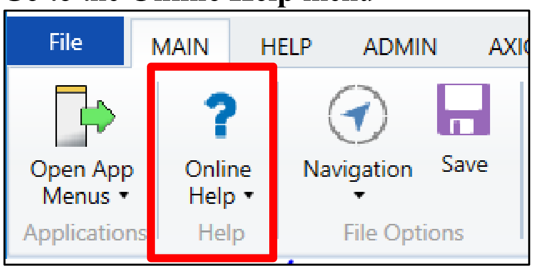
2019.3 Healthcare Budgeting Release
Frequently Asked Questions (FAQS)

Where can I access the KH Video tutorial on how to setup my next year file group?
In order to get all of the performance improvements, you must create your new file group from the prototype and follow the instructions. If you clone your prior year budget file group, you will not get all of the performance updates.

Instructions for accessing the video tutorial

Launch Axiom

Go to the **Online Help** menu



Select **Budgeting and Performance Reporting**

Go to the **BUDGET SETUP** section

Select the **Rolling Forward** menu

Select **2. Rolling Data over to next year's file group**

Launch the video displayed under **Video Instructions**.