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Release Notes

Axiom Budgeting and Performance Reporting

Version 2020.1

KaufmanHall

AXIOM

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Version: 2020.1

Updated: 4/13/2020

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About the release notes

Kaufman Hall is pleased to announce the 2020.1 release of Axiom Budgeting and Performance Reporting. 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.

The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

TIP: Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Budgeting and Performance Reporting online help. On the help home page, simply click the Release Notes link at the top of the page.

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New features in 2020.1

Axiom Budgeting and Performance Reporting 2020.1 delivers features designed to allow for industry-focused planning for Health Plan products around the per member per month model. We also focused on simplifying the user experience with capital project integration and with task pane configuration. Finally, we provided a taxonomy utility to help administrators apply standardized classifications as a ground level step when using Axiom Comparative Analytics products.

Budget health and insurance plan products

Axiom Budgeting and Performance Reporting now includes a health and insurance plan solution that helps your organization forecast a projection and annual budget using planning methodologies centric to the structure of health plan insurance products.

Statistic classification

The new Statistic Identification Update utility and Statistic Classification Review report allow you to easily assign, review, and confirm the application of Kaufman Hall standard classifications to your structure. Each confirmation increases our data metric accuracy and provides a Kaufman Hall national standard ability for data identification, aggregation, and internal comparability that your organization can leverage.

Import project budget data from Axiom Capital Planning

Axiom Capital Planning includes several utilities that allow you to transfer capital project data to multiple Axiom products, including Axiom Budgeting. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many budget, planning, and forecasting needs of your organization.

Budget health and insurance plan products

▶ Why use this feature

Axiom Budgeting and Performance Reporting now includes a health and insurance plan solution that helps your organization forecast a projection and annual budget using planning methodologies centric to the structure of health plan insurance products. This allows you to work with an industry specific model that is common to the health plan business. You can track and plan the profitability of each insurance product, all while viewing real time results in Axiom Budgeting.

▶ How this feature works

There are several key features in the new health and insurance plan product:

> **NOTE:** This is a separately licensed product available for purchase.

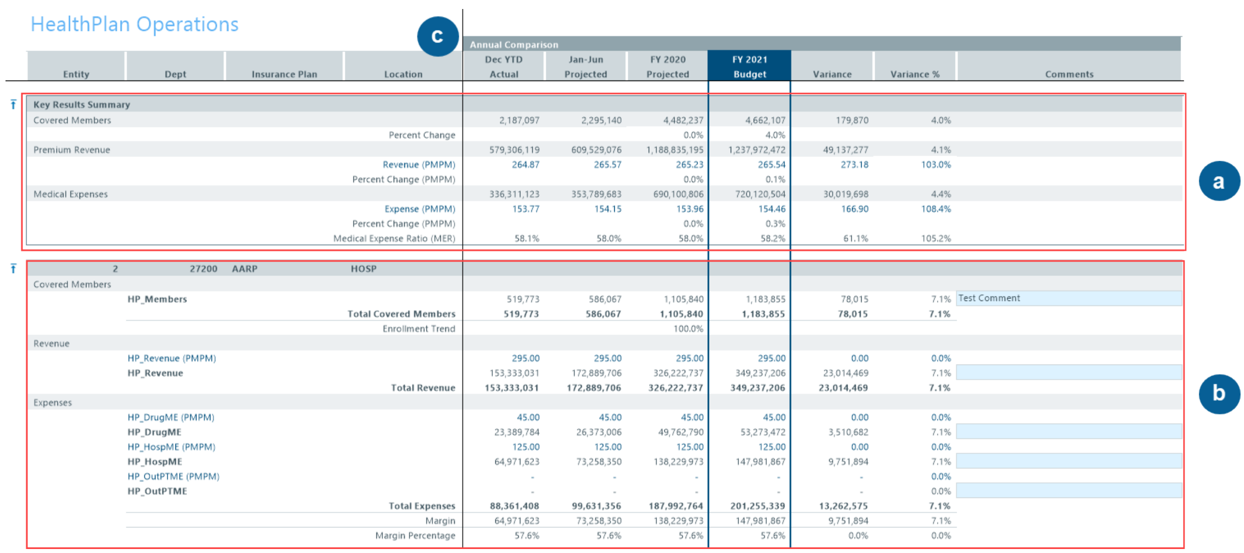
1. HealthPlan Operations utility

This utility allows your organization to calculate revenues and expenses based on Membership Per Member Per Month (PMPM) calculations, which you can then use to determine the profitability of each health plan and/or insurance product. The utility includes the following:

a. **Key Results Summary** - This area summarizes the results of all the health plans included in the utility.

b. **Insurance Plans** - The utility displays a list of all the health plans and their key metrics for members as well as the PMPM rates for revenue and expenses. The system calculates historical PMPM values for historical periods such as Last Year Actual and Year-to-Date. Projection and monthly budget values are calculated based on members multiplied by the PMPM rate for revenues and expenses. The header bar for each entity/department displays the entity and department number, the insurance plan product, and the location. For each entity/department, the system shows the number of covered members, the revenue, and the expenses.

c. **Annual Comparison and Budget** - The first half of the sheet displays the Annual Comparison section, which shows values for the current year, including the current fiscal year budget, YTD actuals, and projected actuals and next year budget. The other half of the sheet is the Budget section, which shows the monthly and total budgeted values for the next fiscal year.



				Annual Comparison						
Entity	Dept	Insurance Plan	Location	Dec YTD Actual	Jan-Jun Projected	FY 2020 Projected	FY 2021 Budget	Variance	Variance %	Comments
Key Results Summary										
Covered Members				2,187,097	2,295,140	4,482,237	4,662,107	179,870	4.0%	
			Percent Change			0.0%	4.0%			
Premium Revenue				579,306,119	609,529,076	1,188,835,195	1,237,972,472	49,137,277	4.1%	
			Revenue (PMPM)	264.87	265.57	265.23	265.54	273.18	103.0%	
			Percent Change (PMPM)			0.0%	0.1%			
Medical Expenses				336,311,123	353,789,683	690,100,806	720,120,504	30,019,698	4.4%	
			Expense (PMPM)	153.77	154.15	153.96	154.46	166.90	108.4%	
			Percent Change (PMPM)			0.0%	0.3%			
			Medical Expense Ratio (MER)	58.1%	58.0%	58.0%	58.2%	61.1%	105.2%	
2	27200	AARP	HOSP							
Covered Members										
	HP_Members			519,773	586,067	1,105,840	1,183,855	78,015	7.1%	Test Comment
			Total Covered Members	519,773	586,067	1,105,840	1,183,855	78,015	7.1%	
			Enrollment Trend			100.0%				
Revenue										
	HP_Revenue (PMPM)			295.00	295.00	295.00	295.00	0.00	0.0%	
	HP_Revenue			153,333,031	172,889,706	326,222,737	349,237,206	23,014,469	7.1%	
			Total Revenue	153,333,031	172,889,706	326,222,737	349,237,206	23,014,469	7.1%	
Expenses										
	HP_DrugME (PMPM)			45.00	45.00	45.00	45.00	0.00	0.0%	
	HP_DrugME			23,389,784	26,373,006	49,762,790	53,273,472	3,510,682	7.1%	
	HP_HospME (PMPM)			125.00	125.00	125.00	125.00	0.00	0.0%	
	HP_HospME			64,971,623	73,258,350	138,229,973	147,981,867	9,751,894	7.1%	
	HP_OutPTME (PMPM)			-	-	-	-	-	0.0%	
	HP_OutPTME			-	-	-	-	-	0.0%	
			Total Expenses	88,361,408	99,631,356	187,992,764	201,255,339	13,262,575	7.1%	
			Margin	64,971,623	73,258,350	138,229,973	147,981,867	9,751,894	7.1%	
			Margin Percentage	57.6%	57.6%	57.6%	57.6%	0.0%	0.0%	

Where: The utility is located in the **Bud Admin** task pane, in the **Budget Files Administration** section.

Who: Axiom Budgeting administrators and/or finance liaisons of health plan companies and their key stakeholders.

How: Most of the utility is devoted to displaying calculated revenues and expenses derived from Membership Per Member Per Month (PMPM) and Membership Enrollment Trend driver. The list of insurance plans is maintained in the new INSCODE dimension table and the actual data used for the calculations is stored in the new ACT_HP_20XX data table.

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2. ACT_HP_20XX data table

This table stores the actual data used by the HealthPlan Operations utility to budget for your organization's health and insurance plans across entities and departments. This information is used primarily by the Membership Per Member Per Month (PMPM) driver to calculate actual and budget amounts by period by the number of members in a particular period. The ability to determine profitability depends on the data provided by your organization. The more revenue and expense data you enter into the system, the closer you can get to a true margin ratio.

	B	D	E	F	G	H	I	J	K	L	M
4	Data Type	String	Integer	String	String	String	Integer	Numeric	Numeric	Numeric	Numeric
5	String Length	25		25	25	50					
6	Description	Insurance Code key field	Department	Location	Data Type	Group	Account	Fiscal Period 1	Fiscal Period 2	Fiscal Period 3	Fiscal Period 4
8	Delete Row	INSCODE	DEPT	LOCATION	DATATYPE	GROUP	ACCT	P1	P2	P3	P4
9		AARP	27200	Hosp	HP_DrugME	NA	0	3801971.25	3839990.96	3878390.87	3917174.78
10		AARP	27200	Hosp	HP_HospME	NA	0	10561031.25	10666641.56	10773307.98	10881041.06
11		AARP	27200	Hosp	HP_Members	NA	0	84488.25	85333.13	86186.46	87048.33
12		AARP	27200	Hosp	HP_OutPTME	NA	0	0.00	0.00	0.00	0.00
13		AARP	27200	Hosp	HP_Revenue	NA	0	24924033.75	25173274.09	25425006.83	25679256.90
14		AARP	27200	Office	HP_DrugME	NA	0	2957088.75	2986659.64	3016526.23	3046691.50
15		AARP	27200	Office	HP_HospME	NA	0	0.00	0.00	0.00	0.00
16		AARP	27200	Office	HP_Members	NA	0	84488.25	85333.13	86186.46	87048.33
17		AARP	27200	Office	HP_OutPTME	NA	0	4224412.50	4266656.63	4309323.19	4352416.42
18		AARP	27200	Office	HP_Revenue	NA	0	24924033.75	25173274.09	25425006.83	25679256.90
19		Anthem	101010	NorthClinic	HP_DrugME	NA	0	512050.00	517170.50	522342.21	527565.63
20		Anthem	101010	NorthClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00
21		Anthem	101010	NorthClinic	HP_Members	NA	0	14630.00	14776.30	14924.06	15073.30
22		Anthem	101010	NorthClinic	HP_OutPTME	NA	0	1097250.00	1108222.50	1119304.73	1130497.77
23		Anthem	101010	NorthClinic	HP_Revenue	NA	0	2911370.00	2940483.70	2969888.54	2999587.42
24		Conesco	101012	NorthClinic	HP_DrugME	NA	0	307230.00	310302.30	313405.32	316539.38
25		Conesco	101012	NorthClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00
26		Conesco	101012	NorthClinic	HP_Members	NA	0	8778.00	8865.78	8954.44	9043.98
27		Conesco	101012	NorthClinic	HP_OutPTME	NA	0	658350.00	664933.50	671582.84	678298.66
28		Conesco	101012	NorthClinic	HP_Revenue	NA	0	1746822.00	1764290.22	1781933.12	1799752.45
29		JohnDeere	27210	WestClinic	HP_DrugME	NA	0	588857.50	594746.08	600693.54	606700.47
30		JohnDeere	27210	WestClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00
31		JohnDeere	27210	WestClinic	HP_Members	NA	0	16824.50	16992.75	17162.67	17334.30
32		JohnDeere	27210	WestClinic	HP_OutPTME	NA	0	1430082.50	1444383.33	1458827.16	1473415.43
33		JohnDeere	27210	WestClinic	HP_Revenue	NA	0	3230304.00	3262607.04	3295233.11	3328185.44
34		McareAdv	27200	Hosp	HP_DrugME	NA	0	5120500.00	5171705.00	5223422.05	5275656.27
35		McareAdv	27200	Hosp	HP_HospME	NA	0	10972500.00	11082225.00	11193047.25	11304977.72
36		McareAdv	27200	Hosp	HP_Members	NA	0	146300.00	147763.00	149240.63	150733.04
37		McareAdv	27200	Hosp	HP_OutPTME	NA	0	12435500.00	12559855.00	12685453.55	12812308.09
38		McareAdv	27200	Hosp	HP_Revenue	NA	0	36428700.00	36792987.00	37160916.87	37532526.04

	N	O	P	Q	R	S	T	U	V	W	X
4	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Integer	String	Integer
5										100	
6	Fiscal Period 5	Fiscal Period 6	Fiscal Period 7	Fiscal Period 8	Fiscal Period 9	Fiscal Period 10	Fiscal Period 11	Fiscal Period 12	NYB KHA	Custom save identifier	Required to use zero on save functionality
8	P5	P6	P7	P8	P9	P10	P11	P12	NYBKHA	SaveCuston	SaveTagDocID
9	3956346.53	3995909.99	4035869.09	4076227.78	5299096.12	5352087.08	5405607.95	5459664.03	0		0
10	10989851.47	11099749.98	11210747.48	11322854.96	14719711.45	14866908.56	15015577.65	15165733.42	0		0
11	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0		0
12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
13	25936049.47	26195409.96	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791130.88	0		0
14	3077158.41	3107930.00	3139009.30	3170399.39	4121519.20	4162734.40	4204361.74	4246405.36	0		0
15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
16	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0		0
17	4395940.59	4439899.99	4484298.99	4529141.98	5887884.58	5946763.42	6006231.06	6066293.37	0		0
18	25936049.47	26195409.96	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791130.88	0		0
19	532841.28	538169.70	543551.39	548986.91	554476.78	560021.54	565621.76	571277.98	0		0
20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
21	15224.04	15376.28	15530.04	15685.34	15842.19	16000.62	16160.62	16322.23	0		0
22	1141802.75	1153220.78	1164752.99	1176400.52	1188164.52	1200046.17	1212046.63	1224167.09	0		0
23	3029583.30	3059879.13	3090477.92	3121382.70	3152596.53	3184122.49	3215963.72	3248123.35	0		0
24	319704.77	322901.82	326130.84	329392.14	332686.07	336012.93	339373.06	342766.79	0		0
25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
26	9134.42	9225.77	9318.02	9411.20	9505.32	9600.37	9696.37	9793.34	0		0
27	685081.65	691932.47	698851.79	705840.31	712898.71	720027.70	727227.98	734500.26	0		0
28	1817749.98	1835927.48	1854286.75	1872829.62	1891557.92	1910473.50	1929578.23	1948874.01	0		0
29	612767.48	618895.15	625084.10	631334.94	637648.29	644024.78	650465.02	656969.67	0		0
30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
31	17507.64	17682.72	17859.55	18038.14	18218.52	18400.71	18584.71	18770.56	0		0
32	1488149.58	1503031.08	1518061.39	1533242.00	1548574.42	1564060.17	1579700.77	1595497.78	0		0
33	3361467.30	3395081.97	3429032.79	3463323.12	3497956.35	3532935.91	3568265.27	3603947.92	0		0
34	5328412.83	5381696.96	5435513.93	5489869.07	5544767.76	5600215.44	5656217.59	5712779.77	0		0
35	11418027.50	11532207.77	11647529.85	11764005.15	11881645.20	12000461.65	12120466.27	12241670.93	0		0
36	152240.37	153762.77	155300.40	156853.40	158421.94	160006.16	161606.22	163222.28	0		0
37	12940431.17	13069835.48	13200533.83	13332539.17	13465864.56	13600523.21	13736528.44	13873893.72	0		0
38	37907851.30	38286929.81	38669799.11	39056497.10	39447062.07	39841532.69	40239948.02	40642347.50	0		0

Where: The table is located in the **Library > Management Reporting > Actuals > Health Plan** folder of the System Browser.

Who: Axiom Budgeting administrators and/or finance liaisons of health plan companies and their key stakeholders (assigned the proper security permissions.

How: You can enter the data in this table manually or as part of an import. Your Kaufman Hall Implementation Consultant will help you set up the table for your organization. There is no pre-defined import available to import health plan data at this time, but you can work with your Kaufman Hall Implementation Consultant to create a custom import. You will need to maintain this table as plans, revenue streams, and expense streams are added or changed.

NOTE: The Health Plan product relies on data identified in this table for refresh variables and blocks of data. Without the data, refresh variable picklist(s) will display blank.

IMPORTANT: Your organization cannot enter any health plan data containing patient identifying information into the system. Please do not send any transmission of data in any form to Kaufman Hall related to this feature containing any patient identifying information.

3. Membership Enrollment driver

This driver allows you to enter enrollment percentages for each health plan or insurance product offered by your organization. The purpose of this driver is to determine the membership trend of each insurance product. The trend percentages are then used in the Membership Per Member Per Month (PMPM) driver to adjust the membership statistics. The driver displays the list of insurance plans by clearly grouping them together by entity.

Where: The driver is located in the **Bud Admin** task pane, in the **Budget Assumptions** section. The driver is located both in the **Access NY Budget Assumptions** and **Access CY Budget Assumptions** drop-downs.

Who: Only users assigned the GlobalDriverMgmt role profile have access to this driver.

How: When you open the driver, you can use the Refresh Variables option to filter the entities to view in the driver. In the actuals columns for each period, enter the actual percentage of growth or reduction of membership that the plan experienced or expect to experience. By default, and upon initial use, all Projected Actuals and Budget columns display 100% for all plans. The configured growth or reduction of membership percentages provides the basis for budgeting plan membership for the next budget year. You can change this number, if needed. In the budget columns for each period, enter the percentage of growth or reduction of membership that you expect the plan to experience. If a plan is removed from the INSCODE dimension table (i.e., a plan is retired or discontinued), an Unmatched Records area displays at the bottom of the driver page.

Membership Enrollment Trend Driver

		Actuals 2020												
Insurance Plan	Description	ACT2020 P1	ACT2020 P2	ACT2020 P3	ACT2020 P4	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8	ACT2020 P9	ACT2020 P10	ACT2020 P11	ACT2020 P12	ACT2020 Projected
2	KH Medical Center													
AARP	AARP	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	110.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Anthem	Anthem Blue Cross	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Conesco	Conesco	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
JohnDeere	John Deere	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
McareAdv	Meidcare Advantage	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Optima	Oprtima Family Care	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
SH	Secure Horizons	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
UA	United American	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
UMW	United Mine Workers	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
3	KH Physician Group													

4. Membership Per Member Per Month (PMPM) driver

This driver provides the basis for several important planning activities needed for your organization to budget health plans and insurance products, which is then used by the system to populate the HealthPlan Operation utility. This driver provides a central location to review member lives, revenue PMPM, and expense PMPM for each health plan and specifically within each entity (or department). The enrollment percentages from the Membership Enrollment Trend driver updates the planned member lives, which also flows to the HealthPlan Operation utility. This driver does the following:

- Depending on the level of detailed records loaded by your organization in the ACT_HP_20XX data table, the driver can bring in actual data for members, revenues, and expenses by entity, department, insurance code, location, and data type. The driver calculation methods then calculate historical PMPM values based on available history.

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- The historical PMPM rates carry forward to any non-actual period. For example, if six months of actual is used, then month seven of the current year in the driver refers to the month six PMPM rate. The rates in all non-actual months can be edited.
- The PMPM rates in the projection and monthly budget columns are then used to calculate the projection and monthly budget for revenues and expenses in the HealthPlan Operations utility.

> **NOTE:** If the Membership Enrollment Trend driver is not configured, the Membership PMPM driver will default to 100%.

Where: The driver is located in the **Bud Admin** task pane, in the **Budget Assumptions** section. The driver is located both in the **Access NY Budget Assumptions** and **Access CY Budget Assumptions** drop-downs.

Who: Only users assigned the GlobalDriverMgmt role profile have access to this driver.

How: When you open the driver, you can use the Refresh Variables option to filter the entities or departments that display in the driver. In the actuals and budget columns for the different data types, you can use the default values derived from the Membership Trend Enrollment driver or enter the values manually. You can also add and remove data types.

Per Member Per Month (PMPM) Driver

Insurance Plan	Description	Spread Tag	Actuals 2020 ACT2020 P1	ACT2020 P2	ACT2020 P3	ACT2020 P4	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8	ACT2020 P9	ACT2020 P10	ACT2020 P11	ACT2020 P12	Members Months ACT2020 Projected
2	KH Medical Center														
27200	EMC Radiology - MRI (JobCode)														
AARP	AARP														
HOSP	Hospital_HP														
	Members	Default	84,488	85,333	86,186	87,048	87,919	88,798	97,678	97,678	97,678	97,678	97,678	97,678	1,105,840
	HP_DrugME	Default	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	
	HP_HospME	Default	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	
	HP_OutPTME	Default	-	-	-	-	-	-	-	-	-	-	-	-	
	HP_Revenue	Previous Input	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	
	No additional Datatypes available for insertion														
Office	Office														
	Members	Previous Input	84,488	85,333	86,186	87,048	87,919	88,798	88,798	88,798	88,798	88,798	88,798	88,798	1,052,561
	HP_DrugME	Previous Input	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	
	HP_HospME	Default	-	-	-	-	-	-	-	-	-	-	-	-	
	HP_OutPTME	Previous Input	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	50.00	
	HP_Revenue	Previous Input	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	
	No additional Datatypes available for insertion														
McareAdv	Meidcare Advantage														
HOSP	Hospital_HP														
	Members	Previous Input	146,300	147,763	149,241	150,733	152,240	153,763	153,763	153,763	153,763	153,763	153,763	153,763	1,822,616
	HP_DrugME	Previous Input	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	
	HP_HospME	Previous Input	75.00	75.00	75.00	75.00	75.00	75.00	75.00	75.00	75.00	75.00	75.00	75.00	
	HP_OutPTME	Previous Input	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	
	HP_Revenue	Previous Input	249.00	249.00	249.00	249.00	249.00	249.00	249.00	249.00	249.00	249.00	249.00	249.00	
	No additional Datatypes available for insertion														
27210	EMC Radiology - CT Scan														
JohnDeere	John Deere														
WestClinic	West Clinic_HP														
	Members	Previous Input	16,825	16,993	17,163	17,334	17,508	17,683	17,683	17,683	17,683	17,683	17,683	17,683	209,601
	HP_DrugME	Previous Input	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	
	HP_HospME	Default	-	-	-	-	-	-	-	-	-	-	-	-	
	HP_OutPTME	Previous Input	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	85.00	
	HP_Revenue	Previous Input	192.00	192.00	192.00	192.00	192.00	192.00	192.00	192.00	192.00	192.00	192.00	192.00	
	No additional Datatypes available for insertion														

5. INSCODE dimension table

The INSCODE dimension stores information for the insurance/health product plans offered by your organization. This information is used to manage and configure the plans included in related driver tables and in the Health Plan Operations utility. Similar to other dimension tables like ACCT, there are column structures to control what insurance plans will be allowed to interface to the HealthPlan tab and at what level of rollup, if any.

Where: The dimension is accessible from the Dimension Maintenance Utility, located in the Bud Admin task pane, in the Budget System Maintenance section.

Who: Users assigned the GlobalDriverMgmt role profile and Budget Admins or Budget Local Admins have access.

How: When you open the dimension, enter the insurance code, description, InsCode.BgtCode (used to group the insurance/health plan products together), and KHAInt (specify whether to include the insurance product in the list of available plans in the Health Plan Operations utility).

Data Type	*String*	*String*	*String*	*String*
String Length	*25*	*100*	*25*	*25*
Description	Dimension field for Insurance/Health Plan	Extended description of the INSCODE key field	Insurance Code Mapping (lookup to INSCODE key field)	Interface indicator
	INSCOD	**Description**	**InsCode_BgtCod**	**KHAIn**
	AARP	AARP	AARP	HealthPlan
	Anthem	Anthem Blue Cross	Anthem	HealthPlan
	Conesco	Conesco	Conesco	HealthPlan
	JohnDeere	John Deere	JohnDeere	HealthPlan
	McareAdv	Meidcare Advantage	McareAdv	HealthPlan
	NA	Default INSCODE	NA	NA
	Optima	Oprtima Family Care	Optima	HealthPlan
	SH	Secure Horizons	SH	HealthPlan
	UA	United American	UA	HealthPlan
	UMW	United Mine Workers	UMW	HealthPlan
	UMW_S	United Mine Workers Supplement	UMW	HealthPlan

Where to find more information

The following topics include new information and instructions for using this feature:

- "Setting up and managing health plan budgeting"
- "Updating dimensions for health plan budgeting"
- "Managing the ACT_HP_20XX data table"
- "Membership Enrollment Trend driver"
- "Membership Per Member Per Month (PMPM) driver"
- "Removing or retiring plans"
- "Budgeting health plans"

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Statistic classifications

Why use this feature

Kaufman Hall leverages artificial intelligence to review and categorize your key dimension elements to a pre-defined Kaufman Hall taxonomy system. The artificial intelligence method leverages descriptions and key characteristics to derive suggested classifications. These classifications provide a required level of standardization and structure to enable comparative analysis as well as key integration points. This data standardization lays the ground work for improved standard Axiom reports that meets the need of your organization.

The new Statistic Identification Update utility and Statistic Classification Review report allow you to easily assign, review, and confirm the application of Kaufman Hall standard classifications to your structure. Each confirmation increases our data metric accuracy and provides a Kaufman Hall national standard ability for data identification, aggregation, and internal comparability that your organization can leverage.

How this feature works

What: The Statistic Identification Update utility allows you to map ACCT.KHAStandardClass values by account/department or department/account combinations. You can use this utility to filter the list of accounts or departments in several different ways so that you can narrow the list down to only those accounts/departments that you need to classify. After you filter the accounts/departments, the utility then displays the list and populates the column values based on the ACCT.KHAStandardClass column in the ACCT dimension.

After you complete the classification process using the Statistic Identification Update utility, you can use the Statistic Classification Review report to review statistics to ensure the correct YTD values tie out from the department summed up to the entity level.

Where: The utility is located in the **Mgmt Admin** task pane, in **Data Maintenance > Data Reconciliation** folder.

Who: Axiom Performance Reporting administrators only.

How:

- **Statistic Identification Update utility** - After opening the utility, filter the list of departments/accounts from the **Filters** panel. As needed, set the options to display the YTD values, display the ACCT.KHAStandardClass, and/or unlock all of the records for editing. For each account/department combination, update the editable columns, and then save.

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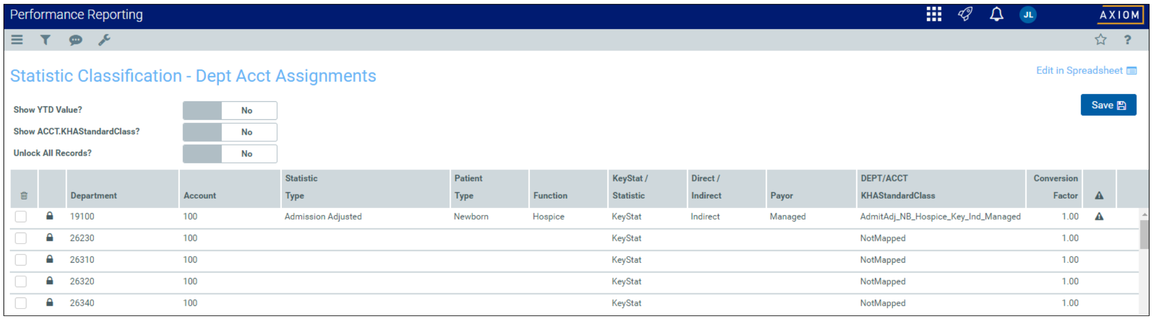


- **Statistic Classification Review report** - After opening the report, filter the list of departments/accounts from the **Filters** panel. Review the YTD statistics in the report to determine that they are correctly summing and rolling up from the department to the entity level. If needed, return to the Statistic Identification Update utility to make the appropriate adjustments. You can then return to this report, where the changes are automatically refreshed.

Where to find more information

The following topics include new information and instructions for using this feature:

- "Standardizing data"
- "Mapping KHA Standard Class codes"
- "Reviewing codes for standards compliance"

- "Assigning KHAStandardClass by department and account"
- "Reviewing codes for standards compliance"

Import project budget data from Axiom Capital Planning

Why use this feature

Axiom Capital Planning includes several utilities that allow you to transfer capital project data to multiple Axiom products, including Axiom Budgeting. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many budget, planning, and forecasting needs of your organization.

The Transfer Capital Projects to Budgeting utility has been redesigned and updated to provide a web-based wizard experience so that you can quickly and easily transfer the specific data needed to include and manage in your budgets. After the data has been transferred, you can then enter or update the project budget data in Axiom Budgeting for each month—the same as any other budget item.

How this feature works

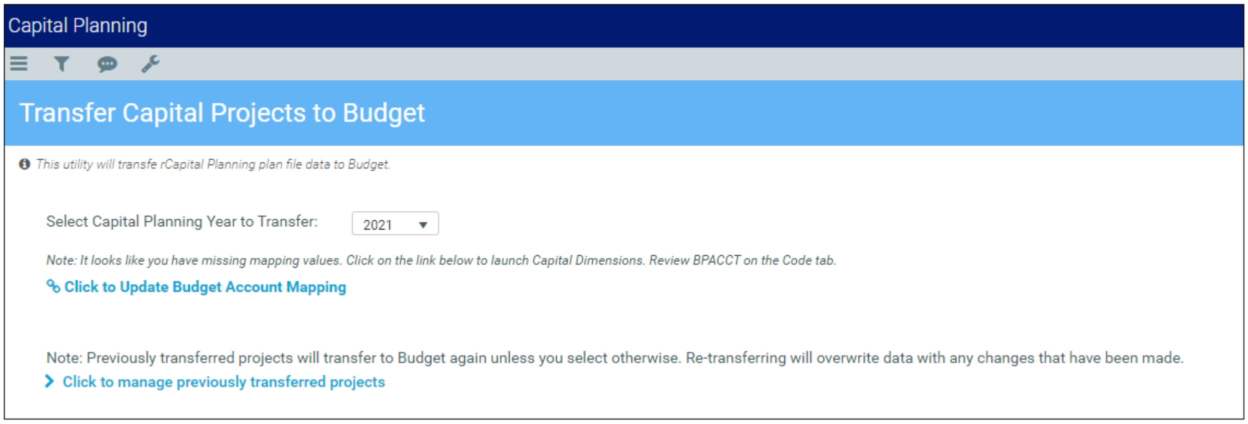
What: If your organization is licensed for Axiom Capital Planning and Axiom Budgeting, you can quickly and easily transfer capital project data to Axiom Budgeting using the new web-based Transfer Capital Projects to Budget utility.

Where: The utility is available from the Capital Planning home page or from the Cap Plan Admin task pane.

Who: Users must be assigned both the Capital Planning Administrator and Budgeting Administrator roles to use this utility.

How: Open the **Transfer Capital Projects to Budget** utility. The wizard will walk you through the process of selecting the projects to transfer.

> **NOTE:** You will first need to map the Capital Planning category codes to the Budgeting accounts. The wizard includes a link to do this.



Where to find more information

The following topics in the online help have been updated with information and instructions for using this feature:

- "Transferring capital project data from Axiom Capital Tracking"

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What to know before upgrading

IMPORTANT: You must apply the Axiom Software 2020.1 upgrade before applying any 2020.1 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 2020.1 *before* the first product upgrade. Refer to the **Axiom Software 2020.1 Release Notes** and **Axiom Healthcare Suite 2020.1 Release Notes** for considerations before upgrading. Apply this update ONLY if you have already applied the release and completed all the manual setup steps from the corresponding release notes.

When upgrading to Axiom Budgeting and Performance Reporting, keep in mind the following:

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

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Preparing for and scheduling upgrades

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** – Submit a request to your organization's Axiom Master System User (MSU) to contact support@kaufmanhall.com to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
    - Desired Axiom Software platform version.
    - Desired Axiom for Healthcare product and version.
    - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Kaufman Hall can do this.
    - Propose an approximate two-hour downtime window when Kaufman Hall can apply update (s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Kaufman Hall).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

IMPORTANT: Some features in this release require configuration after installation and/or considerations to be aware of before or after installation. For more information, see Manual configuration instructions and technical considerations.

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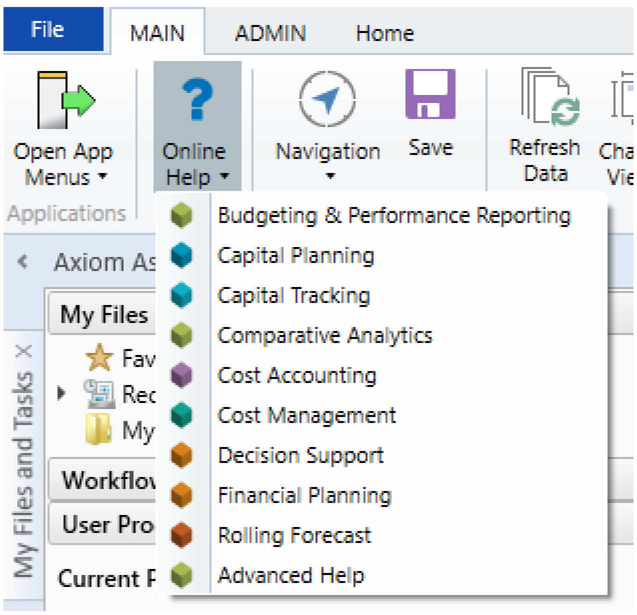
Getting help and training

Kaufman Hall provides world-class resources at your fingertips directly within the Axiom Software 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 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.

Escalating to Axiom Support

As always, we appreciate your commitment to Kaufman Hall. 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 **Support** at the top of the home page.

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Issues fixed in 2020.1

The following tables list the resolutions for issues addressed in 2020.1, released on April 27th, 2020:

Driver, template, calc method, and other updates

Calc Methods

Issue	Description
PFB-08268 - Jobcode calc method contains formula logic in column J, row 14 [TFS 40834]	**Issue:** The logic error is that the value of the denominator for (PTO Alloc % for YTD) occurs at the beginning of the formula when the division calculation is 4 embedded IF-THEN conditions. If the denominator is zero, but the logic doesn't result in the associated calculation, then the result is erroneously zero and will not recognize any PTO configurations from the Labor Override driver. **Resolution:** Corrected by updating the test for IF YTD PTO=0 to the correct section of the formula.
PFB-08403 - Incorrect formula for hours on row 1 of New Jobcode on Staffing tab [TFS 42165]	**Issue:** In the Staffing tab, the total hours for each month on row 1 of the Add New Jobcode calc method includes misplaced parentheses that causes the calculated hours for each pay type row to be less than they should be. This impacts variable job codes, as the total hours for the budget months do not tie to the annual paid hours section of each job code for the Staffing tab. This leads to understated hours on the Expense tab. **Resolution:** In the Add New JobCode Block calc method, corrected by adjusting the formula so that the FTEs by row are no longer being reduced by the formula error within the Hours columns.

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Issue	Description
PFB-08406 - Unable to adjust Gross Charges for new/exst provider in Mgr Input Column [TFS 42395]	**Issue:** In 2019.3 when adding new providers to a plan file, users can no longer adjust Gross Revenue (no blue input cell) for the current year in the Manager Input column, which was an available functionality several versions ago. The logic in this field is similar to the Existing Provider "Manager Input logic" where it uses the (YTD Gross Charges / YTD of the chosen driver from the drop-down) multiplies by the Manager Input value of the chosen driver to calculate your gross charge adjustment. While this works in one case for existing providers, its problematic as it does not allow for additional adjustment on existing or new providers (they have zero YTD). **Resolution:** Corrected the Revenue calc method by reinstating the same update as the original calc methods. Changes were made to the cells in columns L, FK, and GE for the one line Revenue calc method.
PFB-08425 - CYB Detail Description does not come into budget workbooks [TFS 42465]	**Issue:** In the budget workbook, users can include the current year's budget detail information from the last completed budget. In the 2019.3 version, however, the system brings over the budget amounts but not the description for RedcordIDDesc and BudComments. **Resolution:** Corrected by adding fields for the two prior years (RecordIDDesc and BudComments) in the field definition row so that the text comments entered from prior budget year will be included in the plan file.
PFB-08427 - Incorrect job code description on the Jobcodes tab for KHABGTcoded Jobcodes	**Issue:** With the changes in 2019.3 for plan files, an issue occurs when you roll up job codes together using the KHABGTcode column. The system picks up the description of one of the higher-numbered job codes since now the system uses an AQ to bring in that data versus a using GetData. **Resolution:** Corrected by updating the formula for the description to use Jobcode.KHABgtCode.Description.

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Issue	Description
PFB-08476 - Incorrect Stat Reference logic on the ProviderComp tab for CYB,YTD, RemProj [TFS 43369]	**Issue:** With the separation of the ProviderDetail and ProviderSummary logic (starting in 2019.3), the stat referencing formulas on the first line of the PComp block on the ProviderComp tab for CYB, YTD, and Remaining Projected were not correctly updated . If you elect to use a stat that is not the driving stat, the system correctly picks it up for the budget months, but not CYB, YTD , and Remaining Projected. **Resolution:** Corrected by adjusting the calc method library formulas to identify driver setup for ProviderDetail or ProviderSummary and bring in the correct stat value if configured for a non-driver statistic. (ie...WRVUs may be the driver stat but provider comp is using Encounters).
PFB-08446 - Calendar Day description in Budget Method incorrect [TFS 44065]	**Issue:** In cell T87 on Expense tab, the description defaults to Calendar Days because of a cell formula error that looks to a blank cell on the Stat_Rev tab. **Resolution:** Corrected by updating the formula so that "Total Key Statistic" is the description when dept statistics are used.
PFB-08607 - When an Initiative is added to a plan file, a recalculation causes a duplicate [TFS 46716]	**Issue:** When an Initiative is added to a plan file, recalculating the plan file causes a duplicate. **Resolution:** Corrected by adding needed formulas to the Initiative block to create the unique keys keep the initiative block unique.

Drivers

Issue	Description
PFB-06968 - Job class character width - labor rates not compliant [TFS 29371]	**Issue:** In the Labor Rates driver, the Job Class Exceptions is not compliant with the Jobcode.JobClass character width of 50. In the Labor Rates Assumptions table, column O is set for a 25-character width, thus not saving if the Job Class selected within the drop-down is more than 25 characters. As a result, the system displays an error message, and the driver will not save. **Resolution:** Corrected by updating the string from 25 to 50 in column JC in Labor Rates.

Issue	Description
PFB-07685 - Driver-Global Expense Import update to use CONCAT [TFS 37138]	**Issue:** Transform 2 should be modified n the Global Expense import because it currently concatenates department and account using the + string concatenation. This is not as flexible as CONCAT and sometimes returns errors if the source data for ACCT and DEPT are large integers. Using CONCAT converts every value to a string before concatenation. **Resolution:** Corrected by changing the transform step 4 to the recommended CONCAT function.
Budget Provider Driver: Errors upon save due to the length of the department description [TFS 38578]	**Issue:** The provider driver department description is len (50), while the department dimension description is len (100). The difference causes a save error and prevents the driver from saving. **Resolution:** Corrected by increasing the description field length to 100.
PFB-08065 - Driver 12 Budget Revenue GlobalRevenue header displays "Account Description" while it contains Acct and Dept descriptions [TFS 39795]	**Issue:** The definition in Column S is Dept.KHABgtMap.Description, but row 46 description displays "Account Description" when it should display "Description". **Resolution:** Corrected by changing "Account Description" to "Description".
PFB-08130 - Provider - VolSum produces incorrect results for YTD [TFS 40478]	**Issue:** When bringing in the YTD volume for the provider, the Field Definition Row is set to pull in YTD and this can change during the budget process if a second save needs to occur due to volume changes. Cell N27 should be referencing the Variables tab and cell 11 for the Budget YTD period. **Resolution:** When bringing in the YTD volume for the provider, the Field Definition Row is set to pull in YTD and this can change during the budget process if a second save needs to occur due to volume changes. Cell N27 now references the Variables tab and cell 11 for the Budget YTD period. This replaces using the system YTD, which can change over the budget period. The second issue was corrected for the Rem Volume column by deleting the formula in O25 so that is uses the calculation in O26 instead, which takes the total minus YTD to get the projection versus using ProjCalc.

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Issue	Description
PFB-08245 - Driver-Depreciation import transform issue - change {template} to {temptable} [TFS 40646]	**Issue:** The table variable in transform 3 of the Driver-Depreciation import is {template}; it should be {temptable}. **Resolution:** Corrected by updating the transform step to temptable.
PFB-08288 - Labor Config: NotUsed in Paytype column [TFS 41087]	**Issue:** The new data validation for Jobcode and Paytype do not allow for NotUsed as an option unless the driver is unprotected and it is manually entered. This is problematic because all the Hide Row logic in the plan file is looking for NotUsed in the Paytype column to determine if a row should be Visible or Hidden. This would not be an issue for a client with a rolled over File Group that had NotUsed previously listed, but any new system or changes would be problematic as most clients do not have the access to overwrite like that. **Resolution:** Corrected by updating the picklists to select 'NotUsed' as an option.
PFB-08287 - Labor Config: Lump sum payout missing desc [TFS 41088]	**Issue:** The new format of Labor Config no longer includes a description for the Lump Sum Payout line. As a result, it now displays in the plan file with a zero instead of a description. **Resolution:** Corrected by updating cell Q83 to be an input cell in the Labor Configuration tab.
PFB-08360 - 02 Budget Labor Config driver is missing feature that inserted Global section [TFS 41742]	**Issue:** The logic to default a newly inserted budget group to the values in Globals was missing. This was a feature added in 2019.3, which included cell logic that if the current budget group row was blank, then use Global. The driver was inadvertently reverted to a version where this logic was not present. **Resolution:** Corrected by restoring the driver and calc method library from the correct version.

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Issue	Description
PFB-08438 - Budget Labor Configuration does not correctly calculate the Global Hours in Period Global Hours Per FTE Convention is "Default" AND the year is a leap year [TFS 43780]	**Issue:** The Budget Labor Configuration driver does not correctly calculate the Global Hours in Period when Global Hours Per FTE Convention is "Default" AND the year is a Leap Year. **Resolution:** Corrected by updating multiple formulas in the Budget Labor Configuration driver and the Budget Group calc method.
PFB-08456 - AQ9 on Budget Statistics driver should filter for selected budget groups [TFS 43782]	**Issue:** When refreshing the Budget Statistics Driver, AQ9 displays a warning that the number of records retrieved exceeds the maximum allowed, even when only one budget group was selected. **Resolution:** Corrected by adjusting the data filter for AQ9 to consider the budget group selected in the refresh variable.
PFB-08455 - Add rounding to ChgPct and VariancePct formulas in Budget Statistics driver [TFS 43783]	**Issue:** The system displays a data conversion error when refreshing the Budget Statistics driver (AQ9) due to large decimal values in the ChgPct column in the table. **Resolution:** Corrected by updating the formula in column AS to include round logic out to 10 decimals. This will prevent the large integer errors caused by division issues of very small values.
PFB-08498 - ProviderList driver does not save all changes due to error in logic in Save tag [TFS 45449]	**Issue:** The system does not save all changes to the Provider List. **Resolution:** Corrected by updating the save logic on the affected rows.
PFB-08585 - Paytype Description on roll ups in Labor Config not correct [TFS 46720]	**Issue:** With the move to 2019.3, the Paytype field for the Prod and Non Prod categories in the Labor Config Driver changed from an input field to a GetDataElement. The issue that shows up is the description for the paytype listed may belong a child pay type of it. **Resolution:** Corrected by concatenating PAYTYPE.JobCode=PAYTYPE.Paytype to all four data sources ,which now brings in the correct description for the category.

Issue	Description
Jobcode Description on roll ups in Labor Config not correct [TFS 47020]	**Issue:** In 2019.3, the Jobcode field in the Labor Config Driver changed from an input field to a GetDataElement. The issue that shows up is the incorrect description for the job code listed may belong to a job code that was not the rolled up job code. **Resolution:** Corrected by concatinating Paytype.Paytype PAYTYPE.JobCode=PAYTYPE.Paytype to all four data sources, which now brings in the correct description for the rolled up job code.

Task Panes

Issue	Description
PFB-08473 - PayrollGLMapping Duplicate in BudAdmin task pane [TFS 43785]	**Issue:** The feature PayrollGLMapping is located in both the Budget System Maintenance and Budget Reporting section of the Bud Admin task pane. **Resolution:** Corrected by removing the duplicate from the Budget System Maintenance section.
PFB-08474 - Budget Video in Budgeting EU Task Pane outdated - please remove [TFS 43787]	**Issue:** Please remove the video titled "View Budget Introduction Video" from the Budgeting End User task pane as this video is out of date and clients should navigate to the Axiom Knowledge Base Library in the online help. **Resolution:** Corrected by removing the video from task pane, including the entire budget instructions section, and unassigned the budget video from the package.

Templates

Issue	Description
PFB-08252 - Jobcode tab: Jobcode Summary calc method does not calculate CYB FTE [TFS 40647]	**Issue:** When using CYB_FTE as the comparison on Jobcode, the new summary section of the Jobcode does not contain the logic to include CYB_FTE. **Resolution:** After identifying that column K calculated "FTE Comparison to YTD", which was derived from the Labor Config driver setting for JobCode and Employee labor tabs, corrected by adjusting the sum logic in total sections for JobCode summary blocks to identify values in details section. The Summary sections utilize logic to retrieve sums of details instead of retrieving values directly from the table with the setup of Axiom UDF ReapplyCurrentViews.
PFB-08311 - Incorrect department used in column CK/CL of Staffing tab for Dollar pay types[TFS 41201]	**Issue:** On the Staffing tab, when employing the use of KHABGTMap depts, dollar only pay types on these job code blocks may not show the correct dept (shows KHABGTCode Dept), thus preventing the flow of the data to the Expense tab if the account happens to be different than the home department. This may create an out of balance condition in the workbook between the Expense and Staffing tab as well as inaccurate financial reporting. **Resolution:** Corrected by adjusting the calc method library formulas in columns CK and CL to look to the dept used for that specific job code versus the host department.

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Issue	Description
PFB-08328 - Retirement is not calculating correctly in the JOBCODE calc method [TFS 41843]	**Issues:** 1. On the Jobcode and ProviderComp tabs, YTD Retirement Calculation for salary for the prior year was understated due to not including the per/FTE component. 2. On the Jobcode and ProviderComp tabs, the retirement calculation for month 1 of the calendar year may not calculate due to comparing erroneously to YTD of prior year. **Resolution:** 1. In the Jobcode and Provider calc methods, corrected by updating the formulas in column BG and LineRef Jobcode 29 to divide by the FTEs to convert the formula to salary per FTE. 2. In the Jobcode and Provider calc methods, corrected by adding logic to test for month 1 and apply the retirement limits to just that month.
PFB-08358 - Contract Provider Labor not flowing to Expense tab [TFS 41850]	**Issue:** In 2019.3, the Contract Provider lines of the Provider template > ProviderComp tab do not flow to the Expense tab for the corresponding dollars and hours accounts listed in columns CK and CL. These lines flow to the ProviderCompData tab for account zero, which is not picked up on the Expense tab. **Resolution:** Corrected by implementing logic in the Provider template > ProviderComp tab similar to other sections in order to flow data from the static Contract Provider line items to the Expense tab for Acct and HrsAcct.

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Issue	Description
PFB-08496 - Proj Dllrs col for OT row incorrect formula for rate for PA/PC FTEs [TFS 43616]	**Issue:** When moving to 2019.3, we changed the formula logic in the Projected Dollars column of the Jobcode Block on the Jobcode tab to factor in the rate for FTEs that are Program Additions or Position Changes. There is a missing component in this formula on the OT row which could lead to understating projected dollars if you add FTEs or overstate if you remove FTEs because the rate used does not factor in the 1.5 times the rate used on the Program Addition and Position Change lines. **Resolution:** Corrected so that when removing FTEs from the productive and non-productive rows, each row will refer to it's own rate. For example, if backing out 1.0 FTEs and rows like overtime were used, the dollars will be backed out at the overtime rate as defined by the percentage used in column F of the jobcode block for that row. This update will include any rates used in the Program Additions and Program Changes rows.
PFB-08507 - Employee tab: Add New Pay Type calc methods [TFS 43870]	**Issue:** The PayrollGLMapping does not work correctly due to an formula issue in column DK. **Resolution:** Corrected by updating the formulas for row range extension to 2500 (alleviating concerns of clients with workbooks that exceed this row count, causing the formula to once again break) in the Employee calc method.
PFB-08510 - When adding a new job code block to a plan file, the user saves, closes, and upon re-opening the plan file, the new job code is duplicated [TFS 44019]	**Issue:** When adding a new job code block to a plan file, the user saves, closes, and upon re-opening the plan file, the new job code is listed twice. The issue was related to the new job code being added below the insert new job code command row. The newly added job code erroneously became a persistent part of the tab. **Resolution:** By moving the insert command to the same row and the insert prompt, this updated the range so that newly added job codes were within the rebuildable part of the labor tab.

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Issue	Description
PFB-08516 - GL Account from Jobcode table not picked up on new job codes [TFS 44021]	**Issue:** With the changes in 2019.3, we modified our lookup logic for pulling GL account information on the Jobcode tab. If clients do not use the PayrollGLMapping table or Paytype table for GL Accounts, when a job code is added manually on the Jobcode tab or by setting the NYBKHA in the ActPay27 table to 1 to interface in, it does not bring in the account from the Jobcode table, thus dollars and hours cannot flow to the Expense tab. **Resolution:** Corrected by incorporated RelatedColumnValues for the JobCode block calc method to populate the additional required fields. These column values are now resident in the Jobcode calc method so that the lookup to the Jobcode.StdHours, Jobcode.HRAcct and Jobcode.GLAcct are established.
PFB-08500 - AQ1 not active for ProviderSum tab	**Issue:** With the changes made in moving to 2019.3, AQ1 on the ProviderSummary tab is hardcoded to Off. As a result, the system will not bring in the current settings from the Provider Config Driver. **Resolution:** Corrected by replicating ProviderDetail!AQ1 in ProviderSummary!AQ1 since they used the same parameters.
PFB-08595 - Detail calc method on Stat_Rev tab includes incorrect formula for History spread [TFS 44216]	**Issue:** On the Stat_Rev tab, when selecting History as the spread method for an account, the formulas for columns Z:AK, may not spread to all months. The formula references the Configuration tab to look for periods after the YTD period used would refer to months form the current year. These values should refer to the prior year. **Resolution:** Corrected the formula in cells AZ5:BK5 in the Configuration tab to use prior year periods when later than the YTD period used.
PFB-08431 - Pay types for Global Benefits not being reflected in Col DN of PComp tab [TFS 44474]	**Issue:** In 2019.4, the logic to show the proper pay type for Global Benefit lines on the ProviderComp tab may not return the expected paytpes due to a missing parameter in one of the AQs. **Resolution:** Corrected by updating the related AQ on the Drivers tab of the plan file.

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Issue	Description
PFB-08532 - Provider List driver - Global Salary [TFS 44475]	**Issue:** When using Global Benefit rows from the Provider List driver, the values would not spread correctly in rows 2 thru 5 of global benefit rows on the ProviderComp tab. The issue was related to a range reference that was not locked to the needed row. **Resolution:** Corrected by making formula update to rows two thru five of the global benefit section.
PFB-08531 - Provider Comp tab - Summary View there are no totals for the FTEs or hours, even after saving [TFS 45356]	**Issue:** When working on the ProviderComp tab and everything is in summary view, no totals for the FTEs or hours display - even after saving. **Resolution:** Corrected by doing the following: • Mirrored the "Total" tags identified in column CP in new column location (column CJ) for the template and Provider block calc methods. • Adjusted the logic for Hours, FTEs, and FICA to reference column CJ instead of column CP to display on the summary section of the calc method.
PFB-08653 - Duplicate provider blocks appear in ProviderSummary sheet when provider does not have history	**Issue:** A user adds a new provider to the PROVIDER table and drivers, and then inserts the Add New ProviderSummary calc method on ProviderSummary for the provider. The user then adds data and saves the plan file. The next time the plan file is opened, the provider block displays twice, resulting in recalculation errors due to duplicate keys. **Resolution:** ProviderSummary uses a single calc methods for interfaced and add new. Persistent plan file requires key for add new once the record is saved to the db. If key does not exist, insert/update AQ will populate record found in table and persistent record with other save rows produce a save error. Incorporated formula to derive keys for AQ7.
PFB-08666 - Employee tab duplicate new job codes [TFS 46452]	**Issue:** In the Employee tab, a row displays in each job code block right above “Click here to insert new paytype”, causing a defect in the JobCode calc method. **Resolution:** Corrected by changing the formula in the row 24 of the job code block of the Employee tab that was referencing the same key filed causing the duplicate.

Issue	Description
PFB-08546 - Fixed Adjustments to Target totals on JOBCODE do not sum correctly [TFS 46545]	**Issue:** When using the Fixed Adjustment rows of the self balancing option, the row reference was incorrect resulting in the adjustment not being recognized. **Resolution:** This issues resolved when resolving an issue with Add New jobcode which corrected the last row range reference.
PFB-08708 - Duplicate Patient Rev rows in Initiatives tab after recalculation [TFS 46717]	**Issue:** When opening the Initiatives tab and inserting New Patient Revenue calc method, the Patient Revenue block is duplicated after recalculating or refreshing the plan file. What was occurring was that one of the rows in the clac method referenced a key save back row two rows above causing the duplicate. **Resolution:** Corrected by identifying AQ4 for patient-related calc methods, column BQ required key reference adjustments to the same line.
PFB-08586 - Hide columns BU and BV when "Budget Hide Salaries" role is assigned [TFS 46721]	**Issue:** When a user is a member of Budget Hide Salaries and navigates to the Jobcode sheet, the start rates are hidden when scrolling to column BU and BV. **Resolution:** Corrected by implementing the proposed [hidecolumn] logic similar to formulas identified in column G for multiple views. Determination for role based views located on Variables tab.
PFB-08631 - FIF: Employee tab - Dept Level Budgeting [TFS 46746]	**Issue:** In previous versions, Dept Level Pay populated on the Employee tab through AQ7 with the start/stop tags in column EE. In the Master Template in the 2019.4 release, the Dept Level Pay uses AQ8. Column EE on the template references AQ7, which is no longer correct. **Resolution:** Updated the formula to use Dept Pay AQ to use AQ8.

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Utilities

Issue	Description
PFB-08323 - Budget Deductions utility - Total Patient Days - Globals row [TFS 41841]	**Issue:** In Budget Deductions utility (Reports Library\Budgeting Utilities\Balance Sheet & Deductions\Budget Deductions), on the Total Patient Days - Globals row (row 116 in template), there is a formula reference to the incorrect month in the monthly columns AL:AW. **Resolution:** Corrected the formula Budget_ Deductions!AL116 and copied it to Budget_ Deductions!AM116:AW116.
PFB-08499 - Stat_Rev OthStat Locate Method [TFS 45553]	**Issue:** The formula in Column AY of the Non-Key Statistics section determines which key stat a given non-key stat should follow as a corresponding driving statistic. The three choices are IP, OP, Oth. KeyOth should be referenced with row 61 instead of 63. **Resolution:** Corrected by updating the formula in the Stat Rev tab and the Add New Statistic_Oth calc method so that the use of KeyOth will be recognized.

Workbooks

Issue	Description
PFB-08560 - Add New ProviderComp not updating to Expense tab (PayrollGLMapping) [TFS 44074]	**Issue:** When using PayrollGLMapping table and adding a new provider via the Insert option and then saving the ProviderComp part, the expectation is that the new values will display on the Expense tab. The core issue was that while in a current session of a provider plan file, the update to the Expense tab was not being seen immediately upon save. The plan file had to be closed and reopened. This has been corrected. **Resolution:** Corrected by incorporating similar logic from the ProviderComp calc method to the Add New Provider calc method for columns IH, IJ-IK, IX, and IW.

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Report updates

Budget Analysis

Issue	Description
\Axiom\Reports Library\Budgeting Reports\Budget Analysis\Budget Salary Rate Analysis.xlsx	**Issue:** PFB-07466 - Budget Salary Rate Analysis Report [TFS 34926] **Symptom:** The issue is that the filter of Acct.FSSummary='E_Salaries' can be too broad and may include Benefits there by skewing the salary rate. The AQ2 filter needs to be updated to include a filter for Acct.FSDetail='E_Salaries'. **Resolution:** Columns T, V, X, and Z included a filter and column reference change to use FSDetail instead of FSSummary.
\Axiom\Reports Library\Budgeting Reports\Initiatives Analysis\Budget Income Summary-Initiative Monthly.xlsx	**Issue:** PFB-08503 - Budget Income Summary-Initiative Monthly [TFS 45554] **Symptom:** In the Budget Income Summary-Initiative Monthly report, the Hide Row formula only refers to column I instead of the columns I:U. **Resolution:** Corrected by updating formulas in the following sheet ranges: D20:D23, D26:D30, D32, D34, D36, D39:D55, D57, D60:D65, D67, D69, D72:D73

Budget Utilities

Issue	Description
Axiom\Reports Library\Budgeting Utilities\Budget Reconciliation\PayTYpe Mapping Analysis	**Issue:** PFB-08303 - PayType Mapping Analysis - Description lookup to Driver [TFS 41470] **Symptom:** The pay type description formula needs to include the BudgetGroup. **Resolution:** Corrected by updating the formula for the description of each productive and non-productive section to reference the budget group from the Labor Config driver if it exists. Default is Global section of Labor Config.

Management Reporting - Utilities

Issue	Description
\Axiom\Reports Library\Management Reporting Utilities\Data Audit\Standard Data Assessment.xlsx	**Issue:** PFB-07826 - Report: Standard Data Assessment Report - RU Columns [TFS 37715] **Symptom:** Review of the Standard Data assessment indicated Rev Usage warnings for data when Rev Usage was loaded. **Resolution:** Corrected by removing the data filter for AQ1 and placing it on the column data field in AJ3 as a data filter for that column.

Management Reporting - Report Packages

Issue	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-08313 - Dept Monthly Package - Scorecard - OT Hours not filtered to selected Dept [TFS 41853] **Symptom:** The Overtime Hours Graph does not change when new departments are selected. **Resolution:** Corrected by updating cells AD68 and AF68 and applying the dept filter to the AQs that are used in populating the graph data and the report data.
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package	**Issue:** PFB-08322 - Executive Monthly Package - Dept _ Variance tab **Symptom:** In the Executive Monthly Package > Dept_ Variance tab, columns T and X bring in Bud2020.YTDx. Column X should bring in Bud2020.Tot, and cell X9 should be '.Tot'. **Resolution:** Corrected by updating the formula in X3 on the Dept_Variance tab for the Annual Budget column to use .TOT v .YTD

Issue	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-08393 - Cell format of FTEs on BudVar sheet of Dept Monthly Package [TFS 42163] **Symptom:** In Dept Monthly Package > BudVar tab, the cell format for FTEs by GL Class should be two decimal places to match other sections of FTEs. Specifically, the following cells: • Q100:Q103 • S100:S103 • V100:V103 **Resolution:** Corrected the formatting in cells the cells suggested above. No other sections needed these formatting changes.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-08313 - Dept Monthly Package - Scorecard - OT Hours not filtered to selected Dept [TFS 41853] **Symptom:** The Overtime Hours Graph does not change when new departments are selected. **Resolution:** Corrected by updating cells AD68 and AF68 and applying the dept filter to the AQs that are used in populating the graph data and the report data.
\Axiom\Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package	**Issue:** PFB-08322 - Executive Monthly Package - Dept _ Variance tab [TFS 41860] **Symptom:** In the Executive Monthly Package > Dept_ Variance tab, columns T and X bring in Bud2020.YTDx. Column X should bring in Bud2020.Tot, and cell X9 should be '.Tot'. **Resolution:** Corrected by updating the formula in X3 on the Dept_Variance tab for the Annual Budget column to use .TOT v .YTD.

Issue	Description
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** PFB-08393 - Cell format of FTEs on BudVar sheet of Dept Monthly Package [TFS 42163] **Symptom:** In Dept Monthly Package > BudVar tab, the cell format for FTEs by GL Class should be two decimal places to match other sections of FTEs. Specifically, the following cells: • Q100:Q103 • S100:S103 • V100:V103 **Resolution:** Corrected the formatting in cells the cells suggested above. No other sections needed these formatting changes.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package.xlsx	**Issue:** Dept Monthly Package: VarAlert tab contents are not being output correctly when file processed [TFS 42198] **Symptom:** The InvoiceNo column in the GL_ TRANSACTIONS_20xx tables has a max string length of 30. Some invoice numbers may exceed this length, so the length should be increased to at least 50. **Resolution:** Corrected by updating the max string length to 50.
\Axiom\Reports Library\Management Reporting\Report Packages\Manager\Dept Monthly Package	**Issue:** Dept Monthly Package_BudVar_Formatting of PerUnit Inconsistent [TFS 42908] **Symptom:** In the Dept Monthly Package, the Calendar Days do not populate and there is inconsistent per unit formatting. **Resolution:** Corrected by doing the following: • Updated all per unit columns to two decimals. • For calendar days as stat, hide row logic was added if calendar days are zero. The default is to express calendar days as zero if the dept is using an existing statistic.

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Issue	Description
Reports Library\Management Reporting\Report Packages\Executive\Executive Monthly Package.xlsx	**Issue:** PFB-08410 - Pay tab in Executive Monthly Package is incorrectly referencing Act instead of Bud data [TFS 43379] **Symptom:** On the Pay tab of the Executive Monthly Package, cell H10 references Variables!I45 (Actual table) when it should reference Variables!I47 (Budget table). **Resolution:** Corrected the formula to reference Variables!I47.

Management Reporting - Productivity

Issue	Description
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Performance-Hours.xlsx	**Issue:** PFB-07575 - Productivity Reports - Productivity Performance-Dollars and Hours (2 reports)[TFS 37080] **Symptom:** Detail comments display even though Summary is selected. **Resolution:** Corrected by making the initial dynamic view to open as the default view.

Management Reporting - Variance Comments

Issue	Description
\Axiom\Reports Library\Management Reporting\Variance Comments\Comment Review\12Month Comment Review.xlsx	**Issue:** PFB-06491 - VCC - 12 Month Comment Review: Detail comments are shown even though Summary is selected [TFS 29844] **Symptom:** Detail comments display even though Summary is selected. **Resolution:** Corrected by making the initial dynamic view to open as the default view.

Productivity Reporting - BiWeekly Productivity

Issue	Description
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Executive\Productivity Performance-Hours.xlsx	**Issue:** PFB-07575 - Productivity Reports - Productivity Performance-Dollars and Hours (2 reports) [TFS 37080] **Symptom:** #ERR conflict existed with the Cost Management period did not resolve correctly. **Resolution:** Error trapped for this issue so period selection does not cause #ERR
\Axiom\Reports Library\Productivity Reporting\BiWeekly Productivity\Variance Comments\ProductivityVCC	**Issue:** PFB-07935 - ProductivityVCC report errors out when rolling over to a future year and underlying table is missing [TFS 38224] **Symptom:** The ProductivityVCC report may encounter an error after the refresh variables are applied: "Error refreshing Axiom Query AQ3 - Dept List - NYPP - refresh variable on sheet List. Table with name ACT_PAY27_2021 does not exist". This error occurred after rolling year forward to 2020 so no actuals for 2021 existed. **Resolution:** Corrected by adding a true/false formula. In the refresh variables tab, row 17 determines the tables for next year. If the table exists, then the system will show it in the refresh variables; otherwise, it does not.

Productivity Utilities - BiWeekly

Issue	Description
\Axiom\Reports Library\Productivity Utilities\BiWeekly\System Setup\Productivity_Alerts.xlsx	**Issue:** Productivity_Alerts: Issues bucket [TFS 42423] **Symptom:** There are a few user interface issues with the Productivity Alerts report: 1. The “(red)” should display before the colon and include a space. 2. The reference to Axiom Cost Management displays to all client that don't have Cost Mgmt. If CM is being decommissioned, should this get removed? 3. List order needs to be more consistent. **Resolution:** Corrected by doing the following: 1. Included red flag after high/low threshold. 2. Addressed in a previous fix. 3. Re-ordered productivity index section to include warning, high, low to match the other sections on the productivity alerts form.

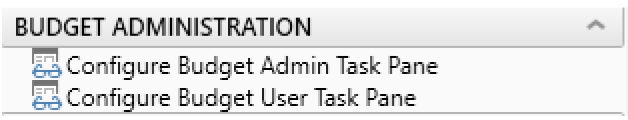
Manual configuration instructions and technical considerations

Update to task panes

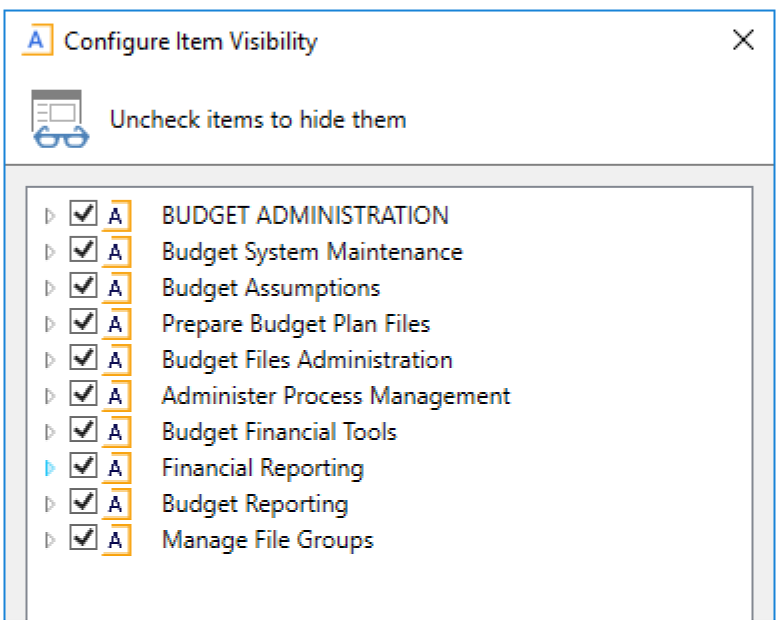
Task panes may be updated due to bundling changes in the product. You can control what item to hide or display using the Configure Budget Admin Task Pane and Configure Budget User Task Pane utilities.

To hide or display items in the task panes:

1. At the top of the Bud Admin task pane, double-click **Configure Budget Admin Task Pane** or **Configure Budget User Task Pane**.



2. In the **Configure Item Visibility** dialog, do any of the following:
   - To hide an item, clear the check mark next to the item name.
   - To display an item, click the empty check box next to the item name.



Click image to view full size

3. After you are done making changes, click **OK**.
4. Close and reopen the Budgeting or Bud Admin task pane to propagate the changes.