Release Notes
Axiom Cost Accounting
Version 2020.1.8

KaufmanHall
AXIOM

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About the release notes

Kaufman Hall is pleased to announce the 2020.1 release of Axiom Cost Accounting. 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 Cost Accounting online help. On the help home page, simply click the Release Notes link at the top of the page.

IMPORTANT: See the Technical Considerations section for important information regarding the CostResultsUsage table and account number length in regards to invalid reclass and overhead allocation rules.

New features in 2020.1

Axiom Cost Accounting 2020.1 delivers features designed to aid in system administration and report access by limiting the need to work between the web and Excel user interfaces.

Access costing reports from a single location

Axiom Cost Accounting reports are a critical part of setting up and maintaining your costing system - especially reconciliation reports. These reports are now available from a single location that is quick and easy to access.

Edit dimension tables using a spreadsheet

Managing Axiom Cost Accounting is often done by only a few specified users, so providing ease-of-use utilities that streamline the process of maintaining the system gives more time back to these users to perform other tasks.

Access costing reports from a single location

▶ Why use this feature

Axiom Cost Accounting reports are a critical part of setting up and maintaining your costing system - especially reconciliation reports. These reports are now available from a single location that is quick and easy to access.

▶ How this feature works

The Costing Reports page provides links to the reports available in Axiom Cost Accounting, including:

- Data import validations
- Reclass and OH reconciliation
- Reconciliation summary
- RVU development
- Transaction Microcost reconciliation
- Unit cost calcs by method
- Unit cost reconciliation
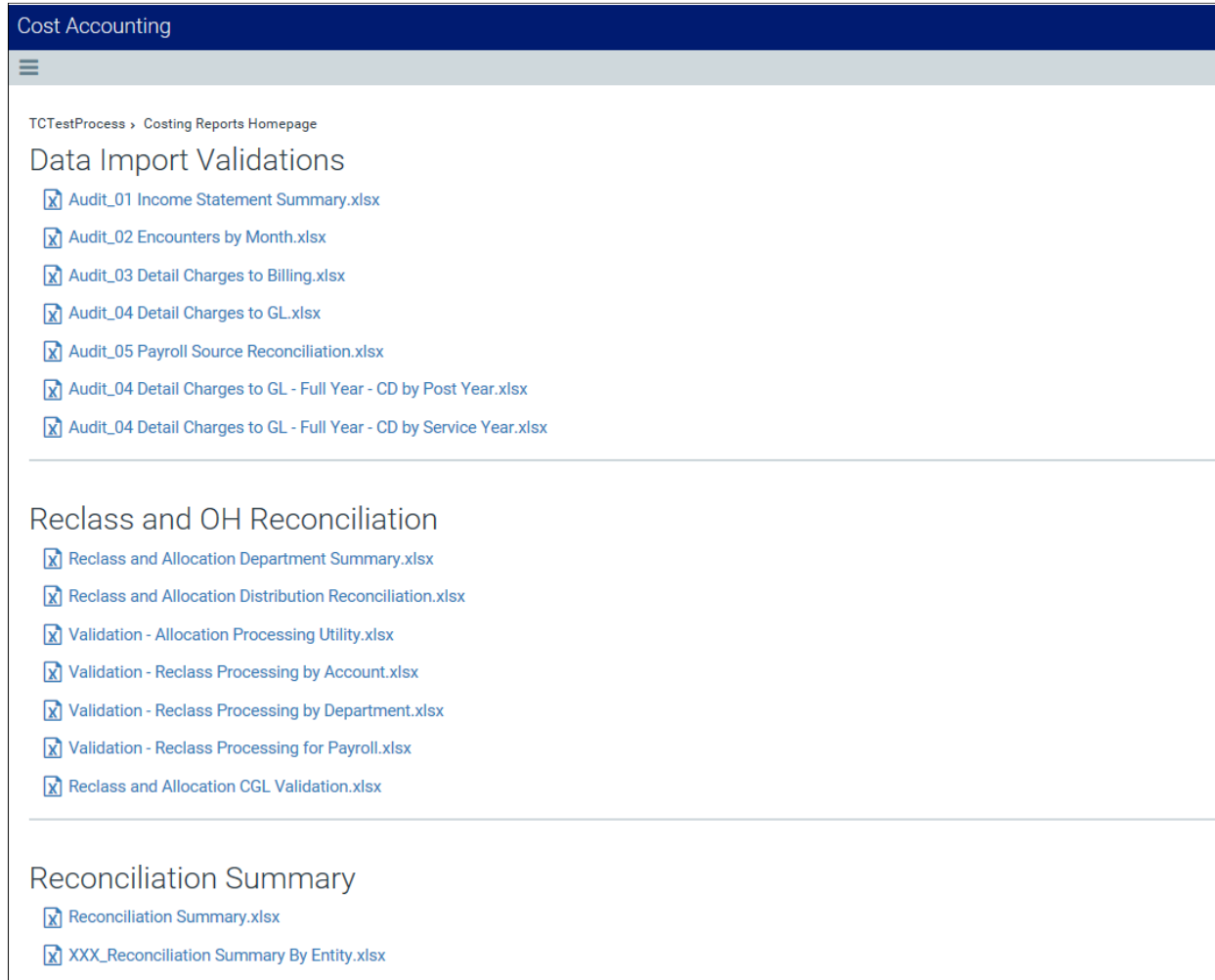
> **NOTE:** The list of available reports may vary depending on the ones used by your organization plus any included custom reports.

Where: This new feature is located in the Navigation panel.

Who: All Cost Accounting users

How: Open the Costing Reports page to access a link to each of the available reports. The reports links are organized into sections. Click the link of the report you want to view.

> **NOTE:** The report opens as a tab in the Windows Client version of Axiom Cost Accounting.

Cost Accounting

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TCTestProcess › Costing Reports Homepage

Data Import Validations

- 🗎 Audit_01 Income Statement Summary.xlsx
- 🗎 Audit_02 Encounters by Month.xlsx
- 🗎 Audit_03 Detail Charges to Billing.xlsx
- 🗎 Audit_04 Detail Charges to GL.xlsx
- 🗎 Audit_05 Payroll Source Reconciliation.xlsx
- 🗎 Audit_04 Detail Charges to GL - Full Year - CD by Post Year.xlsx
- 🗎 Audit_04 Detail Charges to GL - Full Year - CD by Service Year.xlsx

Reclass and OH Reconciliation

- 🗎 Reclass and Allocation Department Summary.xlsx
- 🗎 Reclass and Allocation Distribution Reconciliation.xlsx
- 🗎 Validation - Allocation Processing Utility.xlsx
- 🗎 Validation - Reclass Processing by Account.xlsx
- 🗎 Validation - Reclass Processing by Department.xlsx
- 🗎 Validation - Reclass Processing for Payroll.xlsx
- 🗎 Reclass and Allocation CGL Validation.xlsx

Reconciliation Summary

- 🗎 Reconciliation Summary.xlsx
- 🗎 XXX_Reconciliation Summary By Entity.xlsx

▶ Where to find more information

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

- "Accessing costing reports"

Edit dimension tables using a spreadsheet

▶ Why use this feature

Managing Axiom Cost Accounting is often done by only a few specified users, so providing ease-of-use utilities that streamline the process of maintaining the system gives more time back to these users to perform other tasks. In an effort to efficiently update dimension tables, you can now bulk edit and import changes into the system by using the download and upload functionality.
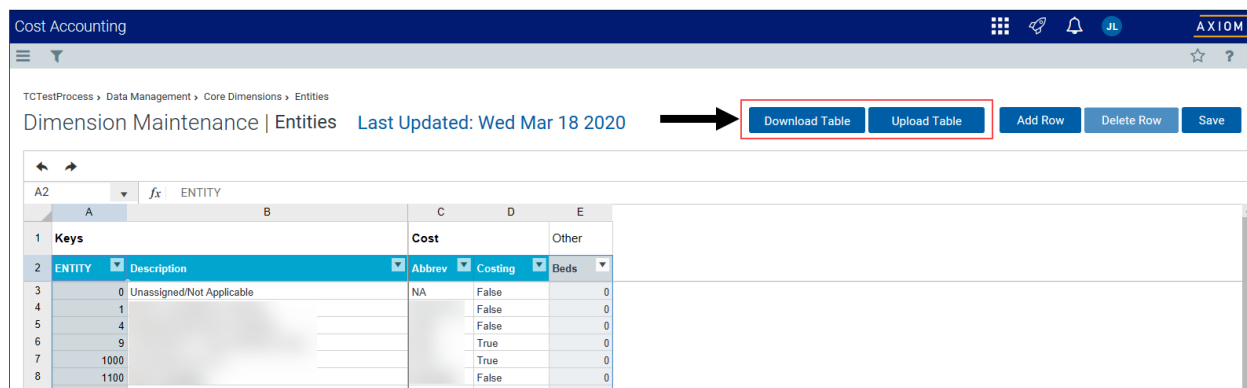
▶ How this feature works

Each dimension page in the system allows the appropriate user to download the dimension spreadsheet and upload the updated spreadsheet file to propagate the changes in the system

Where: In the Guide View, click **Data Management** to manage the different entities.

Who: Cost Accounting Admins or other users responsible for maintaining the costing process.

How: Open a dimension, and at the top of the **Dimensions Maintenance** page, click **Download Table**. Add a new dimension by adding a row, or edit the column information for an existing dimension. After you make changes to the spreadsheet, click **Upload Table** in the **Dimension Maintenance** page. The system displays information regarding the number of changes made, and the number of rows updated and/or added. You can then confirm the changes and upload the data.

Upload and download buttons on the dimension page

Example of the downloaded ENTITY dimension table in spreadsheet form

▶ Where to find more information

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

- "Editing a dimension using a spreadsheet"

What to do 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.

When upgrading to the 2020.1.8 version of Axiom Cost Accounting, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- KHA delivered reports may be removed or 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 by the client will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Process definitions will not be replaced. Process Manager will not currently work with the new system tables and web-based pages and utilities. Consequently, please plan on reviewing and potentially revising any Cost Accounting Process Definitions depending on the scope and what tasks have been created and are in use.
- Security roles and sub-systems will be reset to their configured settings for the Axiom defined roles. All security exceptions you may have made at the individual user level 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. For example, Process Manager defined processes for Cost Accounting will need to be modified by Client Success and has limitations with accessing web-based tasks.
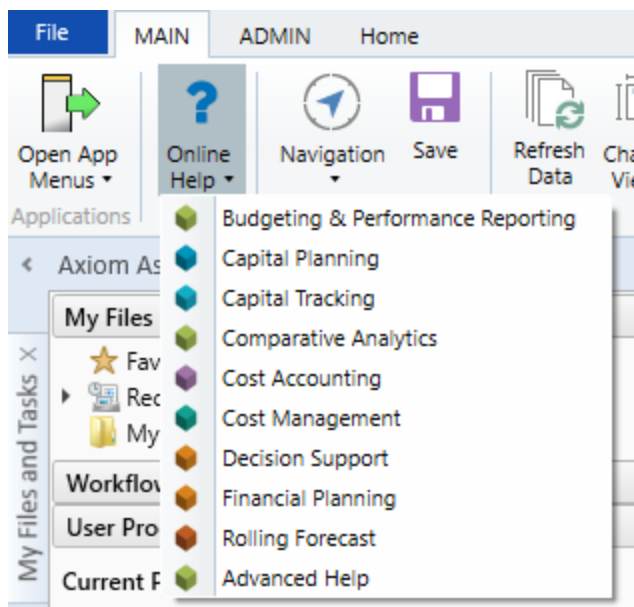
Preparing for and scheduling upgrades

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.

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. 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.

Issues resolved in 2020.1

The following table lists the resolutions for issues addressed in 2020.1, released on April 30th, 2020:

Issue	Description
WebUI: Dimension Default Value Add Row bucketlist Special Characters [TFS 43180]	**Issue:** The system displays an error message when a user saves dimension changes that include special characters. **Resolution:** Corrected by adding the Dimension key validation to the Dimension web page. This validates both the max character length and the new 'bad' special characters set.

Issues resolved in 2020.1.1

No client facing issues were addressed in 2020.1.1, released on May 12th, 2020.

Issues resolved in 2020.1.2

The following table lists the resolutions for issues addressed in 2020.1.2, released on June 8th, 2020:

Issue	Description
PFB-08580 - Sum Cost Detail Category to Encounter Detail Category [TFS 49482]	**Issue:** The Cost Assignment import utility, Sum Cost Detail Category to Encounter Detail Category in 2019.4 does not fully update the EDCC table from CDCC for encounters discharged based on the transaction start and end ServiceYRMO when run for a current or prior period (CostSet). **Resolution:** Corrected by removing additional constraints in the query that summarizes the Cost Detail Category Calculation (CDCC) table to the Encounter Detail Category Calculation (EDCC) table.
PFB-08924 - ReclassDefinition and AllocationDefinition table columns error during 2020.1 product update [TFS 49533]	**Issue:** The following error messages displayed when updating Cost Accounting 2019.3 to 2020.1: • Unable to shorten data length for column ReclassDefinition.FromDeptFilter from 4000 to 500. Data would be truncated. • Unable to shorten data length for column ReclassDefinition.SelectedDeptFilter from 4000 to 500. Data would be truncated. **Resolution:** Corrected by updating the string from 500 to 4000 in filter fields in the AllocationDefinition and ReclassDefinition tables.

Issues resolved in 2020.1.3

No client facing issues were addressed in 2020.1.3, released on July 20th, 2020.

Issues resolved in 2020.1.4

No client facing issues were addressed in 2020.1.4, released on August 17th, 2020.

Issues resolved in 2020.1.5

No client facing issues were addressed in 2020.1.5, released on September 25th, 2020.

Issues resolved in 2020.1.6

The following table lists the resolutions for issues addressed in 2020.1.6, released on November 9th, 2020:

Issue	Description
RCC costing calc not including dept.costmaps [TFS 62220]	**Issue:** The RCC costing calculator did not include a join using dept.costmap, which caused the system to omit offset CGL records from being created. This occurred when a cost map included usage (CostItemUsage) and method definitions, but the children department was used as the base expense on the CGL table without including the parent department. This could cause incorrect cost results for the downstream calculator RCU, which uses the results from RCC (both CGL records and cost results) to allocate the remaining expense dollars, configured for RCU. **Resolution:** Corrected by updating the RCC post job to account for cost map mappings.

Issues resolved in 2020.1.7

The following table lists the resolutions for issues addressed in 2020.1.7, released on December 7th, 2020:

Issue	Description
Sum CDCC to EDCC job fails in large volume systems [TFS 61745]	**Issue:** When importing data using the Sum Cost Detail Category to Encounter Detail Category.axi ETL, the system displays an error message that the import failed. **Resolution:** Corrected by updating the ETL to load into the CDCC using smaller batches of data.

Issues resolved in 2020.1.8

The following table lists the resolutions for issues addressed in 2020.1.8, released on February 15th, 2021:

Issue	Description
2020.1 CostDetailBase & CostDetailTotalCost allows duplicate transactionids [TFS 80060]	**Issue:** Running an import that saves to the CostDetailBase and updates an existing servicedate may cause a duplicate transaction to be created. **Resolution:** Corrected by adding a new transformation to the beginning of the CostDetailStaging to CostDetail import that updates the serviceyrmo for any transactionid where the imported serviceyrmo is different than the one stored in the database. **IMPORTANT:** See the Add new transformation step to customized version of Import CostDetail from Staging.axi for instructions on configuration steps you may need to complete related to this resolved defect.

Technical considerations

Add new transformation step to customized version of Import CostDetail from Staging.axi

A new transformation step has been added to \Axiom\Imports Library\Costing\02 Internal Data\Import CostDetail from Staging.axi that prevents duplicate record creation in the CostDetailBase table. Many clients use a customized version of this import, so you may need to add this new transformation step to your version.

The best way to do this is to identify the import that your organization uses to import cost detail records and, if the version you are using does not point to \Axiom\Imports Library\Costing\02 Internal Data\Import CostDetail from Staging.axi, then you will need to copy transfromation step 1 from \Axiom\Imports Library\Costing\02 Internal Data\Import CostDetail from Staging.axi to your version.

CostResultsUsage table

In Axiom Cost Accounting 2019.4 Patch 1, it was discovered that the CostResultsUsage table was no longer referred to by the original reports it was meant to support. To improve cost processing performance, we deprecated the table, and as a result, the system no longer writes data to the table.

> **IMPORTANT:** If your organization uses exports or reports that use data points from this table, you will need to modify the exports/reports to point them to tables post 2019.4 upgrade.

Account number lengths and invalid reclass/overhead allocation rules

When upgrading from Axiom Cost Accounting 2019.1 or earlier to 2019.2 or later, the upgrade process now identifies when reclass and overhead allocation rules include account numbers with less than 13 digits. To ensure that these are not causing variances in your results, use the following process diagram to determine the appropriate steps to resolve this issue.

> **NOTE:** Variances may occur if an account range is modified in a cost cycle without clearing the results from the shorter accounts lengths.

```
┌─────────────┐                      ┌──────────────────┐
│ Account Ranges From and To │ ── Yes ──▶ │        OK        │
│ fields are at least 13 to 14 digits? │     └──────────────────┘
└─────────────┘
       │
      No
       │
       ▼
┌─────────────┐        ┌──────────────────┐   ┌──────────────────┐   ┌──────────────────┐   ┌──────────────────┐
│ Are you in the middle of a costing │ ─ No ─▶ │ Go to            │──▶│ Select 13 or 14 digits, │──▶│ Run the Reclasses and/or │──▶│ Run the Costing Process │
│ year? │                  │ hc/costing/generalconfiguration │   │ and save your changes │   │ Allocation Process │   │                  │
└─────────────┘        └──────────────────┘   └──────────────────┘   └──────────────────┘   └──────────────────┘
       │                         ▲
      Yes                        │
       │                         │
       ▼                         │
┌─────────────┐        ┌──────────────────┐
│ Do you need to adjust reclass or │ ─ Yes ─▶ │ Go to the current CGL table, and │
│ allocation rules for any reason? │     │ clear out all reclasses and/or │
└─────────────┘        │ allocations      │
       │                └──────────────────┘
      No
       │
       ▼
┌──────────────────┐
│ KH recommends that you first │
│ complete your current costing year, │
│ and then update the Account Ranges │
│ table              │
└──────────────────┘
```