Release Notes

Axiom Healthcare Suite

Version 2020.1

KaufmanHall

AXIOM

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About the release notes

Kaufman Hall is pleased to announce the 2020.1 release of Axiom Healthcare Suite. 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product also has their own separate release notes that provide additional details on features and fixes specific to that product.

IMPORTANT: Prior to upgrading, make sure to review the **Axiom Software 2020.1 Release Notes** as well as the release notes for each product licensed by your organization.

New features summary

This section includes a description of the enhancements included in each product of the Axiom Healthcare Suite. Click the following links to navigate to the specific product:

- Axiom Budgeting and Performance Reporting
- Axiom Capital Planning
- Axiom Capital Tracking
- Axiom Clinical Analytics
- Axiom Comparative Analytics
- Axiom Contract Management
- Axiom Cost Accounting
- Axiom Decision Support
- Axiom Financial Planning
- Axiom Rolling Forecasting
- Axiom Strategy Management

Axiom Budgeting and Performance Reporting

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:

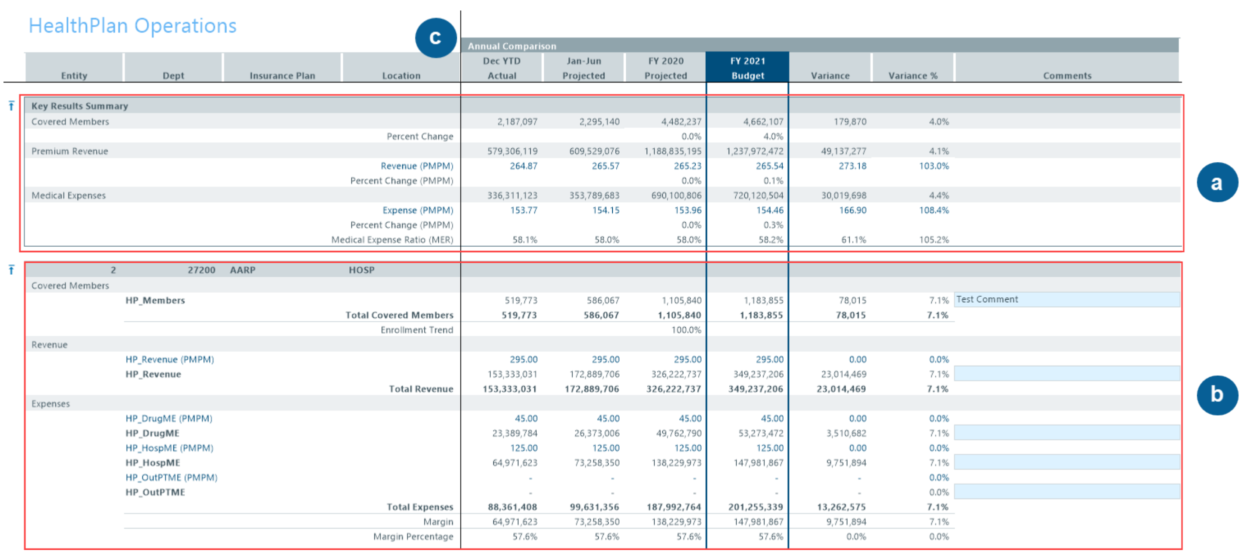
1. HealthPlan Operations utility

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.



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.

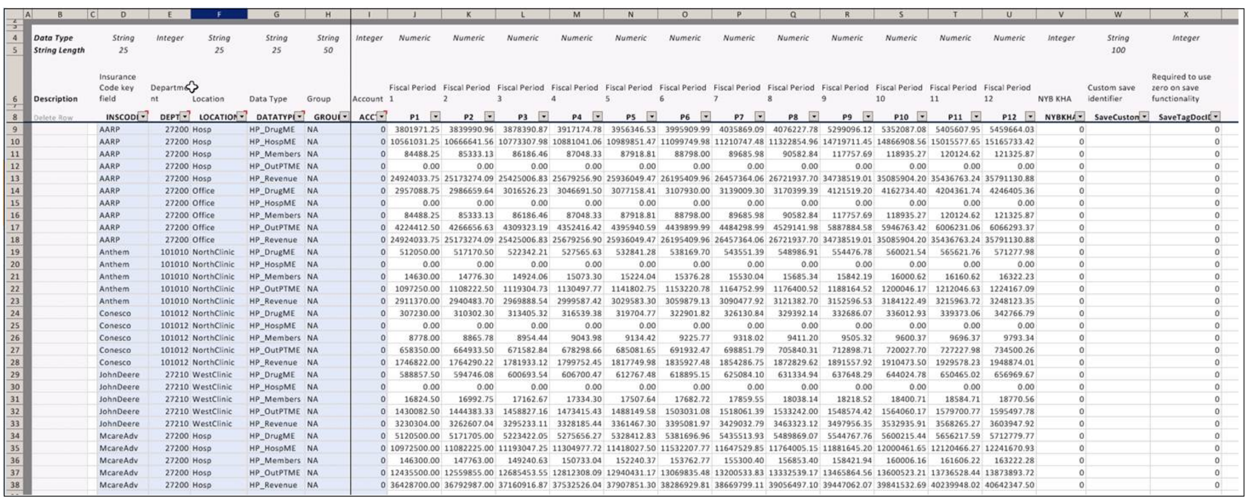
Who: Axiom Budgeting administrators and/or finance liaisons of health plan companies and their key stakeholders.

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.

Click here to watch a video demonstration

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	N	O	P	Q	R	S	T	U	V	W	X
4	*Data Type*	*String*	*Integer*	*String*	*String*	*String*	*Integer*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Numeric*	*Integer*	*String*	*Integer*
5	*String Length*	*25*		*25*	*25*	*50*															*100*	
6	**Description**	Insurance Code key field	Department	Location	Data Type	Group	Account	Fiscal Period 1	Fiscal Period 2	Fiscal Period 3	Fiscal Period 4	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	Delete Row	**INSCOD**	**DEPT**	**LOCATION**	**DATATYP**	**GROU**	**ACC**	**P1**	**P2**	**P3**	**P4**	**P5**	**P6**	**P7**	**P8**	**P9**	**P10**	**P11**	**P12**	**NYBKH**	**SaveCuston**	**SaveTagDocI**
9		AARP	27200	Hosp	HP_DrugME	NA	0	3801971.25	3839990.96	3878390.87	3917174.78	3956346.53	3995909.99	4035869.09	4076227.78	5299096.12	5352087.08	5405607.95	5459664.03	0		0
10		AARP	27200	Hosp	HP_HospME	NA	0	10561031.25	10666641.56	10773307.98	10881041.06	10989851.47	11099749.98	11210747.48	11322854.96	14719711.45	14866908.56	15015577.65	15165733.42	0		0
11		AARP	27200	Hosp	HP_Members	NA	0	84488.25	85333.13	86186.46	87048.33	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0		0
12		AARP	27200	Hosp	HP_OutPTME	NA	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
13		AARP	27200	Hosp	HP_Revenue	NA	0	24924033.75	25173274.09	25425006.83	25679256.90	25936049.47	26195409.96	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791130.88	0		0
14		AARP	27200	Office	HP_DrugME	NA	0	2957088.75	2986659.64	3016526.23	3046691.50	3077158.41	3107930.00	3139009.30	3170399.39	4121519.20	4162734.40	4204361.74	4246405.36	0		0
15		AARP	27200	Office	HP_HospME	NA	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
16		AARP	27200	Office	HP_Members	NA	0	84488.25	85333.13	86186.46	87048.33	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0		0
17		AARP	27200	Office	HP_OutPTME	NA	0	4224412.50	4266656.63	4309323.19	4352416.42	4395940.59	4439899.99	4484298.99	4529141.98	5887884.58	5946763.42	6006231.06	6066293.37	0		0
18		AARP	27200	Office	HP_Revenue	NA	0	24924033.75	25173274.09	25425006.83	25679256.90	25936049.47	26195409.96	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791130.88	0		0
19		Anthem	101010	NorthClinic	HP_DrugME	NA	0	512050.00	517170.50	522342.21	527565.63	532841.28	538169.70	543551.39	548986.91	554476.78	560021.54	565621.76	571277.98	0		0
20		Anthem	101010	NorthClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
21		Anthem	101010	NorthClinic	HP_Members	NA	0	14630.00	14776.30	14924.06	15073.30	15224.04	15376.28	15530.04	15685.34	15842.19	16000.62	16160.62	16322.23	0		0
22		Anthem	101010	NorthClinic	HP_OutPTME	NA	0	1097250.00	1108222.50	1119304.73	1130497.77	1141802.75	1153220.78	1164752.99	1176400.52	1188164.52	1200046.17	1212046.63	1224167.09	0		0
23		Anthem	101010	NorthClinic	HP_Revenue	NA	0	2911370.00	2940483.70	2969888.54	2999587.42	3029583.30	3059879.13	3090477.92	3121382.70	3152596.53	3184122.49	3215963.72	3248123.35	0		0
24		Conesco	101012	NorthClinic	HP_DrugME	NA	0	307230.00	310302.30	313405.32	316539.38	319704.77	322901.82	326130.84	329392.14	332686.07	336012.93	339373.06	342766.79	0		0
25		Conesco	101012	NorthClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
26		Conesco	101012	NorthClinic	HP_Members	NA	0	8778.00	8865.78	8954.44	9043.98	9134.42	9225.77	9318.02	9411.20	9505.32	9600.37	9696.37	9793.34	0		0
27		Conesco	101012	NorthClinic	HP_OutPTME	NA	0	658350.00	664933.50	671582.84	678298.66	685081.65	691932.47	698851.79	705840.31	712898.71	720027.70	727227.98	734500.26	0		0
28		Conesco	101012	NorthClinic	HP_Revenue	NA	0	1746822.00	1764290.22	1781933.12	1799752.45	1817749.98	1835927.48	1854286.75	1872829.62	1891557.92	1910473.50	1929578.23	1948874.01	0		0
29		JohnDeere	27210	WestClinic	HP_DrugME	NA	0	588857.50	594746.08	600693.54	606700.47	612767.48	618895.15	625084.10	631334.94	637648.29	644024.78	650465.02	656969.67	0		0
30		JohnDeere	27210	WestClinic	HP_HospME	NA	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0		0
31		JohnDeere	27210	WestClinic	HP_Members	NA	0	16824.50	16992.75	17162.67	17334.30	17507.64	17682.72	17859.55	18038.14	18218.52	18400.71	18584.71	18770.56	0		0
32		JohnDeere	27210	WestClinic	HP_OutPTME	NA	0	1430082.50	1444383.33	1458827.16	1473415.43	1488149.58	1503031.08	1518061.39	1533242.00	1548574.42	1564060.17	1579700.77	1595497.78	0		0
33		JohnDeere	27210	WestClinic	HP_Revenue	NA	0	3230304.00	3262607.04	3295233.11	3328185.44	3361467.30	3395081.97	3429032.79	3463323.12	3497956.35	3532935.91	3568265.27	3603947.92	0		0
34		McareAdv	27200	Hosp	HP_DrugME	NA	0	5120500.00	5171705.00	5223422.05	5275656.27	5328412.83	5381696.96	5435513.93	5489869.07	5544767.76	5600215.44	5656217.59	5712779.77	0		0
35		McareAdv	27200	Hosp	HP_HospME	NA	0	10972500.00	11082225.00	11193047.25	11304977.72	11418027.50	11532207.77	11647529.85	11764005.15	11881645.20	12000461.65	12120466.27	12241670.93	0		0
36		McareAdv	27200	Hosp	HP_Members	NA	0	146300.00	147763.00	149240.63	150733.04	152240.37	153762.77	155300.40	156853.40	158421.94	160006.16	161606.22	163222.28	0		0
37		McareAdv	27200	Hosp	HP_OutPTME	NA	0	12435500.00	12559855.00	12685453.55	12812308.09	12940431.17	13069835.48	13200533.83	13332539.17	13465864.56	13600523.21	13736528.44	13873893.72	0		0
38		McareAdv	27200	Hosp	HP_Revenue	NA	0	36428700.00	36792987.00	37160916.87	37532526.04	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.

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.

> **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													

Click here to watch a video demonstration

4. Membership Per Member Per Month (PMPM) driver

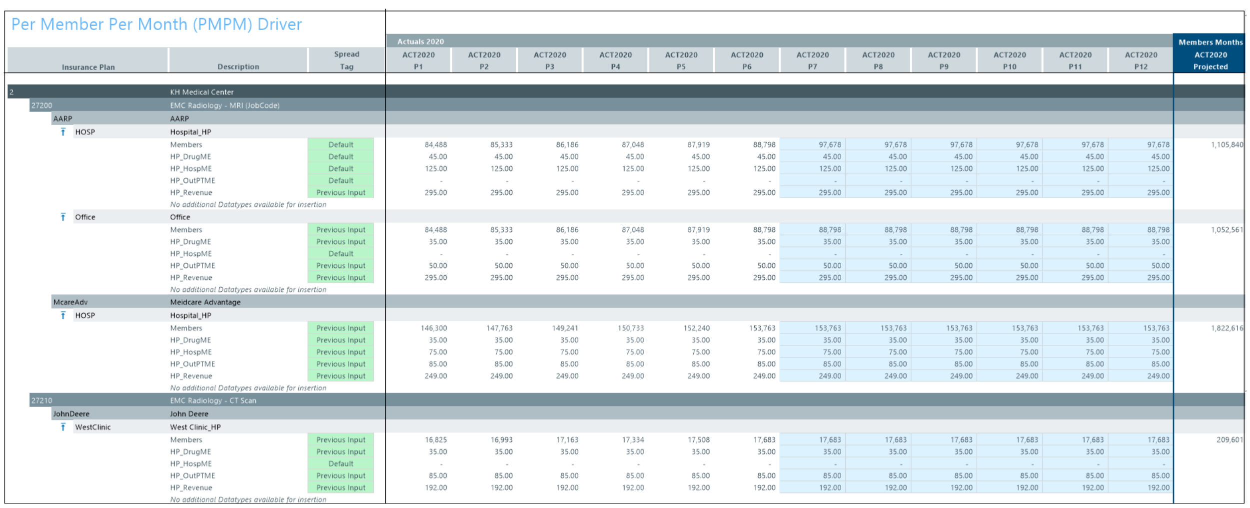
This driver provides the basis for several important planning activities needed for your organization to budget health plans and insurance products, which is then used by the system to populate the HealthPlan Operation utility. This driver provides a central location to review member lives, revenue PMPM, 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.
- 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.

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														

Click here to watch a video demonstration

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
	INSCODI	**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 in the Axiom Budgeting and Performance Reporting online help:

- "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"

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.

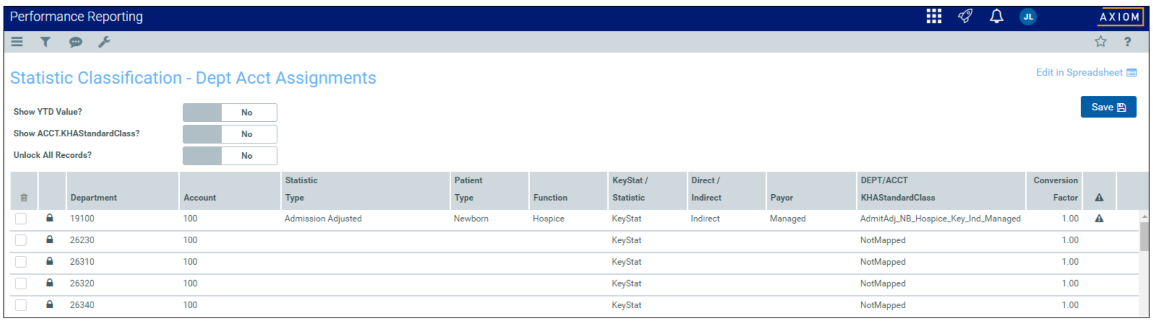
After you complete the classification process using the Statistic Identification Update utility, you can use the Statistic Classification Review report to review statistics to ensure the correct YTD values tie out from the department summed up to the entity level.

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.



- **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.


Performance Reporting

Statistic Classification Review

ENTITY	1000
Description	Baylor University Medical Ctr
Admissions - Adult	7,547
Admissions - by Payor	15,339
Patient Days - Adult	108,981
Patient Days - CMI Adjusted	3,648
Patient Days - by Payor	1,400
Patient Days - CMI Adjusted - By Payor	43,958
Observation Days	427
Observation - By Payor	542
Discharges	1,500
Discharges - CMI Adjusted	240,055
Discharges - by Payor	258,124
Discharges - CMI Adjusted - By Payor	151,987
Deliveries	79,097
Deliveries - By Payor	13,383
Newborn Days	8,266
ED Visits	5,741
OR Minutes	36,505
OR Cases	71,430
Visits	86,112
Visits - by Payor	101,966

Where to find more information

The following topics include new information and instructions for using this feature in the Axiom Budgeting and Performance Reporting online help:

- "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

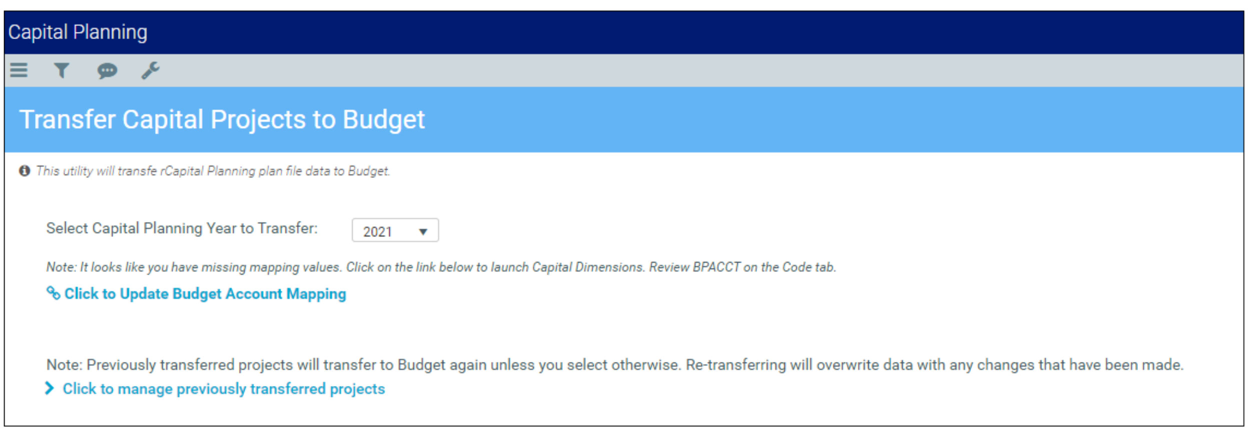
What: If your organization is licensed for Axiom Capital Planning and Axiom Budgeting, you can quickly and easily transfer capital project data to Axiom Budgeting using the new web-based Transfer Capital Projects to Budget utility.

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.



Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Budgeting and Performance Reporting online help:

- "Transferring capital project data from Axiom Capital Tracking"

Axiom Capital Planning

Axiom Capital Planning 2020.1 delivers updated integration from Axiom Capital Planning to Axiom Budgeting, Axiom Rolling Forecast, and Axiom Financial Planning to new wizard-based assets, as well as a few other client requested enhancements.

Create funding source projects

In Axiom Capital Planning, you can now create projects designated as funding sources. The dollar value used for the source project can fund other projects. For example, you may designate a project as a contingency fund to fund other projects, which allows you to save time by easily track the contingency dollars available.

Open project summary reports from plan files

As projects are reviewed, users can quickly and easily access the Executive Summary report, or any other report configured by the administrator, directly from the capital project plan file. This allows users to review details about the project, including detailed financial information, to make the best-informed decisions.

Share project budget data with Axiom Budgeting

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.

Share capital project data with Axiom Financial Planning

The Transfer Capital Projects to Financial Planning 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 financial planning files. After the data has been transferred, you can then enter or update the project data in Axiom Financial Planning.

View process routing details for plan files

Directly within the project plan file or purchase request, you can now see and manage where the project or purchase request is in the review process—saving you time from having to search for and open separate utilities.

Transfer original project budget to Axiom Capital Tracking

When transferring project data to Axiom Capital Tracking, the system can now track the original budget values copied from the project. This allows you to transfer an approved project from Axiom Capital Planning but not transfer the budget so it can be funded via transfer. This value allows the admin to easily see what the original budget was from the originating project.

Enhanced filtering for Update Project Initiator reports

In 2020.1, we enhanced the Update Project Initiator reports for both Axiom Capital Planning and Capital Tracking by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to work with.

Create funding source projects

Why use this feature

In Axiom Capital Planning, you can now create projects designated as funding sources. The dollar value used for the source project can fund other projects. For example, you may designate a project as a contingency fund to fund other projects, which allows you to save time by easily track the contingency dollars available.

How this feature works

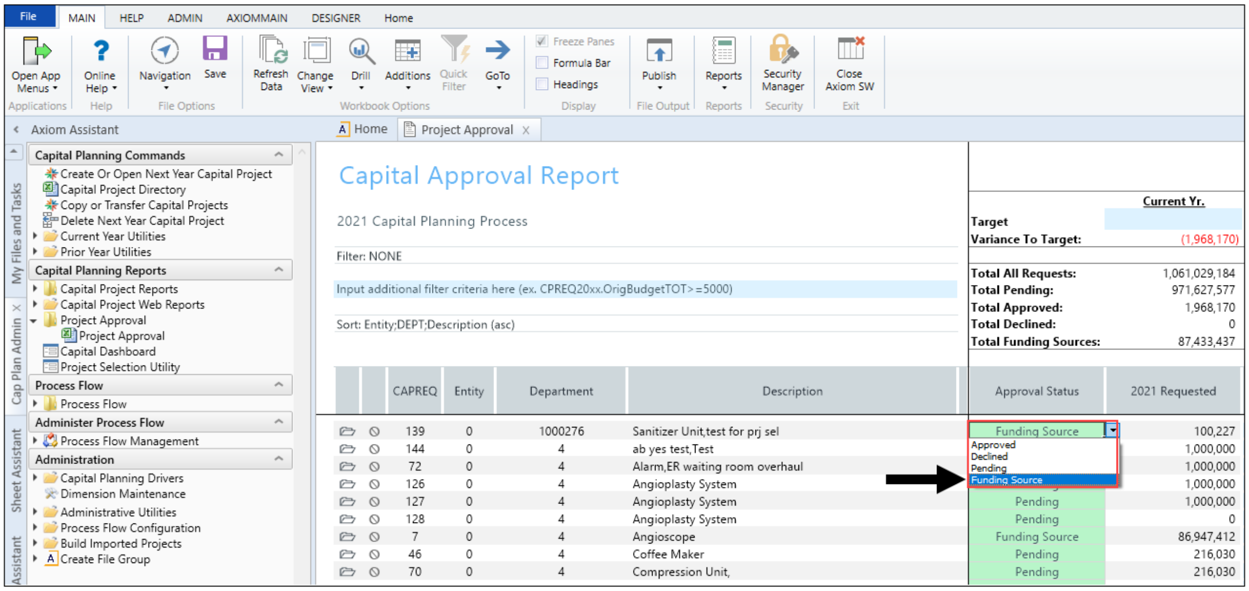
What: Easily change a project to a funding source project type by selecting this option in the Project Approval report. After saving the report, the system automatically updates the Status field in the plan file in the Project tab > Description tab. Users with administrator privileges can also change the project type in the plan file itself in the Description tab.

Systems: Web and Legacy

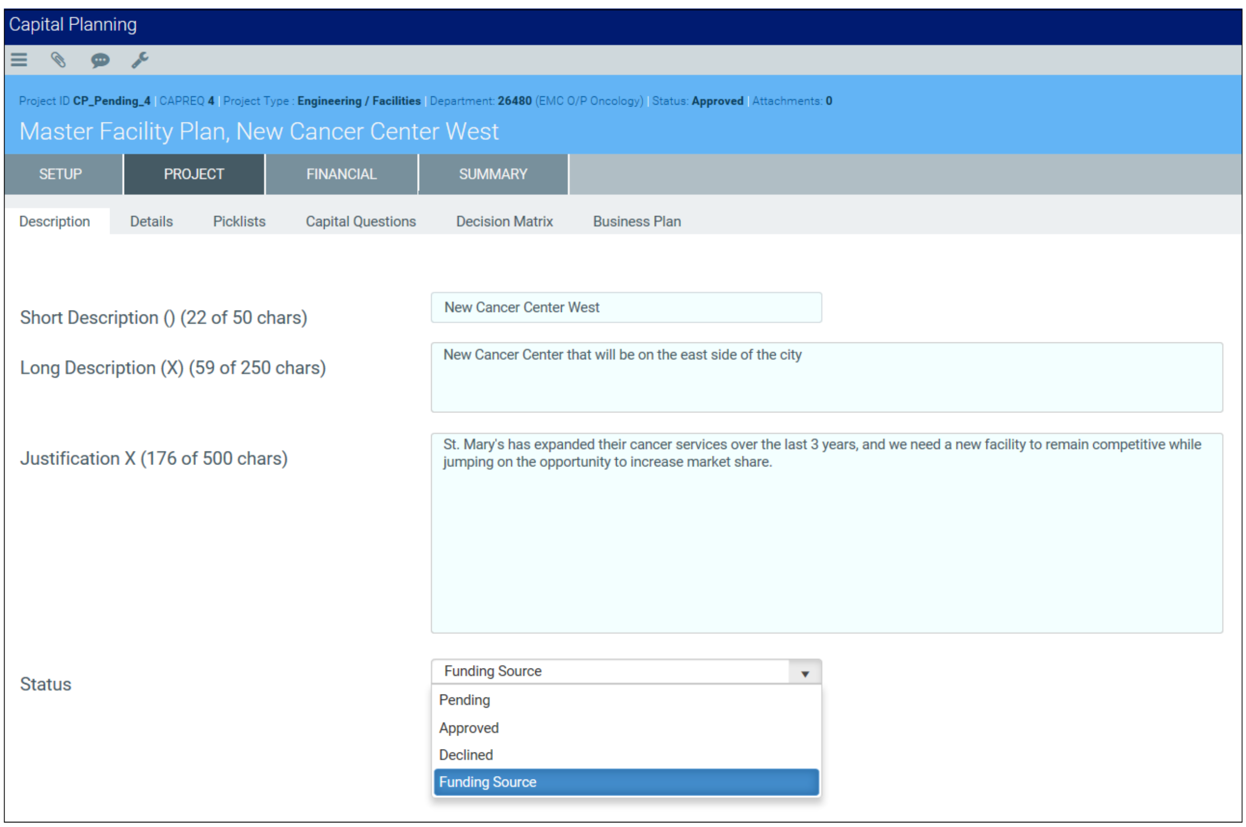
Where: This enhanced feature applies to the Project Approval report and the Project tab > Description tab in the plan file.

Who: Only Axiom Capital Planning administrators can designate a funding source project.

How: Open the Project Approval report. In the **Approval Status** column, select **Funding Source**, and click **Save**.



Designating a funding source project in the Project Approval report



Designating a funding source project in a plan file

Click here to watch a video demonstration

Where to find more information

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

- "Creating capital projects as funding sources for special projects"
- "Creating Non-Threshold (Summary) projects"
- "Creating Threshold (Pro Forma) projects"
- "Approving or declining projects"
- "Viewing the status of a project"

Open project summary reports from plan files

Why use this feature

As projects are reviewed, users can quickly and easily access the Executive Summary report, or any other report configured by the administrator, directly from the capital project plan file. This allows users to review details about the project, including detailed financial information, to make the best-informed decisions.

How this feature works

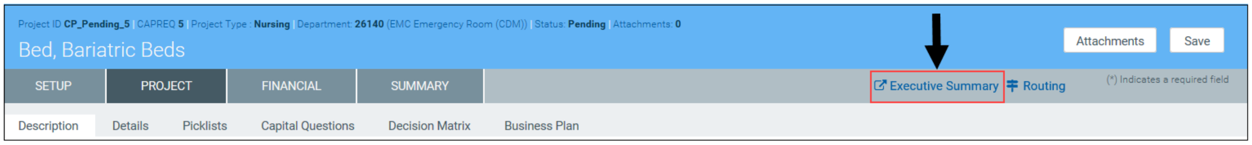
What: By default, users can now open the Executive Summary report directly from any plan file using a link. However, administrators can change the report link to open other standard or custom reports or disable the link from displaying. You can also print a PDF of the Executive Summary report.

Systems: Web and Legacy

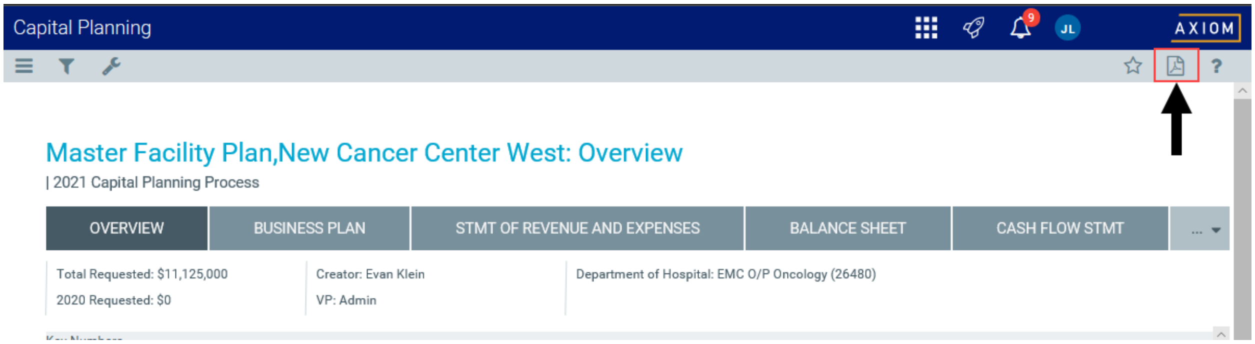
Where: This new report link is included in the upper right corner of each plan file. Administrators can manage the link attributes in the General Setup driver.

Who: Any user with plan file access can see and open the link. Only administrators can configure the link name and file location.

How: To view the link, open any capital project plan file, and click the report link in the upper-right corner of the page. To print or save a PDF of the Executive Summary report, click the PDF icon in the upper-right corner of the page.



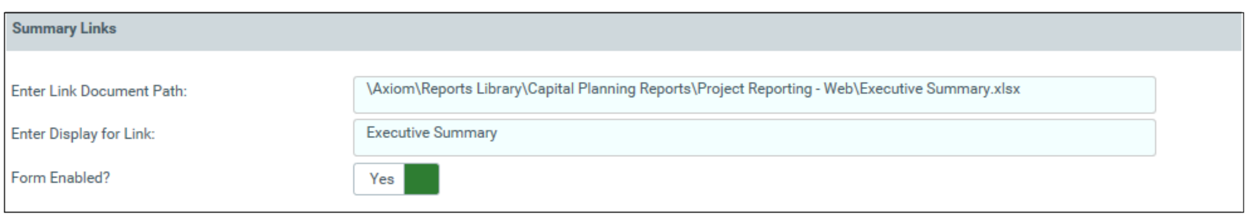
Click the link in the plan file to open the report



Click the PDF icon to open and print or save a PDF version of the report

Click here to watch a video demonstration

Administrator can change the link location, name, and whether to display it in the plan file template web form from the **Capital Planning home page** > **Edit Drivers** > **General Setup driver** > **Summary Links** section.



Click here to watch a video demonstration

Where to find more information

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

- "Configuring general setup options"
- "Creating data for Non-Threshold (Summary) projects"
- "Creating data for Threshold (Pro Forma) projects"

Share project budget data with Axiom Budgeting

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.

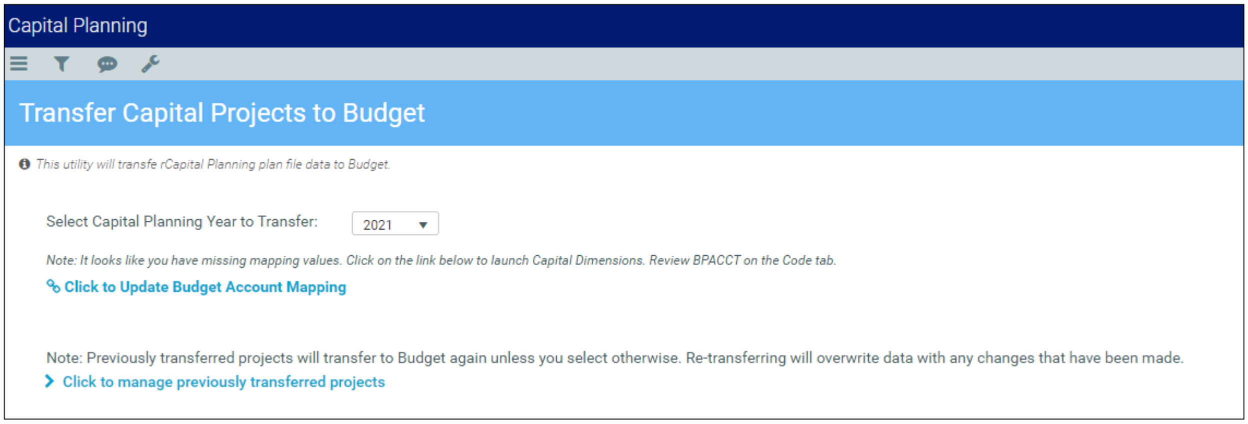
Systems: Web and Legacy

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, and 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.



Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in Axiom Capital Planning online help:

- "Transferring projects to Budgeting"

Share capital project data with Axiom Financial Planning

Axiom Capital Planning administrators now have a better way to map and transfer data from Axiom Capital Planning to Axiom Financial Planning.

Why use this feature

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

The Transfer Capital Projects to Financial Planning 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 in your Financial Planning plan files.

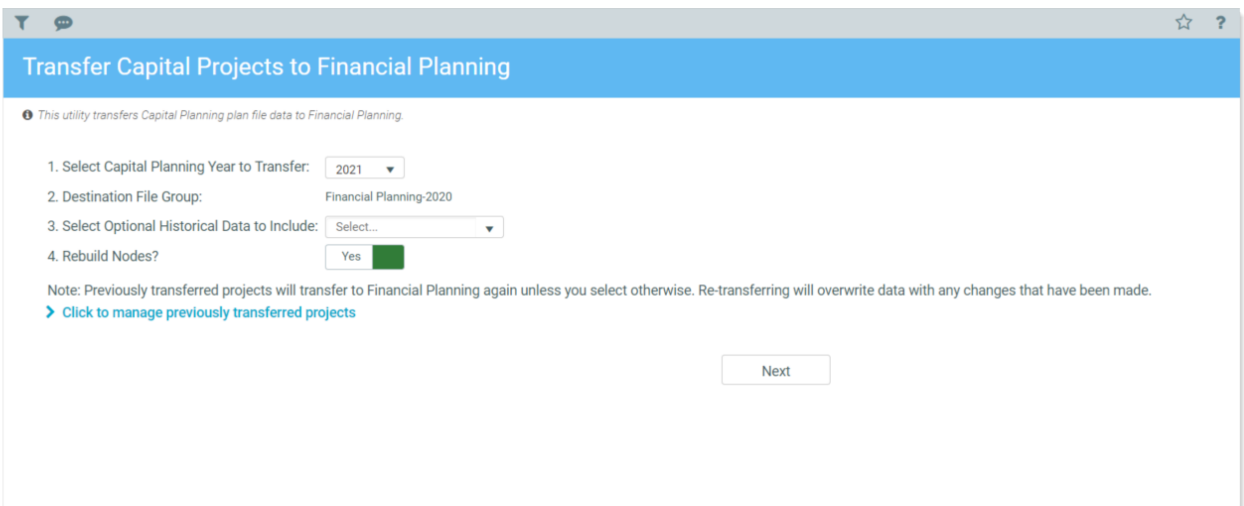
How this feature works

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

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

Who: Administrators who have both Axiom Capital Planning and Axiom Financial Planning products can use this utility.

How: From the Capital Planning home page or from the Cap Plan Admin task pane > Integration section, click **Transfer Capital Projects to Financial Planning**. The wizard will walk you through the process of selecting the projects to transfer.



Where to find more information

The following topic has been created and/or updated with information and instructions for using this feature in the Axiom Capital Planning online help:

- "Transferring capital project data to Axiom Financial Planning"

View process routing details for plan files

Why use this feature

Directly within the project plan file or purchase request, you can now see and manage where the project or purchase request is in the review process—saving you time from having to search for and open separate utilities.

How this feature works

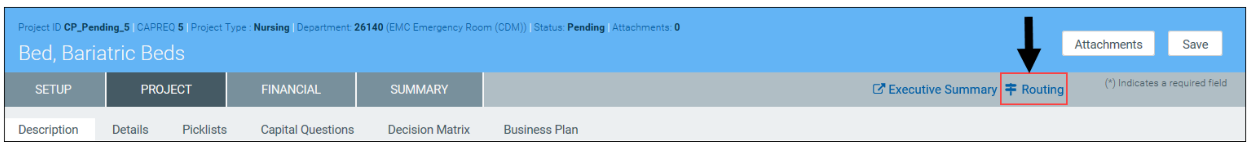
What: The new Routing link in the plan file or purchase request template allows you to open the Process Routing page where you can view the current process status and details for a particular capital project or purchase request. If you are the current step owner, you can also complete the task from this page. If you are an administrator, you can complete the task for the current step owner and/or move the step to another step in the process.

Systems: Web and Legacy

Where: The link to the routing page is included as a link in the plan file.

Who: All users with plan file access.

How: In the upper-right corner of the plan file or purchase request, click the **Routing** link.



Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Capital Planning online help:

- "Viewing process routing details"

Transfer original project budget to Axiom Capital Tracking

Why use this feature

When transferring project data to Axiom Capital Tracking, the system can now track the original budget values copied from the project.

How this feature works

What: As part of the Copy or Transfer Capital Projects utility, users can select whether to include the original budget when transferring a project to Axiom Capital Tracking. The system automatically records the original project budget amount in the CPOrigBudgetTot column of the CTREQ table.

Systems: Web and Legacy

Where: A new CPOrigBudgetTot column is now included in the CTREQ table.

Who: All Capital Planning users

How: In the Windows or Excel Client, open the CTREQ table to view the CPOrigBudgetTot column.

Where to find more information

The following topic includes instructions for using this feature in the Axiom Capital Planning online help:

- "Copying or transferring plan files"

Enhanced filtering for Update Project Initiator reports

Why use this feature

The Update Project Initiator reports for Capital Planning and Capital Tracking as well as the PR Update Purchase Request Initiator report allow you to easily track and manage your organization's projects/purchase requests, their descriptions, as well as their creators. From here, you can change request creator by simply selecting a new name from the user list. This is especially useful when someone leaves your organization and you need to assign the project/purchase request to a new or existing employee.

In 2020.1, we enhanced these reports by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to see.

How this feature works

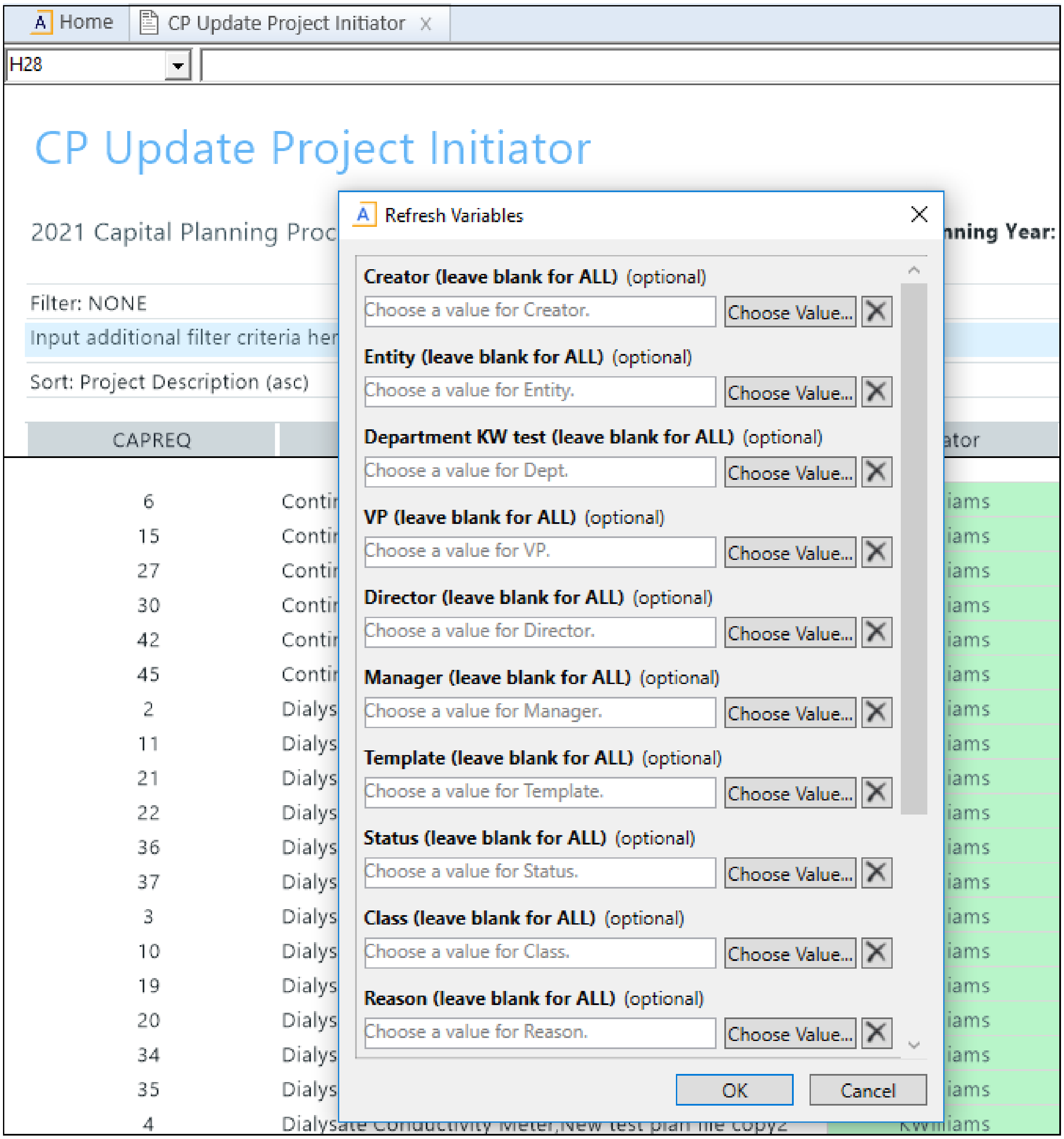
What: When opening the report, you can use the Refresh Variables action to filter the information to include in the report. After applying the Refresh Variables, you add an additional filter to fine tune the information that displays.

Systems: Web and Legacy

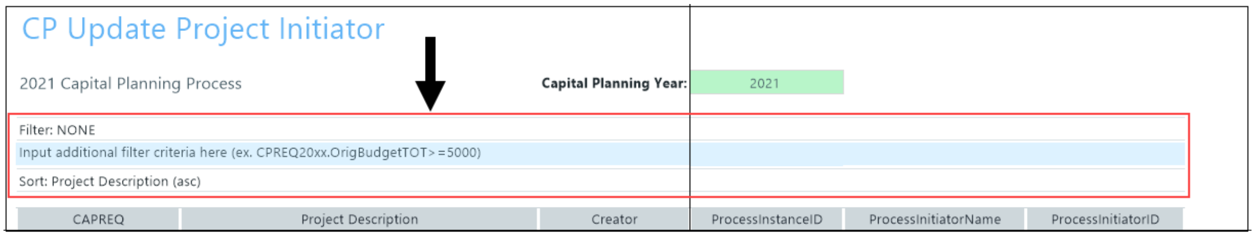
Where: CP Update Project Initiator report, CT Update Project Initiator report, PR Update Purchase Request Initiator report

Who: Capital Planning and Capital Tracking Admins

How: In the Cap Plan Admin or Cap Track Admin task pane, navigate to the **Administration** section, click **Administrative Utilities > Security Setup**, and then double-click the CP/CT Update Project Initiator or PR Update Purchase Request Initiator report. Press F9 to initiate the Refresh Variables action. In the Filter section above the table, type a filter statement using the appropriate filter syntax.



Refresh Variables dialog



Advanced Filter function

Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Capital Tracking online help:

- "Updating the project or purchase request creator"

Axiom Capital Tracking

Axiom Capital Tracking 2020.1 delivers updated integration with Axiom Rolling Forecast with a new wizard-based asset as well as a few other client requested enhancements

The Transfer Capital Tracking to Rolling Forecast 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 rolling forecast plan files.

In 2020.1, we enhanced the Update Project Initiator reports for both Axiom Capital Planning and Capital Tracking by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to work with.

When transferring capital projects to Axiom Capital Tracking, you can now see that the values in the Financial Input sheets came from Axiom Capital Planning—make it easier to see where the data came from, particularly in Capital Tracking plan files with multiple sheets.

Share project budget data with Axiom Rolling Forecast

▶ Why use this feature

You can now transfer project data to Axiom Rolling Forecast, which allows you to get the most out of your Axiom Healthcare products to meet the forecasting needs of your organization.

The Transfer Capital Tracking to Rolling Forecast 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 rolling forecast plan files.

▶ How this feature works

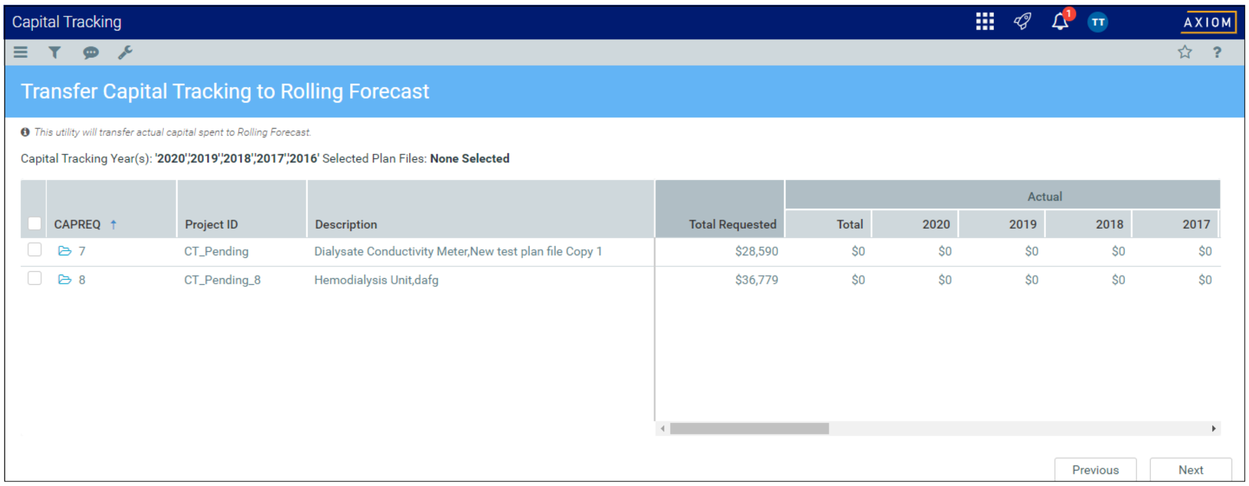
What: If your organization is licensed for Axiom Capital Tracking and Axiom Rolling Forecast, you can quickly and easily transfer capital project data to Axiom Rolling Forecast using the new web-based Transfer Capital Tracking to Rolling Forecast utility.

Systems: Web and Legacy

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

Who: Users must be assigned both the Capital Tracking Administrator and Rolling Forecast Administrator roles to use this utility.

How: From the Capital Tracking home page or from the Cap Track Admin task pane > Integration section, click **Transfer Capital Tracking to Rolling Forecast**. The wizard will walk you through the process of selecting the projects to transfer.



Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Capital Tracking online help:

- "Transferring capital project data to Axiom Rolling Forecast"

Enhanced filtering for Update Project Initiator reports

Why use this feature

The Update Project Initiator reports for Capital Planning and Capital Tracking as well as the PR Update Purchase Request Initiator report allow you to easily track and manage your organization's projects/purchase requests, their descriptions, as well as their creators. From here, you can change request creator by simply selecting a new name from the user list. This is especially useful when someone leaves your organization and you need to assign the project/purchase request to a new or existing employee.

In 2020.1, we enhanced these reports by providing new mechanisms in which to filter information. These enhancements include the standard refresh variables options included in many Kaufman Hall reports as well as an advanced filtering capability to only generate the reports with information you want to see.

How this feature works

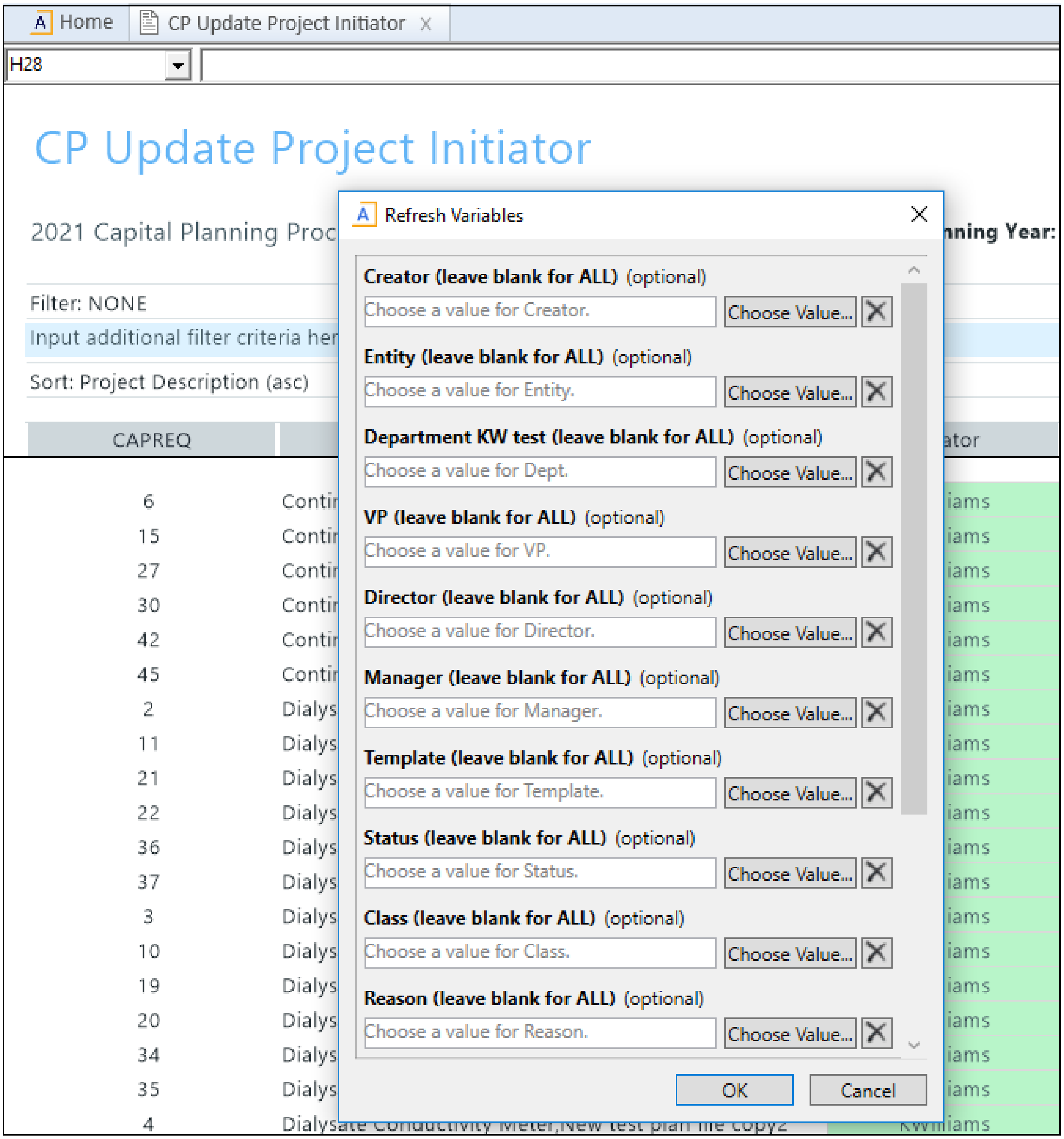
What: When opening the report, you can use the Refresh Variables action to filter the information to include in the report. After applying the Refresh Variables, you add an additional filter to fine tune the information that displays.

Systems: Web and Legacy

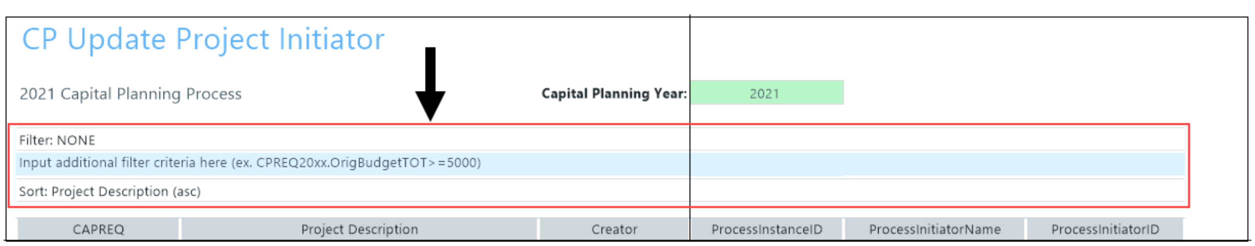
Where: CP Update Project Initiator report, CT Update Project Initiator report, PR Update Purchase Request Initiator report

Who: Capital Planning and Capital Tracking Admins

How: In the Cap Plan Admin or Cap Track Admin task pane, navigate to the **Administration** section, click **Administrative Utilities > Security Setup**, and then double-click the CP/CT Update Project Initiator or PR Update Purchase Request Initiator report. Press F9 to initiate the Refresh Variables action. In the Filter section above the table, type a filter statement using the appropriate filter syntax.



Refresh Variables dialog



Click here to watch a video demonstration

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Capital Tracking online help:

- "Updating the project or purchase request creator"

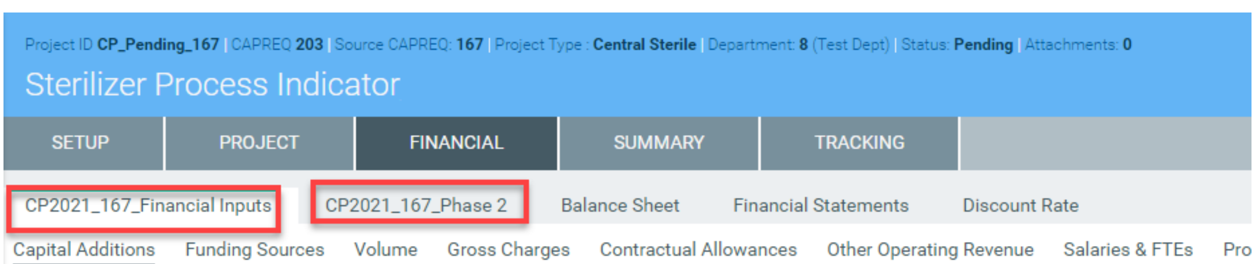
Axiom Capital Planning information displays in Financial Input sheet tabs

Why use this feature

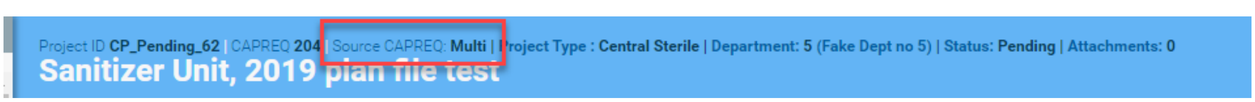
When transferring capital projects to Axiom Capital Tracking, you can now see that the values in the Financial Input sheets came from Axiom Capital Planning—make it easier to see where the data came from, particularly in Capital Tracking plan files with multiple sheets.

How this feature works

What: If the Capital Planning project includes additional or renamed Financial Input sheets and the project is opened in Capital Tracking, then the tab names will display CP_source file group year_sheet name, as shown in the following example:



Also, when transferring multiple Capital Project files to an existing Capital Tracking plan file, the **Source CAPREQ** area at the top of the plan file page displays "Multi" as shown in the following example:



Systems: Web and Legacy

Where: The changes occur in the Financial Input sheets and the plan details of the capital project.

Who: All Capital Tracking users

How: From the Capital Tracking home page, click **Create or Open Capital Projects**. From the Open Existing Capital Project section, select a project transferred from Axiom Capital Planning.

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Capital Planning and Axiom Capital Planning online help:

- Updating the project or purchase request creator

Axiom Clinical Analytics

Axiom Clinical Analytics 2020.1 includes codes for COVID-19 clinical documentation and updates to the ICD diagnosis code exclusion table.

COVID-19 codes

We added three COVID-19 CPT/HCPCS codes as well as updated the diagnosis lookup table to enable clinical reporting and analysis of COVID-19 information.

COVID-19 Scorecard

A new Scorecard designed around official coding guidelines and profiles is now available.

Updated exclusions table

We updated the ICD diagnosis exclusion table in Scorecards and Reporting.

COVID 19 codes

Axiom Clinical Analytics includes the following new codes:

Why use this feature

Codes for COVID-19 clinical documentation allow clinical users to effectively analyze their COVID-19 population.

How this feature works

You can use the following new codes:

CPT

- 87635
  - Short description: IADNA COVID-19 AMPLIFIED PROBE TQ
  - Long description: Infection agent detection by nucleic acid (DNA or RNA); severe acute respirator syn- drome coronavirus 2 (SARS-CoV-2) (Coronavirus disease [COVID-19]), amplified probe technique

HCPCS (CMS)

- U0001
  - Long Description: Centers for Disease Control and Prevention (CDC) 2019 Novel Coronavirus Real Time RT-PCR Diagnostic Test Panel

    - Short Description: CDC COVID-19 RT-PCR diag test panel
- U0002
    - Long Description: Coronavirus, SARS-CoV-2/2019-nCoV (COVID-19), any technique, multiple types or subtypes (includes all targets), non-CDC
    - Short Description: COVID-19 diag test non CDC

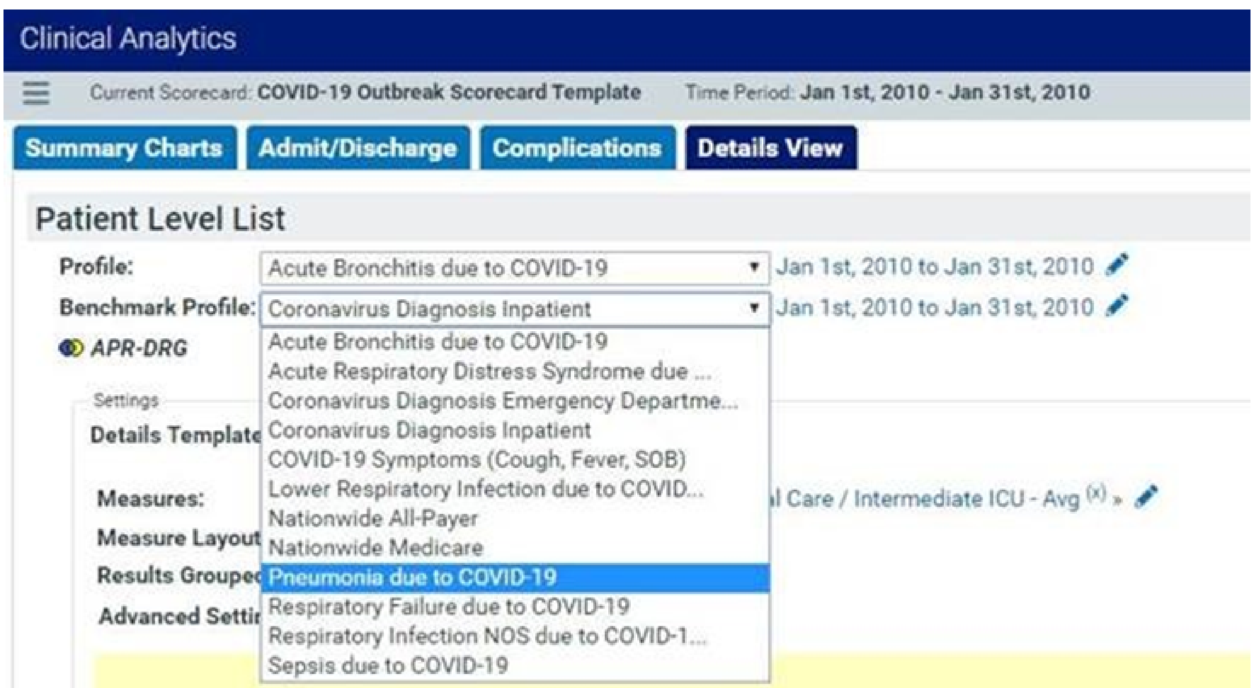
COVID-19 Scorecard

Why use this feature

A new COVID-19 Scorecard is available in the Scorecard Library and designed to provide insights into important clinical and operational data to help you understand what’s happening and make decisions on the frontlines of the COVID-19 outbreak. We designed the scorecard around the official COVID-19 coding guidelines. This Scorecard includes metrics such as mortality rate, length of stay, cost of care, ICU utilization, complication trends, and admit/discharge insights.

How this feature works

To download the COVID-19 Scorecard, click **Scorecards > Scorecard Library** and search for COVID-19 Score- card Template. Profiles specific to COVID-19 are also available. These profiles are based on CDC and 3M provided patient pop- ulation definitions. Users can customize these profiles with additional filters.



Updated exclusions table

The updated exclusions table in Scorecards and Reporting allows users running benchmark data to assess organ- izational performance based on FY 2020 data.

Axiom Comparative Analytics

No new features or enhancements were released for Axiom Comparative Analytics for 2020.1

Axiom Contract Management

Axiom Contract Management 2020.1 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customer and deliver more moments that matter.

New Charge Adjustments feature for adjusting claim charges

The new Charge Adjustments feature enables you to simulate claim charge adjustments. You can adjust charges in a variety of ways. When you make changes to charges for a given simulation, any claims calculated against applicable contracts within that simulation will reflect those adjustments.

New Admin feature for managing insurance plan codes

Now administrators can manage insurance plan codes using the new Manage Insurance Plan Codes feature. This feature enables you to add new insurance plan codes to the system as soon as you know about them, allowing you to assign the codes to contracts before applicable claims come in.

Common reports used in implementation now available as a set

Reports commonly used by system implementers, and admin users reconciling and validating imported data, are now available in Drill-Down Reports as a set named Axiom Templates. Access the desired report from the list and use it as-is or modify it to create a report that returns information tailored more specifically to your needs.

Import flat files using Axiom ETL

Now your supplemental flat files can be imported to Axiom Contract Management using Axiom ETL Import. Just drop the files for import into their corresponding folders, and the files are picked up by the Axiom ETL importer during the nightly full import.

New Charge Adjustments feature for adjusting claim charges

Why use this feature

Use the Charge Adjustments feature to preview adjustments to claim charges in simulations to understand the impact they will have on your net reimbursement and future contract performance.

How this feature works

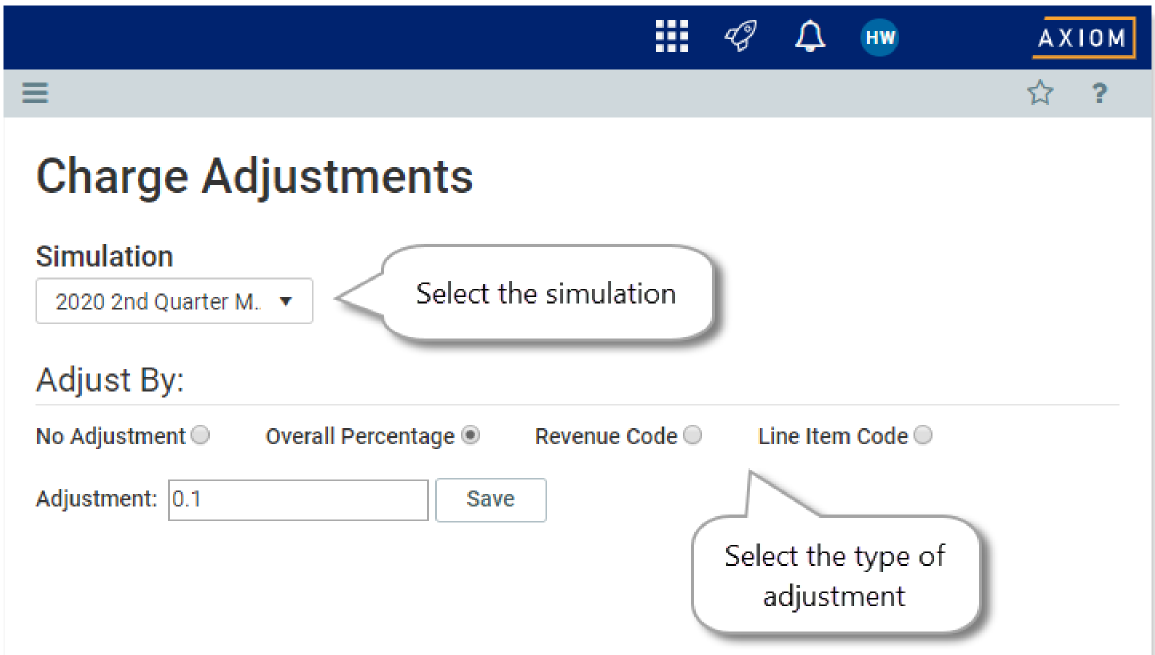
You can adjust charges in a variety of ways. When you make changes to charges for a given simulation, any claims calculated against applicable contracts within that simulation will reflect those adjustments.

> **NOTE:** The Charge Adjustments feature does not work in the Live environment.

Where: This feature is available from the main menu header Claims > Charge adjustments. Adjustments affect only claims in the simulation selected in the Charge Adjustments feature.

Who: Only administrative users have the rights to make price/charge adjustments using this feature. Other users have read-only access based on existing contract modeling rules.

How: From the **Claims** menu, select **Charge Adjustments**, select the simulation in which to adjust claims, and then select the adjustment type: Overall Percentage, Revenue Code, or Line Item Code. The next steps depend on the adjustment type you selected. You can also preview a different adjustment type by clearing the previous adjustment and selecting another.



Click here to watch a video demonstration

Where to find more information

The following topics in the online help have been added or updated with information and instructions for using this feature in the Axiom Contract Management online help:

- “Simulate adjustments to claim charges”
- “About calculating claims”

New Admin feature for managing insurance plan codes

Now administrators can manage insurance plan codes using the new Manage Insurance Plan Codes feature.

Why use this feature

This feature enables you to add new insurance plan codes to the system as soon as you know about them, allowing users to assign the codes to contracts before applicable claims come in. This means claims calculate upon import to the system instead of waiting for the system to add new payer codes from incoming claims, then waiting for users to add the new codes to contracts.

How this feature works

Use the tools in the Insurance Plan Codes pages to search for existing codes and then create them if they do not exist.

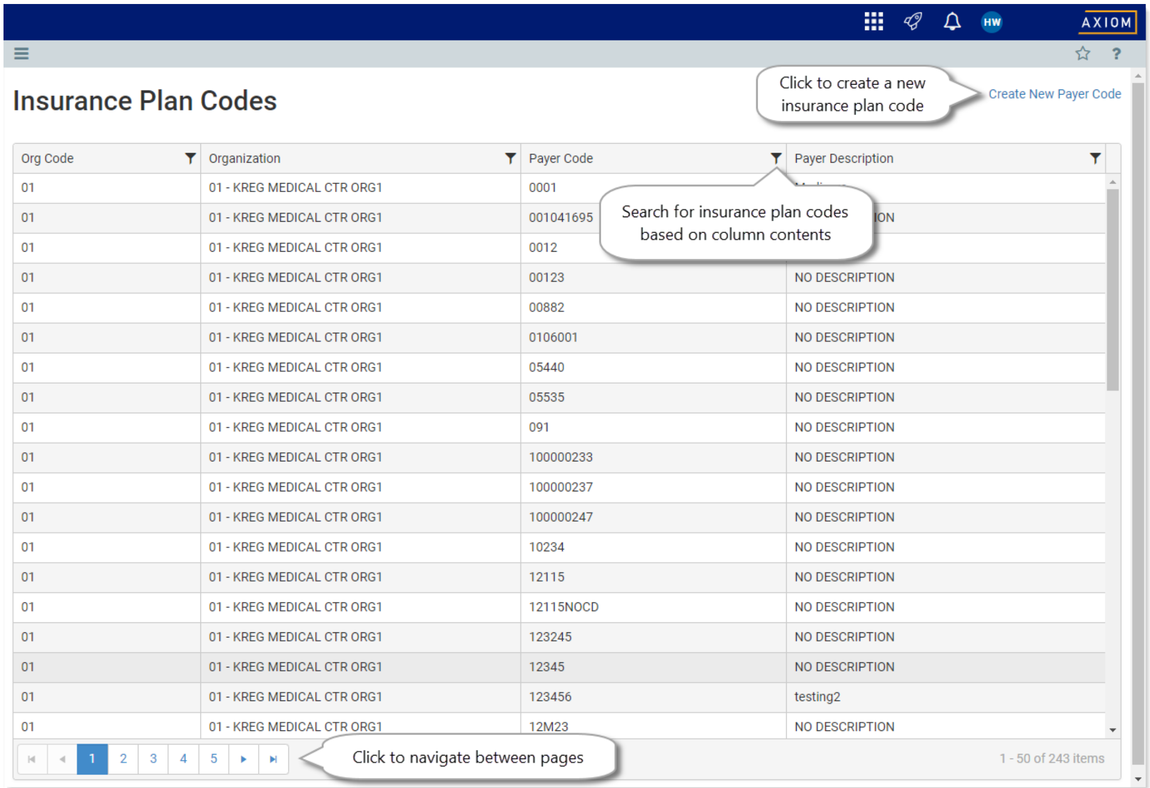
Where: The Manage Insurance Plan Codes feature is available from the Admin menu in the main menu header.

Who: Only Axiom Contract Management administrators can access and use this feature.

How: From the **Admin** menu, select **Manage Insurance Plan Codes**. Then, do one of the following:

- To create a new code, in the upper right of the Insurance Plan Codes page, click **Create New Payer Code** to access the creation tools.

- To search for existing insurance plan codes, decide which criteria to use and then click the funnel icon for that column to open a search parameters dialog.



Click here to watch a video demonstration

Where to find more information

For more information on managing insurance plan codes, see the following topics in the Axiom Contract Management online help:

- "Managing insurance plan codes"
- "Create an insurance plan code"
- "Search for an existing insurance plan code"

Common reports used in implementation now available as a set

Reports commonly used by system implementers, and admin users reconciling and validating imported data, are now available in Drill-Down Reports as a set named Axiom Templates.

Why use this feature

The Axiom Templates set includes the key drill-down reports used by administrators and system implementers to confirm that contract builds are producing the correct results and to confirm that claims are reconciling as expected. Now these reports are conveniently located in one place and can be used as-is or edited and saved as new, customized reports.

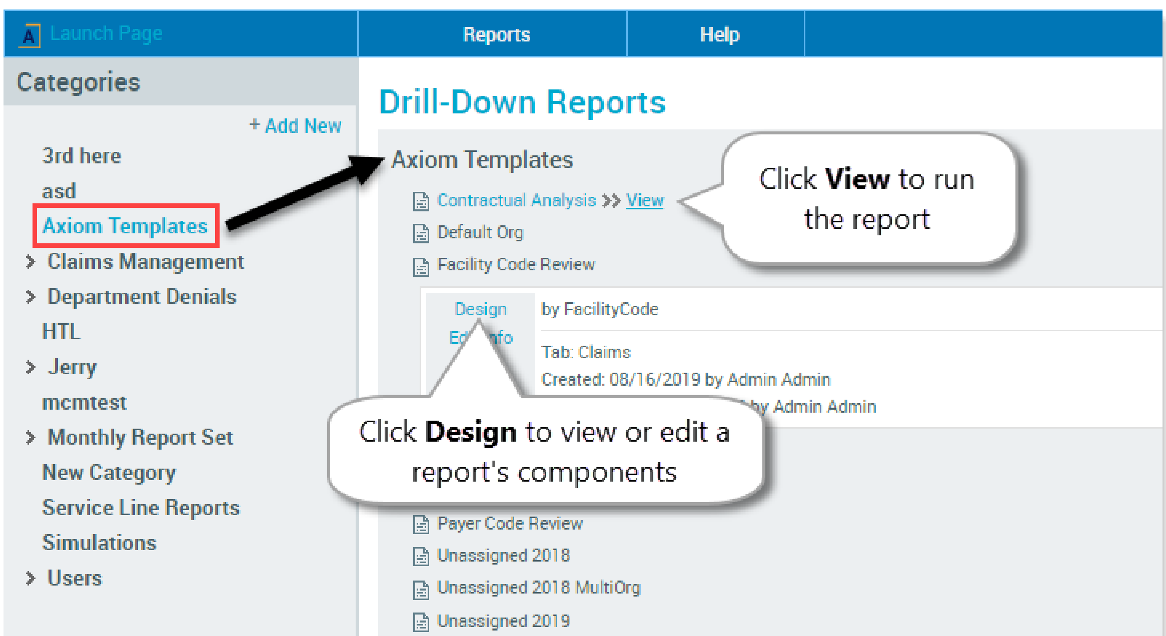
How this feature works

Access the desired report from the list and use it as-is or modify it to create a report that returns information tailored more specifically to your needs.

Where: This report set is available from the Reports > Drill-Down Reports > Drill-Down Reports page.

Who: Implementation consultants installing and testing new systems, and Axiom Contract Management administrators reconciling and validating imported data use these reports.

How: From the main menu header, click **Reports** > **Drill-Down Reports**. On the Drill-Down Reports page, in the **Categories** column, click **Axiom Templates**. The list of reports in the set displays on the page. Then view or edit reports as desired.



Where to find more information

For more information, see the following topics in the Axiom Contract Management online help:

- "Editing and filtering drill-down reports"
- For all drill-down report topics, see "Working with drill-down reports"

Import flat files using Axiom ETL

Now your supplemental flat files can be imported to Axiom Contract Management using Axiom ETL as part of the existing Axiom Contract Management Full Import job.

Why use this feature

The existing Kreg Unified Importer is a Windows application that requires specific knowledge to set up and run and is different from all other Axiom products. While clients can still use the Kreg Unified Importer and SQL Importer combination for flat files, the Axiom ETL importer provides a more efficient method.

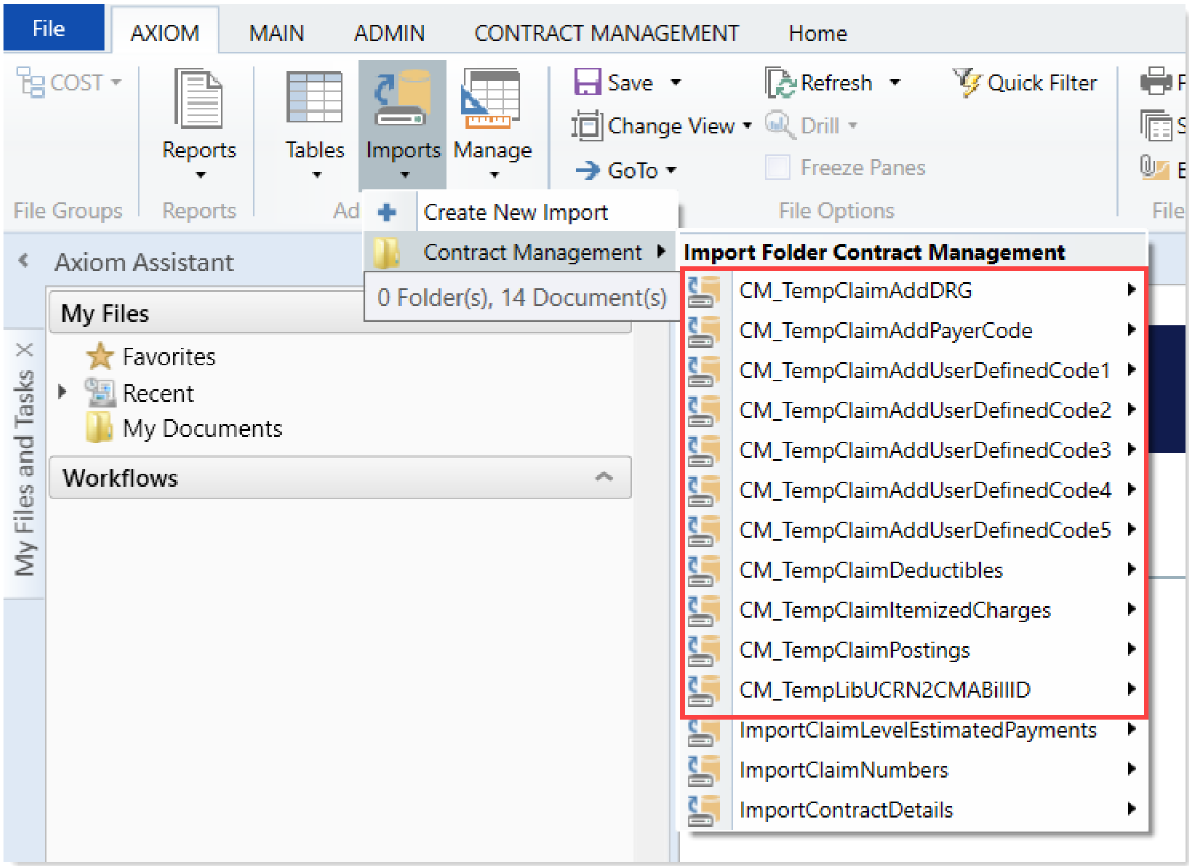
How this feature works

In the client system, system implementers or support technicians create import folders named for the type of flat file being imported. Most clients have AddDRG and AddPayerCode folders for importing DRG files and PayerCode files respectively, but clients can have other folders created for importing other supplemental files as needed. Clients drop the files for import into the corresponding folders, and the files are picked up by the Axiom ETL importer during the nightly full import.

Where: This change applies to delimited, flat text files imported to Axiom Contract Management, generally in the regular scheduled nightly import.

Who: System implementers and support techs who have a support license. Axiom Contract Management administrators have read-only access to the Axiom ETL importer dialogs. Axiom Admin and Scheduler user roles responsible for loading data into Axiom Contract Management.

How: Using Axiom ETL, clients put their flat files into configured folders named for the file content, such as AddDRG for adding DRG files, and AddPayerCode for adding Payer Code files. The Axiom ETL importer picks up the files from the folders and processes them into Axiom Contract Management.



List of file types in the Axiom importer for Axiom Contract Management

Where to find more information

The following topics have been added or updated with information and instructions for using this feature in the Axiom Contract Management online help:

- “Set up Axiom ETL import for flat files”
- “About importing data to Axiom Contract Management”
- “Client file specifications”
- “Understanding data formats”
- “Understanding the flow of data”

Jan 15, 2020 Quarterly Release

Each quarter, 3M provides an update to the 3M GPS Grouper software integrated into Axiom Contract Management. This update includes grouping, pricing, and regulatory updates to the APC and State-specific eAPG groupers.

Axiom Cost Accounting

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. 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.

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

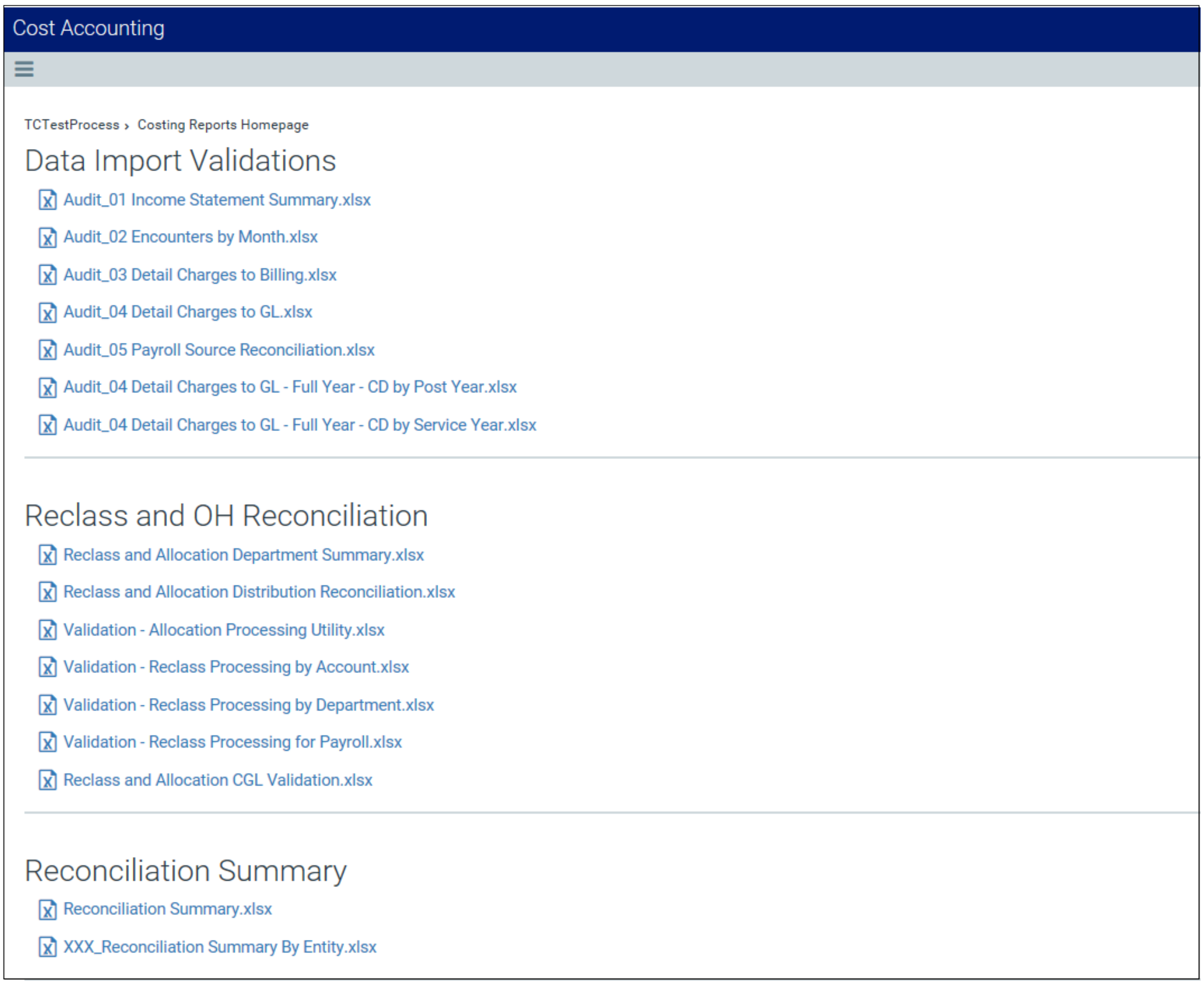
> **NOTE:** The list of available reports may vary depending on the ones used by your organization plus any included custom reports.

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.



Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Cost Accounting online help:

- "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.

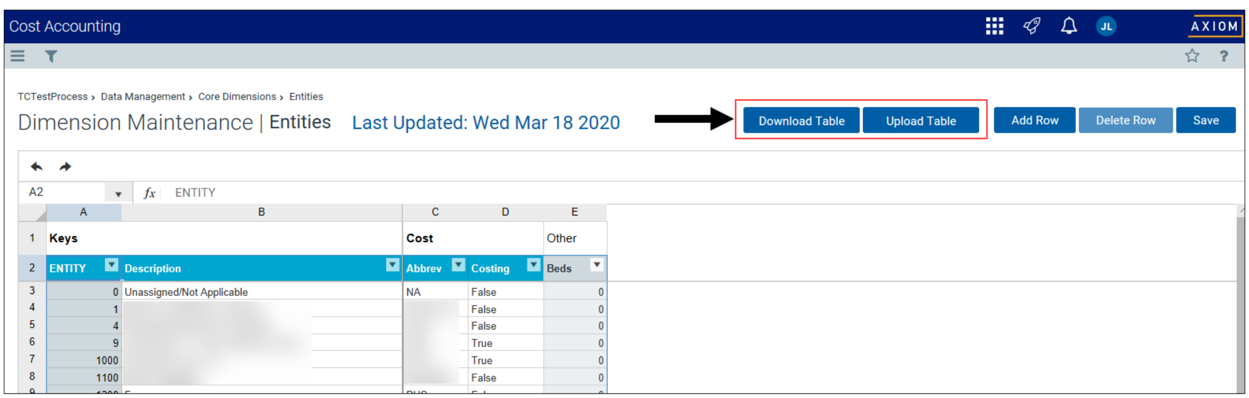
How this feature works

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

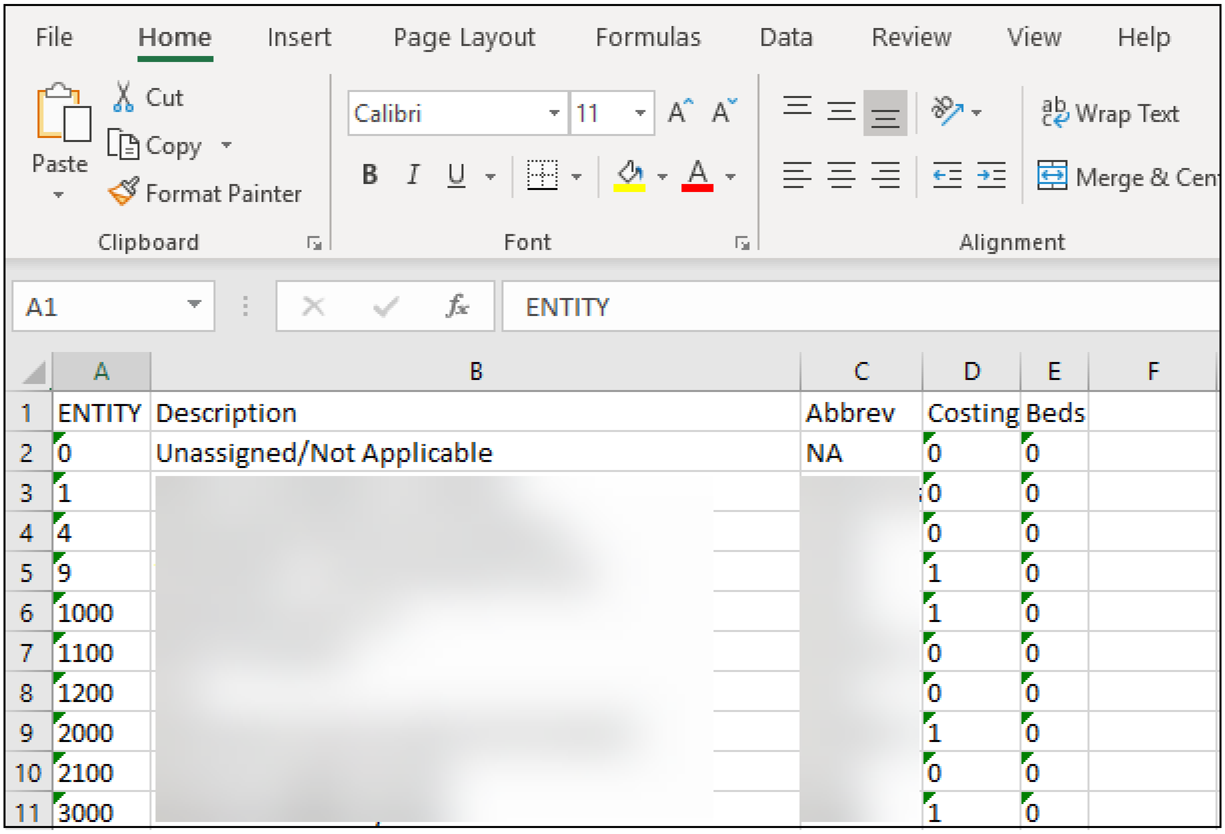
Where: In the Guide View, click **Data Management** to manage the different entities.

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 topic includes new information and instructions for using this feature in the Axiom Cost Accounting online help:

- "Editing a dimension using a spreadsheet"

Axiom Decision Support

Visualize the impact of the COVID-19 patient population

The new COVID-19 Population and Utilization Analysis Dashboard allows you to quickly and easily monitor ongoing and dynamic changes to volume and demographics related to the COVID-19 patient population while also tracking utilization activity and cost of critical resources across your organization.

Monitor performance with the Health Network Summary Dashboard

The Health Network Summary Dashboard provides an easy and clear way to understand your overall performance as well as identify opportunities for improvement through the use of patient, volume, Case Mix Index (CMI), ALOS, and margin analysis.

Create and manage population definitions

Population definitions allow you to group and report on encounters specific to a particular population type for enhanced reporting capability in Axiom Intelligence.

Create reports based on regions or territories

Axiom Decision Support now includes a new Patient Zip Code reference table so that you can create custom columns to build groups from patient Zip code information. You can then access these groupings in Axiom Intelligence to update or generate reports.

New DAX measures for improved health plan network reporting

You can now build Axiom Intelligence dashboards for health plan networks to accurately understand volumes, determine patient severity, and pinpoint improvements to length of stay for your organization.

New unique patient identifier field for Per Patient analysis reporting

You can now build Axiom Intelligence reports that utilize unique patient identifier information to create patient counts and per patient analysis to understand health network performance, including cost, utilization, and profitability, across the network.

Visualize the impact of the COVID-19 patient population

▶ Why use this feature

The COVID-19 population definitions combined with the COVID-19 Population and Utilization Analysis Dashboard help your organization understand and visualize the impact of the COVID-19 patient population.

How this feature works

There are two key features to the new COVID-19 reporting capability:

1. COVID-19 patient population definitions

The new Population Builder utility allows you to create and manage population definitions, including specifying criteria. The tagged encounters can then be pushed to Axiom Intelligence for reporting purposes. As part of the 2020.1 release, we included the following pre-defined population definitions specific to COVID-19:

- COVID-19 Cases
- COVID-19 Deaths
- Exposure to COVID-19
- Signs & Symptoms of COVID-19

These population definitions were used to create the new COVID-19 Population and Utilization Analysis Dashboard, but you can also reconfigure these definitions to meet your needs and/or use them to create and customize other Axiom Intelligence reports.

Where: In the DSS Admin task pane, in the **Encounter Grouper and Care Continuum** section, double-click **Launch Population Builder**.

Who: DSS Administrators or DSS Analysts (DSS Report Writers).

How: Add a definition by clicking **Add Population Definition** at the top of the Population Definitions home page. Edit or clone a definition by clicking the definition to highlight it, and then click the notepad icon. Configure the definition, including adding criteria, and save it. To process this definition individually, click **Process**, or to process multiple active definitions at the same time, on the Population Definitions home page, click **Process Active Definitions**.

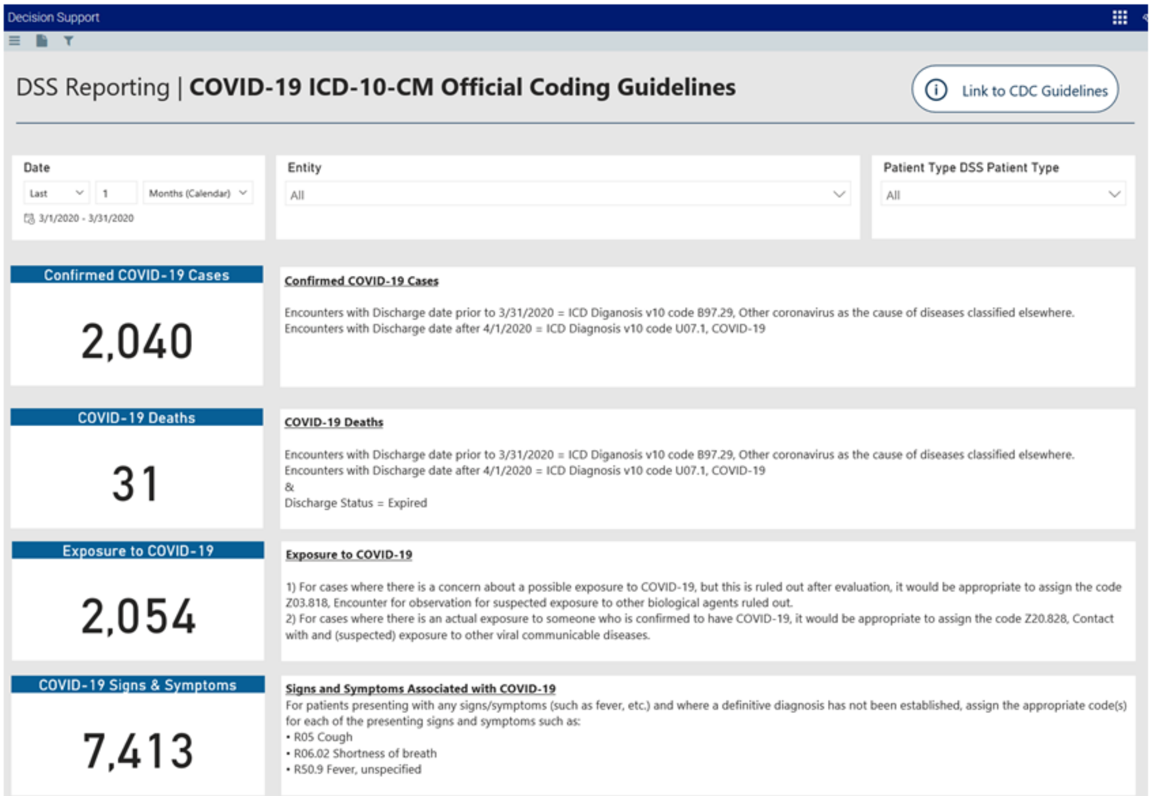
Click here to watch a video demonstration

2. COVID-19 Population and Utilization Analysis Dashboard

This dashboard report allows you to monitor ongoing and dynamic changes to volume and demographics related to the COVID-19 patient population while also tracking utilization activity and cost of critical resources across your organization. This dashboard includes the following reports:

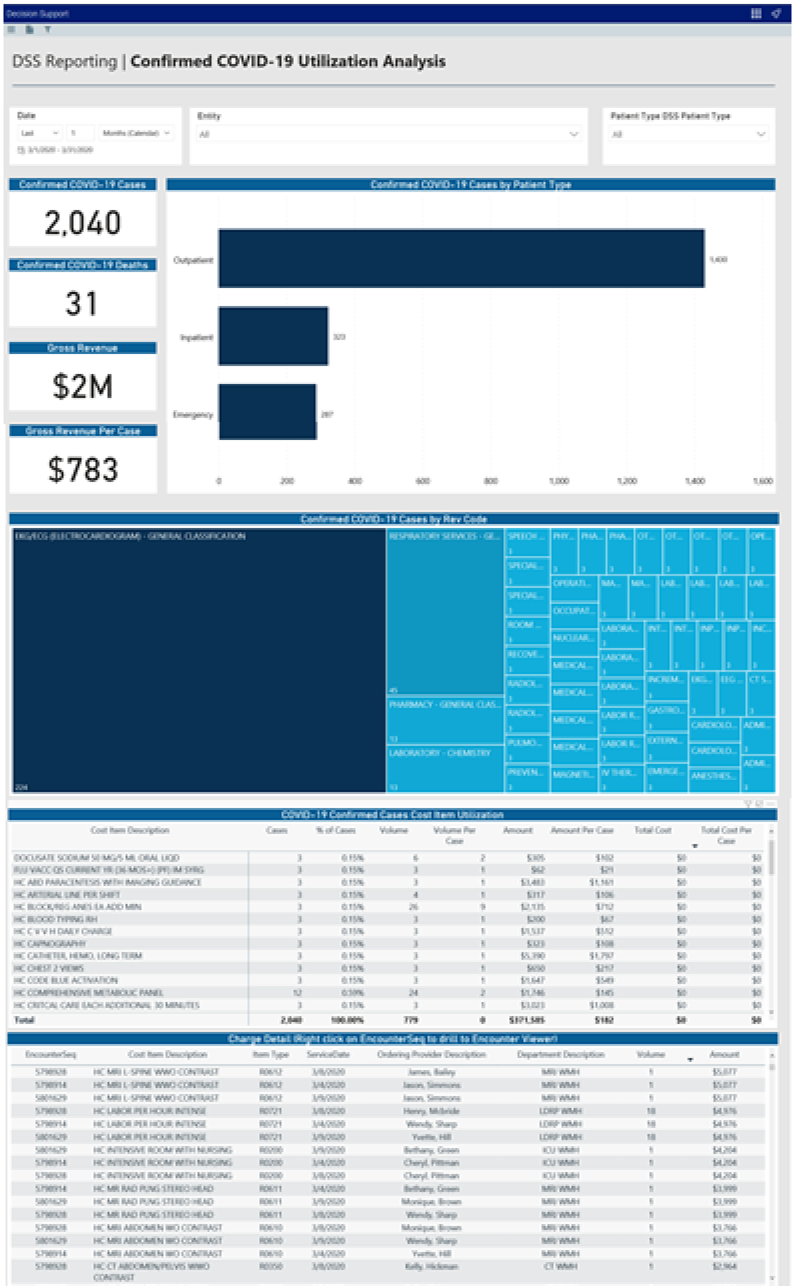
- **COVID-19 ICD-10-CM Coding Guidelines** - Serves as the main home page for the dashboard and includes the following Key Performance Indicators (KPIs) as well as a link to the CDC Guidelines used to create these populations:

- Confirmed COVID-19 Cases
- COVID-19 Deaths
- Exposure to COVID-19
- Signs and Symptoms Associated with COVID-19



- **COVID-19 Population Analysis report** - Allows you to monitor the ongoing and dynamic changes to volumes and understand these new populations across demographic, geographic, and operational sectors.

- **COVID-19 Utilization Analysis report** - Allows you to quickly investigate and drill into various aspects of the COVID-19 populations to better understand the utilization activity and cost of critical resources such as beds, equipment, drugs, and supplies. This insight is key to both resourcing in the short term and planning for the future.



Where: In the Axiom Intelligence Reports section, click **COVID-19 Population & Utilization Analysis**.

Who: DSS Administrators or DSS Analysts (DSS Report Writers).

How: After opening the dashboard, use the Slicer section at the top of the page to select the date, entity, and patient type variables in which to configure the data to display. At the bottom of the page, click the COVID-19 Population Analysis tab or the COVID-19 Utilization Analysis tab. Hover your mouse over different areas of the report sections to view details. For tables, right-click a line item to drill down to more information.

Click here to watch a video demonstration

Where to find more information

The following topics in the online help include instructions on using Axiom Intelligence:

- "Managing population definitions"
  - "Adding, editing, or cloning population definitions"
  - "Archiving population definitions"
  - "Deleting population definitions"
  - "Processing population definitions"
  - "Including or excluding population definition data in Axiom Intelligence reports"
- "Using the COVID-19 Population and Utilization Analysis Dashboard"
  - "COVID-19 Population Analysis report"
  - "COVID-19 Utilization Analysis report"

Monitor performance with the Health Network Summary Dashboard

Why use this feature

The Health Network Summary Dashboard provides an easy and clear way to understand your overall performance as well as identify opportunities for improvement.

How this feature works

What: The Health Network Summary Dashboard provides data regarding patients, volume, Case Mix Index (CMI), ALOS, and margin analysis.

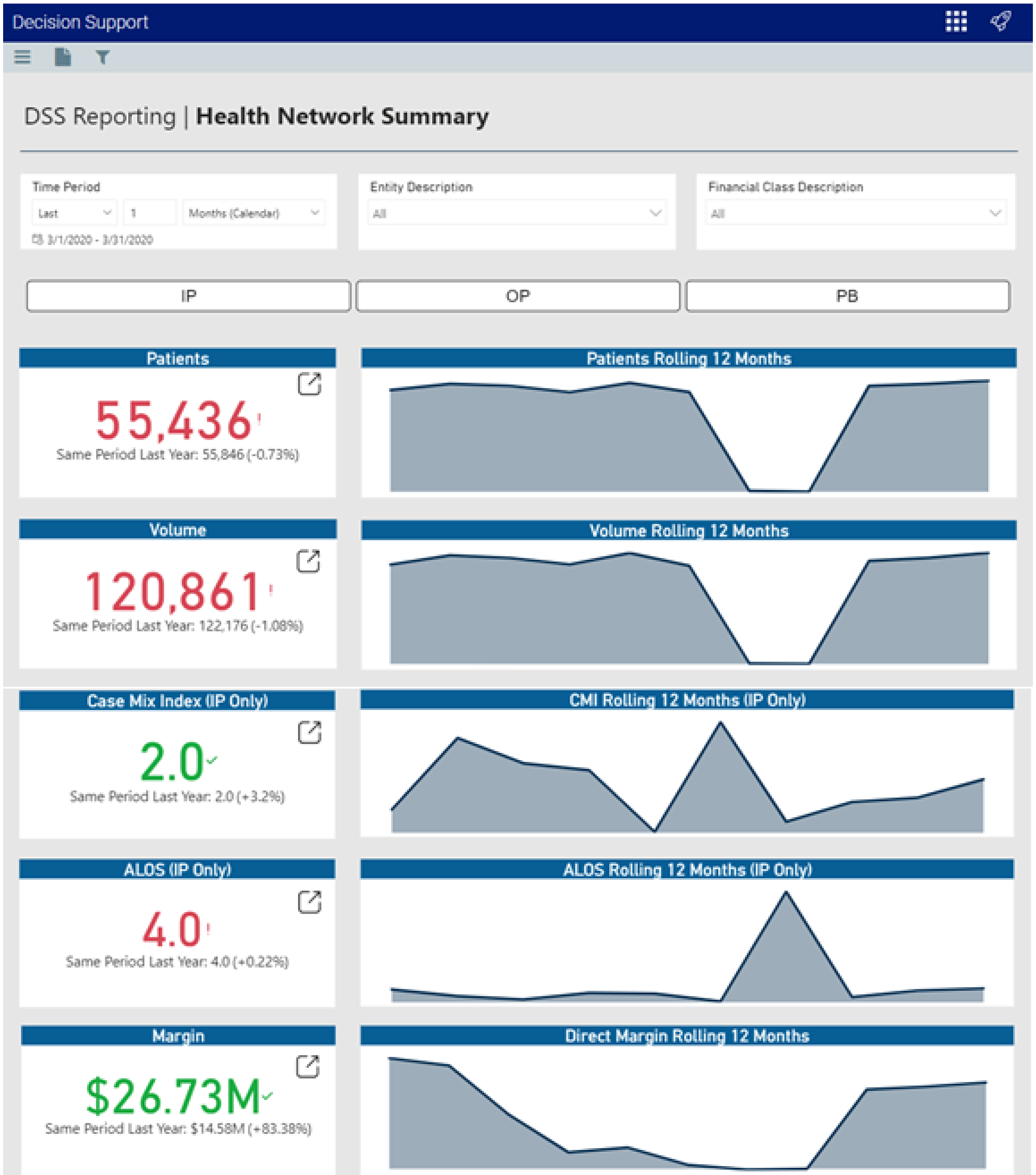
Where: From the Axiom Decision Support home page, click the **Navigation** icon in the far-left corner of the page, and click **Report Designer**. Under the **Axiom Intelligence Reports** section, double-click **Health Network Summary**.

Who: All Axiom Decision Support users.

How: After opening the dashboard, you can view the following KPI information:

- **Patient Analysis** - The Patients KPI card shows the number of patients over a specified time period, including the percentage of change over the same period the previous year. The Patients Rolling 12 Months card displays a graph of the number of patients over a rolling 12-month period.
- **Volume Analysis** - The Volume KPI card shows the case volume over a specified time period, including the percentage of change over the same period the previous year. The Volume Rolling 12 Months card displays a graph of the number of cases over a rolling 12-month period.
- **Case Mix Index (CMI) Analysis** - The Case Mix Index KPI card shows the Case Mix Index (CMI) for In Patient over a specified time period, including the percentage of change over the same period the previous year. The CMI Rolling 12 Months card displays a graph of CMI data over a rolling 12-month period.
- **ALOS Analysis** - The ALOS KPI card shows the Average Length of Stay (ALOS) for In Patient over a specified time period, including the percentage of change over the same period the previous year. The ALOS Rolling 12 Months card displays a graph of the ALOS for patients over a rolling 12-month period.
- **Margin Analysis** - The Margin KPI card shows the profit margin over a specified time period, including the percentage of change over the same period the previous year. The Direct Margin Rolling 12 Months card displays a graph of the direct margin dollars over a rolling 12-month period.

At the top of the dashboard, filter data by time (days, weeks, months, years), entity, financial class, and service line type. To view In the Rolling 12 Months cards, hover your cursor over any of the graphs to view the values for a specific month. To open the report that includes the data behind each KPI, click the drill icon in the following cards: Patients, Volume, Case Mix Index, ALOS, and Margin.



Where to find more information

The following topics include instructions on using Axiom Intelligence in the Axiom Decision Support online help:

- "Using the Health Network Summary Dashboard"

Create and manage population definitions

Why use this feature

Population definitions allow you to group and report on encounters specific to a particular population type for enhanced reporting capability in Axiom Intelligence.

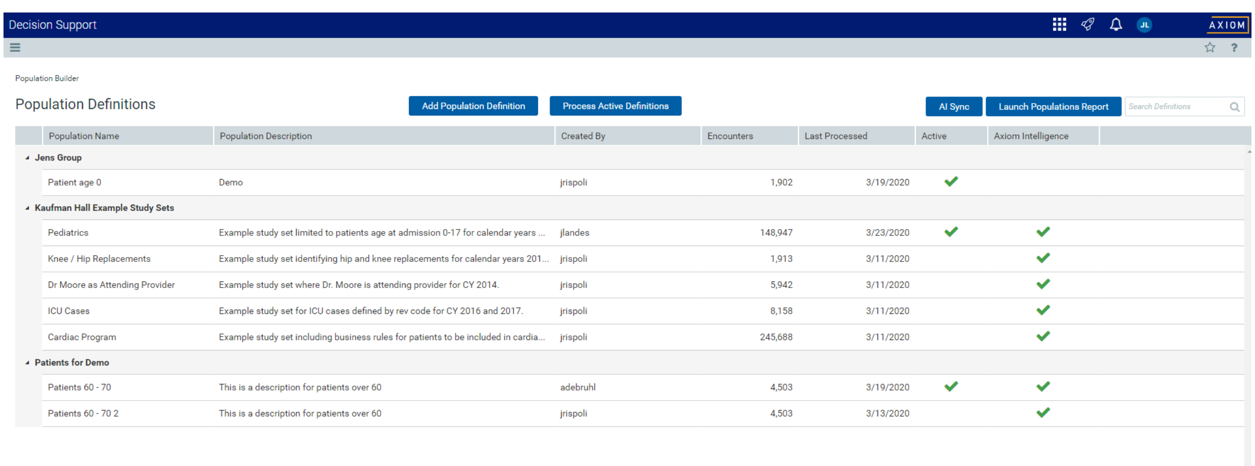
How this feature works

What: The Population Builder utility allows you to create and manage population definitions, including specifying criteria, all from one location. You can then push the tagged encounters to Axiom Intelligence for reporting capability.

Where: This new feature is located in the DSS Admin tab, in the Encounter Grouper and Care Continuum section.

Who: DSS Administrators or DSS Analysts (DSS Report Writers).

How: Open the Population Builder utility to view a table of the population definitions. From this on location, you can add, edit, archive, and delete definitions. You can activate/deactivate them just by clicking the Active column. You can also include/exclude definitions from Axiom Intelligence by clicking the Axiom Intelligence column. To push the definitions to Axiom Intelligence, simply click the Process Active Definitions, and then AI Sync. You can even launch the Population report in Axiom Intelligence directly from this utility.



Click here to watch a video demonstration

Where to find more information

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

- "Managing population definitions"
- "Adding, cloning, or editing a population definition"
- "Processing population definitions"
- "Archiving population definition"
- "Deleting a population definition"
- "Including or excluding population definition data in Axiom Intelligence reports"

Create reports based on regions or territories

Why use this feature

Axiom Decision Support now includes a new Patient Zip Code reference table so that you can create custom columns to build groups from patient Zip code information. You can then access these groupings in Axiom Intelligence to update or generate reports.

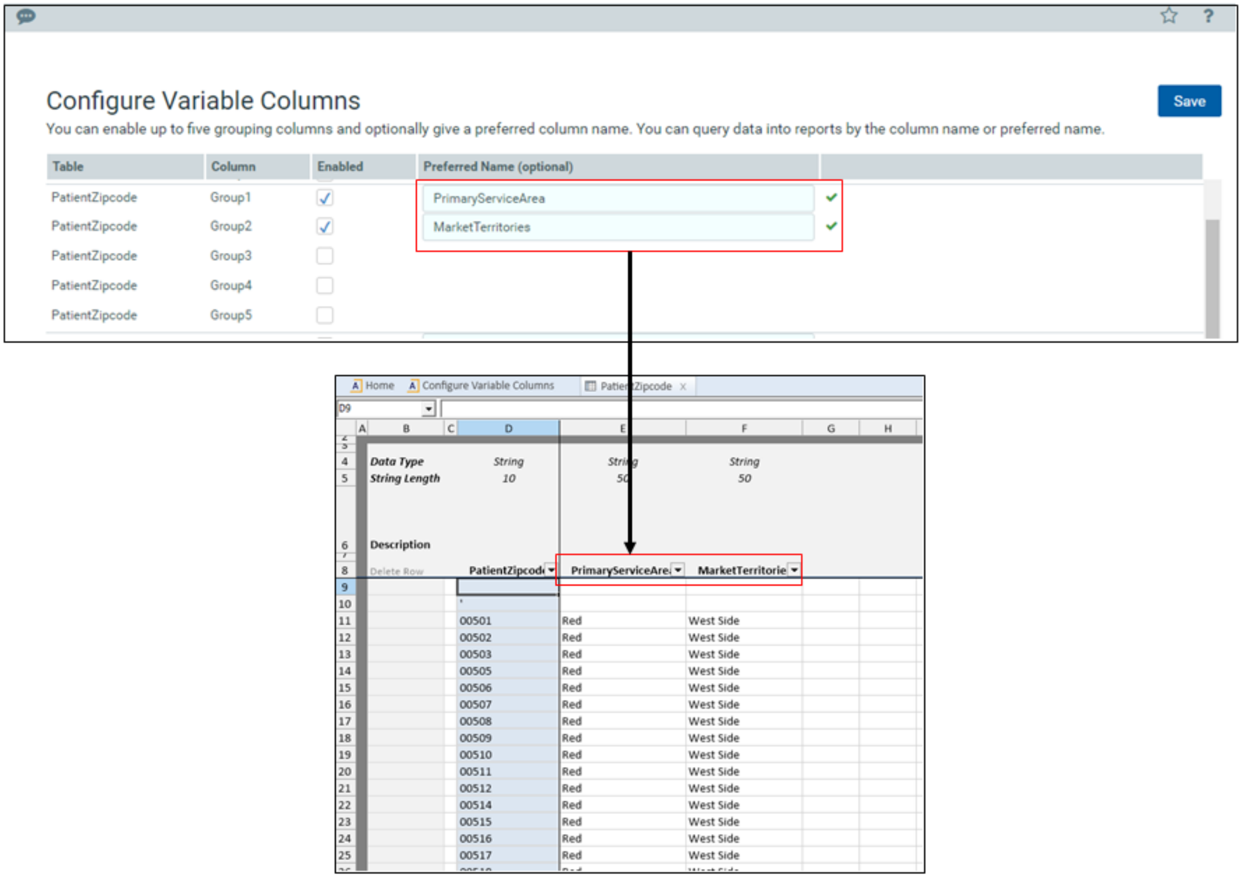
How this feature works

What: The updated Configure Variable Columns utility now allows you to create custom columns for patient Zip codes.

Where: This enhanced feature applies to the Configure Variable Columns utility and the new Patient Zip Code reference table.

Who: DSS Administrators.

How: In the Configure Variable Columns utility, enable the PatientZipcode group numbers and type a preferred name for the columns to use. In the Patient Zip Code reference table, enter the data to report on.



▶ Where to find more information

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

- "Creating or modifying custom columns in dimensions"
- "Patient Zip Code reference table"

New DAX measures for improved health plan network reporting

▶ Why use this feature

You can now build Axiom Intelligence dashboards for health plan networks to accurately understand volumes, determine patient severity, and pinpoint improvements to length of stay for your organization. The following new measures include the following:

- Cases with Gross Charges greater than - Identify cases that have gross charges greater than zero versus all cases
- Case Mix Index (CMI) - Determine the CMI of a given population

- GeometricLOS - Identify the Geometric Length of Stay
- Difference between ALOS and GeomLOS (opportunity) - Compare your organization's ALOS and GeomLOS at a MSDRG and service line level and identify your opportunity or difference between these two measures

How this feature works

What:

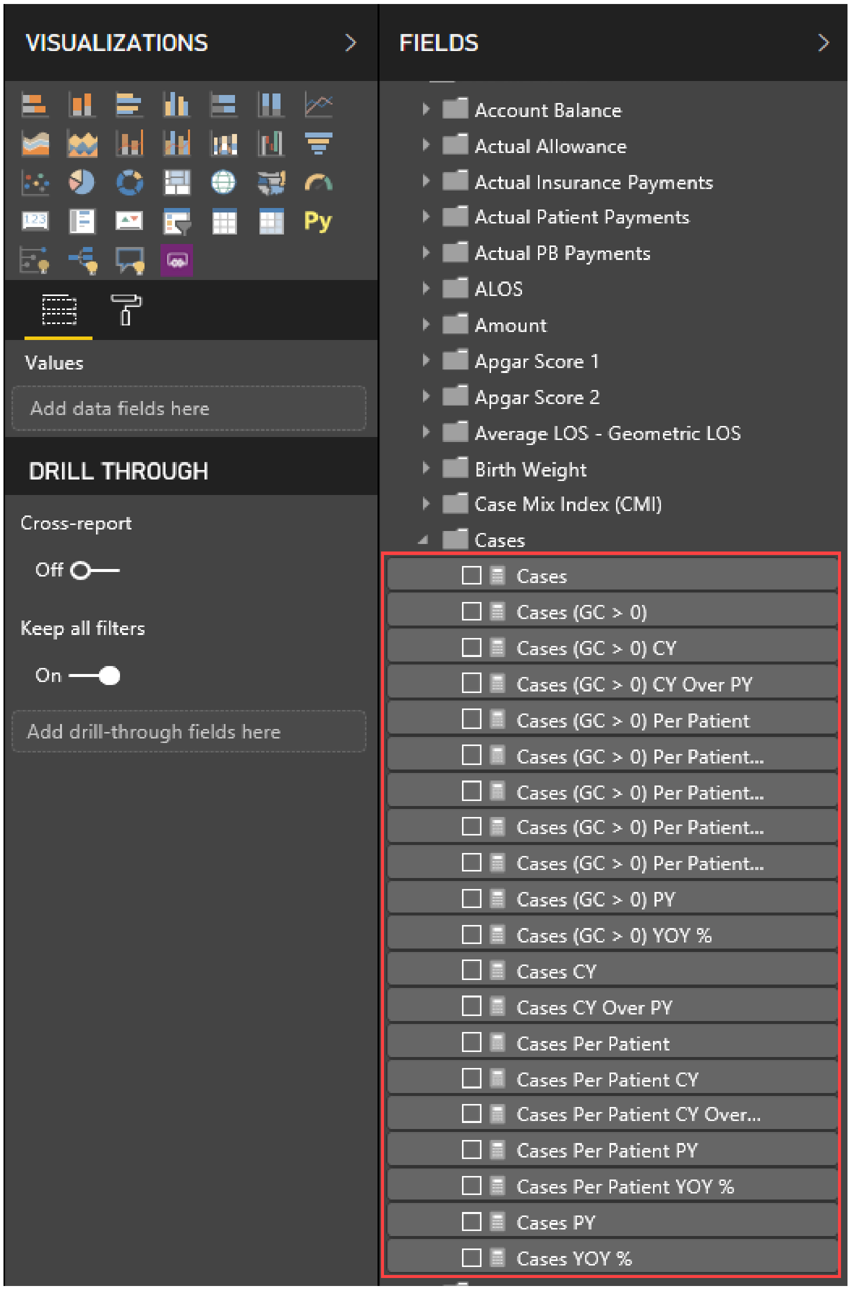
- Cases (GC>0) (New base measure folder) * Field Description = Sum of Cases with Gross Charges greater than Zero
  - Cases (GC>0)
  - Cases (GC>0) CY
  - Cases (GC>0) CY Over PY
  - Cases (GC>0) Per Patient
  - Cases (GC>0) Per Patient CY
  - Cases (GC>0) Per Patient CY Over PY
  - Cases (GC>0) Per Patient PY
  - Cases (GC>0) Per Patient YOY%
  - Cases (GC>0) PY
  - Cases (GC>0) YOY%
- Case Mix Index (CMI) (New base measure folder) * Field Description = Sum of MSDRG weight for each discharge divided the total by the number of discharges
  - CMI
  - CMI CY
  - CMI PY
  - CMI CY over PY
  - CMI YOY %
- Geometric Mean LOS (GMLOS) (New base measure folder) * Field Description = Calculated by multiplying all of the lengths of stay and then taking the nth root of that number.
  - GMLOS
  - GMLOS CY
  - GMLOS PY
  - GMLOS CY over PY
  - GMLOS YOY %

- Average LOS - Geometric LOS (New base measure folder) * Field Description = Difference between Average LOS and Geometric LOS
  - ALOS - GMLOS
  - ALOS - GMLOS CY
  - ALOS - GMLOS PY
  - ALOS - GMLOS CY over PY
  - ALOS - GMLOS YOY %

Where: The new measures are included in the **Model Measures** folder in Axiom Intelligence.

Who: DSS Administrators or DSS Analysts

How: From the Axiom Decision Support home page, click the **Navigation** icon in the far-left corner of the page, and click **Report Designer**. In the Fields section, click **Model Measures > DSS Measures**. Drag and drop the appropriate measures into the data visualization area to build your dashboard or report.



Where to find more information

The following topics include instructions on using Axiom Intelligence in the Axiom Decision Support online help:

- "Managing Axiom Intelligence reports"
- "Using the Axiom Intelligence report editor"
- "Managing data for Axiom Intelligence reporting"

New unique patient identifier field for Per Patient analysis reporting

Why use this feature

You can now build Axiom Intelligence reports that utilize unique patient identifier information to create patient counts and per patient analysis to understand health network performance, including cost, utilization, and profitability, across the network. The following new/updated measures include the following:

- Patient
- Per Patient versions of the following measures:
  - Cases
  - Cases (GC > 0)
  - All financial measures (cost, revenue, margin, allowance, etc.)

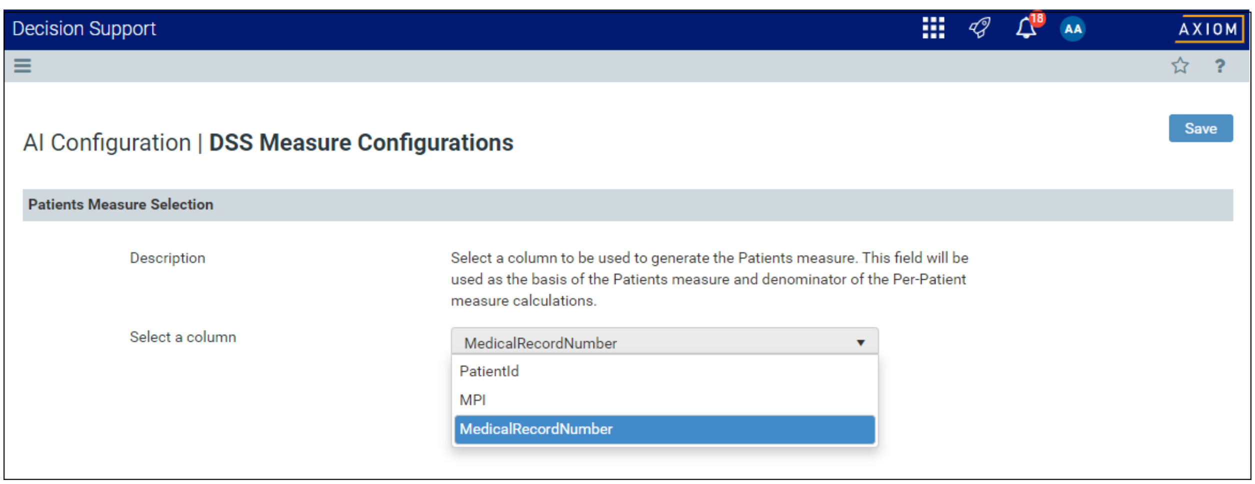
How this feature works

What: The new DSS Measure Configuration utility allows you to select the unique patient identifier type used by your organization for enhanced Axiom Intelligence report building.

Where: From the DSS Admin task pane, in the in the **Decision Support Imports and Data Maintenance** section, double-click **DSS Measure Configuration**. The utility opens in a separate web browser,

Who: DSS Administrators or DSS Analysts

How: In the utility, select the unique patient identifier used by your organization, and click **Save**.



Click here to watch a video demonstration

Where to find more information

The following topic includes new information and/or instructions for using this feature in the Axiom Decision Support online help:

- "Selecting a unique patient measure type"

Axiom Financial Planning

Axiom Financial Planning 2020.1 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customer and deliver more moments that matter.

The Transfer Capital Projects to Financial Planning 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 financial planning files. After the data has been transferred, you can then enter or update the project data in Axiom Financial Planning.

A new mapping column and additional Revenue items have been added to the Code Dimension Update utility. The Transfer to Financial Planning utility uses the Code Dimension table in transferring data between products. Enhancements to the Code Dimension utility provide additional information and mapping options when integrating data.

New utility shares capital project data with Axiom Financial Planning

Why use this feature

Axiom Financial Planning includes utilities that allow you to transfer project data from other Axiom products, including Axiom Capital Planning. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many financial planning needs of your organization.

The Transfer Capital Projects to Financial Planning utility provides a form-based wizard experience so that you can quickly and easily transfer the specific data needed in your Financial Planning plan files.

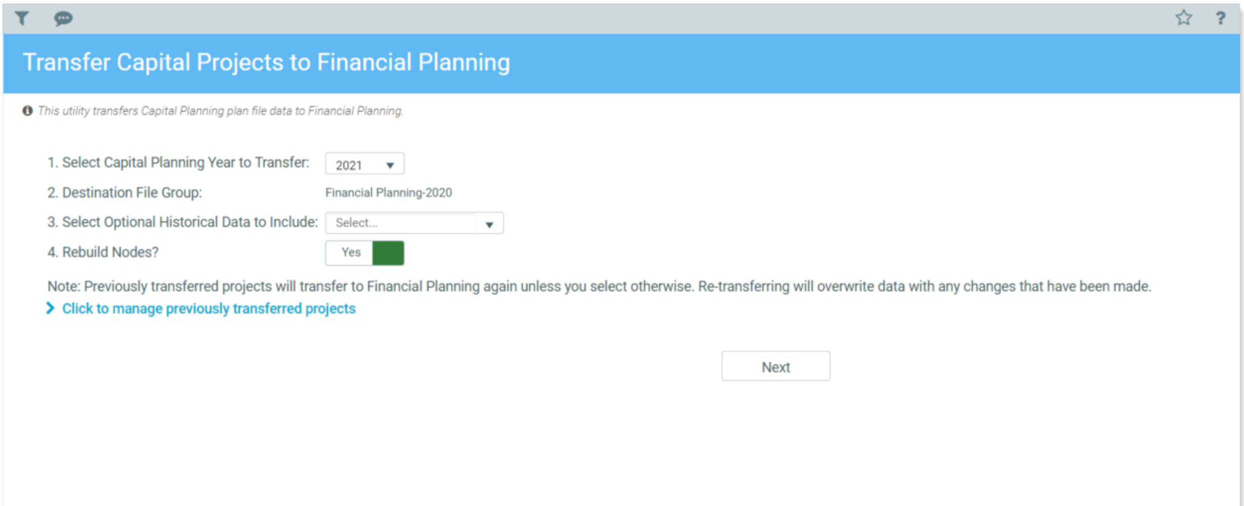
How this feature works

If your organization is licensed for Axiom Capital Planning and Axiom Financial Planning, you can quickly and easily transfer capital project data to Axiom Financial Planning using the new Transfer Capital Projects to Financial Planning utility.

Where: This new utility is available from the Integration section of the Fin Plan Admin task pane.

Who: Administrators who have both Axiom Capital Planning and Axiom Financial Planning products can use this utility.

How: From the Fin Plan Admin task pane > Integration section, click **Transfer Capital Projects to Financial Planning**. The wizard will walk you through the process of selecting the projects to transfer.



Where to find more information

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

- "Transferring capital project data"
- “Select and transfer capital projects”
- “Working with capital project data in plan files”

Enhancements to the Code Dimension Update utility

Why use this feature

Axiom Financial Planning includes utilities that allow you to transfer data from other Axiom products, including Axiom Management Reporting and Axiom Rolling Forecasting. This sharing of data allows you to get the most out of your Axiom Healthcare products to meet the many financial planning needs of your organization.

The Transfer to Financial Planning utility uses the Code Dimension table in transferring data between products. Enhancements to the Code Dimension utility provide additional information and mapping options when integrating data.

How this feature works

If your organization is licensed for Axiom Management Reporting and/or Axiom Rolling Forecasting, you can quickly and easily transfer operating budget and rolling forecast data to Axiom Financial Planning using the Transfer to Financial Planning utility. The CODE dimension table contains all the valid CODE items used in the Axiom Financial Planning system. For each revenue item listed in the CODE and Description columns of the Code Update Report, the new column displays the mapping code to use to in the ACCT table's FPCode column to map that item to Axiom Financial Planning.

Where: This change applies to the Code Dimension Update utility, available from the Fin Plan Admin task pane, which is used to update Dimension tables used specifically by Axiom Financial Planning.

Who: Only Axiom Healthcare Suite administrators can access and use this utility to modify Axiom Financial Planning dimensions.

How: From the Fin Plan Admin task pane, in the **Administration** section, expand **Dimension Update Utilities**, and then double-click **Code Dimension**. The new column, Mapping Code (Transfer to FP Only), is column N. In the following example, to map Payor Inpatient Gross Revenue to Axiom Financial Planning, you would use the code listed in column N.

Code Update Report

H	I	J	K	L	M	N
CODE	Description	Active	Conversion Factor (Transfer to FP Only)	Conversion Factor YR2 (Transfer to FP Only)	Conversion Factor YR3 (Transfer to FP Only)	Mapping Code (Transfer to FP Only)
Other Revenue			(Mapping Codes must be combined with Payor number, i.e. R_IPREV9 would map to payor 9)			
421100	Payor Inpatient Gross Revenue	Yes	1000	1	1	R_IPRev9
422100	Payor Outpatient Gross Revenue	Yes	1000	1	1	R_OPRev9
423100	Physician Charges	Yes	1000	1	1	R_PHYRev9
424100	Mid Level Charges	Yes	1000	1	1	R_MLRev9
652800	Health Plan Revenue	Yes	1000	1	1	R_Premium9
925710	Indirect Funding - Research (Payor Detail)	Yes	1000	1	1	S_RIF110
925810	Total Realized Funding - Research (Payor Detail)	Yes	1000	1	1	R_RRF110
952810	Health Plan Premium Revenue (Payor Detail)	Yes	1000	1	1	R_Premium210
962580	Total Research Grant (Awarded)		1000	1	1	S_RG110

Where to find more information

The following topic has been updated with information and instructions for using this feature in the Axiom Financial Planning:

- "Updating Axiom Financial Planning dimensions - Update the Code dimension"

Axiom Rolling Forecasting

No new features or enhancements were released for Axiom Rolling Forecasting for 2020.1

Axiom Strategy Management

No new features or enhancements were released for Axiom Strategy Management for 2020.1

What to know before upgrading

IMPORTANT: Refer to the respective release notes of each Axiom Healthcare Suite product licensed by your organization for product-specific considerations before upgrading. **You must apply the Axiom Software 2020.1 upgrade before applying any 2020.1 product upgrades.** The 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.

When upgrading to Axiom Healthcare Suite Version 2020.1, keep in mind the following:

- Each product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- Suite-upgraded components are included in all product upgrades.
- 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.

Upgrade considerations

The following table describes upgrade considerations that your product administrator should review to determine the appropriate course of action:

Product	Considerations
Axiom Software Platform	Upgrade. Each product is back-wards compatible, so staying on the latest platform version has many benefits with no risk.
Axiom Budget Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Capital Planning and Capital Tracking	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. Upgrade Axiom Capital Tracking at the same time as Axiom Capital Planning.
Axiom Comparative Analytics	There are no required upgrade considerations with this release.
Axiom Contract Management	Contact your Kaufman Hall Implementation Consultant to schedule an installation.
Axiom Cost Accounting	Contact your Kaufman Hall Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.
Axiom Cost Management	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Decision Support	Contact your Kaufman Hall Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.
Axiom Financial Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Performance Reporting and Productivity	Upgrade if you are not in an active Budget planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.

Product	Considerations
Axiom Rolling Forecasting	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Strategy Management	There are no required upgrade considerations with this release.

Preparing for and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document and the products in which your organization is licensed 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.

Issues fixed in 2020.1

The following table lists the resolutions for issues addressed in 2020.1, released on April 30th, 2019:

Issue	Description
My Files and Tasks task pane: Invalid Shortcut for Workflows (target not found for 'UserWorkflowViewAdapter') [TFS 11080]	**Issue:** In the My Files and Tasks task pane, the Workflows option displays an error. **Resolution:** Corrected to remove the Workflows header because workflows have been deprecated.
PFB-08000 - Year and Period Form FTE Hours [TFS 38632]	**Issue:** In the Update Year and Period Tables form, the FTE Hours revert back to 2,080 even after saving 2,086. The underlying table remains correct, but the form itself does not visibly reflect what's currently in the table. **Resolution:** Corrected by removing the hardcoding of the Combo box.
PFB-08212 - Dimension Maintenance Utility Task Pane Behavior [TFS 40543]	**Issue:** The 2019.3 Axiom Software release includes a change to the task pane behavior of file shortcuts. The Read Only parameter now reduces save data permissions set in security as well as file access levels, such that users that have Save Data access to the Dimension Maintenance utility, if Read Only is checked for the Task Pane shortcut, the file opens without Save Data permissions. **Resolution:** Corrected in a previous fix.
PFB-08294 - Turn off Refresh Forms Run Behavior "on open" for Dimension Maintenance utility. [TFS 41052]	**Issue:** When A user opens the 2018.3 Dimension Maintenance Utility, no products display in the list, but when opening the 2019.3 version, the system displays the list of products. **Resolution:** Corrected the Datalookup to run before the user is prompted to make Refresh Variables selections.