



Release Notes
Axiom Healthcare Suite
Version 2020.2



KaufmanHall

AXIOM

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About the release notes

Kaufman Hall is pleased to announce the 2020.2 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 2020.2 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 and Capital Tracking](#)
- [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

Rely on a market-informed guide to identify the largest opportunities

The new Budget Assessment and Metric Explorer dashboards includes Axiom Comparative Analytics data embedded directly into the Budgeting workflow to provide access to comparative and market-based information while setting and adjusting budgets. This data allows you to create an achievable budget and discover the best strategies to end your fiscal year on target.

Improve budgeting efficiency with instant access to supporting documents

You can now view the detail behind numbers on budget reports, including purchase detail for expenses, without needing to exit the reporting environment to research payment details that may exist outside the Axiom Performance Reporting in other documents. This helps increase efficiency by offering instant access to the documentation that supports the detail needed to make more informed budgeting decisions. It also saves your organization time and money by allowing you to set up and manage connections to your document systems without product or report customization.

Rely on a market-informed guide to identify the largest opportunities

► Why use this feature

The new Budget Assessment and Metric Explorer dashboards includes Axiom Comparative Analytics data embedded directly into the Budgeting workflow to provide access to comparative and market-based information while setting and adjusting budgets. This data allows you to create an achievable budget and discover the best strategies to end your fiscal year on target.

NOTE: This feature requires a license for Axiom Comparative Analytics.

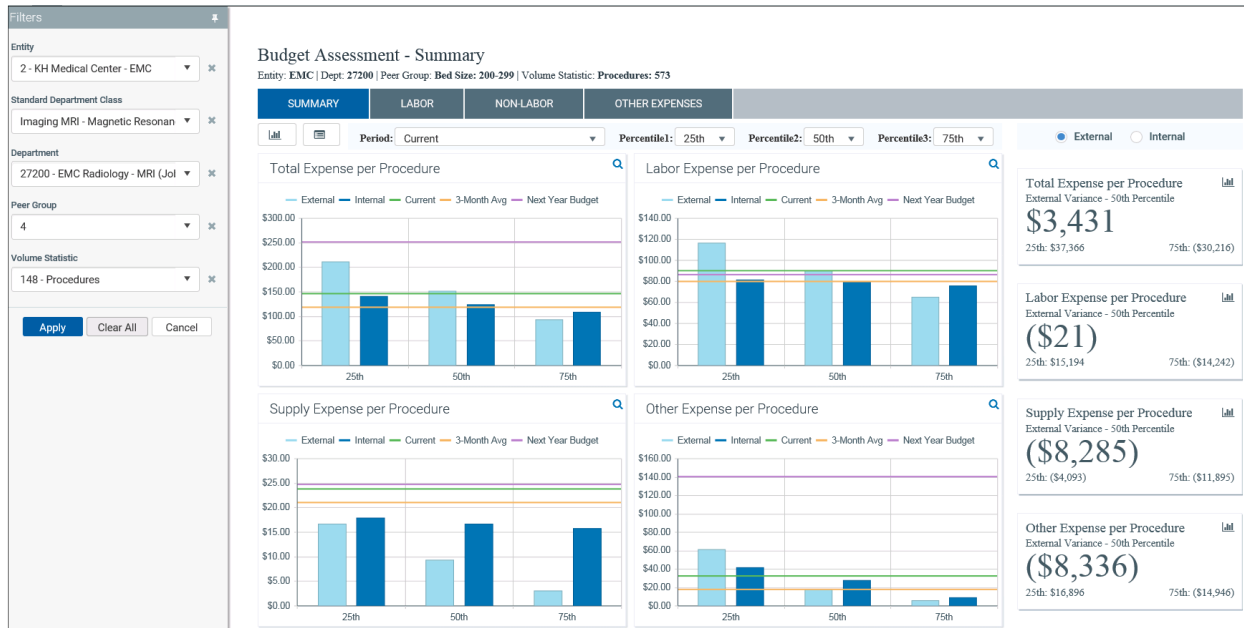
► How this feature works

What: The Budget Assessment dashboard displays comparative budget charts to help compare your next year budget to peer groups and percentiles for your market or organizational context.

Where: In the **Budgeting** or **Bud Admin** task pane, in the **Budget Reporting** section, double-click **Budget Assessment**.

Who: Users must be assigned either the Bud Admin or Budget User role along with the Comparative Analytics - Dept role to view the dashboard.

How: Use the filter options on the left side of the page to select your organization's entity and department to include in the dashboard as well as the peer group to compare your entity and department against.



Example of the Budget Assessment dashboard



Click [here](#) to watch a video demonstration



Drill down to details from the Budget Assessment dashboard to the Metric Explorer dashboard



Click [here](#) to watch a video demonstration

► Where to find more information

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

- "Working with the Budget Assessment dashboard"
- "Working with the Metric Explorer dashboard"

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

Improve budgeting efficiency with instant access to supporting documents

► Why use this feature

You can now view the detail behind numbers on budget reports, including purchase detail for expenses, without needing to exit the reporting environment to research payment details that may exist outside the Axiom Performance Reporting in other documents. This helps increase efficiency by offering instant access to the documentation that supports the detail needed to make more informed budgeting decisions. It also saves your organization time and money by allowing you to set up and manage connections to your document systems without product or report customization.

► How this feature works

What: You can define links between Axiom reporting and external document imaging systems to provide seamless drilldown into document detail. This eliminates the need to exit the reporting environment to research payment details, invoices, purchase orders, etc.

Where: The GLTRANSACTIONS_20XX table includes a new column, VendorImageLink, that allows you to import or manually enter a URL to the location where the document image resides. The 06-Load AP Detail and 08-Load Accrued Receipts imports have been updated to automatically import document image links, but you can also configure custom imports to include importing of these links. The Month End Review dashboard and the Department Monthly Package have been updated to display document images links, if available.

Who: Users must be assigned the PR Admin or PR Analyst roles to view a transaction image.

How: To open the GLTRANSACTIONS_20XX table, go to **Axiom Explorer > Table Library > Management Reporting > Actuals > Transactions**. To view the Month End Review dashboard, go to **Mgmt Admin task pane > Management Reporting**, and double-click **Month End Review**. To run the Department Monthly Package, go to the **Mgmt Admin task pane > Management Reporting > Manager**, and double-click **Dept Monthly Package**.

Data Type	Integer	Integer	Integer	String	Integer	String	String	String	String
String Length				10		100	50	10	1000
Description	Vendor Image Link								
Delete Row	ACC	DEPT	GLPERIOD	GLSOURC	RECORDID	JEDes	JENun	JESourc	VendorImageLink
	53210	15300	201812	AP	925				
	53210	15300	201912	AP	925				
	58000	27450	201508	AP	6533				
	58000	27450	201606	AP	6533				
	58000	27450	201608	AP	6533				
	58000	27450	201706	AP	6533				
	58000	27450	201708	AP	1				
	58000	27450	201708	AP	6533				

New VendorImageLink column in the GLTRANSACTIONS_20xx table

Transaction Information

Dept: 26610 - EMC 6A (JobCode ADC) | Acct: 61200 - Medical Insurance | Period ending February 29, 2020

GL Source	Amount
AP	2,030.00

Period	Amount
201908	2,030.00

n	JE No.	GL Sou...	Vendor	Item Description	Invoice No.	PO No.	Date	Check No.	Qty.	Amount	Link to Image
									0	496.00	
									0	483.00	
									0	241.00	
									0	158.00	
									0	496.00	
									0	156.00	

AR	1,638.00
JE	4,502.00
MM	1,666.00

Open document images for AP and AR transactions in the Variance Comments Collection tab in the Month End Review dashboard

AR Detail Listing							
For The Period Ending February 29, 2020 26610 - EMC 6A (JobCode ADC)							
Acct	Vendor	Vendor Name	PO Number	Item Description	Quantity	Amount	Link to Image
61200					0	356.00	
61200					0	201.00	
61200					0	486.00	
61200					0	194.00	
61200					0	272.00	
61200					0	129.00	

Links to document images are also included in the AP and AR tabs in the Department Monthly Package

► Where to find more information

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

- "Managing document image links"
- "Using the Variance Comments Collection tab in the Month End Review dashboard"
- "Understanding Monthly Variance Analysis"

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

Axiom Capital Planning and Capital Tracking

Planning 2022 projects and beyond

To plan for 2022 and future year projects, the new 2022 file group has been added to Axiom Capital Planning.

NOTE: No new features have been developed for the 2022 file group for the Legacy (Excel) version of Axiom Capital Planning.

Planning 2022 projects and beyond

► Why use this feature

To plan for 2022 and future year projects, the new 2022 file group has been added to Axiom Capital Planning.

NOTE: No new features have been developed for the 2022 file group for the Legacy (Excel) version of Axiom Capital Planning.

► How this feature works

What: The new 2022 file group includes all drivers, calc methods, utilities, and templates used to manage the capital planning process for your organization.

Systems: Legacy only

Where: In the **Cap Plan Admin** task pane, in the **Administration** section, click **Create File Group > Create New File Group**, and double-click **Create New File Group - Next Year**.

Who: All Capital Planning users

How: There are several steps involved in moving your planning process to a new year. For the location in the online help that includes instructions that will walk you through this process, see the following section.

► Where to find more information

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

- "Rolling forward to a new capital budget year"

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

- [Rolling Forward to a new capital budget year](#)

Axiom Clinical Analytics

No new features or enhancements were released for Axiom Clinical Analytics for 2020.2.

Axiom Comparative Analytics

Update Axiom Intelligence data

When you, or other users, make changes to peer group priority or loaded data on a day other than the 23rd of the month, this option allows you update Axiom Intelligence data used for the Axiom Intelligence dashboards.

Dashboard conversion to Axiom Intelligence

The Entity Performance, Expense Improvement, Data Explorer, and Peer Explorer dashboards have been converted to the Axiom Intelligence platform resulting in an improved user experience. The Axiom Intelligence platform provides you with powerful visualization and drill-through tools so that you can see the big-picture performance information as well as the granular detail support it. These dashboards are designed to present data in a way that is informative and useful.

Security enhancements

We narrowed the role-based security definitions that allow users to have quicker access to only the data relevant to their organizational role. Further, these enhancements allow you to apply bulk security settings to users of Axiom Intelligence dashboards as these dashboards do not support legacy security protocols that apply to other Comparative Analytics assets.

Update peer group priority

Use this feature to prioritize the primary peer group that displays in each dashboard. This feature is especially useful if you are especially interested in data on a specific peer group and do not want to have to select that peer group each time you open a dashboard. This feature can also help limit extraneous information from dashboards used to compare specific data points.

Update Axiom Intelligence data

► Why use this feature

This is an administrative function used when changes are made to Dept Dimension assignments (owner/reviewer/approver), peer group priority or loaded data on a day other than the 23rd of the month, this feature allows you update Axiom Intelligence data used for the Axiom Intelligence dashboards without waiting for the nightly scheduled job.

► How this feature works

Execute this process by clicking an icon on the Comparative Analytics homepage.

Where: The Axiom Intelligence Data Update function is accessible on the Axiom Healthcare Suite homepage.

Who: Users with a Comparative Analytics Admin role.

How: On the Axiom Healthcare Suite homepage, click **Axiom Intelligence Data Update**. In the **Warning** dialog that displays, click **Yes**.

► Where to find more information

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

- "Updating Axiom Intelligence data"

Dashboard conversion to Axiom Intelligence

► Why use this feature

The Entity Performance, Expense Improvement, Data Explorer, and Peer Explorer dashboards have been converted to the Axiom Intelligence platform resulting in an improved user experience. The Axiom Intelligence platform provides you with powerful visualization and drill-through tools so that you can see the big-picture performance information as well as the granular detail support it. These dashboards are designed to present data in a way that is informative and useful.

► How this feature works

Each dashboard is accessible from the homepage. Each dashboard varies in specific functionality, but provides an improved user experience and the ability to filter without clicking in the toolbar.

Where: The Entity Performance, Data Explorer, and Peer Explorer dashboards.

Who: Access to the dashboards is limited based on role. Depending on the dashboard, users need a Department and/or Entity role.

How: Access any dashboard from the Navigation menu or the Comparative Analytics homepage.

► Where to find more information

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

- "Entity Performance"
- "Detailed Department Report"
- "Metric Explorer"

Security enhancements

► Why use this feature

We narrowed the role-based security definitions that allow users to have quicker access to only the data relevant to their organizational role. Further, these enhancements allow you to apply bulk security settings to users of Axiom Intelligence dashboards as these dashboards do not support legacy security protocols that apply to other Comparative Analytics assets.

► How this feature works

Security changes for this release include:

- Dashboards and utilities on the homepage are only accessible if your role has access to them. If your role does not have access to a dashboard or utility, it will display in a lighter color.
- Users with only the Department role now only have access to the Expense Improvement Opportunity Dashboard, the Detailed Department Report, and the Metric Explorer. This role can be layered with other roles to provide access to additional Axiom Healthcare Suite dashboards.

NOTE: Users with both a Department and Entity role will have access to the Data Explorer including Jobcode and Salary data relevant to their assigned DEPT filter.

- For dashboards converted to Axiom Intelligence, administrators must set up any desired custom filters using the **AI Tables** tab of the **Security Manager**.

Where: User roles are assigned in the Comparative Analytics Security Update utility.

Who: Users with a Security role can add/remove roles and filters for other users.

How: Open the Excel Client. In the **Explorer** tab, in the **Libraries** section, click **Reports Library > Comparative Analytics Utilities > Security Setup**. Double-click **Comparative Analytics Security Update**.

Assign custom filters for the Axiom Intelligence dashboards in the **AI Tables** tab of the **Security Manager**.

► Where to find more information

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

- "Understanding Comparative Analytics user roles"
- "Using the Security Update utility to manage user access"
- "Managing user access to Axiom Intelligence"

Update peer group priority

► Why use this feature

Use this feature to prioritize the primary peer group that displays in each dashboard. This feature is especially useful if you are especially interested in data on a specific peer group and do not want to have to select that peer group each time you open a dashboard. This feature can also help limit extraneous information from dashboards used to compare specific data points.

► How this feature works

This feature allows you to select a primary peer group that displays automatically for each entity or department. That peer group will display automatically in select dashboards whenever the data of that entity or department is displayed.

Where: The **Update Peer Group Priority** page is accessible from the Comparative Analytics homepage. Priority selections effect the data displayed on the Expense Opportunity, Detailed Department Report, Entity Performance, and the Metric Explorer dashboards.

Who: Comparative Analytics administrators have access to this feature.

How: On the Comparative Analytics homepage, click **Update Peer Group Priority**. Click the **Filter** icon, select filter options, and click **Apply**. Use the **Activate** column to select which peer groups are active (displayed in the dashboards). Use the **Change Primary** column to select a primary peer group for an entity.

► Where to find more information

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

- "Setting peer group priority"

Axiom Contract Management

Common Axiom contracts now available as a set

Certain contracts, such as Medicare, are used in almost every type of client installation by system implementers setting up new systems and by Axiom Contract Management administrators creating and maintaining contracts. These common contracts are now available as a standard set of templates that can be used to create new contracts, reducing the time and effort of setup during implementations and providing contract build consistency when you add new contracts to any simulation.

Common Axiom jobs now available for setup and maintenance

Key Axiom jobs typically uploaded during setup to establish import settings or to perform common maintenance tasks are now included in the system installation. These common jobs are available in the Contract Management folder of the Axiom Desktop Client's Scheduler Jobs Library.

April 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. These updates are necessary for clients to get the latest software and regulatory changes for accurately grouping and pricing APC and eAPG claims.

Common Axiom contracts now available as a set

► Why use this feature

Certain contracts, such as Medicare, are used in almost every type of client installation by system implementers setting up new systems and by Axiom Contract Management administrators creating and maintaining contracts. These common contracts are now available as a standard set of templates that can be used to create new contracts, reducing the time and effort of setup during implementations and providing contract build consistency when you add new contracts to any simulation.

► How this feature works

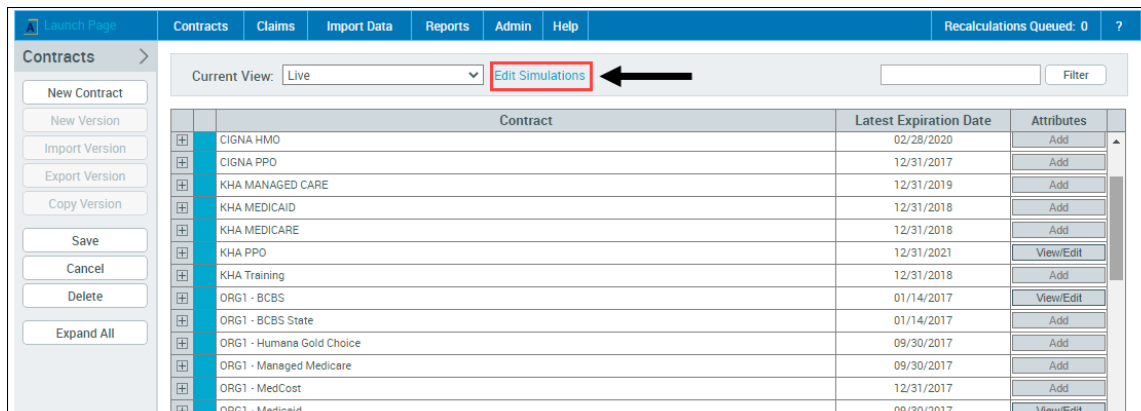
You can customize these templates or use them as-is when adding contracts to your system.

Where: The set of template contracts is stored in the simulation Axiom Contracts, available from the main Contracts page.

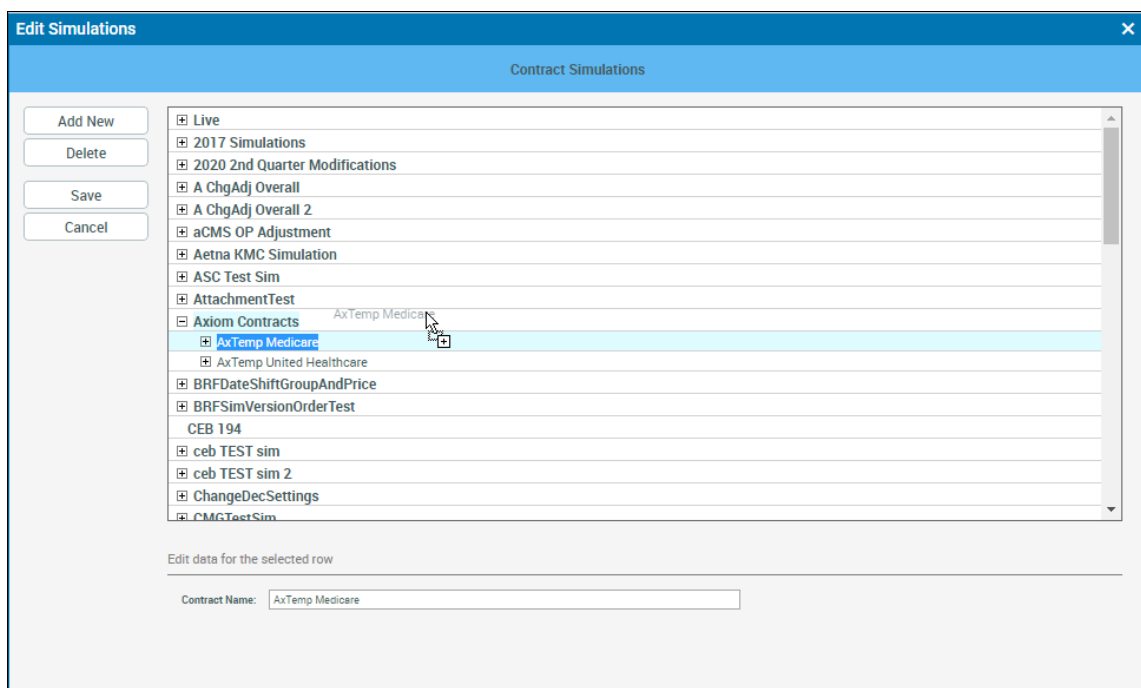
Who: Only system implementers, administrative users performing system setup and maintenance, and other users who are able to model contracts can access these templates.

How: You can copy the entire contract to a new or different simulation, including LIVE, and then edit the contract as needed.

1. In the **Contracts** main page, click **Edit Simulations**.



2. In the **Edit Simulations** dialog, select the contract to copy and drag it to a simulation in the list.



Dragging a listed contract does not move it; instead, it copies the entire contract to the destination simulation.

You can also copy parts of a contract template, such as versions or provisions.

► Where to find more information

For more information on copying contracts, see the following topics in the online help:

- “Copying contracts”
- “Copy an entire contract to a simulation”
- “Export and import a version”
- “Import a provision”

Common Axiom jobs now available for setup and maintenance

► Why use this feature

Key Axiom jobs typically uploaded during setup to establish import settings or to perform common maintenance tasks are now included in the system installation. These common jobs are available in the Contract Management folder of the Axiom Desktop Client’s Scheduler Jobs Library.

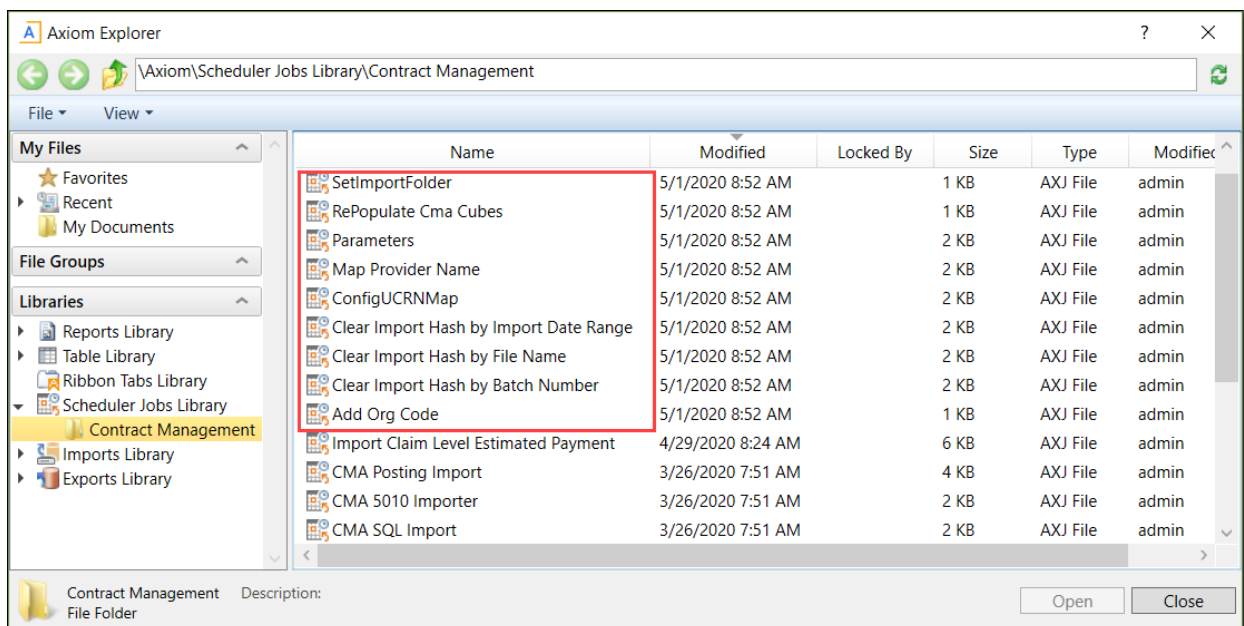
► How this feature works

You can customize these jobs or run them as-is when scheduling jobs in Axiom Contract Management.

Where: The set of jobs is stored in the Axiom Desktop Client’s Scheduler Jobs Library in the Contract Management folder.

Who: Only system implementers and users with the Axiom Scheduler role can access these jobs.

How: In the Axiom Desktop Client, access the jobs through the **Scheduler Jobs Library > Contract Management**.



Name	Modified	Locked By	Size	Type	Modified
SetImportFolder	5/1/2020 8:52 AM		1 KB	AXJ File	admin
RePopulate Cma Cubes	5/1/2020 8:52 AM		1 KB	AXJ File	admin
Parameters	5/1/2020 8:52 AM		2 KB	AXJ File	admin
Map Provider Name	5/1/2020 8:52 AM		2 KB	AXJ File	admin
ConfigUCRNMap	5/1/2020 8:52 AM		2 KB	AXJ File	admin
Clear Import Hash by Import Date Range	5/1/2020 8:52 AM		2 KB	AXJ File	admin
Clear Import Hash by File Name	5/1/2020 8:52 AM		2 KB	AXJ File	admin
Clear Import Hash by Batch Number	5/1/2020 8:52 AM		2 KB	AXJ File	admin
Add Org Code	5/1/2020 8:52 AM		1 KB	AXJ File	admin
Import Claim Level Estimated Payment	4/29/2020 8:24 AM		6 KB	AXJ File	admin
CMA Posting Import	3/26/2020 7:51 AM		4 KB	AXJ File	admin
CMA 5010 Importer	3/26/2020 7:51 AM		2 KB	AXJ File	admin
CMA SQL Import	3/26/2020 7:51 AM		2 KB	AXJ File	admin

The following table describes each job:

IMPORTANT: Please consult Client Success before running any of the following jobs outside of working with your Implementation Consultant.

Job name	Description
Add Org Code	Used to add a new Organization Code
Clear Import Hash by Batch Number	Clears the batch numbers from the import hash to allow duplicate claim imports
Clear Import Hash by File Name	Clears file names from the import hash to allow duplicate claim imports
Clear Import Hash by Import Date Range	Clears date ranges from the import hash to allow duplicate claim imports
ConfigureUCRNMap	Used to set the UCRN Mapping
Map Provider Name	Used to map an org code to a provider name
Parameters	Used to modify CMA
RePopulate CMA Cubes	Parameters Runs a full cube recalculation
SetImportFolder	Used to modify the import folder path

► Where to find more information

For more information on using the Scheduler to run jobs, see the following topics in the online help:

- “About accessing data in the Desktop Client”
- “About Scheduler”
- “Managing Scheduler jobs and tasks”
- “Running a job”

April 15, 2020 Quarterly Release

► Why use this feature

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. These updates are necessary for clients to get the latest software and regulatory changes for accurately grouping and pricing APC and eAPG claims.

► How this feature works

On a quarterly basis, 3M releases product Service Packs containing updates to its Group & Price service software. Kaufman Hall maintains Medicare contracts for many clients, and partners with 3M to handle APC and eAPG calculations and to keep current with all regulatory changes that occur.

Where: The Group and Price menu in the Claims tab of Axiom Contract Management, and Group and Price jobs in the Axiom Scheduler.

Who: Axiom Contract Management Administrators who create contracts with the CMS Outpatient calculation basis on a clause or term, and other users working with applicable claims.

How: The Development team creates the update from the quarterly download. Customer Success updates the clients' schedules and customer contracts to the required Medicare changes. The client picks up available schedules for any new contract updates between quarters.

Axiom Cost Accounting

No new features or enhancements were released for Axiom Cost Accounting for 2020.2.

Axiom Decision Support

No new features or enhancements were released for Axiom Decision Support for 2020.2.

Axiom Financial Planning

No new features or enhancements were released for Axiom Financial Planning for 2020.2.

Axiom Rolling Forecasting

No new features or enhancements were released for Axiom Rolling Forecasting for 2020.2.

Axiom Strategy Management

No new features or enhancements were released for Axiom Strategy Management for 2020.2.

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 2020.2 upgrade before applying any 2020.2 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 2020.2 before the first product upgrade.

When upgrading to Axiom Healthcare Suite 2020.2, 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 2020.2

No issues were addressed in this release.