Data Management Guide

Axiom Enterprise Decision Support Version 2020.3



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Working with Axiom Enterprise Decision Support

Axiom Enterprise Decision Support is primarily a web-based application that helps you easily walk through the process of configuring default system settings, managing data, setting up and processing methods, reclasses, and overhead allocations. You can also manage unit cost calculations and cost assignments as well as manage and view reports.

When you log into the system and launch the application, the Axiom Enterprise Decision Support home page displays a series of card buttons that open utilities, reports, and other functions. Cards can include multiple levels, depending on the number of tasks to complete. A breadcrumb link at the top of the page informs you of where you are in the system. You can use these links to quickly and easily move through the system.

Card are grouped into the following functional areas:

- Data Control Dimension, statistics, costing, and data import management
- Data Enhancement & Refinement Service line management and processing, population management, episode building, and encounter viewing
- Cost Accounting System configuration, data management, methods and assumptions management, method processing, reclass and overhead allocation management and processing, RVU development, unit cost calculations, and cost assignment
- Reporting Axiom Intelligence report building and standard Excel reports
- Administration Security management, job process management, product configuration

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Costing Process Guide

The Costing Process Guide is a series of grouped utilities and functions specifically for configuring and managing the cost accounting processes. The guide is accessed by clicking the Costing Process Guide card on the home page.

The guide works, as follows:

- Tasks are grouped together into similar areas and sub-areas. For example, you can find all of the tasks associated with setting up and managing methods and assumptions in the Method and Assumptions section. Next to the card, the page displays a description. Click the card to navigate to the task(s) for that area.
- The status column on the right side of the page displays tasks as Completed, In Progress, or Not Started. You can click the circle to toggle the status from one status type to another. For example, if all of the tasks for Data Management are now complete, click the circle to toggle the status from In Progress to Complete.

NOTE: All of the tasks in a specific area need to be marked as complete in order for the button above it to be marked as complete. For example, in Data Management area, all of the tasks in Data Management must be marked complete in order for the Status column for the Data Management button to be marked as complete.

3. The Checklist View provides a list of tasks to complete as part of the set up and configuration process.

TIP: You can toggle back and forth between the Guide View and the Checklist View.

4. If you need help configuring a specific area, click the question mark in the upper right corner of each screen. A help panel displays conceptual information or contextual instructions for the page that displays. For more detailed help, the instructions include links to fuller topics in the online help. To access the full online help for Axiom Enterprise Decision Support, click the question mark in the upper right corner of the page, and click **Open Help**. The online help opens in a separate browser window.

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Data Management 🗲	Structure and Data Management Define your system structure based on entities, departments, accounts, and other costing related classifications. Maintain dimensions, imports, and load data into your system. Contents • Coro Dimensions • Encounter Dimensions • Encounter Data • Encounter Dimensions	DAT	NTUS TE STARTED	0 Ir 6	Progress /13/2019 11:15 AM	
Methods and Assumptions	Methods and Assumptions Determine and maintain the costing methods to be used, e.g., by department and revenue code, and define various assumptions for the cost processing. Contents • Cost Set Maintenance • Methods • Assumptions	DAT	ITUS	Ir 6	1Progress (13/2019 11:15 AM	
Process Advanced Cost Methods	Process Advanced Cost Methods to Cost Detail Categories Process Transaction Microcosts, Microcost and/or Reverse Markup costing methods and post results to the CDCC Table.	ST/ DA1	ITUS	0 Ir 6	i Progress /17/2019 1:42 PM	
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Checklist View

From the Costing Process Guide, the Checklist View offers administrators an easy and convenient way to manage and track each of tasks required to set up the costing process. You can add, edit, clone, and delete processes as well as toggle to view different costing processes. The page also displays the high-level configuration parameters for the current costing process, including the active cost set as well as the method and versions being used.

NOTE: The Method section only displays those methods that have been selected in the System Configuration page to be used by your organization. The Active Cost Set version comes from the Method Definition version.

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✓ Expand All	Status	Last Activity	Conting Dropping Decemptors
System Configuration	Complete	Completed: 6/21/2019 7:55 AM	Costing Process Parameters
✓ Data Management	O In Progress	Started: 6/13/2019 11:15 AM	2019 FROM 2018
 Methods and Assumptions 	O In Progress	Started: 6/13/2019 11:15 AM	FISCAL YEAR TO 2018
Process Advanced Cost Methods	O In Progress	Started: 6/17/2019 1:42 PM	Active Cost Set
 Reclasses and OH Allocations 	Not Started		Start
 RVU Development and Maintenance 	Not Started		End
Unit Cost Calculations	O In Progress	Started: 6/17/2019 1:43 PM	Use Axiom GL Data Yes
✓ Cost Assignments	Not Started		Use Axiom Payroll Data Yes
			Method VERSION
			RCC
			RVU
			Provider RVU
			MicroCost N/A
			Transaction MicroCost N/A
			Reverse Markup N/A
			RCU N/A

Desktop Client

While a majority of the setup and configuration tasks can be done using the Web Client, there are times when you may need access to Axiom system-level utilities. The Desktop Client provides all of the options provided by the Web Client as well as access to multiple reports. You can also manage security, processes, and other system administration tasks.

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min	Costing Structure Maintenance				
Cost Accounting Adr	Cot Set Maintenance System Account Ranges Dimension Maintenance Cot Behavior Exceptions Markup Group Definition U Junit Cot Method Assignments				
s	Build RVUs from Components				
Data Import	RVU Cost Items Copy RVU and Cost Components Update Detailed RVUs by Cost Component We Reconciliation Reports				
SS	Adjustments and Reclasses		CALENDAR	DASHBOARDS	KEY REPORTS
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	Cost Item Processing				
	Direct to Encounter Setup and Processing Cost Item Calculations Transaction Cost Reconciliation Reports				
	Cost Assignments				
	Cost Assignments Reconciliation Summary Cost Assignment Reconciliation Reports				

About this document

This document assumes the following:

- You are familiar with navigating and using Axiom Enterprise Decision Support, including the Web Client and the Desktop Client.
- You have been assigned the proper role profile and/or permissions to access the utilities and screens described in this document.
- This document only covers data configuration and maintenance for Axiom Enterprise Decision Support. For more information regarding other parts of the system, we recommend that you visit the online help accessible through the product.

Importing Data

You can import General Ledger and payroll data from within the Web Client. However, to import other types of external source data, such as encounters, costing data, and reference data, you will need to use the Axiom Import Wizard. For more information, see Importing data using the Import Wizard.

Before you begin, we recommend that you first review the file review checklist.

General Ledger

One of the first steps in the costing process is to generate a Costing General Ledger (CGL). The CGL is associated with a period of financial data and becomes the primary and only source of all costs, statistics, adjustments, reclasses, and allocations used in the cost accounting process.

To import General Ledger data:

1. From the Enterprise Decision Support home page, in the Data Control section, click Data Management > External Financial Data > General Ledger.

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Data Control				
Data Management > Data Extensibility >				
Data Enhancement & Refinement				
Service Lines > Population Builder > Episodic Grouper > Encounter Viewer >				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting				

2. From the Select Year of GL Table to Importdrop-down, select the year to import.

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mjmtest2 > Data Management > External Financial Data > General Ledger				
General Ledger Import				
Processing Utility Copy GL to CGL axi				
Variables Select Year of GL Table to Import 2017 Keep Manual Statistics Image: Compare the second se				
Run Now				

3. To retain the manual statistic records in the Costing General Ledger (CGL) table, click the Keep Manual Statistics checkbox. To clear the manual statistic records from the CGL and only load the records from the source GL table, leave the checkbox blank.

IMPORTANT: If manual statistics are loaded manually to the CGL instead of using the Manual Statistics page, and you want to use the Keep Manual Statistics option, then the **ReclassType** column in the ACCT dimension must be set to **StatManual**.

- 4. Click Run Now.
- Payroll Data

Payroll data is often required to help provide a greater level of detail for costing purposes than is stored in the general ledger. Payroll dollars interface directly to the general ledger, but the amount of detail needed for financial reporting is often at a higher level than that desired for cost accounting purposes. The payroll data is used as a basis or statistic to reclass general ledger accounts into more granular categories.

To import payroll data:

- 1. From the Setup Guide page, click Data Management > External Financial Data > Payroll Data.
- 2. From the Input Year (YYYY) drop-down, select the year to import.
- 3. Click Run Now.

File review checklist

Use the steps listed in the following table to prepare your files for import:

Process	Desc	ription
Perform basic file format checks	1.	Verify that the file is plain text and pipe-delimited (uses the character).
	2.	Verify that the first line contains a header listing all of the fields.
		NOTE: Consult the file specification document provided by your Syntellis Implementation Consultant for a list of all fields to contain in each file.
Perform data-type checks	1.	Verify that data types are correct. For example, integer or numeric fields should not contain text values.
		NOTE: Consult the file specification document for the data type of each field.
	2.	Verify that all date and time fields are formatted as "YYYY-MM-DD" and/or "YYYY-MM-DD hh24:mi:ss".
	3.	Verify that the file does not contain numerous instances of the word "NULL". Null values should be extracted as blanks. For example, integer or numeric fields should not contain text values.
	4.	Verify that amount (Numeric data type) fields are formatted correctly. Use a negative sign to indicate negative amounts ("-" in front of the number, instead of parentheses). Amounts should not contain commas.

Process	Description
Verify key fields on each table	NOTE: Refer to the file specification document to determine the key fields, which are listed in bold .
	 Use the filter function in Excel to verify that all key fields are populated (no blanks). Keep in mind the following:
	 If there is only one key on the table, it must always be populated.
	 If there are multiple keys on the table and only some of them are blank, check with your Syntellis Implementation Consultant or an Application Specialist for further guidance
	 For all files except Cost Detail, use the Remove Duplicates function in Excel on the key column(s) to verify that they do not contain duplicate values. In other words, there should be only one row for each unique combination of key values.

Importing data using the Import Wizard

Imports can be used to import external data into Axiom Enterprise Decision Support tables, so that the data can be included in reports or used in planning models and calculations. Data can be imported from files or by directly reading a database.

Imports are created in the Import Wizard, and stored in the Imports Library. Access to imports is controlled via security.

For Axiom Cloud systems, a remote data connection can be used to access local databases or files for the import data source.

About imports

Imports can be used to import external data into Axiom Enterprise Decision Support tables, so that the data can be included in reports or used in planning models and calculations. This topic explains some of the key concepts and requirements for importing data.

Import sources

You can import data into Axiom Enterprise Decision Support from the following sources:

• From an external database

- From a file (delimited or Excel)
- From special designated sources, such as Ellucian

Import Wizard

Imports are defined in the Import Wizard dialog. Imports consist of the following:

- Source tab: Specifies the source of the data to be imported.
- Variables tab: Defines variables to be used in the import, in order to dynamically change certain import settings.
- **Mapping** tab: Specifies the destination table for the import, and maps the import data to columns in the destination table.
- **Transforms** tab: Defines transformation statements to be performed on the import data before it is saved to the destination table. Transforms can use SQL or built-in Axiom Enterprise Decision Support functions.

The Import Wizard also contains the **Execute** tab, which can be used to execute the import in preview mode for testing, or to execute the actual data import.

The import process

When data is queried from the source file or database, it is first placed in a temporary table known as the *temp table*. The import can perform actions on the temp table before the data is saved to the destination table in Axiom Enterprise Decision Support, such as mapping or data transformations. Use the reserved term {temptable} whenever you want to refer to this temporary table in SQL statements.

When an import is executed, the following processes occur:

1. If any import variables are defined on the **Variables** tab, the user is prompted to select values for these variables. The selected variable values are then substituted for the variable names within the import settings.

When running the import using a Scheduler job, you must specify values for the import variables within the Scheduler import task, or use job variables that will populate the import variable values when the job is executed.

- 2. The import creates the temp table by querying data from the source database or by gathering data from the specified file. The settings on the **Mapping** tab are used to determine the structure of the temp table. You can insert additional columns into the temp table (meaning columns that were not in the source file or table) by adding them as work column mappings.
- 3. Any transforms defined on the **Transforms** tab are processed, in the order listed. Transforms can edit the temp table directly, and they can reference information held in other tables in the Axiom Enterprise Decision Support database. Transforms can also set values for transform variables, which can then be used in subsequent transform steps and in certain import settings.
- 4. The temp table data is validated and then saved to the destination table, based on the destination column settings on the **Mapping** tab. If a column in the temp table is not mapped, then that data

is not saved.

If the import utility is a multiple-file import, then steps 2-4 are performed for each file to be imported. For more information, see How multiple-file imports work.



The save-to-database process for imports is performed as follows:

- If the destination table has any validated columns (columns that have an assigned lookup column), then the temp table data is validated against these lookup columns before saving. If a data row contains an invalid value, that data row is invalid and cannot be saved.
- By default, temp table data is aggregated before the save is performed. This means that duplicate rows (rows with the same key column values) will be treated as follows:
 - Columns holding numeric data will be summed.
 - For all other column types, the duplicate rows must have the same values. For example, if a column contains strings or dates, the duplicate rows must have the same string or the same date.

If instead the optional setting Aggregate rows on final save option is disabled, then no aggregation is performed on the temp table data. In this case, any duplicate rows are invalid and cannot be saved.

NOTE: Aggregation only applies when importing data to a data table. If the destination table is a reference table, aggregation is not allowed. If duplicate keys are present in the import data, those rows are invalid and cannot be saved to the reference table.

• Blanks are not allowed in key columns. If a data row in the temp table contains a blank key value, that data row is invalid and cannot be saved.

If any invalid rows are present in the import data, the import behaves as follows:

- By default, if any invalid data rows are present, then the import is aborted and no data is saved to the destination table.
- If instead the optional setting **Ignore lookup and key errors** is enabled, then the save-to-database process ignores the invalid data rows and only valid data rows are saved.

Managing imports

Using the **Imports** menu, you can create, edit, and delete imports as needed. Each import can import data from a designated source to a designated destination table.

For information on how to execute an import, see Executing imports.

Creating an import

Only administrators and users with the **Administer Imports** security permission can create imports. Nonadmin users must also have read/write access to at least one folder in the Imports Library, in order to have a location to save the newly created import.

1. On the Axiom tab, in the Administration group, click Imports > Create New Import.

NOTE: In systems with installed products, this feature may be located on the Admin tab.

TIP: You can also create new imports by right-clicking the Imports Library in the Axiom Explorer dialog or the Explorer task pane.

- 2. In the Create New Import dialog, select one of the following and then click OK.
 - Create from scratch (default): Create a new import starting with blank import settings.
 - **Create from existing**: Create a new import by copying an existing import. If you select this option, then select the import that you want to copy from the list in the bottom of the dialog.
- 3. In the **Import Wizard** dialog, complete the settings on each tab as appropriate. For details on specific import settings, see **Import Wizard**.

If you copied an existing import, that import's settings are copied into the Import Wizard, and the import is named "Copy of *ImportName*." Edit these settings as appropriate for the new import.

You can move between tabs in any order, however, before you can save the import, all required settings must be completed and no invalid settings must be present. If errors exist, an error message displays at the bottom of the dialog; you can click the error link to be taken to the tab with the error.

- 4. When you are finished completing the settings and no errors exist, click **OK** to save the import.
- 5. In the **Save As** dialog, navigate to the folder where you want to save the import, then click **Save**. By default, the import will be saved to the root of the Imports Library. You can create a new subfolder from this dialog if desired (and if you have the appropriate permissions).

Once an import has been created, it becomes available on the **Imports** menu (to users with the appropriate permissions). Imports are listed in alphabetical order based on the import name.

Editing an import

You can edit existing imports as needed, as long as the import was not installed by a product package. Only administrators and users with read/write access to the import file can edit imports. Product-controlled imports are locked and cannot be edited. Some of these imports may be designed to work as is, without customizations. If customizations are required, you can create a copy of the product-controlled import and make customizations in the copy. If the original import is later updated by the product, you can review the original import to see the changes that need to be made in your copy (or you can create a new copy of the import and re-make your customizations as needed).

To edit an existing import:

1. On the Axiom tab, in the Administration group, click Imports > ImportName > Edit.

NOTE: In systems with installed products, this feature may be located on the Admin tab.

TIP: You can also edit an import from the Axiom Explorer dialog or the Explorer task pane. You can double-click an import in the Imports Library to open it.

- 2. In the **Import Wizard** dialog, edit any import settings as desired. For details on specific import settings, see Import Wizard.
- 3. Click **OK** to save your changes the import, or click **Save As** to save the edited import as a new import file.

Deleting an import

You can delete an existing import if it is no longer needed, as long as the import was not installed by a product package. Only administrators and users with read/write access to the file and its folder can delete imports.

Product-controlled imports are locked and cannot be deleted.

To delete an import:

• On the Axiom tab, in the Administration group, click Imports > ImportName > Delete.

NOTE: In systems with installed products, this feature may be located on the Admin tab.

TIP: You can also delete an import from the Axiom Explorer dialog or the Explorer task pane.

Using variables in imports

Imports can use variables, so that certain import settings can change dynamically depending on the variable value. You can use two different types of variables in imports:

- Import variables: Import variables are defined on the Variables tab of the Import Wizard. Import variables can be used throughout the import settings (though not in *all* settings—see the documentation for each setting to see if variables are supported there). When the import is executed manually, the user is prompted to define values for the variables. If the import is run using Scheduler, the Scheduler job must define values for the variables.
- **Transform variables:** Transform variables are defined on the **Transforms** tab of the Import Wizard. Transform variables can only be used in transform statements, and as destination columns. Transform variables are associated with a specific SQL statement that results in a single value.

The values for import variables are defined at the start of the import, before any other import steps are processed. Therefore import variables are a good fit for actions such as:

- Selecting the appropriate source file based on user input.
- Selecting the appropriate destination table based on user input.

On the other hand, values for transform variables can only be determined as a result of a SQL statement, and are defined near the end of the import, after the temp table has been created. Transform variables are a good fit for situations where actions need to be driven dynamically based on the contents of the imported data, not by a user selection.

Variable syntax

To use a variable in the import, enter the variable name into one of the supported areas of the import settings, enclosed in curly brackets {}. For example, if the variable name is "mycolumn", you would enter {mycolumn}.

NOTE: If the variable defines the destination table, then you must place the variable in double curly brackets when you use it in a SQL statement, so that the eventual table name value is enclosed in curly brackets as expected. For example, if you have a variable named "destinationtable", you would reference that variable as {{destinationtable}}. That way, when the {destinationtable} value is defined, it will resolve as {GL2020}.

System variables

In addition to the user-defined variables, you can reference system variables in imports. The following variables are supported:

System Variable	Description	Can Be Used In
{CurrentPeriod}	The current period as defined for the destination table (if not set, then this is the system current period).	All import locations that support variables, except the destination table.
{CurrentUserDomain}	The domain name of the user running the import. Returns blank for users who do not have a defined domain.	All import locations that support variables.
{CurrentUserEmail}	The email address of the user running the import.	All import locations that support variables.
{CurrentUserLogin}	The login name of the user running the import.	All import locations that support variables.
{DefaultRemoteDataConnection}	The name of the default remote data connection for your system. If your system has multiple defined connections, then the default is determined alphabetically among the connections that are not enabled for authentication. If all of the connections are enabled for authentication, then the default is simply determined alphabetically.	In the Remote Data Connection field on the Source tab, or as an import variable choice.
	If the variable is used in a system without any remote data connections, then the variable returns blank and the import will not attempt to use a remote data connection. This allows products to develop standard imports for use in both on-premise and Axiom Cloud systems.	

System Variable	Description	Can Be Used In
{SourceFileName}	The name of the source file for the import.	Import transformation steps only.
{SystemCurrentYear}	The current year as defined for the system.	All import locations that support variables.
{SystemCurrentPeriod}	The system current period.	All import locations that support variables.
{TempTable}	The temporary table where imported data is placed before saving to the destination table.	All import locations that support variables.
{TableName}	Any user-defined table created in the Axiom Enterprise Decision Support system. For example, {ACCT}, {DEPT}, {GL2020}, {BGT2020}.	All import locations that support variables.

Importing external source data

Each import is set up during the implementation process. Changes to these imports should be rare, but may be required as source system changes occur or as new fields are required. Please contact Syntellis Support if you require changes to data imports.

Examples of the external source data import definitions include:

- Encounter
- Cost Data Placeholders
 - Formulary
 - Historical RVUs
 - \circ Microcost
 - RVU
 - Supply
- Data Tables
- Reference
- Reference Tables

When new source data is available, you can run each import using the Scheduler or run it manually ondemand. Importing external source data may generate errors that may require you to edit and reload data. There are specific reports available to assist in validating the external data that is commonly loaded to support the Axiom Enterprise Decision Support and Decision Support processes. **NOTE:** Sequencing to the import process may be required for the encounter files since some of the files have dependencies on other files. For more information, see Data import sequence.

To import external source data:

 In the Explorer task pane of the Desktop Client, in the Libraries section, click Imports Library > Costing > 01 External Data.

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		Reference Placeholders									
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		lmport to EncounterStaging									

NOTE: The folders and placeholder files in this example may differ from what displays in your system since the placeholders are replaced by your Implementation Consultant with data specific to your organization.

- 2. Click the folder for the appropriate predefined Import Wizard to run, and double-click the import definition to use.
- 3. Follow the steps in Using the Import Wizard.

Executing imports

When you execute an import utility, data is queried from the source database or file, import steps are processed, and the resulting data is saved to the destination table. For more information on what occurs when an import is executed, see About imports.

Only administrators and users with Execute permission to the import file can execute an import.

NOTE: You can also use Scheduler to execute import utilities, using the Import ETL Package task.

To execute an import:

- 1. Do one of the following to open the import for execution, depending on whether you need to access the full import settings:
 - Open the full Import Wizard: On the Axiom tab, in the Administration group, click Imports > ImportName > Edit. Then in the Import Wizard, go to the Execute tab.

Using the Import Wizard, you can switch between the Execute tab and other tabs to view and edit the import settings as needed, and then run the import again.

 Open in execute-only mode: On the Axiom tab, in the Administration group, click Imports > ImportName > Execute.

This opens a special **Execute Import** dialog that only displays the import execution options and controls. Use this mode if you only need to execute the import and you don't need to review or edit any import settings. This is the only mode available to users who have execute-only permissions to the import.

NOTE: In systems with installed products, these features may be located on the Admin tab.

TIP: You can also open imports for execution using Axiom Explorer or the Explorer task pane. If you have read/write or read-only access to the import, the full Import Wizard opens. If you have execute-only permission to the import, then the Execute Import dialog automatically opens when you access the import from the Imports Library.

2. Click Execute to start the import.

The option at the top of the dialog, **Execute in development mode**, should only be used if you want to test or troubleshoot the import. When development mode is enabled, the import is executed, but the data is not saved to the destination table. For more information, see Executing imports in development mode.

- 3. If the import uses variables, the **Variables** dialog opens so that you can to define values for the variables. For each variable, you can select a value from the drop-down list. Some variables may also allow you to type in a user-defined value.
- 4. If the import uses a source file, you may be prompted to specify the location of the source file. In the **Open** dialog, navigate to the file that you want to use and then click **Open**.

In this case, a copy of the specified file is uploaded to the application server for processing. Once the import is complete, the temporary copy of the file is deleted.

As the import is processed, status messages display in the **Execution log** box. If an error occurs, the error message displays in the log and the import is stopped. If necessary, you can copy and paste the text in the execution log—for example, to send the error to Axiom Support. To copy the log text, right-click inside the log and choose **Select All**, then select **Copy**.

TIP: If an import experiences an error and you need more information on the error, try running the import in development mode. The error messages in development mode may contain more detail.

If you want to stop the import while it is executing, click **Stop**. The import stops after completing the step that is currently in-process. You cannot restart the import at the same spot—when you click **Execute**, the import starts over from the beginning.

Import validation errors

If the import experiences import validation errors, then those errors are logged to a separate CSV file in addition to being displayed in the **Execution log** within the dialog. You can open this file separately to see exactly which rows of data were invalid within the context of the import data.

The error file includes the following information:

- Lookup validation errors from Axiom Enterprise Decision Support's built-in validation against lookup columns.
- Validation errors from any Custom Data Validation steps in the transforms.
- Key validation errors such as blank keys or duplicate keys.

You can open the file from the **Execute Import** dialog by clicking the link in the Status area. The status will be either "failed" or "warning," followed by the text "click here to open errors in a spreadsheet." The status type depends on whether the option to **Ignore lookup and key errors** is selected.

A Execute Import: Import GL data	?	×
Execute in development mode (data will not be saved to destination table)		
Execute Stop Status: 🗶 failed, click here to open errors in a spreadsheet		
Execution log	Show desc	ription
<pre>11:41:56 AM Starting import 'Import GL data' 11:42:05 AM Extracting data: C:\Users\whunter\Documents\testGL.xlsx 11:42:05 AM Imported 1 rows of data into temp table 'dbo.tmp762_40227 11:42:05 AM Validating data for save 11:42:06 AM Validating data for save 11:42:06 AM 0 record(s) updated, 0 inserted. 11:42:06 AM 0 record(s) updated, 0 inserted. 11:42:06 AM Dropping temporary table dbo.tmp762_40227 11:42:06 AM Dropping temporary table dbo.tmp762_40227 11:42:06 AM Import 'Import GL data' Lookup error: row 1. Invalid Dimension Dept (1) Import Failed: Save errors occurred during import</pre>		
	Clo	ose

Example link to open validation errors in a spreadsheet

The CSV file contains the import data, followed by one or more validation columns. Validation columns are labeled as follows:

- Lookup and key validation messages are in a column named *LookupColumnName* Lookup Error. For example: "Acct Lookup Error" when looking up against the ACCT column.
- Custom Data Validation messages are in a column named AXTRANSFORM_StepNumber, where StepNumber is the number of the associated transformation step. For example: "AXTRANSFORM_ 5" when the associated transform is step 5 in the list.

The error CSV files are placed in a system-maintained folder in the Imports Library named **Import Errors**. Access to the error files is automatically managed based on access to the import. You can access the error file directly later by using the Explorer task pane or Axiom Explorer.

Each execution of an import that results in a lookup error generates a unique error file (differentiated by a date/time stamp). These error files are not automatically deleted; you must manually delete them when you are finished investigating the error.

Executing imports in development mode

You can execute an import in development mode, in order to test import settings or troubleshoot an import issue. In development mode, all import steps are performed except for the last step that saves the temp table data to the destination table.

When executing in development mode, additional options are available:

- You can pause the import after certain transformation steps are performed, and view the data in the temp table as it exists after performing the step. Reviewing this data can help you determine if a particular transform is working as you expect. If an import doesn't have defined transformation steps, you can view the import data as it exists after the temp table is populated from the source data.
- For delimited file imports, you can limit development mode processing to a certain number of rows, for more efficient testing and troubleshooting.

IMPORTANT: When an import is run in development mode, all of the steps in the **Transforms** tab are performed, including any steps that modify tables other than the temp table. If you do not want these steps to occur during testing, then you should disable the step on the **Transforms** tab before executing the import in development mode.

To run an import in development mode:

- 1. Do one of the following to open the import for execution, depending on whether you need to access the full import settings:
 - Open the full Import Wizard: On the Axiom tab, in the Administration group, click Imports > ImportName > Edit. Then in the Import Wizard, go to the Execute tab.

Using the Import Wizard, you can switch between the Execute tab and other tabs to view and edit the import settings as needed, and then run the import again.

 Open in execute-only mode: On the Axiom tab, in the Administration group, click Imports > ImportName > Execute.

This opens a special **Execute Import** dialog that only displays the import execution options and controls. Use this mode if you only need to execute the import and you don't need to review or edit any import settings. This is the only mode available to users who have execute-only permissions to the import.

NOTE: In systems with installed products, these features may be located on the Admin tab.

TIP: You can also open imports for execution using Axiom Explorer or the Explorer task pane. If you have read/write or read-only access to the import, the full Import Wizard opens. If you have execute-only permission to the import, then the Execute Import dialog automatically opens when you access the import from the Imports Library.

2. In the Execute Import dialog (or the Execute tab of the Import Wizard), select Execute in development mode.

Once development mode is enabled, the **Development Mode Options** section becomes available.

Option Description

3. Select the Development Mode Options as needed:

Limit the number of rows imported to	Limits the development mode processing to a specified number of rows. When testing the import, you may only need to process a handful of rows in order to verify that the import is working as expected. Using a smaller number of rows speeds import processing.
	After selecting this option, enter a number of rows from 1 to 1000 into the box. By default, the row limit is 1000.
	NOTE: This option is only available when the import source is a delimited file or Ellucian. If the import source is a database, you can limit the number of rows by setting a temporary WHERE clause in the SOL Select Statement

Option	Description
Pause after specified transforms and display current temp table data	 Specifies whether pauses are honored during development mode processing. If enabled, then Axiom Enterprise Decision Support honors the pause settings on the Transforms tab. If a step has Pause enabled, then the import pauses after performing the step, and displays the temp table in the View Data dialog. When the dialog is closed, the import continues to the next step. See Troubleshooting transforms using pause.
	 If disabled (the default setting), then the import continues without pausing, regardless of whether any steps are flagged with Pause. NOTES:
	• This option is only available in the Execute tab of the full Import Wizard, and only if you have read/write access to the import.
	 If the import does not have any transforms, this option is renamed to Pause and display temp table data after preview data is fetched. If enabled, the temp table is populated with data from the import source, and then the temp table data is displayed in the View Data dialog.
NOTE: Developm	ent mode and its options only apply to the current import session—these

options are not saved in the import settings.

4. Click Execute to run the import in development mode.

The import is executed and status messages display in the Execution log as normal. If pauses are enabled, the import pauses at the designated steps to display the View Data dialog. After closing the dialog, click Continue to continue processing. Once all transform steps have been executed, the import stops before saving data to the destination table.

Troubleshooting transforms using pause

When running an import in development mode, you can configure the import to pause after performing certain transform steps, and view the data in the temp table.

To configure an import to pause after a transform:

• On the Transforms tab, select the Pause check box 🖱 for the transform.

Gen	eral Source	Variables	Mapping	Transforms	Execute				
Use the Exa	Use transforms to modify the temp table before it is loaded into the destination table. Transforms are executed in the order shown.								
	inpic ode tra	Transform	1		Description	Target	: Variable 🥑	0	
1	1 Update {temptable} set M1=Bei								
2	2 Update {temptable} set M1=BegBal+								
3	Pre-save val	idate()		Performs	the same validatio	n that occ			

• On the Execute tab, select Execute in development mode and then select Pause after specified transforms and display current temp table data.

General S	Source	Variables	Mapping	Transforms	Execute		
Execute in development mode (data will not be saved to destination table)							
Development Mode Options							
✓ Pause after specified transforms and display current temp table data							

When the import is executed in development mode with pauses enabled, it continues until it reaches a transform step that is configured to pause. After completing that step, the import pauses and shows the current temp table data within the **View Data** dialog.

Acct	Dept	M1	M2	M3	M4	M5	
1000	20000	5050	5050	5050	5050	5050	5
1000	21000	3030	3030	3030	3030	3030	3
1000	22000	4545	4545	4545	4545	4545	4
1000	23000	5050	5050	5050	5050	5050	5
1000	24000	3030	3030	3030	3030	3030	3
1000	25000	4545	4545	4545	4545	4545	4
1000	26000	5050	5050	5050	5050	5050	5
1000	27000	3030	3030	3030	3030	3030	3
1000	28000	4545	4545	4545	4545	4545	4
1000	29000	5050	5050	5050	5050	5050	5
1000	40000	3030	3030	3030	3030	3030	3

Example View Data dialog

Using this dialog, you can view and filter the data to help determine whether the transform is working as expected. When you are done viewing the data, click **Close** to return to the import. At this point the import is still paused. You can click **Continue** to continue the import, or **Stop** to stop it.

By default, the **View Data** dialog shows the first 500 rows of data in the temp table. This row limit is controlled by the **ETLMaxRows** system configuration setting. If desired, you can filter the data to make it easier to find specific records you might be looking for. To do this, click **Show Filter** in the top right corner of the View Data dialog. This enables the following filter options for the dialog:

Item	Description
Filter	Type a filter to limit the data shown in the dialog. The filter must use column-only syntax, using a column name in the temp table. For example:
	Dept=45000
	Where Dept is a column in the temp table.
Row count	Type a number to limit the data to a certain number of rows. The maximum number of rows that can be shown is 5000.
Columns	Select or clear columns to limit the temp table columns that display in the dialog. You can use the All or None options to select or clear all columns at once.
	If you clear a column, then that column cannot be used in the filter.
	NOTE: At least one column must be selected to display. If no columns are selected, then all columns will display.

After modifying the filter options, click **Refresh** to filter the data in the dialog using your selections. To clear your filter options and return to the default dialog, click **Hide Filter**.

Filter:			Acct	Dept	M1	M2	M3	M4
dept=29000			1000	29000	5050	5050	5050	5050
			4400	29000	85438.4232	85901.4828	85901.4828	85438.4232
			4900	29000	18796.4274	18898.2948	18898.2948	18796.4274
Row count (5000 max):	500		5100	29000	0	0	0	0
Columns:	ΔΙΙ	None	5300	29000	143.7078	385.0398	205.0812	143.7078
A cet	200		5600	29000	1706.358	1027.089	1539.6186	1706.358
✓ Acct ✓ Dept ✓ M1			5800	29000	0	0	0	0
			6000	29000	212.6496	576.81	341.139	212.6496
✓ M2			6100	29000	578.9316	-3458.0652	3124.4232	578.9316
✓ M3			6200	29000	38131.5984	95510.607	69628.005	38131.5984
✓ M4		~	6300	29000	1304.937	17330.922	5511.57	1304.937
	Refre	sh	6400	29000	0	0	0	0

Example View Data dialog with filter options

Import Wizard

Using the Import Wizard, you can create new imports and edit existing imports. Import settings are organized by tab.

Tab	Description
General	Defines the name of the import and other general settings.
Source	Specifies the source of the data to be imported, and how to access it.
Variables	Defines variables to be used in the import, in order to dynamically change certain import settings.
Mapping	Specifies the destination table for the import, and maps the import data to columns in the destination table.
Transforms	Defines transformation statements to be performed on the import data before it is saved to the destination table. Transforms can use SQL or built-in Axiom Enterprise Decision Support functions.
Execute	Execute the import. You can run the import normally, or you can run it in development mode for testing and troubleshooting purposes.
	NOTE: It is possible to configure user permissions so that a user has read/write or read-only access to the import utility file, but the user does not have execute permissions for the import. In this case, the Execute tab is hidden.

As you complete the import settings, the Import Wizard performs error checking for missing required settings and invalid settings. If an error is detected, an error message displays in the bottom of the dialog. You can click the link to be taken to the tab that contains the error. Only one error is displayed at a time; once you resolve the current error message, a new message may appear.

Import Wizard: General tab

On the **General** tab of the Import Wizard, you can define general properties for the import—such as the import name and save options.

ltem	Description
Import Name	The name of the import. The import name is how you access and execute imports from the Imports menu, and in other areas such as the Import ETL Package task in Scheduler.
Description	Optional. The import description. The description can be used to document the purpose of the import and/or to detail important import instructions. The description is limited to 2000 characters.
	When an import is opened in execute-only mode, the description can be viewed by clicking the Show description link in the Execute Import dialog.

Save Options

The save options impact how data is saved to the destination table when the import is executed.

Item	Description
Ignore lookup and key errors	Specifies the import behavior if lookup and key errors exist in the temp table data before saving to the destination table. These errors include invalid lookup data, blank keys, and duplicate keys.
	 If enabled, then any rows with lookup and key errors are ignored, and only valid rows are saved to the destination table. Once the import is complete, an error log is provided to detail the invalid rows. For more information, see Import validation errors.
	This option allows you to continue to save valid data even if invalid data is present. You can then investigate the invalid data, make corrections, and reimport.
	 If disabled (the default setting), then the import is aborted if any lookup and key errors exist in the temp table data. No data is saved to the destination table.
	NOTES:
	 If this option is enabled and the import is executed by Scheduler, the execution status of the job is set to Partial Success if any errors are found. This will result in an email notification if the job is set to notify only on error.
	 This option does not apply if a Pre-Save Validation function is used in the import's transform steps. If this function is used, then the import is aborted if any validation errors are found, and no further import steps are processed.
	• Duplicate keys count as an error condition when saving to a reference table, or when Aggregate rows on final save is disabled.

Item	Description
Aggregate rows on final save	Specifies whether duplicate rows are aggregated during the final save to the destination table. Duplicate rows are rows that have the same key column values.
	 If enabled (the default setting), then duplicate rows are aggregated before saving data to the destination table. This aggregation process may take some time for large imports.
	 If disabled, then the temp table data is not aggregated before saving data to the destination table. If any duplicate rows exist, the import is aborted and no data is saved to the destination table. You can optionally use the Ignore lookup and key errors option to instead exclude the invalid rows and only import valid rows.
	Disabling this option may improve import performance for large imports where aggregation is not necessary.
	NOTE: This option does not apply when the destination table for the import is a reference table, or any table with an identity key column.
Bypass updating existing rows	Specifies whether the import saves both updated data and new data, or just new data.
when saving to the destination table	 If enabled, then only new records of data are saved to the destination table when the import is run. Updates to existing records are ignored.
	 If disabled (the default setting), then new records and updates to existing records are saved to the destination table when the import is run.
	Enabling this option may improve import performance for use cases where the import source is not expected to contain updates to existing data. Keep in mind that if you enable the option and the import source does contain updates to existing data, the updates are simply ignored with no warning.
	NOTE: If this option is enabled, existing records in the source data may still cause import errors, even though these records will be ignored for the final save to the destination table.

Import Wizard: Source tab

The **Source** tab of the Import Wizard specifies the source of the data to be imported. The contents of the tab depend on the **Import type** selection at the top of the tab.

The available import types are as follows. Select the type that corresponds to the source of the data that you want to import:

Import Type	Description	More Information
File	Use to import data from a file:	Importing from one
	Delimited files or Excel files	or more source files
	A single file or multiple files	
External database	Use to import data from an external database. The following database connections are supported:	Importing from an external database
	SQL Server	
	• Oracle	
	• OLEDB	
	• ODBC	

NOTE: The OLEDB source type can also be used to import data from a file. If you want to import from a file that is not one of Axiom Enterprise Decision Support's supported file types, you may be able to use the OLEDB source type. The database connection strings can be configured to pull data from various file types.

The topics in this section detail the requirements and import settings for each import type.

Importing from one or more source files

You can import data into Axiom Enterprise Decision Support from a file, using either a delimited file or an Excel file. You can import from a single file, or from multiple files that use the same file structure.

File requirements

When using a delimited file, the file must meet the following criteria:

- Delimiters can be any character. You specify the delimiting character in the import settings.
- The first row of the file can optionally contain column header names.
- Numeric values cannot be in scientific notation or formatted with extraneous characters such as currency signs or parentheses.

When using an Excel file, the file must meet the following criteria:

- The file format must be XLS or XLSX. XLSM files cannot be imported.
- The first row can optionally contain header names.
- Each column in the Excel file translates to a column in the destination table. Each row in the file translates to a data record in the table. Blank columns and rows are ignored.

• The data in the spreadsheet must match the designated data type for the destination column. For example, if numeric values in the spreadsheet are prefixed with a quotation mark, then Excel considers those values to be strings instead of numbers. This will cause an error if attempting to import these string values into a numeric column.

Import source files can be no larger than 2GB. Additionally, some import features may impose a smaller file size limit. If the source file exceeds the file size limit, it should be split into multiple smaller files.

Source configuration

To import data from a file, complete the following configuration settings on the **Source** tab of the Import Wizard.

General settings

The following settings are always present at the top of the tab.

Item	Description
Import type	Select File to import data from a file.
Remote Data Connection	If your Axiom Enterprise Decision Support system is hosted on the Axiom Cloud, and you are not using the Prompt for path during execution option to allow the user to select a file, then you must specify a remote data connection so that the Axiom Cloud can read the file located on your network.
	You can select any remote data connection defined in your system, or you can enter an import variable name. For example, you can enter the built-in system variable {DefaultRemoteDataConnection} to automatically use the default remote data connection for your system. For information on how the default remote data connection is determined, see System variables.
	If no remote data connections have been defined in your system, then this setting does not apply and will not display.

File import options

The following settings are present when **File** is selected as the import type.

Item	Description
File type	 Select one of the following to specify the type of file to use as the import source: Delimited file: Import data from a delimited text file, such as CSV or TXT files.
	• Excel file: Import data from an Excel file (XLS or XLSX).

Item	Description
Source path	 Select one of the following to specify the location of the source file: Use specified path: Use this option if the file path is always known. To specify the file path, use either the File path or Source folder setting, depending on whether you are importing from a single file or multiple files. The specified path must be accessible to the Axiom Application Server (for on-premise installations) or to the Axiom Cloud Integration Service (for Axiom Cloud systems).
	 Prompt for path during execution: Use this option if you want the user to be able to specify the file when running the import. You can optionally complete the Default folder setting to provide a starting point.
	When using this option, a copy of the specified file is uploaded to the application server for processing. Once the import is complete, the temporary copy of the file is deleted.
	NOTE: Files greater than 100 MB cannot be uploaded using the "prompt" option. While it is possible to increase this limit, it is not recommended. Instead, you should use the Use specified path option if you need to import a file larger than 100 MB. Please contact Axiom Support if you need assistance with a large file.
	For more information, see Design considerations for the source path.
Import from	Select one of the following:
	 Single file: Use when importing data from a single designated file.
	 Multiple files: Use when importing data from multiple files within a designated folder. All of the files to be imported must use the same file structure.
	When importing from multiple files, additional configuration settings become available on the Source tab, in the Multiple file options section.

File path orThis setting applies when Use specified path is selected for the Source path. Specify one of the following, depending on whether you are importing a single file or multiple files:Source folder• File path: When importing from a single file, specify the path to the file. You can type the file path or click the folder icon to navigate to the file. • Source folder: When importing from multiple files, specify the path to the folder. All of the files to be imported must reside in this folder. You can type the folder path or click the folder icon to navigate to the folder. Once the path is specified, Axiom Enterprise Decision Support will validate whether the application server or the cloud integration service can access the file or folder, and will display an error if not.If the path is to a network location, it must be a UNC path (i.e. \\servername\foldername\filename). If you enter a mapped drive, the entry will automatically be converted to a UNC path.NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you
 Source folder File path: When importing from a single file, specify the path to the file. You can type the file path or click the folder icon to navigate to the file. Source folder: When importing from multiple files, specify the path to the folder. All of the files to be imported must reside in this folder. You can type the folder path or click the folder icon to navigate to the folder. Once the path is specified, Axiom Enterprise Decision Support will validate whether the application server or the cloud integration service can access the file or folder, and will display an error if not. If the path is to a network location, it must be a UNC path (i.e. \\servername\foldername\filename). If you enter a mapped drive, the entry will automatically be converted to a UNC path. Import variables can be used in the path. See Using variables in imports. NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you
 Source folder: When importing from multiple files, specify the path to the folder. All of the files to be imported must reside in this folder. You can type the folder path or click the folder icon to navigate to the folder. Once the path is specified, Axiom Enterprise Decision Support will validate whether the application server or the cloud integration service can access the file or folder, and will display an error if not. If the path is to a network location, it must be a UNC path (i.e. \\servername\foldername\filename). If you enter a mapped drive, the entry will automatically be converted to a UNC path. Import variables can be used in the path. See Using variables in imports. NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you
 Once the path is specified, Axiom Enterprise Decision Support will validate whether the application server or the cloud integration service can access the file or folder, and will display an error if not. If the path is to a network location, it must be a UNC path (i.e. \\servername\foldername\filename). If you enter a mapped drive, the entry will automatically be converted to a UNC path. Import variables can be used in the path. See Using variables in imports. NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you
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NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you
can either manually type the file or folder path, or you can temporarily set Remote Data Connection to <none>.</none>
Default folder Optional. This setting applies when Prompt for path during execution is selected for the Source path . Specify a folder path to use as the default location when prompting the user to select a file. You can type the folder path or click the folder icon to navigate to the folder.
If a folder is specified, then when the user is prompted to select a file, the file selection dialog will open to this folder by default. The user can still browse to a different location.
Import variables can be used in the path. See Using variables in imports.

File options (Excel)

The following options are present if the File type is Excel file.

Item	Description
First row has column names	Select this option if the first row of the file contains column names. If the first row of the file contains data, leave this option unchecked.

Item	Description
Sheet name	The sheet in the Excel file to import. Leave this blank to use the first sheet in the file. Only one sheet can be imported.
	Variables can be used to specify the sheet name. See Using variables in imports.

File options (Delimited)

The following options are present if the File type is Delimited file.

ltem	Description
First row has column names	Select this option if the first row of the file contains column names. If the first row of the file contains data, leave this option unchecked.
Import file has multi-line values	Select this option if the import file has data where a field value splits across rows (within the text qualifier). For example:
	DEPT, ACCT, LOCATION, A1, A2, A3 100,4000, East Region, 123, 456, 789 100,4100,"West Region",111,222,333
	If this option is selected, then the split value will be read as a single import value.
Delimiter	In the box to the right of the option, enter the delimiting character used in the source file. For example, if the delimiter is a comma, enter a comma into the box.
	Delimiter ,
	If the delimiting character is a space or a tab, place your cursor in the box and press the space bar or the tab key. The character will be indicated in parentheses to the right of the box (since the character is not visible in this case).
	Delimiter (space)
Text Qualifier	By default, the text qualifier is double quotation marks ("). If desired, you can enter a different character as the text qualifier, or you can clear the field if you do not want to use a text qualifier.
	The text qualifier is used when values in the source file may contain the delimiting character. For example, if the delimiting character is a comma, but the source file contains values such as full names that also contain a comma (for example: "Doe, Jane"). In this case, the comma within the quotation marks is considered part of the field value instead of starting a new field.
Multiple file options

The following options are present if Import from is set to Multiple files.

ltem	Description
Import order	Select one of the following to specify the order in which multiple files are imported:
	 Alphabetical: Files in the specified source folder are imported in alphabetical order.
	 Creation date: Files in the specified source folder are imported by creation date (earliest first).
File filter	Optional. Specify a filter to determine the files to import within the specified source folder. If the filter is left blank, then all files in the folder are imported.
	You can use wildcard characters (* or ?) to include groups of files that share naming conventions. For example: North*.xls to collect all XLS files where the file name starts with "North". Import variables <i>cannot</i> be used in the filter.
	NOTE: The import attempts to process all files in the folder allowed by the file filter, regardless of whether those files meet the specified file type for the import (delimited or Excel). You should make sure that the folder only contains valid file types, or set the filter appropriately so that invalid file types will not be imported.
Archive folder	Specify a target folder in which to archive source files after they have been imported. You can type the folder path or click the folder icon to navigate to the folder.
	After the data in a file has been imported successfully, the file is <i>moved</i> from the original source folder to the archive folder. Files are not moved when running the import in preview mode.
	Import variables can be used in the path. See Using variables in imports.
	NOTE: If a remote data connection is specified, then by default the file/folder navigation dialog shows the folder structure of the server where Axiom Cloud Integration Service is installed. If you need to point to a different location, you can either manually type the file or folder path, or you can temporarily set Remote Data Connection to <none></none> .

Item	Description
Add timestamp prefix to file	Optional. Select this option if you want to add a timestamp to the file names in the archive folder.
names when archiving successful import files	 If enabled, then when a file is moved to the archive folder after a successful import, the file is renamed so that the name starts with the current date and time. This is intended to make it easier to find and identify files that were imported as part of a particular import execution. If disabled, then file names are left as is when they are moved to the archive folder.

Design considerations for the source path

There are two options to specify how the import obtains the source file: **Prompt for path during execution** and **Use specified path**. When deciding which option to use, you should consider the following to determine which option is most appropriate.

Prompt for p	bath during	execution
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File permissions	The file must be accessible by the user's file system permissions.
Data flow	 A copy of the file is streamed from the client machine to the application server, then from the application server to the database server. The file copy on the application server is deleted after the import is complete.
Ramifications / Limitations	 Slower performance (file is copied multiple times) Only available when running the import interactively Maximum file size of 100MB
Use specified path	
File permissions	 The file must be accessible by the application server or the cloud integration service. The file path must be a UNC path, not a mapped drive (meaning \\servername\foldername, not I:\foldername).
Data flow	The file is streamed from the file source to the database server for import.
Ramifications / Limitations	 Faster performance Maximum file size of 2GB Can be used in Scheduler

How multiple-file imports work

When the import is configured to use multiple source files, the import works as follows:

• When the import begins, Axiom Enterprise Decision Support inspects the source folder and compiles a list of all files found in that folder. If a file filter is specified, the list is limited to only those files that match the filter. If any files are added to the folder after this list is compiled, those new files will not be imported during the current import execution.

If no files are found, the import stops. The absence of files to import is not an error condition.

- The files in the list are then imported sequentially, in the configured order (either alphabetical by file name, or by creation date). For each file, the following occurs:
 - Data is copied from the source file into the temp table.
 - Transform statements are run.
 - Data is saved to the destination table.
 - The source file is moved from the source folder to the archive folder.

Each file must complete this import process successfully before moving on to the next file.

NOTE: If the import uses import variables, these values are set once, before the file list is created. The import variables will remain the same for each file that is imported. However, transform variables are set by transform statements. Since the transform statements are run per file, it is possible that transform variables could resolve differently per file.

- If any file fails to import successfully, the import stops and the import status is set to Error. No further files are imported. Currently, it is not possible to configure the import to ignore the error and continue processing other files.
- If all files in the list import successfully, the import stops and the import status is set to Success.

Because all of the files are imported sequentially, if multiple files contain data for the same set of key values, the data in the last-processed file will be saved in the database (overwriting any previously saved data for the same keys). It is *not* currently possible to batch and aggregate the data from multiple files before saving.

Importing from an external database

You can import data into Axiom Enterprise Decision Support from an external database, such as a SQL Server or Oracle database.

When importing from an external database, you must provide the appropriate information to allow Axiom Enterprise Decision Support to connect to the database, such as the server and/or database name, and the login credentials. You must also create a SQL statement to query the necessary data that you want to import into Axiom Enterprise Decision Support. **NOTE:** The Connection information is only used to connect to the source and extract the data into the import temp table. If the connection information includes a password, the password must be reentered anytime the connection information is changed.

Source configuration

To import data from an external database, complete the following configuration settings on the **Source** tab of the Import Wizard.

ltem	Description
Import type	Select External Database to import data directly from an external database.
Import source	Select one of the following database sources:
	SQL Server: Use this to import from a SQL Server database.
	Oracle: Use this to import from an Oracle database.
	OLEDB: Use this to connect to any database that supports OLEDB.
	 ODBC: Use this to connect to any database that supports Open Database Connectivity. Generally speaking, this option should only be used if no other option is available to connect to your desired database.
	NOTES:
	 The OLEDB option can also be used to import data from files if necessary. However, it cannot be used with Excel files. The Excel file option should be used instead.
	• An ODBC driver is required for use with the ODBC option. See ODBC driver.
	 When using the Oracle option, the Oracle Data Access Connection software (ODAC) must be installed on the Axiom Enterprise Decision Support application server. If you want to import directly from an Oracle database without installing this software on the application server, you can use the OLEDB import source instead.
Remote Data Connection	If your Axiom Enterprise Decision Support system is hosted on the Axiom Cloud, then you must specify a remote data connection so that your Axiom Cloud system can connect to the database server located on your network.
	You can select any remote data connection defined in your system, or you can enter an import variable name. For example, you can enter the built-in system variable {DefaultRemoteDataConnection} to automatically use the default remote data connection for your system. For information on how the default remote data connection is determined, see System variables.
	If no remote data connections have been defined in your system, then this setting does not apply and will not display.

Connection information for SQL Server

Complete the following connection information when the Import source is SQL Server.

Item	Description
Server	The name of the SQL Server.
Database	The name of the database.
User	The user name to use to connect to the specified server and database. The user credentials must be for a SQL Server account; network domain credentials cannot be used.
Password	The password to use to connect to the specified server and database.

Once you have completed the connection settings, click the **Test connection** button 🔚 to test the connection. The **Status** updates to show either a success message or an error message.

Connection information for Oracle

Complete the following connection information when the Import source is Oracle.

Field	Description
Server	The connection parameters for the Oracle server. You can obtain this information from the Oracle TNS Names entry. A typical TNS Names entry for Oracle looks like the following:
	<pre>SERVER=(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP) (HOST=MyHOSTNAME)(PORT=MyPORT))(CONNECT_DATA=(SERVICE_ NAME=MyOracleServiceID)))</pre>
	Axiom Enterprise Decision Support requires this information in the following format:
	MyHOSTNAME:MyPORT/MyOracleServiceID
	Where:
	MyHostName is the name of the Oracle server machine
	 MyPort is the port number that the server is listening on, typically 1521
	 MyOracleServiceID is the name of the Oracle service running on the host machine
User	The user name to use to connect to the database.
Password	The password to use to connect to the database.

Once you have completed the connection settings, click the **Test connection** button **Setting** to test the connection. The **Status** updates to show either a success message or an error message.

Connection information for OLEDB

Complete the **Connection string** field when the **Import source** is **OLEDB**. The connection string identifies the name and location of the database or file to connect to, including any necessary validation information. Any valid SQL connection string can be used. The connection string cannot contain spaces.

Once you have completed the connection settings, click the **Test connection** button let to test the connection. The **Status** updates to show either a success message or an error message.

A good resource for connection strings is http://www.connectionstrings.com/ (external link). Some examples of common connection strings are shown below:

Source	Sample string
CSV	Server=.\SQLExpress;Provider=MSDASQL;Driver={Microsoft Text Driver (*.txt; *.csv)};UID=test;PWD=test!123;Database=AxiomFinancial
SQL Server, trusted connection	Data Source=myServerAddress;Initial Catalog=myDataBase;Integrated Security=SSPI;
Oracle with TNS	Data Source=TORCL;User Id=myUsername;Password=myPassword;
SQLOLEDB (standard)	Provider=sqloledb;Data Source=myServerAddress;Initial Catalog=myDataBase;User Id=myUsername;Password=myPassword;
SQLOLEDB (trusted)	Provider=sqloledb;Data Source=myServerAddress;Initial Catalog=myDataBase;Integrated Security=SSPI;
SQLOLEDB (server instance)	Provider=sqloledb;Data Source=myServerName\theInstanceName;Initial Catalog=myDataBase;Integrated Security=SSPI;
AS400	Provider=IBMDA400;Data Source=MY_SYSTEM_NAME;User Id=myUsername;Password=myPassword;

Connection information for ODBC

Complete the **Connection string** field when the **Import source** is **ODBC**. The connection string identifies the name and location of the database to connect to, including any necessary authentication credentials. The connection string requirements and syntax vary depending on the source database you are attempting to connect to. Consult the documentation from your database vendor to determine an appropriate ODBC connection string for this purpose.

Once you have completed the connection settings, click the **Test connection** button **Setting** to test the connection. The **Status** updates to show either a success message or an error message.

SQL Select Statement

The SQL SELECT statement defines the data query to the source database, resulting in the set of data to be imported to the *temp table*. You can then perform mapping and transformations on the data before importing into the destination table.

In the SQL Select Statement box, enter any valid SQL statement to define the data query. You can click the SQL editor button k to open the Edit SQL dialog. This dialog provides a text editor for entering and reviewing large SQL statements, and several tools to check the statement. For more information, see Creating the SQL SELECT statement.

Variables can be used in the SELECT statement. See Using variables in imports.

NOTE: The syntax of the SQL statement cannot be validated when using OLEDB or ODBC as the source.

ODBC driver

Use of ODBC requires an ODBC driver to be installed on the following servers:

- For on-premise systems, the driver must be installed on the Axiom Enterprise Decision Support Application Server.
- For Axiom Cloud systems, the driver must be installed on the local server that is hosting the Axiom Cloud Integration Service.

The ODBC driver is specific to your source database. If you want to use ODBC with a particular database, that database vendor should provide or recommend an ODBC driver for use with that database.

Importing from an internal Axiom Enterprise Decision Support database

You can import data from the current Axiom Enterprise Decision Support database. This feature can be used to automate the process of copying data from one table to another, or to transform the data within a table.

NOTE: Only administrators can create or edit an import that uses the current Axiom database as the source. Non-administrators do not see this option when creating or editing an import, and cannot open any existing imports that are configured to use this option. However, non-administrators can be given the right to execute an import that uses the Axiom database.

Source configuration

To import data from the Axiom Enterprise Decision Support database, complete the following configuration settings on the **Source** tab of the Import Wizard.

Item	Description
Import type	Select Internal Database to import data from the Axiom Enterprise Decision Support database.
Import source	Select one of the following database sources:
	 Current Axiom system database: Import data from a table in the system database.
	 Current Axiom audit database: Import data from a table in the corresponding audit database.
	NOTE: Systems with an Axiom Contract Management license can also import data from the Current Contract Management database . See the separate product documentation for more information on importing contract management data.

When you use this option, Axiom Enterprise Decision Support automatically creates the necessary connection string in the background when the import is performed. If the import is copied to another system or if the current database is restored to a different location, the new context is used to create the connection string.

SQL Select Statement

The SQL SELECT statement defines the data query to the source database, resulting in the set of data to be imported to the *temp table*. You can then perform mapping and transformations on the data before importing into the destination table.

In the **SQL Select Statement** box, enter any valid SQL statement to define the data query. You can click the **SQL editor** button is to open the **Edit SQL** dialog. This dialog provides a text editor for entering and reviewing large SQL statements, and several tools to check the statement. For more information, see Creating the SQL SELECT statement.

Variables can be used in the SELECT statement. See Using variables in imports.

Creating the SQL SELECT statement

If the import source is an external database or an internal database, then you must define a SQL SELECT statement to query the source database, resulting in the set of data to be imported to the *temp table*.

You can use the Edit SQL dialog to create and test the SELECT statement. To open the dialog:

• On the Source tab of the Import Wizard, click the browse button (...) to the right of the SQL Select Statement box.

The **Edit SQL** dialog provides a text editor for the statement, and also several tools to help create and test the statement.

Creating the statement

You can type the statement into the text editor, or copy and paste from another source.

You can use the **Choose Table** tool to automatically generate a SQL statement that selects all columns in a specified table. You can then edit the statement to meet the specific data needs. To do this:

- 1. Click the Choose source table to create SQL button I.
- 2. In the **Choose Table** dialog, select the table for which to generate the SQL statement, and then click **OK**.

The **Choose Table** dialog lists all tables in the SQL Server database specified on the **Source** tab, including views.

The generated SELECT statement is placed in the text editor. Any existing text in the editor is overwritten.

Testing the statement

NOTE: If the SQL statement uses variables, then these validation features are not available. Validation features are also not available if the source is OLEDB.

To validate the syntax of the SQL statement, click the **Check SQL syntax** button \clubsuit . Axiom Enterprise Decision Support sends the statement to your database server to see if the statement can be parsed, resulting in either a success message or an error message.

To view a set of sample records, click the View data button Axiom Enterprise Decision Support queries the database and returns the first 100 rows in the View Data dialog. You can review this data to help determine if the SELECT statement is returning the desired set of data.

When you are finished reviewing the data, click Close to return to the Edit SQL dialog.

Import Wizard: Variables tab

In the **Variables** tab of the Import Wizard, you can define variables to be used in the import. Import variables can be used in the following import settings:

- Source and destination columns (Mapping tab)
- Destination table (Mapping tab)
- Transform statements or functions (Transforms tab)
- SQL SELECT statement to the source table (Source tab)
- Source file (Source tab)
- Sheet name (Source tab)

When the import is executed, before any import steps are processed, Axiom Enterprise Decision Support checks the **Variables** tab for variables. If variables are defined (regardless of whether they are used in the import), the **Variables** dialog is presented to the user. Once the user has specified a value for each variable, the import begins processing.

For example, you might have database tables that have the year incorporated into the table name. You could define a variable for year, and configure the destination table to use the variable. Data would then be imported into the appropriate table, depending upon the year selected by the user.

To use a variable in the import, enter the variable name into one of the supported areas of the import settings, enclosed in curly brackets {}. For example, if the variable name is "mycolumn", you would enter {mycolumn}.

NOTE: If the variable defines the destination table, then you must place the variable in double curly brackets when you use it in a SQL statement, so that the eventual table name value is enclosed in curly brackets as expected. For example, if you have a variable named "destinationtable", you would reference that variable as {{destinationtable}}. That way, when the {destinationtable} value is defined, it will resolve as {GL2020}.

Managing import variables

This tab has two sections. In the top section, you can create user-defined variables for the import. The bottom section displays the built-in system variables that can be used in the import. This **Built-in Variables** section is for reference only, so that you can see the variables available for use.

- To add a variable, click Add variable *. The new variable row is added below the row that is currently selected.
- To edit a variable, type the changes into the grid.

If you change the name of a variable, you must update any references to that variable in the import to use the new name.

• To delete a variable, select the row that you want to delete and then click Remove variable imes.

Make sure the variable is not used in the import before deleting it. If the import references a variable that is not defined, an error will result when executing the import.

The following settings are defined for variables:

Item	Description
Prompt for value even if variable only contains one choice	This setting applies to all defined variables for the import, and determines the system behavior when a variable has only one choice.
	 If enabled (default), then users will always be prompted to select variable values, even if a variable has only one defined choice.
	 If disabled, then users will not be prompted to select variable values for variables that have only one defined choice.
Name	The name of the variable.
	Import variable names cannot use the same name as transform variable names, and vice versa. Every variable name within the import must be unique.
	NOTE: Import variables cannot use the same names as tables defined in your system. This is because the syntax for referencing tables is the same as the syntax for referencing variables. A validation message will display in the Import Wizard if a variable name matches a table name. If a table is later created with the same name as an existing variable, then subsequent executions of the import will fail with an error identifying the table name / variable name duplication.
Choices	The set of valid choices for the variable, separated by semi-colons.
	You can leave the choices blank if there is not a defined set of values for the variable. When the import is executed, the user can type in a value for the variable (if Allow Free Input is enabled).
	Variables (user-defined or system variables) can also be used as choices. Note that variables used as choices will not be resolved to values in the Variables dialog that is presented to the user when the import is run interactively. However, the variable will be resolved during the import execution.
	You can also specify a column or columns in the database by entering fully qualified Table.Column syntax. The user will be presented with a drop-down list of all values (up to 500) in the specified column. For example, enter DEPT.Region if you want the user to select from the list of regions in the DEPT table. You can specify multiple database columns, separated by semi-colons. For example, DEPT.VP; DEPT.Mgr. The column values will be collected into a single list.
Description	Optional description text that displays in the Variables dialog. This dialog displays when the import is executed, to prompt the user to specify a value for the variable.
	Description text displays as follows above the variable selection drop-down list:
	VariableName:DescriptionText

Item	Description
Allow Free Input	Specifies whether users can type in their own values for the variable, or if they are restricted to the list of choices.
	• If enabled (default), then users can either select from the list of choices, or type in their own value. Keep in mind that the user-defined value may not be valid in the context of the import.
	 If disabled, then users can only select from the defined list of choices.

Import Wizard: Mapping tab

The **Mapping** tab of the Import Wizard maps the import data to the destination table. In this tab, you define:

- The columns to be created in the *temp table*, including any "work columns" to be used for interim calculations only.
- The destination table for the imported data.
- The destination columns for the imported data.

When an import is executed, data is first imported from the source file or table into the temp table. Each entry in the **Temp Table Column** field becomes a column in the temp table. After performing any mappings or calculations on the temp table (as defined in the transforms), data is imported from the temp table to the destination table. The entries in the **Destination Column** field determine whether a column of data is imported to the destination table, and to which column in the destination table.

Setting the destination table

The **Destination table** field at the top of the tab specifies the table where imported data is to be saved. To specify this table, you can:

- Type the name of an existing table into the field, or use the **Choose table** button III to select an existing table.
- Enter a variable name in curly brackets. When using this approach, the destination table will be determined dynamically based on the variable value. For more information, see Using variables in imports.

If needed, you can use the **create destination table** link to create a new table to hold the imported data. This process opens the **Create Table** wizard and populates the **Columns** screen with the columns defined in the **Mapping** tab, using the temp table names and data types. Before using this option, you should first use **Auto-generate temp table and destination columns** in to generate the list of columns based on the source data. Once the new table is created, the destination table and destination columns are automatically set. Only administrators and users with the **Administer Tables** security permission can see this option and create new tables.

Populating the import column mappings

The top section of the Mapping tab must contain a row for each column of data in the source. Each column in the source data becomes a column in the import temp table, which is then mapped to a column in the destination table.

The easiest way to generate the list of columns is to use the **Auto-generate temp table and destination columns** is button in the top right of the tab. This process reads the source data and creates a row for each column. If a destination table is already specified, the auto-generate process attempts to map the source columns to the appropriate destination columns, based on column name. After auto-generating, you should review all entries to be sure they are correct.

NOTES:

- If the import source is set to **Prompt for file during execution**, you will be prompted to select a file to use for the auto-generated mappings.
- If the import source is set to import from multiple files, the mappings are generated based on the first file that is found in the specified folder.
- If the import uses a remote data connection, that connection is used to access the specified source file or database.
- If the import source is Ellucian, the import columns are automatically generated based on the selected data type on the Source tab. In this case, the only purpose of the auto-generate button is to map these columns to the destination columns.
- If the import source or the destination table uses variables, the Variables dialog opens so that you can specify variable values to use when generating the column mappings.

You can also define columns manually, or edit the settings after auto-generating:

- To add a row, click Add imported column mapping +. The new row is added below the row that is currently selected. This option is not available for certain source types that have a fixed set of source columns.
- To edit a row, type changes into the grid.
- To delete a row, select the row that you want to delete and then click **Remove mapping** X. This option is not available for certain source types that have a fixed set of source columns. Keep in mind that all columns in the import source must have a corresponding row in the mapping tab. If you do not need to save the corresponding data to the destination table (either because it is unneeded or because you need to manipulate data using a work column), simply leave the column unmapped.

• To change the order of rows, select the row that you want to move and then click the arrow icons to move it up or down.

IMPORTANT: For all import types except Ellucian, the columns must be listed in the order of the columns in the source. For example, the first column of the source data must be row 1 in the mapping grid, the second column must be row 2, and so on. If you perform any action that changes the existing order of rows, this may cause data to be imported incorrectly. After making manual adjustments to the grid, check to make sure that each mapping row in the grid matches up with the appropriate source column.

Item	Description
Source Column	The number of the corresponding source column in the import source. The first row in the grid corresponds with the first column in the source, and so on.
	These numbers cannot be edited. If you auto-generate the mappings, the name of the source column will display next to the number for reference. Names are only displayed when the import source is a database or a file with a header row.
	NOTE: For Ellucian imports, this field displays the source column name without a number, because the columns can be listed in any order.
Temp Table Column	The name of the column to create in the temp table to hold the imported data. The column name does not have to match the name of the column in the source. The data is imported in column order, not by name.
	Import variables can be used to define temp table column names. For more information, see Using variables in imports.
	NOTE: Temp table column names must follow the same rules as normal table columns. See Column naming requirements. Keep in mind that if you auto-generate the column mappings, the temp table column names are based on the headers in the source. These headers may contain spaces or other invalid naming conventions that should be manually corrected.

Each row in the top section of the Mapping tab has the following properties:

Item	Description
Туре	The data type of the column.
	The data type must match the data type of the destination column. The data type is automatically selected when you use the auto-generate mappings feature, or when you manually select a destination column. You only need to manually select a data type if the column is only for the temp table and does not have a destination column. EXCEPTION: If you are importing into a table with an identity column, and the identity column is mapped, the type should be set to Integer. For more information, see Importing data into tables with identity columns.
	If the data type is String , you must also specify the maximum length of the string field. This entry should match the string length of the destination column so that data is saved appropriately. To specify the string length, select the row and then click the browse button [] to the right of the field. In the Edit String Length dialog, type the string length (from 1 to 4000). The string length displays in parenthesis after the data type. For example: String (200) .
	NOTES:
	 To create a string column with unlimited size, leave the string field blank. You should only do this if you understand the ramifications.
	• If a string column has a destination column, the column in the temp table automatically matches the Unicode status of the destination column (True/False). However, if the string column does not have a destination column, Unicode is assumed as True.

Item	Description
Nulls	Determines how blank values in the import source are brought into the temp table column.
	 If disabled (the default behavior), then blank values are brought into the temp table column as the default value for the specified destination column. If the column is unmapped, then the system default value as defined for the column type is used.
	 If enabled, then blank values are brought into the temp table column as null values.
	This setting can impact transform statements that look for "blank" or undefined values in the temp table. You should set this as appropriate depending on whether you want to check for null values or the default value for the affected column.
	The presence of null values in the temp table does not necessarily mean that the imported data will contain null values. When the temp table values are imported into the destination table, the default values for the destination columns are always applied to any null values at that point. However, if the default value for a destination column is null, then the null values will be retained.
Destination Column	The name of the column in the destination table where you want this data to be saved.
	You can type the name of the column directly, or use the drop-down list to select a column name. The data type of each column is displayed in the drop-down list for reference. The data type of the destination column must match the data type specified in the mapping grid.
	NOTE: If the destination table uses a variable and you are manually creating column mappings, the selections in the destination column drop-down lists are based on the first choice listed for the variable.
	If this column is not intended to be saved to the destination table, select <not mapped="">. "Not mapped" is the default if you do not explicitly select a destination column.</not>
	Import variables or transform variables can be used to define destination column names. If you are using a variable for a destination column and you want to set the column to not mapped, the value of the variable must be blank for import variables and empty string (") for transform variables). For more information, see Using variables in imports.

Using work columns

You can use work columns in the temp table to perform calculations and data mapping before saving data to the destination table. For example, there may be a column in the source data that you need to manipulate before it can be saved to the destination table. In this case you would do the following:

- In the top mapping section, set the destination column for the source column to <not mapped>.
- In the work columns section, add a row for the work column, and set the destination column to the appropriate column in the destination table.
- On the **Transforms** tab, define a transform that manipulates the data from the original source column and populates the work column with the resulting desired data.

Any column defined in the **Work column mappings** section will be created in the temp table. If a destination column is specified, the data will be saved to the destination table.

- To add a row, click Add work column mapping +.
- To edit a row, type changes into the grid.
- To delete a row, select the row that you want to delete and then click Remove mapping X.
- To change the order of rows, select the row that you want to move and then click the arrow icons to move it up or down.

ltem	Description
Temp Table Column	The name of the work column in the temp table.
	Import variables can be used to define temp table column names. For more information, see Using variables in imports.
	NOTE: Temp table column names must follow the same rules as normal table columns. See Column naming requirements.
Туре	The data type of the work column.
	See the Type entry in the previous table for more information.

Each row in the work columns section of the Mapping tab has the following properties:

Item	Description
Null	Determines the starting values for work columns in the temp table (before transforms are applied).
	 If disabled (the default behavior), then the work column starts with the default value for the specified destination column. If the column is unmapped, then the system default value as defined for the column type is used.
	 If enabled, then the work column starts with null values.
	This setting can impact transform statements that look for "blank" or undefined values in the temp table. You should set this as appropriate depending on whether you want to check for null values or the default value for the affected column.
	The presence of null values in the temp table does not necessarily mean that the imported data will contain null values. When the temp table values are imported into the destination table, the default values for the destination columns are always applied to any null values at that point. However, if the default value for a destination column is null, then the null values will be retained.
Destination Column	The name of the column in the destination table where you want this data to be saved. If this column is used only for calculations in the temp table and is not intended to be saved to the destination table, select <not mapped="">.</not>
	See the Destination Column entry in the previous table for more information.

Column naming requirements

When naming temp table columns, the following requirements apply:

- Column names can use standard ASCII alphanumeric characters (a-z, 0-9) and the underscore character. No spaces and no other special characters are allowed.
- The first character in a column name cannot be a number or an underscore. For example, you can have a column named Plan 09 but you cannot have a column named 09 Plan.
- Columns cannot be named Col#, where # is a number, such as Col1, Col2, etc. Other column name constructions with text and numbers are allowed—for example, BUD1 is valid.
- Database reserved words should be avoided whenever possible.
- Column names are limited to 50 characters by default.

- Miscellaneous behavior notes
 - When importing numeric values, the number of digits in the import source cannot exceed the number of digits allowed by the data type assigned to the temp table column.
 - If column data is null in the temp table and the destination column is a String column, the null data is converted to an empty string when the data is saved to the destination table (rather than using the column's default value).

Import Wizard: Transforms tab

The **Transforms** tab of the Import Wizard contains a set of statements to perform actions on the data in the temp table, in order to transform the data before saving it to the destination table.

When the import is executed, the transforms are processed after import variables have been selected and after the data query has been made to the source table or file. Transforms are processed in the order listed in the tab.

Transforms can use SQL statements or built-in Axiom transform functions.

Managing transforms

- To add a transform, click Add transform +. The new transform is added below the row that is currently selected.
- To duplicate a transform, select the row that you want to duplicate and then click **Duplicate** selected transform =.
- To edit a transform, make changes directly in the grid.
- To delete a transform, select the row that you want to delete, and then click Remove transform X.
- To change the order of transforms, select the row that you want to move and then use the arrow icons to move it up or down.

The following settings are defined for each transform:

Field	Description
Number	The ordinal number assigned to each transform, to determine processing order. This setting is managed by Axiom Enterprise Decision Support. When you change the order of rows, Axiom Enterprise Decision Support automatically changes the order number.
Transform	A SQL statement, or a built-in Axiom import function. To define the transform, double-click the field or click the browse button () in the field. The Edit Transform dialog opens so that you define the transform. See Defining transform statements.

Field	Description
Description	Displays the description of the transform. This is for reference only. You can define this description when defining the transform.
Target Variable	Displays the name of the target variable for the SQL transform.
	For SQL statements, target variables are defined when editing the statement. Target variables do not apply to import functions. See Defining transform statements.
- C	Select the Pause check box if you want the import to pause and display the temp table after processing this transform. This option only applies when executing the import in development mode, using the option Pause after specified transforms and display current temp table data . For more information, see Executing imports in development mode.
0	Select the Disable check box to disable the transform. When the import is processed, this transform will be skipped.

Transform notes

If the import contains a transform that zeroes old data before importing the new data, the **Pre-Save Validate** function should be used before the zero step. This allows you to identify any data issues before deleting existing data. If invalid data is found, the import is aborted and the zero step will not be processed.

Defining transform statements

For each transform listed on the **Transforms** tab of the **Import Wizard**, you must use the **Edit Transform** dialog to define the associated SQL statement or transform function. To open the dialog, click the ... button in a transform field.

At the top of the Edit Transform dialog, specify whether the transform is a SQL statement, or a Built-in Function. By default, SQL is selected.

Defining a SQL statement transform

If the transform is a SQL statement, complete the following:

Field	Description
Enter a SQL statement	Type or copy and paste the SQL statement into the text editor. To validate the syntax of the SQL statement, click the Check SQL syntax button 4.
	NOTE: When referencing Axiom Enterprise Decision Support tables in a SQL statement, place the table name in curly brackets. For example, to reference the table DEPT, use $\{DEPT\}$.
	The SQL statement can use import variables and/or transform variables (that were defined in a previous transform statement). See Using variables in imports. If the statement includes variables, then the ability to check the SQL syntax is not available.
	Variables can be used in calculations in the SQL statement, for example, to calculate the value of a second variable based on the first variable.
	NOTE: If the variable defines the destination table, then you must place the variable in double curly brackets when you use it in a SQL statement, so that the eventual table name value is enclosed in curly brackets as expected. For example, if you have a variable named "destinationtable", you would reference that variable as {{destinationtable}}. That way, when the {destinationtable} value is defined, it will resolve as {GL2020}.
	For some examples of common SQL transforms, see Example SQL statements for transforms.
Target Variable Name	If you want to define a target variable for the transform, type the name of the variable.
	The SQL statement can be any query that results in a single value. If the query returns multiple values, the target variable uses the first value in the return set.
	The target variable can be used in subsequent transforms, or as destination columns in the Mapping tab. To use the variable in the import, enter the variable name into one of the supported areas of the import settings, enclosed in curly brackets {}. For example, if the variable name is Column, you would enter {column}.
	Transform variable names cannot use the same name as import variable names, and vice versa. Every variable name within the import must be unique.
	Transform variables should not use the same name as an Axiom Enterprise Decision Support table that you plan to reference in the import, because the syntax for table names is the same as for variables (both are placed in curly brackets). If a variable name and a table share the same name, any references will be interpreted as the variable, not the table.

Field	Description
Description	If desired, type a description for the transform.
	The description may be useful when viewing the list of transforms on the Transforms tab, to easily identify specific transforms.

Using a transform function

If the transform is a built-in function, select the function that you want to use from the **Function** list, and then complete the parameters for the function.

- Add new dimension elements
- Custom data validation
- Delete rows
- Pre-save validate
- Update temp column

You can edit the description for the transform if desired. By default, the standard description of the function is used.

NOTE: If you select a different function, the current description will be overwritten with the standard description of the new function. If you go back to the original function before saving the transform, the original description will be preserved.

Add new dimension elements during an import

To add new dimension elements during an import, create a transform step that uses the built-in function **Add new dimension elements**. You can use this function to add new accounts, departments, or other dimensions as part of the import.

This function is intended to be used in cases where the import data may contain new dimension elements that have not yet been added to the relevant reference tables in Axiom Enterprise Decision Support, and the organization wants these records to be added automatically as part of the import. Other organizations may prefer to prevent these records from importing and instead add the new dimension elements manually, in which case this function should not be used.

If new dimension elements are added by this function, then after the import is complete an administrator will most likely need to edit the reference table in order to fill in grouping columns for the new element. This is why the function supports notifying one or more users of the added dimension elements. Keep in mind that it is possible for invalid dimension elements to be added when using this function, if the source data for the import is not correct.

Function parameters

This function uses the following parameters:

Parameter	Description
Table	The name of the dimension table to update. This can only be reference tables that have a single-level lookup relationship with the destination table for the import.
	For example, if you are importing data into GL2020, and that table has columns Acct and Dept which have lookup relationships with the Acct and Dept tables, then you can add new dimension elements to the Acct and Dept tables.
	When this transform step is performed, the data in the temp table will be validated against this dimension table. If any dimension elements are found that do not match the dimension table, those new dimension elements will be added to the dimension table.
Column defaults	Optional. Values to use for grouping columns in the target dimension table when new dimension elements are added. You can add as many column=value pairs as needed, separated by commas. See the discussion following this table for more information on the specific syntax.
	Any columns in the target dimension table that are not listed here will use the column's default value (as defined in the column properties) when the new record is added.
	If the target dimension table contains any validated columns , then you must do one of the following:
	 List the validated column in this parameter with a valid value. That valid value will be used when the new records are added to the table. OR
	 Make sure the validated column has a valid default value in its column properties. If the validated column is not listed in this parameter, then its default value from the column properties will be used when the new records are added to the table.
	If the validated column is not assigned a valid value using one of these options, then an error will occur when this transform is processed and the import cannot continue.
Email notification	Users and or roles to notify via email when new dimension elements are added to the table. Enter a list of one or more user and role names, separated by commas.
Task pane notification	Users and or roles to notify via the Notifications task pane when new dimension elements are added to the table. Enter a list of one or more user and role names, separated by commas.

Defining column defaults

You can populate a grouping column using a fixed default value, or by using a value from a column in the import temp table.

• To use a fixed default value, use the following syntax:

GroupingColumnName='StringValue',GroupingColumnName=NumericValue, etc.

Where *GroupingColumnName* is the grouping column in the target dimension table. If the grouping column is a string column, then the value must be placed in single quotation marks, just like when writing a filter statement.

• To use a value from a column in the import temp table, use the following syntax:

GroupingColumnName={temptable}.TempTableColumnName, etc.

For example, if the temp table contains a column named Desc that you want to use to populate the Description column in the target dimension table, you would enter: Description= {temptable}.Desc

NOTE: If the default values are populated from a column in the import temp table, those values must be the same for all instances of a particular dimension element. If the same dimension element has multiple rows in the temp table with different values in the specified temp table column, then the maximum value will be placed in the grouping column for that dimension element.

Example

To add new departments when importing GL actuals data, the function parameters could look as follows:

Table:	Dept
Column defaults:	Description={temptable}.Desc, DeptStatus='New'
Email notification:	sysadmins
Task pane notification:	jdoe

When the import is run, any departments that do not already exist in the DEPT table will be added to that table. The Description column in the DEPT table will be populated with the value from the Desc column in the import temp table, and the DeptStatus column in the DEPT table will be populated with the string "New". An email notification of the added departments will be sent to users in the role sysadmins, and a task pane notification of the added departments will display for user jdoe.

All other columns in the DEPT table will use the default value defined for the column in the column properties.

Deleting rows of data as part of an import

To delete rows from a target table during an import, create a transform step that uses the built-in function **Delete rows**. For example, you could use this function to clear the existing rows in a table before importing new data.

Function parameters

Parameter	Description
Table	The name of the table from which to delete rows.
Filter	Optional. A filter used to identify rows to delete. If omitted, all rows in the table are deleted.
	The filter can be against the specified table or against a lookup reference table. Standard Axiom filter criteria syntax applies.
	NOTE: The temp table cannot be referenced in the filter.

For example, if the table is GL2020, then the filter could be something like:

```
GL2020.YrMo='{YrMo}'
```

Where the value of YrMo is defined by an import variable.

```
Dept.Region='North'
```

Where the GL2020 table has a column Dept that looks up to the Dept table.

NOTES:

- If you are only updating specific columns in the destination table, then you may want to use a SQL step to zero data rather than using the Delete rows function.
- If all rows in the target table are being deleted, Axiom Enterprise Decision Support will perform a truncate instead of a delete, for improved performance. Truncate cannot be used if a filter is defined in the Delete rows function, or if the user performing the import has filtered access to the target table.

Updating data in the temp table based on another column

To update data in the temp table based on another column, create a transform step that uses the builtin function **Update temp column**. This function updates a column in the temp table from a specified column in another table, using the given match key. For example, this function would typically be used to look up the credit reversal sign from the Account table.

Function parameters

Parameter	Description
Temp table column	The name of the column in the temp table to be updated.
Source column	The name of the column to use to update the temp table. Fully qualified Table.Column syntax must be used.
Match columns	The columns to use to match data to update, in the format <i>TempColName</i> = SourceColName. Separate multiple match sets with commas.
	For example: ACCT = ACCT, DEPT = DEPT
Temp table filter	Optional. A filter used in the SQL WHERE clause against the temp table, to identify rows to update. If omitted, all matching rows are updated.
	Fully qualified Table.Column syntax must be used. The temp table must be represented as a variable.
	<pre>For example: {temptable}.ACCT > 20000</pre>
	NOTE: If a temp table column uses a database reserved word (such as "Key") then in the filter you must place that column in double quotation marks and use all upper-case letters. Use of database reserved words should be avoided whenever possible.

Validating data to be imported before the save

To validate data against lookup columns *before* performing the save for the import, create a transform step that uses the built-in function **Pre-save validation**. This function takes no parameters.

This is the same validation process that occurs automatically as part of the actual save for the data import. By performing the validation before the save, you can check for invalid data and abort the process before performing irrevocable data changes in subsequent transform steps (such as deleting old data in the destination table). If instead you want to perform a different custom validation, see Performing custom data validation for an import.

If any destination columns in the import are validated columns, this function validates the data in the temp table against the lookup columns. If exceptions are found, an error message is written to the import log and the import is aborted.

NOTE: If this function is used in an import, then the option to **Ignore lookup and key errors** does not apply. If invalid data is found in the pre-save validation step, then the import is automatically aborted and does not proceed to the data save.

Performing custom data validation for an import

To exclude rows of data from an import based on a custom criteria, create a transform step that uses the built-in function **Custom data validation**. Any data in the temp table that matches the specified filter will be excluded from the save.

This custom validation is separate from the built-in lookup validation that occurs as part of the data save (or by use of the Pre-Save Validate function).

Parameter	Description
Filter	A filter used in the SQL WHERE clause against the temp table. Any rows that match this filter are <i>excluded</i> from the save, and will be reported in the import error log with any other validation errors.
Failure Message	An error message to display next to records that are excluded due to this data validation step.
	Errors are logged in a column named AXTRANSFORM_StepNumber , where StepNumber is the number of the associated transformation step. For example: "AXTRANSFORM_5" when the associated transform is step 5 in the list.

Function parameters

For example, you might want to check to make sure that data exists in a particular column of the temp table before importing that record. If the necessary data is missing, then that record will be excluded from the import. In this case the function settings would be something like the following:

Filter: Benchmark=0

Failure Message: The Benchmark data is missing

Where Benchmark is the column in the temp table that must have a value in order to import the record.

Example SQL statements for transforms

The following example SQL statements can be used to perform common transforms for imports.

Converting data types

```
Convert a number to a string to populate into a string column
UPDATE {temptable} SET RATESTRING = CONVERT(NVARCHAR, RATENUM) WHERE
RATENUM IS NOT NULL
```

If Unicode is disabled for the string column, then convert to varchar instead.

```
Convert a string to a number to populate into a numeric column
UPDATE {temptable} SET RATENUM = CONVERT (BIGINT, RATESTRING) WHERE
RATESTRING IS NOT NULL
```

or

```
UPDATE {temptable} SET ACCT=CAST (tAcct as BigInt)
```

If you are using Integer 32 or Integer 16, then convert to int or smallint instead.

```
Convert a datetime field to a concatenated string (yearmo)
UPDATE {temptable} SET YEARMO = YEAR(DateTimeField) * 100 + MONTH
(DateTimeField)
```

Convert a datetime field to a concatenated string (yearmonthday)

```
UPDATE {temptable} SET YEARMONTHDAY = (YEAR(DateTimeField) * 100 + MONTH
(DateTimeField)) * 100 + DAY(DateTimeField)
```

Other conversion statements

CONVERT (STRING (xx), RATENUM)

CONVERT (BIGINT, RATESTRING)

CONVERT (DECIMAL (28, 14), RATESTRING)

Math transformations

Convert values to a negative number if a credit column exists in the temp table

UPDATE {temptable} SET M1 = - M1, M2 = -M2, M3 = -M3, M4 = -M4, M5 = -M5, M6 = - M6, M7 = -M7, M8 = -M8, M9 = -M9, M10 = -M10, M11 = -M11, M12 = -m12 WHERE Credit = 'C'

Perform math on a field if another field in the temp table contains a value

UPDATE {TempTable} SET M1 = M1 * Rate WHERE Rate <> ''

Round a value to 2 decimals and replace the value

UPDATE {temptable} SET RATE = ROUND(RATE, 2)

Divide two integer numbers and keep the decimal

Remember that an integer divided by an integer returns only an integer (example: 5/7 = 0). If you want to capture the decimal remainder, you must cast the integer values as decimal:

CAST(INT1 AS DECIMAL(28,14)) / CAST(INT2 AS DECIMAL(28,14))

Pivoting data

Pivot incoming data with respect to time

```
UPDATE {temptable} SET
M1 = case when (TheMonth=1) then Amt else 0 end,
M2 = case when (TheMonth=2) then Amt else 0 end,
ETC.
```

Pivot data from columns to rows (using a monthly variable)

```
Update {temptable} set Amt =
  Case
   When ({VarMonth}=1) then M1
   When ({VarMonth}=2) then M2
   ETC.
   Else 0
   End
```

General temp table transformations

Perform a find and replace in a data column to detect the # character and replace it with nothing UPDATE {temptable} SET AcctDesc = REPLACE(AcctDesc, '#', '')

Place zeros in a field rather than null values
UPDATE {TempTable} SET Rate = 0 WHERE Rate IS NULL

Insert new records into the temp table by summarizing transaction detail records INSERT INTO {temptable} (DEPT,ACCT,TRANSID,M1,M2,M3,DELETE) SELECT DEPT,ACCT,'Summarized',SUM(M1),SUM(M2),SUM(M3),'DeleteFlag' FROM {temptable} GROUP BY DEPT,ACCT

Add an identity or row number to each record, using the system column AxReference UPDATE {temptable} SET MYROWNUMBER={temptable}.AxReference

Delete records from the temp table with a flag set

DELETE from {temptable} where FLAG = 'DeleteFlag'

Delete records from the temp table where the dimension combination already exists in the destination table

This example might be used to load only new transactional records and leave existing destination records untouched.

DELETE FROM {temptable} WHERE {temptable}.DEPT IN (Select DEPT from {TRANSACTIONTABLE} group by DEPT) and {temptable}.TRANSID IN (Select TRANSID from {TRANSACTIONTABLE} group by TRANSID)

Concatenate strings together with a hyphen in between

UPDATE {temptable} SET DESCRIPTION = DESC1 + ' - ' + DESC2

Fill an entire column with the same value

UPDATE {temptable} SET RATE = 0

Copy the left 5 characters into a new column UPDATE {temptable} SET ShortDesc = LEFT(LongDesc, 5)

Subtract 1 character from the end of a field and copy the remaining text to a new column UPDATE {temptable} SET ShortDesc = LEFT(LongDesc, (LEN(LongDesc) - 1))

Aggregate balance sheet records

UPDATE	{temptable}	SET	M1=BegBal+M1
UPDATE	{temptable}	SET	M2=M2+M1
UPDATE	{temptable}	SET	M3=M3+M2
UPDATE	{temptable}	SET	M4=M4+M3
UPDATE	{temptable}	SET	M5=M5+M4
UPDATE	{temptable}	SET	M6=M6+M5
UPDATE	{temptable}	SET	M7=M7+M6
UPDATE	{temptable}	SET	M8=M8+M7
UPDATE	{temptable}	SET	M9=M9+M8
UPDATE	{temptable}	SET	M10=M10+M9
UPDATE	{temptable}	SET	M11=M11+M10
UPDATE	{temptable}	SET	M12=M12+M11

Import into only the current period using a variable

On the Mapping tab, for each column where you want to use a variable, set the destination column as {M1}...{M12} instead of the normal M1 ... M12.

On the Transforms tab, create 12 statements—one for each data column that you set up with a variable. The SQL for each statement is as follows (each statement will have a different current period value and a matching column name):

```
SELECT RESULT =
  CASE
  WHEN {CurrentPeriod} = 1 THEN 'M1'
  ELSE ''
  END
```

In the **Target Variable Name** section of the transform, type the name of each variable. In the text above, the variable name would be M1. The next statement would be M2, then M3, and so on. This will set the variable value to the result of the SQL statement. Columns that do not match the current period will be set to ", which means they will not be imported to the destination table.

Abort the import if no data exists to import

```
IF (SELECT COUNT(*) FROM {temptable}) = 0
```

```
RAISERROR ('Temptable was empty, aborting import', 11, 0)
```

Updating a table other than the temp table

Update a reference table with new elements that currently exist in the temp table, but not in the reference table

Whenever possible, the new built-in function Add new dimension elements should be used for this instead of a SQL statement. See Add new dimension elements during an import. If this function cannot be used, then use a SQL statement like the following:

INSERT INTO {ACCT} (ACCT, Description) Select ACCT, 'Exception from Import'
FROM {temptable} WHERE NOT EXISTS (SELECT ACCT FROM {ACCT} WHERE
{temptable}.ACCT = {ACCT}.ACCT GROUP BY ACCT) GROUP BY ACCT

Zero out columns in a destination based on a flag in a reference table

```
UPDATE {{destinationtable}} set M1=0,M2=0,M3=0,M4=0,
M5=0,M6=0,M7=0,M8=0,M9=0,M10=0,M11=0,M12=0 FROM {{destinationtable}} INNER
JOIN {ACCT} ON {ACCT}.ACCT={{destinationtable}}.ACCT WHERE
{ACCT}.ZEROME='1'
```

This example assumes that {destinationtable} is an import variable that resolves to a table name.

Delete large numbers of records from a table

```
DECLARE @RowsDeleted INTEGER
SET @RowsDeleted = 1
WHILE (@RowsDeleted > 0)
BEGIN
DELETE TOP (10000) FROM MyTable [WHERE ....]
SET @RowsDeleted = @@ROWCOUNT
END
The WHERE clause in the DELETE step is optional.
```

Importing data into tables with identity columns

Columns that use the Identity data type contain automatically-generated, unique ID numbers. If you want to import data into a table with an identity column, special considerations apply. The identity column can be mapped as part of the import, or left unmapped. The decision of how to handle this depends on whether you are updating existing data or only creating new records, and whether you want new records to use automatically generated numbers or specific numbers.

Updating existing data with an identity key column

If the import is updating existing data and the table contains an identity key column, the identity column must be mapped. In order to update existing data, the import must be able to match the value in the import temp table with an identity key in the destination table.

When mapping a temp table column to an **Identity** column in the destination table, the data type of the temp table column must be set to **Integer**. (If the identity column is **Identity32**, the temp table column should be set to **Integer32**.)

Identity import - Fla	at File Import - TestIDI riables Mapping T	Data Table			?	×
Map the imported columns and extra work column names can reference variables using Destination table TestIDData						
Source Column	Temp Table Co	umn Typ	2	Nulls	Destination Column	Column is
1	TestID	Integer	-		TestID	Identity
2	Description	String (EO)			<not mapped=""></not>	
2	Description	String (50)			💡 TestID	Identity
3	Owner	String (50)			Description	String (50)(UNICOD
4	Townlate	Station (EQ)			Dept	Integer
4	Template	String (50)			Owner	String (50)(UNICOD
Work column mappi	ngs:				Template	String (50)(UNICOD
Temp Table	Column	Type	Nulls	Des	Extra	Numeric
		.76-			Date	Date
Save As				Apply	OK	Cancel

Creating new records with an identity key column

If the import is creating new records in the destination table, you can opt to use automatically-generated ID numbers in the identity column or you can specify the ID numbers.

If you want to use automatically-generated ID numbers, there are two ways to accomplish this:

• Leave the identity column unmapped. When the identity column is unmapped, all records in the import data are created as new records with automatically-generated ID values. This configuration is appropriate when the only purpose of the import is to create new records. If the import data contains a mix of new and updated records, then the identity column cannot be left unmapped.

This is also the only use case where it is possible to leave a key column unmapped in an import.

• Map the identity column, but leave the column blank for new records. When the identity column is mapped, but the temp table column is left blank, new records are created for the blank values using automatically-generated ID values. This configuration is appropriate when the import data contains a mix of new and updated records. If the column contains an existing identity value, the existing record is updated.

In some cases, you may have a need to create new records using specific identity values. You can do this by mapping the identity column, and populating the import data with the desired identity values. When new records are created in the table, they will use the specified values instead of using automatically-generated values. When using this approach, keep in mind the following:

- In order to create new records, the values in the temp table column must not already exist in the destination table. If a temp table value matches an existing value, then the existing record is updated instead of creating a new record.
- The "seed" value for the identity column will be reset to the largest inserted value, instead of continuing where it left off. For example, if the last auto-generated value was 20, but you import a specific new value of 80, the next auto-generated value will start at 81.
- It is not possible to create new records with a mix of automatically-generated ID values and specific values. If you want to create any new records with specific values, then all new records in the import data must be assigned specific values. The temp table column cannot be left blank when using this configuration.

When mapping a temp table column to an identity column, the data type of the temp table column must be Integer (see previous section).

Other considerations

It is also possible for a table to contain a non-key identity column. This column can be mapped or unmapped for an import, and will be treated as follows:

- If the identity column is unmapped, then new records are created using automatically-generated values, and existing values are unchanged. This is the recommended approach unless you need to create new records with specific identity values (an unlikely situation).
- If the identity column is mapped, and new records are created in the table, the value in the temp table column will be used if it is available. If the value already exists in the identity column on another record, then the value is ignored and an automatically-generated value is used. When updating existing records, the temp table value is ignored and the existing values are left as is (in other words, it is not possible to change the identity value on an existing record).

As mentioned previously, if new records are created with specific values, the "seed" value for the identity column is reset to the largest inserted value, instead of continuing where it left off.

Data import sequence

There are a few Reference tables with look ups to other reference tables. In those cases, import the referenced tables first. With this exception, you can load reference table data loads in any order. It may need to refresh the various reference tables more frequently than others. (For example, you need to update Provider and CostItem more frequently than MSDRG and HCPCS).

Make sure to first import Data table loads with the Patient and Encounter imports. This is due to the dependency of the other tables to encounter data table based on the Encounter Seq. Execute Encounter Staging before Encounter. After you load the Encounter table for the specific period, you can perform the other imports in any sequence, with one exception. You must execute Cost Detail Staging before CostDetail.

The following table lists the recommended order for loading the files, however, you can run the remaining imports in any order.

File Number	Name
1	Encounter Patient
2	Encounter Staging
3	Encounter
4	Encounter Custom
5	CostDetail Staging
6	CostDetail
7	Enc_CPT
8	Enc_Diag
9	Enc_Payment
10	Enc_Payor
11	Enc_Proc
12	Enc_Provider
13	Surgical

Validating imported data

Data validation is required during the implementation as well as ongoing for recurring data loads (imports) to the Axiom system. Data validation should be performed by both your organization and Syntellis during the implementation process.

The following table lists the validation reports available:

Report	Description
Audit_01 Income Statement Summary report	Provides a point of validation to ensure proper import of the General Ledger file into the Axiom system from the source system.

Report	Description
Audit_02 Encounters by Month report	Allows you to validate the Encounter data loaded to the Encounter table by summarizing encounter cases, charges (chargeable records), and charge-per-case by month.
Audit_03 Detail Charges to Billing report	Summarizes Cost Detail Volume and Charge totals (only chargeable items at this point) for monthly validation to the billing source system based on the posting date of Cost Items for a selected month and entity.
Audit_04 Detail Charges to GL report	Allows you to validate Cost Detail data by comparing the cost detail (chargeable items with a unit or total charge amount) by postdate to Patient Revenue on the General Ledger.
Audit_05 Payroll Source Reconciliation report	Allows you to evaluate and reconcile payroll related data (dollars and hours) by month.

Running the Audit_01 Income Statement Summary report

The Income Statement Summary report provides a point of validation to ensure proper import of the General Ledger file into the Axiom system from the source system. You need to generate a similar report from the source system to validate against this standard Costing Income Statement Summary.

To run the Audit_01 Income Statement Summary report:

1. From the Enterprise Decision Support home page, in the **Reporting** section, click **Costing Report** Library.
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| Cost Accounting | | | |
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2. Under the Data Import Validations section, click the Audit_01 Income Statement Summary.xlsx link.

NOTE: The report opens as a tab in the Desktop Client version.

- 3. Refresh the report by clicking Refresh Data in the Main ribbon tab, or pressing F9.
- 4. In the Refresh Variables dialog, select the variables to include in the report, and click OK.

When compared to the generated source system report:

Audit 01 - Income Statement Summary														
KH COSTING														
For The Period Ending March 2014														
Consolidated	YTD	Total	July	August	September	October	November	December	January	February	March	April	May	June
	FY2014	FY2014	2013	2013	2013	2013	2013	2013	2014	2014	2014	2014	2014	2014
Patient Revenue														
Inpatient	663,522,941	889,579,894	74,821,032	70,897,017	71,294,627	74,063,391	70,014,604	72,441,677	81,440,985	71,003,560	77,546,047	73,895,430	75,235,076	76,926,446
Outpatient	425,143,480	577,895,509	48,967,503	51,198,976	47,405,238	48,302,427	43,137,143	46,260,850	48,702,955	45,651,808	45,516,581	50,764,507	51,228,721	50,758,801
Other Patient	63,859,136	87,214,641	7,183,972	6,559,837	6,672,842	8,372,411	6,316,211	6,457,768	7,461,478	7,047,513	7,787,103	7,225,982	7,791,020	8,338,503
Total Patient Revenue	1,152,525,557	1,554,690,043	130,972,508	128,655,830	125,372,707	130,738,229	119,467,958	125,160,294	137,605,419	123,702,882	130,849,731	131,885,919	134,254,817	136,023,750
Deductions From Revenue														
Charity Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deductions From Revenue	603,009,968	832,942,802	67,545,694	67,626,048	67,503,265	70,263,666	62,782,501	65,993,597	77,406,134	69,770,986	54,118,077	69,253,924	80,711,192	79,967,718
Other Discounts	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bad Debt	84,454,711	101,737,311	13,286,135	9,588,043	7,490,403	8,957,320	11,107,156	11,960,555	7,561,026	6,569,488	7,934,585	12,719,447	5,481,316	(918,163)
Total Deductions From Revenue	687,464,679	934,680,113	80,831,828	77,214,091	74,993,668	79,220,986	73,889,656	77,954,152	84,967,161	76,340,474	62,052,662	81,973,371	86,192,508	79,049,555
Net Patient Revenue	465,060,878	620,009,930	50,140,679	51,441,739	50,379,038	51,517,244	45,578,301	47,206,142	52,638,258	47,362,408	68,797,068	49,912,548	48,062,309	56,974,195
Other Operating Revenue	9,174,507	12,453,789	1,209,914	900,819	967,896	1,140,959	992,321	983,486	1,154,314	836,894	987,904	1,244,596	1,026,216	1,008,470
Total Operating Revenue	474,235,385	632,463,719	51,350,593	52,342,558	51,346,934	52,658,203	46,570,622	48,189,628	53,792,572	48,199,302	69,784,972	51,157,144	49,088,524	57,982,665
Operating Expenses														
Salaries & Wages	170,124,344	230,015,330	18,591,837	18,698,635	18,629,535	19,199,741	19,033,930	18,888,224	19,316,139	18,320,365	19,445,938	19,033,820	19,775,979	21,081,187
Benefits	44,902,004	57,883,803	4,627,461	5,041,482	5,089,094	4,607,135	4,789,371	4,317,051	5,668,699	4,498,303	6,263,408	2,471,393	5,129,592	5,380,814

- This report should equal or tie out completely in total and ideally by line items.
- Line item variances are likely due to classification at the FSDetail level in the ACCT dimension table and the definition of the financial statements and/or reports used as the comparison.
- Variances in total are likely due to filters applied on either side of the reporting, e.g., defined Entities.

NOTE: You need to update any new accounts or departments added during an import in the Account and Department dimension tables for the reconciliation report to tie out completely.

Running the Audit_02 Encounters by Month report

The Encounters by Month report allows for validation of Encounter data loaded to the Encounter table. This report summarizes encounter cases, charges (chargeable records), and charge-per-case by month for validation to the source system for a selected entity and date range. It ensures that the encounters in the Axiom system are the same as what the external system is reporting.

You can run this report admission or discharge, and compares the selected refresh variable to the appropriate date to the YRMO defined date in the Refresh Variables dialog. You can also run this report by Entity.

To run the Audit_02 Encounters by Month report:

1. From the Enterprise Decision Support home page, in the **Reporting** section, click **Costing Report** Library.

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Service Lines > Population > Episodic Grouper > Encounter Builder > Episodic Grouper > Counter				
Cost Accounting				
Costing Process > Costing Process > Costing Process >				
Reporting				
Costing Report > Report Builder >				

2. Under the Data Import Validations section, click the Audit_02 Encounters by Month.xlsx link.

NOTE: The report opens as a tab in the Desktop Client version.

- 3. Refresh the report by clicking Refresh Data in the Main ribbon tab, or pressing F9.
- 4. In the Refresh Variables dialog, do the following, and click OK:

Option	Description
Select Admits or Discharges	Select to populate the report with admits or charges.
Entity	Select one or more entities.
Beginning of Calendar Period	Select a beginning date to include in the report.
End of Calendar Period	Select an end date to include in the report.

The report populates inpatient and outpatient encounters separately, with IP grouped for inpatient and OP/ER grouped for outpatient based on how the Patient Types are mapped in the Patient Type dimension table to the DSSPtType IP, OP, or PB.

Audit 02 - Encounters by Month

KH COSTING

As of June, 2014

Consolidated	ALL INF	ATIENTS (DSSPtType	= 'IP')	ALL OUTPAT	ALL OUTPATIENTS (DSSPtType = 'OP or 'PB')			
Admission Date Year Month	Admissions	Charges	Charges/PC	Visits	Charges	Charges/PC		
201307 (July)	1,059	1,059,000	1,000	3,625	3,625,000	1,000		
201308 (August)	861	861,000	1,000	4,008	4,008,000	1,000		
201309 (September)	829	829,000	1,000	3,629	3,629,000	1,000		
201310 (October)	885	885,000	1,000	4,246	4,246,000	1,000		
201311 (November)	797	797,000	1,000	3,488	3,488,000	1,000		
201312 (December)	804	804,000	1,000	3,753	3,753,000	1,000		
201401 (January)	918	918,000	1,000	4,347	4,347,000	1,000		
201402 (February)	832	832,000	1,000	4,942	4,942,000	1,000		
201403 (March)	864	864,000	1,000	4,894	4,894,000	1,000		
201404 (April)	970	970,000	1,000	4,908	4,908,000	1,000		
201405 (May)	997	997,000	1,000	4,459	4,459,000	1,000		
201406 (June)	900	900,000	1,000	4,263	4,263,000	1,000		
Totals	10,716	10,716,000	1,000	50,562	50,562,000	1,000		

To validate the data imported to the encounter table, you need to generate a report from the source system, validating between the Source and Encounter table.

When comparing the encounter-level data to the Costing General Ledger:

- This data should tie out completely in terms of Total Charges by month.
- Differences could be due to filtering issues with source system extract creation.

If the extracts are not matching the reporting from source system, you may need to revisit and update the extracts.

Running the Audit_03 Detail Charges to Billing report

This report summarizes Cost Detail Volume and Charge totals (only chargeable items at this point) for monthly validation to the billing source system based on the posting date of Cost Items for a selected month and entity.

The Detail Charges to Billing report allows for validation of Cost Detail data (chargeable items with a Unit Charge value) through comparison of summed volume and charges by department.

To run the Audit_03 Detail Charged to Billing report:

1. From the Enterprise Decision Support home page, in the **Reporting** section, click **Costing Report** Library.

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Costing Process > Costing Process > Checklist				
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Costing Report Report Builder				

2. Under the Data Import Validations section, click the Audit_03 Detail Charges to Billing link.

NOTE: The report opens as a tab in the Desktop Client version.

- 3. Refresh the report by clicking Refresh Data in the Main ribbon tab, or pressing F9.
- 4. In the Refresh Variables dialog, do the following, and click OK:

Option	Description
Select Entity (leave blank for all) (optional)	Select the one or more entities.
Select Calendar Year and Month	Select the year and month.

Audit 03 - Detail Charges to Billing By Department

Portland Health Care

For April, 2017

Consolidated

Dept	Description	Quantity	Charges	
200060302	Family Practice Clinic	1,317	\$246,602	
200061101	Neuroscience Center	562	\$177,980	
200064900	Distribution Willamette Memorial Hospita	al 537	\$175,690	
200065100	Emergency Department Willamette Mem	orial F 8,714	\$4,353,752	
200065120	Emergency Department Tigard	1,733	\$844,910	
200066100	Laboratory Willamette Memorial Hospita	l 108,409	\$8,756,450	
200066120	Laboratory Tigard	20	\$513	
200066140	Laboratory Prescott	6,647	\$459,438	
200066200	Cardiovascular Willamette Memorial Hos	pital 3,707	\$2,730,236	
200066220	Cardiovascular Tigard	130	\$243,433	
200066230	Cardiology Dundee	49	\$87,143	
200066240	Cardiovascular Prescott	105	\$165,281	
200066600	Respiratory Therapy Willamette Memoria	l Hosk 9,259	\$1,628,904	
200066601	Sleep Lab Center	148	\$213,956	
200066620	Respiratory Therapy Tigard	158	\$28,949	
200067000	Radiology Diagnostic Willamette Memor	ial Ho: 3,363	\$924,833	
200067001	Interventional Radiology Willamette Men	norial 1,032	\$1,537,536	
200067020	Radiology Diagnostic Tigard	460	\$125,408	
200067040	Radiology Diagnostic Prescott	125	\$41,632	
200067120	Medical Oncology Tigard	1,333	\$395,731	
200067140	Medical Oncology Prescott	4,472	\$1,293,767	
200067201	CT Willamette Memorial Hospital	1,509	\$5,515,167	
200067202	MRI Willamette Memorial Hospital	292	\$1,283,411	

After you select variables, the report populates total volume and charges by department for the selected calendar year and month.

To validate the data pulled into the Cost Detail, generate a report from the source system, validating between the source and Cost Detail table. When you compare this data to the data of the billing source system:

- This should tie-out completely.
- Differences could be due to filtering issues with source system extract creation.

NOTE: If these extracts are not matching the reporting from source system, you may need to update the extracts.

• There could also be timing differences in the billing system versus the encounter source system.

Running the Audit_04 Detail Charges to GL report

The Detail Charges to GL report allows for validation of Cost Detail data by comparing the cost detail (chargeable items with a unit or total charge amount) by postdate to Patient Revenue on the General Ledger. This report is a department level report showing monthly charges and variances.

To run the Audit_04 Detail Charges to GL report:

1. From the Enterprise Decision Support home page, in the **Reporting** section, click **Costing Report** Library.

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Costing Report > Report Builder >				

2. Under the Data Import Validations section, click the Audit_04 Detail Charges to GL.xlsx link.

NOTE: The report opens as a tab in the Desktop Client version.

- 3. Refresh the report by clicking Refresh Data in the Main ribbon tab, or pressing F9.
- 4. In the Refresh Variables dialog, do the following, and press OK:

Option	Description
Select Entity (leave blank for all)	Select one or more entities.
Select Calendar Year and Month	Select the year and month.

Audit 04 - Detail Charges to GL

Portland Health Care For February, 2016 Consolidated

		ChargeDetail	Financial (GL)	nancial (GL) Detail to GL I	
Dept	Description	Gross Charges	Gross Charges	Difference	Variance
200060302	Family Practice Clinic	264,125	(1,042)	265,167	100.4%
200061101	Neuroscience Center	126,099	123,698	2,402	1.9%
200064900	Distribution Willamette Memorial Hospit	192,042	192,042	0	0.0%
200065100	Emergency Department Willamette Mem	4,142,241	4,145,288	(3,048)	(0.1%)
200065120	Emergency Department Tigard	770,336	768,950	1,385	0.2%
200066100	Laboratory Willamette Memorial Hospita	7,631,202	7,991,355	(360,153)	(4.7%)
200066120	Laboratory Tigard	196	112	84	42.8%
200066140	Laboratory Prescott	370,629	0	370,629	100.0%
200066200	Cardiovascular Willamette Memorial Hos	2,642,882	2,642,731	151	0.0%
200066220	Cardiovascular Tigard	189,249	189,249	0	0.0%
200066230	Cardiology Dundee	90,718	90,718	0	0.0%
200066240	Cardiovascular Prescott	93,991	93,991	0	0.0%
200066400	Palliative Care	830	830	0	0.0%
200066600	Respiratory Therapy Willamette Memoria	1,791,750	1,792,504	(754)	(0.0%)
200066601	Sleep Lab Center	339,158	339,158	0	0.0%
200066620	Respiratory Therapy Tigard	29,166	29,166	0	0.0%
200067000	Radiology Diagnostic Willamette Memor	865,834	867,889	(2,055)	(0.2%)
200067001	Interventional Radiology Willamette Mer	1,740,339	1,762,971	(22,632)	(1.3%)
200067020	Radiology Diagnostic Tigard	128,855	128,625	230	0.2%
200067040	Radiology Diagnostic Prescott	44,114	44,114	0	0.0%
200067120	Medical Oncology Tigard	309,527	309,345	183	0.1%
200067140	Medical Oncology Prescott	1,100,239	1,100,861	(623)	(0.1%)
200067201	CT Willamette Memorial Hospital	5,224,452	5,221,732	2,720	0.1%
200067202	MRI Willamette Memorial Hospital	1,826,447	1,830,446	(3,999)	(0.2%)

The report populates Cost Detail Gross Charges for comparison to Financial Gross Charges (Costing GL) while calculating any variance value and percent.

You need to review and resolve variances between the cost detail and cost GL, and then re-import and rerun the validation reports.

When this data is compared to the data of the billing source system:

- This should tie-out completely.
- Differences could be due to filtering issues with source system extract creation.

NOTE: If these extracts do not match, you may need to update the extracts for Cost Detail.

• There could also be timing differences in the financial billing system versus the encounter source system.

Running the Audit_05 Payroll Source Reconciliation report

Use this report to evaluate and reconcile payroll related data (dollars and hours) by month.

To run the Audit_05 Payroll Source Reconciliation report:

1. From the Enterprise Decision Support home page, in the **Reporting** section, click **Costing Report** Library.

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Service Lines > Population > Episodic Grouper > Encounter > Viewer				
Cost Accounting				
Costing Process > Costing Process >				
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Costing Report > Report Builder >				

2. Under the Data Import Validations section, click the Audit_05 Payroll Source Reconciliation link.

NOTE: The report opens as a tab in the Desktop Client version.

- 3. Refresh the report by clicking Refresh Data in the Main ribbon tab, or pressing F9.
- 4. In the Refresh Variables dialog, do the following:

Option	Description
Select Entity	a. Click Choose Value.
	 In the Choose Value dialog, select an entity to include in the report.
	c. Click OK.
Select Payroll Fiscal Year	Select the payroll fiscal year to include in the report.

5. Click OK.

The following is an example of this report:

Audit_05 Payroll Source Reconciliation									
PKG									
Reconciliation for ACT PAV12 2014									
DEPT ENTITY Entity='1'									
ber herein hereig = 1									
DEPT DESCRIPTION	Dollars P1	Dollars P2	Dollars P3	Dollars P4	Dollars P5	Dollars P6	Dollars P7	Dollars P8	Dollars P9
17840 EHS Sports Medicine	20,431.96	17,116.41	22,370.20	17,000.43	16,038.02	16,389.29	16,389.29	15,354.94	549.01
19000 EHS Administration	223,567.25	221,000.36	250,414.03	224,065.18	208,488.10	212,976.44	208,617.85	46,825.43	1,485.27
19050 EHS Trust	13,506.35	13,448.14	17,856.65	13,399.61	13,082.87	14,457.50	14,722.01	12,312.75	438.10
19060 EHS Corporate Communications	30,108.99	28,542.03	39,237.82	29,247.73	27,430.64	31,272.86	28,828.28	26,043.28	930.08
19080 EHS Teleservices	19,986.22	22,110.95	29,622.56	21,821.34	20,875.94	22,201.09	22,365.87	19,871.16	710.41
19100 EHS Accounting Operations (Employee)	30,995.70	30,747.78	41,312.32	30,788.55	30,030.39	30,969.71	31,023.19	28,571.71	970.48
19105 EHS Payroll (Alternate Employee)	11,576.02	11,048.12	19,011.85	12,776.56	10,944.30	11,255.56	12,178.74	10,631.88	377.70
19110 EHS Administrative Finance	14,041.63	18,486.83	27,208.30	15,832.58	15,010.14	15,753.36	17,430.55	15,170.93	538.73
19150 EHS Information Services	115,587.84	118,662.00	155,859.37	117,763.63	113,592.21	122,540.77	106,137.89	75,680.98	2,688.15
19160 EHS Audit Services	5,183.19	5,183.21	9,904.33	5,783.55	5,190.86	5,363.90	5,363.90	4,847.50	173.19
19170 EHS Medical Information Network	55,024.86	60,494.17	70,302.94	54,893.61	53,055.89	55,025.51	67,590.62	78,682.93	2,810.70
19185 EHS Corporate Health Services	16,468.33	15,764.92	19,470.84	15,032.87	14,101.07	15,479.28	15,489.67	13,162.87	469.99
19220 EHS Human Resources	42,338.92	41,143.56	53,890.70	42,586.86	40,958.53	42,314.36	42,461.84	28,437.59	1,002.33
19250 EHS Performance Improvement	7,675.07	7,103.44	10,334.88	6,976.91	6,678.55	7,245.16	7,245.17	6,547.65	233.93
19370 EHS Risk Management And Safety	14,594.06	13,384.73	19,167.20	13,880.33	13,658.91	14,263.74	14,503.90	12,752.27	455.29
Total	621,086.40	624,236.65	785,963.98	621,849.76	589,136.42	617,508.52	610,348.77	394,893.88	13,833.36
Entry for reconciliation source values:									
	621,086.40	624,236.65	785,963.98	621,849.76	589,136.42	617,508.52	610,348.77	394,893.88	13,833.36

Managing Dimensions

Dimensions are the key index fields for the tables in the Axiom database. For cost accounting, there are three types of dimensions: Core, Encounter, and Cost Item. The Core dimensions store generic data and options used throughout most Axiom products. The Encounter dimensions store information specific to the services provided by your organization. The Cost Item dimensions are specific to cost accounting.

Core dimensions

- Accounts Stores records for various pools to which values (dollars, days, and so on) can be assigned—Patient Days, Construction Costs, Medicaid discounts—quite literally anything to which a dollar amount or statistic can be assigned. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.
- Calendar Dates Ensures referential integrity for core data tables that are period based or other data driven attributes. It is also used as a means of managing the relationship between a calendar date and the fiscal equivalent.
- Cost Categories Defines the cost category and represents a grouping of accounts in the General Ledger used to perform the costing process. The cost category is the lowest level of detail at which costs are calculated for unit costs. They are stored for the calculated variable and fixed amounts.
- Cost Pools Defines the level at which the cost method are defined and assigned for the cost categories. For example if an entity is using the RCC method for all departments and all items, then only one cost pool is necessary. It is also used to define the level at which an RVU is used. For example, if three labor Cost Categories are using the same RVU to allocate labor costs, one cost pool can be used for the three Cost Categories. Cost Pools are a group of cost categories using the same method or RVU.
- Departments Includes records for each department within an organization (e.g., radiology, emergency, finance, etc.).
- Entities Provides basic information about the entities supported by the software and can determine for some products, e.g. Cost Accounting, which entities to include in processing of data.
- Job Codes Stores records for all of the job codes within your organization. Each job code represents a job position or role within the organization.
- Pay Types Stores records for all of the possible categories of compensation that an employee might receive. For example, regular pay, paid time off, sick pay, incentive pay, and so on.

- YRMO Dates A simpler version of the Cal Date dimension table, which helps processing and performance speed of the system.
- Encounter dimensions
 - Age The age of the patient during the loaded encounter. Age is a reference field for the Enc_ Patient.Age, Encounter.AgeAtAdmission, and Encounter.AgeAtDischarge.
 - APR DRGs The APR DRGs for your organization, which are commonly implemented as part of the coding and billing process.
 - Bill Types The bill type for the primary insurance claim upon final bill drop for the encounter.
 - Discharge Status The discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter.
 - Financial Classes Use to group insurance plans into financial classes for the primary insurance claim.
 - ICD Diagnosis Codes The ICD Diagnostic information, which is referred to by a number of tables in the system.
 - ICD Procedure Codes The clinical procedures performed for the patient in the course of care for the encounter being loaded.
 - Insurance Plans The insurance plan of the subscriber or guarantor for the loaded patient encounter.
 - Locations The physical locations that have been billed within your organization. This information is used for monthly reporting and provider-level budgeting.
 - MDC Codes Use to place a DRG into a higher level category.
 - Modifiers The additional standard codes used to further identify services or supplies used in the course of patient care.
 - MS DRGs The MS DRGs for hospital acute care providers.
 - Patient Types The type of patient for the loaded encounter.
 - Place of Service Codes The Place of Service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.
 - Point of Origin The nature of a diagnosis coded for a patient during the IP encounter being loaded.
 - Present On Admission The nature of a diagnosis coded for a patient during the IP encounter being loaded.
 - Providers The providers within your organization. This information is used for monthly reporting and provider-level budgeting.
 - Reporting DRGs Use to combine or determine the primary DRGs used for reporting purposes.
 - Services The services of the patient during the encounter course of care.
 - Sex The sex of the patient during the loaded encounter. Sex is a reference field for the Enc_ Patient.Sex.
 - Stations The nursing station of a patient when first admitted to a facility as well as the station from which the discharge occurred for the loaded encounter.

- Transaction Codes The transaction codes for payments and adjustments stored in the Enc_ Payments table for the loaded encounter.
- Cost Item dimensions
 - CDM Codes The charge codes within your organization. The charge codes are used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.
 - Cost Items Defines the cost object to which costs are allocated during the unit cost calculation processes for all methods.
 - CPT Codes The CPT Codes that have been billed within your organization. This information is used for monthly reporting and provider-level budgeting.
 - HCPCS Codes The HCPCS codes within your organization used as level three CPT codes, which provide further detail as to the services, procedures, or supplies that were used in the course of care.
 - Revenue Codes The revenue codes used within your organization.

Creating or modifying custom columns in dimensions

Some dimension tables allow you to add additional custom columns. These grouping columns allow you to customize the data available to query into reports. You can add up to five grouping columns to the following dimensions:

- Accounts
- Age
- APR DRG
- Cost Categories
- CPT Codes
- Departments
- Encounters
- Financial Classes
- ICD Diagnosis Codes
- ICD Procedure Codes
- Insurance Plans
- MS DRGs
- NDCs
- Patient Zip Codes
- Revenue Codes

NOTE: At this time, this utility is only available from the DSS Admin task pane, accessible from the Desktop Client. Only users assigned the DSS Admin role can access this task pane (assuming your organization has a license for Axiom Enterprise Decision Support).

To create or modify custom columns in dimensions:

1. From the Enterprise Decision Support home page, under the Data Control section, click Data Extensibility.

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🐐 Home			
Enterprise Decision Support			
Data Control			
Data Management > Data Extensibility >			
Data Enhancement & Refinement			
Service Lines > Population > Episodic Grouper > Encounter > Viewer >			
Ost Accounting			
Costing Process Guide Costing Process Checklist			
Reporting			

2. In the **Configure Variable Columns** page, in the **Enabled** column, click the check box next to the column to use.

Configure You can enable u	Variable Co	Diumns umns and option	ally give a preferred column name. You can query dat	a into reports by the column name or preferred name.	Save
Table	Column	Enabled	Preferred Name		
			- Name must start with a letter and can only contain A-Z,	0-9, or _	
			- No spaces. Max length 200		
ACCT	Group1	\checkmark	Group1 Preferred Name	✓	
ACCT	Group2				
Age	Group1				

3. In the Preferred Name field, type a name for the column that makes sense for reporting purposes.

NOTE: The column name must start with a letter. The name can only include letters A-Z, 0-9, and/or an underscore (_), and can only include up to 200 characters. The system displays a check mark next to the name if it is allowed by the system; otherwise, it displays an **x**. The system will not allow you to save your changes until the check mark displays.

4. After making your changes, click Save.

After you save the changes, the system updates the appropriate dimension tables with the new columns. You then update the columns with the appropriate records.

Editing a dimension using a spreadsheet

You can edit dimension values with a spreadsheet instead of using the dimension web page user interface. The dimension data that you can download as an Excel file includes all of the data that is currently available in the dimension editor on the web. Deleting dimensions in the downloaded spreadsheet does not remove the dimension from the system. In fact, if you have a large amount of data in the spreadsheet and to help improve performance, we recommend that you remove all the unchanged rows from the downloaded file before uploading.

TIP: Before you begin this process, we recommend that you first review the steps in this topic, including the Spreadsheet formatting section below.

To edit a dimension using a spreadsheet:

1. Open a dimension, and click Download Table.

Cost	t Accounting					
=	Т					
тсте	estProcess > Data Management > Core Dimensions > Entities					
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2	ENTITY Description		ADDrev	Costing	Beds	
3	0 Unassigned/Not Applicable	N	AV	False		0
4	1			False		0
5	4			False		0
6	9			True		0
7	1000			True		0
8	1100			False		0
9	1200			False		0
10	2000			True		0
11	2100			False		0
12	3000			True		0
13	4000			True		0

2. Open the spreadsheet, or save the spreadsheet to a location first and then open it.

IMPORTANT: DO NOT rename the workbooks within the downloaded file.

 Add a new dimension by adding a row, or edit the column information for an existing dimension. For columns that require a True/False (Yes/No) value, type 1 for True (Yes) and 0 for False (No). If adding new dimension rows, review the Spreadsheet formatting section below.

IMPORTANT: DO NOT add columns, change column names, or change sheet tab names.

4. After making your changes, save the spreadsheet.

5. In the dimension editor page for the spreadsheet to upload, click **Upload Table**.

IMPORTANT: If the spreadsheet includes a lot of data, it may take several minutes for the upload to complete before the system displays a confirmation message.

Cost	Acco	ounting								
-	T									
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Dir	ner	noion	Maintenance	Fntities	Last	Indat	ed. Med	Ma	r 18 2	02
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6. The **Review Uploaded Dimension Changes** prompt displays information regarding the number of changes made, and the number of rows updated and/or added. Click **OK**.

NOTE: The system can only display up to 10,000 rows.

- 7. The system displays the row(s) where changes occurred and/or new rows added in the **Confirm Uploaded Data** page. Do one of the following:
 - If the information is correct and you are ready to commit the changes to the system database, click **Confirm Upload**.

IMPORTANT: This action will save ALL of the CHANGED dimension rows that you upload, not just the rows that display within the web editor confirmation page. For example, if you upload 20000 rows of changes and set the filter (while in confirm mode) to the max 10000 records, you will only be viewing half of the changes that will be saved on Confirm.

- To correct the spreadsheet and/or make further changes, click **Cancel Upload**. Repeat the upload process starting with step 4.
- 8. At the confirmation prompt, click **OK**.

Spreadsheet formatting

When downloading the dimensions values, they may display in the spreadsheet with General formatting. This is indicated by the green tick mark in the left corner in some cells—specifically number-based cells.

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	Α	В	С	D	Е
1	ENTITY	Description	Abbrev	Costing	Beds
2	0	Unassigned/Not Applicable	NA	0	0
3	1			1	0
4	4			0	0
5	9			1	0
6	1000			1	0
7	1100			0	0
8	1200			0	0
9	2000			1	0
10	2100			0	0

Large numbers

If you add new dimension rows that include large numbers, reformat them so they properly add to the database on return to the system by changing the number formatting to **Number** and the **Decimal places** field to zero.

Format Cel	ls						?	\times
Number	Alignment	Font	Border	Fill	Protection			
<u>Category:</u> General Number Currency Accountii Date Time Percentag Fraction Scientific Text Special Custom	ng ge	Sample 100299 Decimal Use 1 Negative -1234 1234 (1234) (1234)) places: 0 1000 Separ e numbers:) 🗘				~
Number is formatting	used for gen g for monetar	eral displa y value.	y of numb	ers. Currer	ncy and Accou	nting offer spe	cialized	
					[OK	Can	icel

Leading zeroes

For numbers that include leading zeroes, change the formatting to Text.

Number Alignment Font Border Fill Protection Category: General Sample 10029 Number 10029 Text format cells are treated as text even when a number is in the cell. The cell is displayed exactly as entered. Date The cell is displayed exactly as entered.									
Sample Sample 10029 Text format cells are treated as text even when a number is in the cell. The cell is displayed exactly as entered. Text Special Custom	lumber	Alignment	Font	Border	Fill	Protection			
General Number Currency Accounting Date Time Percentage Fraction Scientific Text Special Custom	ategory:								
Accounting Date Time Percentage Fraction Scientific Text Special Custom	General Number Currency	^	Sample 10029						
	Accountin Date Time Percentag Fraction <u>Scientific</u> Text Special Custom	ng ge	Text form The cell i	nat cells ar	e treated a d exactly as	s text even wi	hen a number i	s in the o	cell.

You can also simply add a single quote in front of the zero (this quote mark is not included in the data when it is uploaded).

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Formulas

You can include formulas in the spreadsheet, and the system will only import the result into the database.

Opening dimension tables in spreadsheet mode

You can access and manage all dimensions directly from the Desktop Client using the Open Table in Spreadsheet (OTIS) mode.

NOTE: Only users with the Cost Accounting administrator role can access and manage the dimensions tables using this method.

To open dimension tables in spreadsheet mode:

1. Click the Quick Launch icon \checkmark in the Global Navigation Bar.



2. Click either Windows Client or Excel Client.

NOTE: The only difference between the clients is that the Excel Client includes Excel-based features.

3. In the Main ribbon tab, click Navigation > Explorer.

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4. In the Libraries section, click Table Library > !Dimensions.

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- 5. Double-click the dimension table to edit.
- 6. In the Open Table in Spreadsheet dialog, click OK.
- 7. Make the appropriate changes in the table.

IMPORTANT: We recommend that you work closely with your Syntellis Implementation Consultant or Syntellis Support before making significant changes to any dimension tables.

8. After you finish making your changes, in the Main ribbon tab, click Save.

Patient Zip Code reference table

The Patient Zip Code reference table includes the zip codes. You can use the Configure Variable Columns utility to map the Zip codes to custom columns you can use for reporting.

NOTE: Ensure that the Zip codes you enter or import are free of duplicates.

The following table lists all of the options available in this dimension table:

Column	Description
PatientZipcode	The Zip code entered manually or imported from your organization.

CORE DIMENSIONS

Accounts dimension

The Accounts dimension contains records for each account in the GL of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system database. For more information, see Editing a dimension using a spreadsheet.

Accessing the Account dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Accounts.

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Data Data Extensibility >				
다. Data Enhancement & Refinement				
Service Lines > Population Builder > Episodic Grouper > Encounter Viewer >				
Cost Accounting				
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Reporting				

The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing an account

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit an account:

1. In the table, do any of the following:

• To add an account, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the ACCT column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit an account, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Deleting an account

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an account:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.

The account row is removed from the table.

Column descriptions

This section provides descriptions for each column in the Accounts dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values

in those key columns defines a unique record in the table.

ACCT - The Axiom Software account number. This can be the combination of the prime account and sub account, if that is how your GL system is set up.

Description - The account description from the GL.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

COSTCAT - Represents the cost category mapping of accounts, which is used to assign cost categories to incoming data when the GL data is imported into a CGL format table.

CostMethod - Identifies the cost calculation offset accounts used for writing offsets to the GL-oriented tables and matches them to the method that they represent.

NOTE: This options in this column are system generated. We highly recommend that you not make changes to this column.

CostVarPct - The percent variable for costing; 0 = Fixed, 1=Variable. A value between 0 and 1 represent a percentage of variability.

CostDSSSummary - An FSSummary clone, but owned by Axiom Enterprise Decision Support so that cost accounts can be categorized differently to facilitate costing and DSS needs without impacting Axiom Financial Reporting.

CostProvider - Identifies the salary accounts of providers for the Provider RVU method of cost calculation.

ReclassType - Defines the type reclass that was used to calculate the values in the account. This information is important for post-reclass reporting.

AllocType - Defines the type of allocation account for indirect allocation in Axiom Enterprise Decision Support.

CostAdjustmentID - Used in Axiom Enterprise Decision Support to tie allocation and reclass step IDs to account numbers for easier referencing in downstream reports. This number represents the ReclassID (reclasses) or the StepID (overhead allocations) accounts that are not reclass or allocation accounts that have a value of zero in this column.

Calendar Dates dimension

The Calendar Dates dimension ensures referential integrity for core data tables that are period based or other data driven attributes, e.g., admission date for a patient in Axiom Enterprise Decision Support. This forces valid dates in an integer format are loaded into the system and can be cross referenced across the various tables and processes.

It is also used as a means of managing the relationship between a calendar date and the fiscal equivalent. The fiscal equivalent of the calendar date can used by data processing and also be presented back to the user in reporting.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Calendar Dates dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Calendar Dates.



The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add records in this dimension table directly through **Axiom Explorer > Table Library > !Dimensions > CALDATE** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Editing a date

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a date:

1. In the table, click in the cell(s) to edit, make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. Click Save.

Deleting a date

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a date:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Calendar Dates dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CALDATE - The day of the year used for each record in the Daily Productivity table. The values must be an Integer and created as YYYYMMDD (ex. 20171231).

Description - The description can be the long form of the date such as December 31, 2017.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost Categories dimension

The Cost Categories dimension defines the cost category and represents a grouping of accounts in the general ledger used to perform the costing process. The cost category is the lowest level of detail at which costs are calculated for unit costs. They are stored for the calculated variable and fixed amounts.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Cost Categories dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Cost Categories.



Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a cost category

Due to the large number of records that this table may contain, the page can only display a maximum of 10,000 records.

To edit a cost category:

- 1. In the table, do any of the following:
 - To add a cost category, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the COSTCAT column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a cost category, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon
- To redo your changes, click the right arrow icon
- 2. When you finish making changes, click Save.

Deleting a cost category

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a cost category:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.

3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the Cost Categories dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

COSTCAT - An abbreviated definition of the cost category description. Keeping this short, yet intuitive, is best.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - A full description of the cost category.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

ShortDescription - A shortened description to use for reporting purposes to save space.

DisplayOrder - Determines the order in which cost category data displays in the workbook utilities and can be used to order them in reports.

COSTPOOL - A key attribute of a cost category and determines the cost method to use in calculating the cost category cost information. In some instances, a one to one relationship may need to exist between a cost category and a cost pool. For example: Supplies, where the reverse markup is used as calculating the cost using such a method applies to only one cost and would not be applicable to more than on cost category.

DirectFlag - Determines the definition of costs contained and calculated for each cost category as a direct cost or an indirect cost. Used primarily for reporting cost results and is separate from the Direct Flag at the department level used to drive other costing processes.

AccountNum - The base account number to use for cost method account numbers in the CGL table.

IMPORTANT: DO NOT CHANGE after the accounts are created and used in the Accounts dimension.

ReportGroup - The grouping of cost categories for Axiom Enterprise Decision Support reporting purposes.

ReportDetail - The detail expense assignment for Axiom Enterprise Decision Support reporting. This should either be at the FSDetail level or highly correlated. Some FSDetail accounts can be grouped for costing purposes and may not have a corresponding cost category, e.g., EX_Utilities may be grouped into OtherExpenses.

ReportDetailOrder - The order of the report detail definitions used in reporting.

RCUDEF1-5 - RCU definitions #1-5 or Relative Cost Unit definition. One of five fields that provides the ability to define the cost category as part of a RVU cost calculation. Valid options are include the following: Variable, Fixed, or Total, which defines which measures to use for this cost category within the definition. See related information in the Cost Pools dimension.

Cost Pools dimension

The Cost Pools dimension defines the level at which the cost methods are defined and assigned for the cost categories. For example if an entity is using the RCC Method for all departments and all items, then only one cost pool is necessary. It is also used to define the level at which an RVU is used. For example, if three labor cost categories are using the same RVU to allocate labor costs, one cost pool can be used for the three cost categories. Cost pools are a group of cost categories, using the same method or RVU.

NOTE: In some cases the cost pool and the cost category need to be the same, e.g., when the Reverse Markup method is assigned, the calculated costs is always assigned to only one cost category based on the markup table.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Cost Pools dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Cost Pools.

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Enterprise Decision Support				
Data Control				
Data Data Extensibility >				
Data Enhancement & Refinement				
Service Lines > Population > Episodic Grouper > Encounter > Viewer				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting				

NOTE: The page can only display up to a maximum of 10,000 records.

Adding or editing a cost pool

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a cost pool:

- 1. In the table, do any of the following:
 - To add a cost pool, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the CostPool column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes.

• To edit a cost pool, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click Save.

Deleting a cost pool

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an account:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Cost Pools dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CostPool - The primary key for the Cost Pools dimension table. We recommend using short, intuitive abbreviations.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - A longer, full description for the cost pool.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

DefaultCostMethod - The cost method to use for the pool of cost categories.

DisplayOrder - The order in which to display column elements on reports and in utilities.

RCUdef - The RCU definition number.

ResourceClass - Reserved for future use.

Departments dimension

The Departments dimension contains records for each department within an organization. For example, radiology, emergency, finance, and so on.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Department dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Departments.

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NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > !Dimensions > DEPT** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
- Editing a department

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a department:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Departments dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

DEPT - The Axiom Software department number, which is formed by combining the entity and cost center.

Description - The department description. The naming convention is entity abbreviation with department description. For example, MHS Operating Room.

NOTE: For closed departments, add three asterisks to the beginning of the description. For example, MHS *** Operating Room. Descriptions should not be in all capital letters.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

ActivityGroup - Reserved for future use.
CostMap - Allows departments to process as a group in the unit cost processing phase of cost accounting. All costs for the group are combined and allocated to all of the cost items within the group. In most cases, the first or largest department of the groups becomes the target CostMap definition to which the other members are mapped.

DeptType - Determine how to categorize a department:

- Deadend Receive allocations but ignore from cost calculation
- NA Fully ignore

MarkupName - The specified markup table to use when processing unit costs using the Reverse Markup method.

Entities dimension

The Entities dimension provides basic information about the entities supported by the software and can determine for some products which entities to include in processing of data.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Entity dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Entities.

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► Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing an entity

To add or edit an entity:

1. In the table, do any of the following:

• To add an entity, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by Entity number.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit an entity, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶 .
- 2. When you finish making changes, click Save.

Deleting an entity

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an entity:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides description for each column in the Entities dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ENTITY - The primary key for the table using an integer data format.

Description - The long entry description for the entity.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

Abbrev - The standard abbreviation for the entity.

Costing - Do one of the following:

- If the entity is used in Axiom Enterprise Decision Support, select True.
- If the entity is not used in Axiom Enterprise Decision Support, select False.

Job Codes dimension

The Job Codes dimension includes records for all of the job codes within your organization. Each job code represents a job position or role within the organization.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Jobcode dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Job Codes.

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Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
- Modifying the Job Codes dimension

To modify the Job Codes dimension:

1. In the **Filter** panel, type the number of records to display in the **Maximum Records** field. The default is 1000.

NOTE: Due to the large number of records that this table may contain, the page can only display a maximum of 10,000 records.

- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
- 4. In the table, do any of the following:
 - To add a job code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the JOBCODE column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a job code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To delete a job code, select the row to highlight it, and then click **Delete Row**. At the **Continue**? prompt, click **OK**.
- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 5. When you finish making changes, click Save.

Column descriptions

The following section describes the areas and columns in the Job Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

JOBCODE - The Axiom Software job code. This entry must be an alpha-numeric field so that during the import process a J is prepended to all job codes to ensure they are alpha numeric.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - The job code description from the payroll system.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

CostHr - The Prod Hours Account Definitions for Costing.

ResourceJobClass - Used in the RVU developer process by the mapping of job codes to a Resource Job Class, which determines the level of detailed RVU development for labor resources. This attribute is also used in the mapping of payroll hour and dollar into an average wage rate in the resource table that then drives the calculation of the RVU.

CostCat - The cost category for the job code.

CostGL - The Prod Dollars Account Definitions for Costing.

CostClass - An alternative grouping column used in the costing process that is invoked during the loading of payroll information into the CGL as statistics to support a payroll related reclassification of GL dollars or hours.

CostVariable - Determines whether the job code is a fixed or variable cost.

Pay Types dimension

The Pay Types dimension includes records for all of the possible categories of compensation that an employee might receive. For example, regular pay, paid time off, sick pay, incentive pay, and so on.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Pay Type dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > Pay Types.

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Filtering records

To filter records:

1. Click the funnel \mathbf{T} icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a pay type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To modify the Pay Types dimension:

- 1. In the table, do any of the following:
 - To add a pay type, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the PAYTYPE column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a pay type, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click Save.

Deleting an pay type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a pay type:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Pay Types dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

PAYTYPE - The Axiom Software pay type. This must be an alpha-numeric field, so that during the import process, a P is prepended to all pay types to ensure they are alpha numeric.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - Identifies the pay type description from the payroll system. Be as explicit as possible, avoid abbreviations, and use layman's terms.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

ResourcesCalculation - Determines the calculation behavior for the hours or dollars within the pay type when using the payroll information within the RVU development process. When labor rates are calculated for the Resource Table, the designation here determines if the Hours, Dollars, or Both are to be used in the numerator and denominator in the average.

CostVariable - Determines whether the pay type is a fixed or variable cost.

YRMO Dates dimension

The YRMO Dates dimension is a simpler version of the Cal Dates dimension table, which helps processing and performance speed of the system.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the YRMO Dates dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Core Dimensions > YRMO Dates.

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NOTE: At this time, you can only add records in this dimension table directly through **Axiom Explorer > Table Library > !Dimensions > CALDATE** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Column descriptions

This section provides descriptions for each column in the YRMO Dates dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

YRMO - Zero (0) is a default value, 999999 is used in costing to denote a current effective date range (To /From).

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

CQtr - The calendar quarter.

CQtrCount - The month counter within a quarter period.

FYear - The fiscal year.

FMonth - The fiscal month. It is the same as the GL Period associated with YRMO to link patient centric tables with the CGL tables.

FQtr - The fiscal quarter.

FQtrCount - The month counter within a quarter period.

DaysInMth - The number of days in a month.

CopyPass - Reserved for future use.

MonthName - The name of the month.

LongName - Month, yyyy

ShortName - mmm-yyyy

FLongName - Month, Fiscal yyyy

FShortName - mmm-Fiscal yyyy

ENCOUNTER DIMENSIONS

Age dimension

The Age dimension is a reference table used to capture the age of the patient during the loaded encounter. Age is a reference field for the Enc_Patient.Age, Encounter.AgeAtAdmission, and Encounter.AgeAtDischarge. The codes and descriptions used here will generally match your organization's source systems and data standards, however, conversions may be warranted to improve analysis and reporting.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Age dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Age.



The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add, edit, or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > Age** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
- Column descriptions

This section provides descriptions for each column in the Age dimension table: department

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

AGE - A five-character string value entered as an abbreviation. Examples include the following:

- N for newborn, delivered on-premise
- 3_H, for a newborn delivered and admitted
- 1_D for one day old
- 4_M for a four month old
- 25 for a twenty five year old

APR DRGs dimension

The APR DRGs dimension is a reference table used to manage the APR DRGs for your organization, which are commonly implemented as part of the coding and billing process. These values will generally match industry standards or your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the APR DRGs dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > DRGs > APR DRGs.

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The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > APRDRG** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.



To edit an APR DRGs dimension:

- 1. In the table, do any of the following:
 - To edit an APR DRG, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the APR DRGs dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

APRDRG - The value for the All Patient Refined DRG.

Description - The description for the value.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Bill Types dimension

The Bill Types dimension is a reference table used to capture the bill type for the primary insurance claim upon final bill drop for the encounter. Codes and descriptions will generally match your organization's source systems and data standards. Bill types may also comply with regulatory requirements in some cases, e.g., CMS Medicare claims.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Bill Type dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Bill Types.



The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or edit records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > BillType** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a bill type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a bill type:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Bill Types dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

BillType - The bill type code that represents the primary insurance claim for the encounter.

Description - The description for the bill type.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Discharge Status dimension

The Discharge Status dimension is a reference table used to capture the discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter. Codes and descriptions generally match your organization's source systems and data standards. Discharge status codes and descriptions may also comply with regulatory requirements in some cases, e.g., CMS Medicare claim.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Discharge Status dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Discharge Status.



NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > DischargeStatus** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a discharge status

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a bill type:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

- 2. After you finish making changes, click Save.
- Column descriptions

This section provides descriptions for each column in the Discharge Status dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values

in those key columns defines a unique record in the table.

DischargeStatus - The code used to identify the discharge disposition status of a patient.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Financial Classes dimension

The Financial Class dimension is a reference table used to group insurance plans into financial classes for the primary insurance claim. Codes and descriptions will generally match the your organization's source systems and data standards. This dimension is shared with other Axiom Healthcare solutions.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Financial Classes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Financial Classes.

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To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a financial class

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit financial classes:

1. In the table, do any of the following:

• To add a financial class, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the FinClass column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a financial class, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Deleting an financial class

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a financial class:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Financial Classes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

FinClass - The financial class code. This must be an alpha code so that an F is prefixed during the import process.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

ICD Diagnosis Codes dimension

The ICD Diagnosis Codes dimension includes the ICD diagnosis information, which is referred to by a number of tables in the system. This information is used primarily used with cost detail, which my refer to up to five standard ICDDIAG fields and more if needed in COSTDETAIL.Custom.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the ICD Diagnosis Code dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > ICD Diagnosis Codes.

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Filtering records

To filter records:

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing an ICD diagnosis code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit an ICD diagnosis code:

1. In the table, do any of the following:

• To add an account, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the ICDDIAGIDcolumn.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Deleting an ICD diagnosis code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an ICD diagnosis code:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the ICD Diagnosis Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ICDDIAGID - The code for the ICD diagnosis identification.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - A description for the ICD diagnosis code (20 character limit)

ICD Procedure Codes dimension

The ICD Procedure Codes dimension is a reference table used to capture the clinical procedures performed for the patient in the course of care for the encounter being loaded. These procedures are referenced by the Encounter and Enc_Proc tables.

NOTE: These procedure codes are specific to the International Classification of Diseases (ICD) procedure codes and do not include CPT or HPCPS procedure codes.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Account dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > ICD Procedure Codes.

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NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > ICDPROC** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing an ICD procedure code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit an ICD procedure code:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the ICD Procedure Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ICDPROCID - The code used for the ICD Procedure.

Description - The long entry description for the ICD Procedure code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Insurance Plans dimension

The Insurance Plans dimension is a reference table used to capture the insurance plan of the subscriber or guarantor for the loaded patient encounter. Codes and descriptions will generally match your organization's source systems and data standards. This table also includes insurance plans grouped into payors and financial classes.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Insurance Plans dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Insurance Plans.

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Filtering records

To filter records:

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.



Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit an insurance plan code:

- 1. In the table, do any of the following:
 - To add an insurance plan, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes.

• To edit an insurance plan, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click Save.

Deleting an insurance plan

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an insurance plan:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the Insurance Plans dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

Keys

INSPLAN - The code used to for the insurance plan.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <>:? | * ' \"
- Begins with + =.

Description - The long name of the insurance plan.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

DSS

These columns are used for the Axiom Enterprise Decision Support.

PlanCode - The code associated with the plan type.

ENTITY - The entity associated with the insurance plan.

Payor - The code associated with the insurance plan payor.

PayorDescription - The long name of the insurance plan payor.

FinClass - The financial class code.

FinClassDescription - The long name of the financial class.

Locations dimension

The Locations dimension contains all of the physical locations that have been billed within the organization and is used for monthly reporting and provider-level budgeting.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Locations dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Locations.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing locations

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit locations:

1. In the table, do any of the following:

• To add a location, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the LOCATION column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a location, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- redo your changes, click the right arrow icon *★*.
- 2. When you finish making changes, click Save.

Deleting a location

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a location:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Locations dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

LOCATION - The code used to represent the location. This must be an alpha code, so an L is prefixed during the import process. Default should be used as the Location code if this dimension is not being used.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <> : ? | * ' \"
- Begins with + =.

Description - Describes the location associated with the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

DSS

These columns are used for the future development of Axiom Enterprise Decision Support.

LocationEntity - The entity location code used to identify the physical location of the department (entity).

TIP: The entity location code is different from the entity code, which is associated with a financial department. For example, departments on a hospital campus may have different entity codes but share the same entity location code because they reside in the same physical area.

MDC Codes dimension

The MDC Codes dimension is a reference table used to place a DRG into a higher level category. Major Diagnostic Categories (MDC) are universally defined and apply to DRGs, MDC values, and descriptions, which will generally match your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the MDC Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > DRGs > MDC Codes.

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NOTE: At this time, you can only add or edit records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > MDC** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
Editing an MDC code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit an MDC code:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the MDC Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

MDC - The code for the MDC.

Description - The description of MDC to be used for reporting purposes. You can enter up to 50 characters in this field.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Modifiers dimension

The Modifiers dimension includes the additional standard codes used to further identify services or supplies used in the course of patient care. They can modify the CPT or the HCPCS. For example a procedure done multiple times, will have a modifier of 51. This may mean that there is a discount in reimbursement, but also perhaps a reduction in the cost of the item.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Modifiers dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Modifiers.

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Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a modifier

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a modifier:

- 1. In the table, do any of the following:
 - To add a modifier, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the MODIFIER column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a modifier, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click **Save**.

Deleting a modifier

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a modifier:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.
- Column descriptions

This section provides descriptions for each column in the Modifiers dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

MODIFIER - The additional status codes used to identify services and supplies.

Description - The long form description of the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

MS DRGs dimension

The MS DRGs dimension is a reference table used to manage the MS DRGs for hospital acute care providers. Codes and descriptions will generally match industry standards or your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the MS DRGs dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > DRGs > MS DRGs.

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The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > MSDRG** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing an MS DRG code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit an MS DRG code:

- 1. In the table, do any of the following:
 - To edit an MS DRG code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the MS DRGs dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

MSDRGID - The value for the MS DRG.

Description - The description for the value.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Patient Types dimension

The Patient Types dimension is a reference table used to capture the type of patient for the loaded encounter. Codes and descriptions will generally match the your organization's source systems and data standards.

NOTE: At this time, you can only edit records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > PTTYPE** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Patient Types dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Patient Types.

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Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding a patient type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add a patient type:

- 1. In the table, do any of the following:
 - To add a patient type, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the PtType column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click Save.

Deleting a patient type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a patient type:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Patient Types dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

Description - The description of the patient type.

P1Type - Inpatient and Outpatient high-level patient type for summary reporting.

P2Type - Inpatient and Outpatient as well as some other higher types of patients for reporting.

DSSPTType - Identifying all patient types into four categories - IP, OP, PB, NA.

PtType - The most detailed patient type referenced in the encounter data.

Place of Service Codes dimension

The Place of Service Codes dimension stores the place of service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Place of Service Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Place of Service Codes.

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Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a Place of Service code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a Place of Service code:

1. Review and/or make selections for the following columns:

• To add a code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the PlaceOfService column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Deleting a Place of Service code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a Place of Service code:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Place of Service Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

PlaceOfService - The code used to indicate where the service was rendered.

Description - A long form description of where the service took place.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Present On Admission dimension

The Present On Admission dimension is a reference table used to capture the nature of a diagnosis coded for a patient during the IP encounter being loaded. The Present On Admission code helps establish if a diagnosis was a Hospital Acquired Condition (HAC). Codes and descriptions will generally match your organization's source systems and data standards. This is a reference to the Enc_Diag.PresentOnAdmit.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Present on Admission dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Present on Admission Codes.



The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a Present On Admission code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a Present On Admission code:

- 1. In the table, do any of the following:
 - To add a code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the PresentOnAdmit column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon
- To redo your changes, click the right arrow icon
- 2. When you finish making changes, click Save.

Deleting a Present on Admission code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a Present on Admission code:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.

3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the Present On Admission dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

PresentOnAdmit - The code that describes the nature of a diagnosis for a patient during the IP encounter.

Desc - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Providers dimension

The Providers dimension contains all of the providers within the organization and is used for monthly reporting and provider-level budgeting.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Providers dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Providers.

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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a provider

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a provider:

1. In the table, do any of the following:

• To add an account, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the **Provider**column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a provider, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Deleting a provider

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a provider:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Providers dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

Provider - The Provider ID used in Axiom Budgeting and Performance Reporting. Must be an alpha code, so a D is prefixed during the import process.

Description - Identifies the provider description to use for budgeting and reporting.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

DSS

These columns are reserved for future use with Axiom Enterprise Decision Support.

CostProvider - The provider to use for costing purposes when using the Provider RVU method. This allows providers to be grouped into a generic group for costing purposes.

MedicalGroup - The primary medical gGroup the provider is associated with for grouping and reporting purposes.

City - The city where the provider resides.

State - The state where the provider resides.

SecondarySpecialty2 - The secondary specialty offered by the provider.

Reporting DRGs dimension

The Reporting DRGs dimension is a reference table used to combine or determine the primary DRGs used for reporting purposes. In some cases, multiple DRGs may be assigned to an inpatient or in others only certain DRGs may be assigned, e.g., MS DRGs are assigned to Medicare encounters and APR DRGs are assigned to Medicaid encounters. This reference table allows you to combine or determine which DRG to use within a single reference table. These values will generally match one of the DRG reference values.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Reporting DRGs dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > DRGs > Reporting DRGs.

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The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > REPORTINGDRG** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a Reporting DRG code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a Reporting DRG code:

- 1. In the table, do any of the following:
 - To edit a Reporting DRG code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Reporting DRGs dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ReportingDRG - The value for the Reporting DRG.

Services dimension

The Services dimension is a reference table used to capture the services of the patient during the encounter course of care. Services is a reference field for the Encounter.PrimaryService. The codes and descriptions here may match your organization's source systems and data standards, but can also be created to meet specific analysis and reporting needs.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Services dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Services.

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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel \mathbf{T} icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a service

To add or edit a service:

- 1. In the table, do any of the following:
 - To add a service, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the Services column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a service, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon *★*.
- 2. When you finish making changes, click Save.

Deleting a service

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a service:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.
- Column descriptions

This section provides descriptions for each column in the Services dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values

in those key columns defines a unique record in the table.

Services - The code the represents the service for the patient.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / <>:? | * ' \"
- Begins with + =.

Description - The description for the service.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Sex dimension

The Sex dimension is a reference table used to capture the sex of the patient during the loaded encounter. Sex is a reference field for the Enc_Patient.Sex. The codes and descriptions will generally match your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Sex dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Sex.

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The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only edit records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > Sex** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel $\overline{}$ icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding the sex code

To add the sex code:

- 1. In the table, do any of the following:
 - To add a sex, click Add Row. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the SEX column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶 .
- 2. When you finish making changes, click Save.

Deleting a sex code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a sex code:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the Continue? prompt, click OK.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Sex dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

SEX - The code for the sex of the patient.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Stations dimension

The Stations dimension is a reference table used to capture the nursing station of a patient when first admitted to a facility as well as the station from which the discharge occurred for the loaded encounter. Codes and descriptions will generally match the your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Stations dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Stations.



The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > Station** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a station

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a station:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Stations dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

Station - The code assigned to the nursing station.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Transaction Codes dimension

The Transaction Codes dimension is a reference table used to capture the transaction codes for payments and adjustments stored in the Enc_Payments table for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards. You can also use this table to group transaction codes into transaction types.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Transaction Code dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Encounter Dimensions > Transaction Codes.



The page can only display up to a maximum of 10,000 records.

NOTE: At this time, you can only add or delete records in this dimension table directly through **Axiom Explorer > Table Library > DSS > Reference > TransactionCode** in the Windows or Excel Client. For more information, see Opening dimension tables in spreadsheet mode.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a transaction code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a transaction code:

1. Click in the cell(s) to edit, and make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. After you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Transaction Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

TransactionCode - The financial class code. This must be an alpha code so that an F is prefixed during the import process.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

LongDescription - A longer description or comments about the transaction code.

TransactionType - Type of transaction code. Allows you to group individual transaction codes into types.

COST ITEM DIMENSIONS

CDM Codes dimension

The CDM Codes dimension includes all the charge codes within an organization. The charge codes are used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the CDM Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Costing Data > Cost Item Dimensions > CDM Codes.

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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing a CDM code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To edit a CDM code:

1. In the table, click in the cell(s) to edit, make your changes.

NOTE: Columns that are grayed out cannot be edited.

2. Click Save.

Column descriptions

This section provides descriptions for each column in the CDM Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CDMCODE - The charge codes used within your organization. This must be an alpha numeric field so that during the import process, a C is appended to all CDM codes to ensure they are alpha numeric.

Description - Identifies the CDM code description. Try to be as explicit as possible, avoid abbreviations, and use layman's terms.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost Items dimension

The Cost Items dimension defines the cost object to which costs are allocated during the unit cost calculation processes for all methods. It can be a chargeable activity or item, thus the foreign key reference to CDM codes, but it can also be a non-chargeable item. The cost item can also be created during a Direct to Encounter costing process, whereby the encounters can be assigned cost items based on business rules.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Cost Items dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Costing Data > Cost Item Dimensions > Cost Items.

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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Editing cost items

To edit cost items:

- 1. In the table, do any of the following:
 - To edit a cost item, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To delete a cost item, select the row to highlight it, and then click **Delete Row**. At the **Continue?** prompt, click **OK**.
- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Cost Items dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CostItem - The primary key for the table and uniquely identifies the cost item.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

DEPT - The default department for the cost item. Many chargeable items are used in multiple departments.

CDMCODE - The reference to the CDM code potentially associated to the cost item, if not set to the default.

REVCODE - The UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

CPT - The CPT code associated with a chargeable cost item in an institutional or professional setting.

TYPE - A client-controlled Type indicator helpful in filtering cost items of particular nature or category. This can be used to indicate different cost treatment in the costing process.

HCPCS - The HCPCS code associated with a chargeable cost item in an institutional or professional setting.

CreateDate - Reserved for future use.

CPT Codes dimension

The CPT Codes dimension contains all of the CPT codes that have been billed within the organization and is used for monthly reporting and provider-level budgeting.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the CPT Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Costing Data > Cost Item Dimensions > CPT Codes.

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Data Control				
Data Management > Data Extensibility >				
Data Enhancement & Refinement				
Service Lines > Population Builder > Episodic Grouper > Encounter Viewer				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting				

The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.



- In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.

Adding or editing a CPT code

To add or edit a CPT code:

- 1. In the table, do any of the following:
 - To add a code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the CPT column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To delete a code, select the row to highlight it, and then click **Delete Row**. At the **Continue**? prompt, click **OK**.
- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the CPT Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CPT - The CPT code used in Axiom Budgeting and Performance Reporting. This must be an alpha code, so a C is prefixed during the import process.

Description - Identifies the CPT description to use for budgeting and reporting.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

HCPCS Codes dimension

The HCPCS Codes dimension includes HCPCS codes used within your organization as level 3 CPT codes that provide further detail as to the services, procedures, or supplies that were used in the course of care.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the HCPCS Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Costing Data > Cost Item Dimensions > HCPCS Codes.
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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel **T** icon in the upper left corner of the page.

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- 2. In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **TEdit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
- 3. Click Apply.
- Adding or editing an HCPCS code

To add or edit an HCPCS code:

1. In the table, do any of the following:

• To add a code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the HCPCS column.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

• To edit a code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To delete a code, select the row to highlight it, and then click **Delete Row**. At the **Continue**? prompt, click **OK**.
- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🖈.
- 2. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the HCPCS Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

HCPCS - The HCPCS codes, which can be unique to states, payors, etc.

Description - A long form description of the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Revenue Codes dimension

The Revenue Codes dimension lists all of the revenue codes.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the Revenue Codes dimension

From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Costing Data > Cost Item Dimensions > Revenue Codes.

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The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel T icon in the upper left corner of the page.

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In the Filter box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click TEdit. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.

- 3. Click Apply.
- Adding or editing a revenue code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a revenue code:

- 1. In the table, do any of the following:
 - To add a revenue code, click **Add Row**. The new row displays at the bottom of the table. Enter information in each column. After you save, the table will display the new row in order by the REVCODE column.

IMPORTANT: If you add a new revenue code that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes.

• To edit a revenue code, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon 🔦 .
- To redo your changes, click the right arrow icon 🔶 .
- 2. When you finish making changes, click Save.

Deleting a revenue code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a revenue code:

- 1. In the table, select the row to highlight it, and then click **Delete Row**.
- 2. At the **Continue?** prompt, click **OK**.
- 3. When you finish making changes, click Save.

Column descriptions

This section provides descriptions for each column in the Revenue Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TIP: In this dimension, you can add custom "grouping" columns to customize the data you want to query into reports. For more information, see Creating or modifying custom columns in dimensions.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

REVCODE - The UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

Working with Patient Data

Axiom Enterprise Decision Support includes several utilities to manage patient data, including:

- **Episodic Grouper** Provides an easy way to select patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition. This includes the ability to define rules and reuse them where appropriate, and then use them to define an episode or bundle.
- Encounter Viewer Displays the details regarding a patient encounter to help you understand overall reporting results.
- Patient Zip Code reference table This reference table includes the zip codes. You can use the Configure Variable Columns utility to map the Zip codes to custom columns you can use for reporting.

Working with episodes

An episode is a series of medical encounters that address a specific medical condition or center around a specific set of medical services. Episodes have been used by organizations for some time, but until recently, they were of interest from a clinical or quality perspective. Episodes are now becoming more popular due to the potential of being a source of reimbursement.

Episodes are similar to and often synonymous with bundles, which is the process of bundling a set of services and paying one amount to allocate across providers. A bundled payment methodology involves combining the payments for a physician, hospital, and other health care provider services into a single bundled payment amount. This amount is calculated based on the expected costs of all items and services furnished to a beneficiary during an episode of care. Payment models that provide a single bundled payment to healthcare providers can motivate them to furnish services efficiently, to better coordinate care, and to improve the quality of care. Healthcare providers receiving a bundled payment may either realize a gain or loss, based on how successfully they manage resources and total costs throughout each episode of care. A bundled payment also creates an incentive for providers and suppliers to coordinate and deliver care more efficiently because a single bundled payment will often cover services furnished by various health care providers in multiple care delivery settings.

Episodes have a trigger event that are often (but not always) a pre-and/or a post-phase. Episodes and bundles often have very specific criteria with numerous inclusion and exclusion rules. These rules are generally interpreted to resemble the advanced filtering used to identify which encounters might be defined as having a triggering event and what encounters may be related to each other, thus defining the episode.

In Axiom Enterprise Decision Support, the Episode Builder utility provides an easy way to select patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition. This includes the ability to define rules and reuse them where appropriate, and then use them to define an episode or bundle.

By defining an episode, you create or select a data filter, which narrows the scope of the Encounter table to match events to the criteria, called the Anchor. After further configuration of an optional pre-Anchor and post-Anchor, you can submit the Episode Definition to the Scheduler for processing. Processing generates records into the EpisodicGroupingEncounter table for reporting purposes.

The Episode Builder includes two main areas:

- Episode Browser The page where you manage the episode definitions. From this page, you can:
 - View a list of all the episodes definitions created by all users
 - View only those episode definitions created by you
 - View episode definitions that are not active
 - View bundled episode definitions
 - Manage filters
 - Create episode definitions



- **Episode Editor** The page used to configure the specific episode definition criteria. From this page, you can:
 - General Setup tab Configure the episode definition name, description, folder, activate/deactivate the definition, and set the parameter dates of the episode
 - Anchor, Pre-Anchor, and Post- Anchor tabs Configure the Anchor, Pre-Anchor, and Post-Anchor criterion.
 - Process tab Process the definition to display a list of the episodes based on the criterion you configured.

Episode Edito	or Births					
General Setup			Anchor Date P	arameters		
Episode Name		(6 of 75)	*Please choose the start an	d end date range for	the Anchor Encounters	
Births			Evaluation Period Start	Date	Evaluation Period End	Date
Episode Description		(28 of 500)	3/6/2017	₩ ×	6/4/2018	m ×
A group of patient's births. Folder Birt	hs	Active				
Is Bundle		No				

TIP: When using the Episode Builder for the first time, we recommend that you first set up the filters you will mostly likely use to create the criterion for the episode definitions. To do this, click the Filters button in the top right corner of the Episode Browser page. For more information on how to create and save filters for future use, see Using the Import Wizard.

Adding or editing an episode definition

If you are new to using episodes, we recommend you first review the following topic Working with episodes.

To add or edit an episode definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Episodic Grouper.

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Service Lines > Population > Episodic Grouper > Encounter > Viewer				
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2. Do one of the following:

E.

• To create a new episode definition, on the Episode Browser page, click + Add New in the upper right corner of the page.

Episode	Browse	r All Episo	odes	+ Add New T	ilters

- To modify an episode definition to modify, click the link for an existing definition from the list of definitions. There are different ways to view and search for definitions. For more information, see Viewing episode definitions.
- 3. In the dialog that displays, do the following:
 - a. In the Episode Name field, type a name for the Episode Group.
 - b. In the **Episode Description** field, type a description for the Episode Group.
 - c. Save the Episode Group to a folder by doing the following:
 - To save the Episode Group to a new folder, select Create New Folder, and type a name for the folder in the box.
 - To save the Episode Group to an existing folder, select **Select an Existing Folder**, and select a folder from the drop-down.

4. Click Save and Continue.

NOTE: The Episode Editor opens in a separate browser window.

5. In the **Setup** tab, complete the following fields:

Option	Description
Episode Name	Displays the name you entered in the + Add New dialog. You can make edits, if needed.
Episode Description	Displays the description you entered in the + Add New dialog. You can make edits, if needed.
Folder	Displays the folder you created/selected in the + Add New dialog. You can make edits, if needed.
Is Active	Do one of the following:
	 To allow the episode definition to process, click the toggle to Active.
	 To remove the episode definition from processing, click the toggle to Inactive.
Is Bundle	Do one of the following:
	 To allow the episode to be grouped with other episodes as a bundle of services to allocate one payment across multiple providers, click the toggle to Yes.
	 To not include the episode as part of a bundle, click the toggle to No.
Evaluation Period Start Date	Select the start date range for the Anchor encounters.
Evaluation Period End Date	Select the end date range for the Anchor encounters.

- 6. In the Anchor, Pre-Anchor, and Post-Anchor tabs, create the criteria used to define the Episode Group by doing the following:
 - a. Do one of the following:
 - To add a criterion, click + Add Criterion.



• To edit a criterion, click the pencil and notebook icon next to the Criteria field.



- b. In the Enter a name for the Criterion field, type a name for the criterion.
- c. Click the funnel icon to open the Advanced Filter Wizard, and create or select a filter. For instructions, see .

The filter criterion details displays in the box.

7. To preview the data for each tab, click **Preview** in the upper right corner of the page.

Ep	Disode Editor CCJRV3		Preview	Save
1	Name	Criteria		
	+ Add Criteria			
	MSDRG	{imit=EncounterSEQ; select=ClinicalCoreMeasure EncounterSeq; where=EncounterSeq IN (1, 2, 3);)		▼
	MSDRG 2	{imit=EncounterSEQ; select=CostDetail.EncounterSeq: where=CostDetail.TransactionID.TransactionID IN (1, 2, 3, 4, 5, 6, 7);		T

- 8. After you are done configuring the episode definition, click Save.
- When you are ready to process to the episode definition, in the Process tab, click Process Definition.

Viewing episode definitions

The Episode Browser allows you to view the list of episode definitions by the following:

- All definitions
- Only definitions that you created
- Inactive definitions
- Bundled definitions

You can also search for a specific definition by name or description.

To view episode definitions:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Episodic Grouper.

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- 2. Do one of the following:
 - To view all episode definitions, click the folder icon.
 - To view only episode definitions that you created, click the person icon.
 - To view only episode definitions that are not activated for processing, click the pencil and paper icon.
 - To view only episodes that are part of a bundle, click the stacked boxes icon.
 - To find a specific episode definition, in the Search box, type the name or description of the definition, and press **Enter**.

Processing an episode definition

Use these steps to process an existing episode definition. When you process a definition, the system sends it to the Scheduler for processing.

To create or edit a definition, see Adding or editing an episode definition.

To process an episode definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Episodic Grouper.

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- 2. Click the link for the episode definition to process from the list of definitions. There are different ways to view and search for definitions. For more information, see Viewing episode definitions
- 3. In the Process tab, click Process Definition.

Episode Editor	Births
Setup Anchor Pre-Anchor	Post-Anchor Process
Anchor Date Param	eters
Evaluation Period Start Date	Evaluation Period End Date
3/6/2017	6/4/2018
Process Definition *Plea	se make sure date parameters are entered and the episode definition is set to active on the Setup tab

NOTE: Depending on the amount of data in the system, it may take a few minutes to process the definition.

Deactivating an episode definition

At this time, you cannot delete an episode definition, but you can deactivate it so it cannot be processed.

To deactivate an episode definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Episodic Grouper.

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Service Lines > Population > Episodic Grouper > Encounter > Viewer				
Cost Accounting				
Costing Process Guide Costing Process Checklist				
Reporting				

- 2. Click the link for the episode definition to deactivate from the list of definitions. There are different ways to view and search for definitions. For more information, see Viewing episode definitions.
- 3. In the Setup tab, for Is Active, click the toggle to Inactive.

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General Setup			
Episode Name			(6 of 75)
Births			
Episode Description			(28 of 500)
A group of patient's births.			
Folder Births			•
Is Active			Inactive

4. Click Save.

Viewing encounter details

The Encounter Viewer allows you to view the entire data set for a patient's encounters.

To view encounter details:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Encounter Viewer.

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Service Lines > Population > Episodic Grouper > Encounter > Encounter > Encounter > Enco				
Costing Process > Costing Process > Checklist				
Reporting				

2. In the Enter an encounter dialog, type the encounter number, and click OK.

To navigate back to the encounter selector, click **Encounters List** in the breadcrumb at the top of the page.



Encounter records

The encounter record includes several tabs that contain encounter details organized into different areas so you can understand what occurred regarding a patient's visit.

Summary tab

Shows high-level overview information related to the encounter, including:

- Facility details
- Financial summary
- Admin/Discharge information
- Billing summary
- Cost category details

Groupings tab

Shows the service lines and population assignments associated with the encounter.

Coding tab

Shows codes related to the encounter, including:

- Encounter codes
- ICD Diagnosis
- ICD Procedures
- CPTs

Providers tab

Shows the list of providers associated with the encounter, including:

- Provider name
- Role
- Date assigned

Financial tab

Includes the following sub-tabs for two types of financial categories:

- **Payments & Adjustments** Shows payment and/or adjustment detail information by account number. From the drop-down above the list, you can view all the payments and adjustments, payments only, or adjustments only.
- **Cost Details** Shows cost information by department for items used in the encounter. To see more details about the item, click the link in the Department column.

Payors tab

Shows the primary, secondary, and tertiary insurance plans used for the encounter, including:

- Sequence
- Insurance plan name and group
- Subscriber information
- Authorization details
- COB details
- Coverage and non-coverage details

Surgeries tab

Shows a list of the provided surgical procedure details, including:

- Operation ID
- Procedure code and description
- CPT code and description
- Performing provider
- Surgery start and end time
- Surgery duration

Clinical tab

Shows the metrics specific to the encounter, including:

- Hospital acquired conditions
- Patient safety indicators
- Utilization
- Readmissions

Managing Population Definitions

The 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 capability.

The Population Builder displays a home page with a list of the definitions used by your organization. From here, you can add, edit, archive, and delete them. You can also easily activate/deactivate and enable/disable Axiom Intelligence reporting for each definition as well as launch the Population Analysis report directly from the utility.

The list displays the definition name and description as well as who created it, the number of encounters tagged with the definition criteria, and when the definition was last processed. Check marks in the Active and Axiom Intelligence columns allow you to easily see which definitions are active for processing and pushed to Axiom Intelligence.

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Population Builder									
Population Definitions	Add Population Definition	n Process Batched Definition	าร			AI Sync	Launch Populations Rep	ort Search Definitio	ins Q
Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence		
 COVID-19 Populations 									-
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	×	×	✓		
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	 		×		
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	 		×		
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	 		×		
 Kaufman Hall Example Study Sets 									
Pediatrics	Example study set limited to patients age at admission 0-17 for calendar years 2	adebruhl	148,947	3/23/2020					
Knee / Hip Replacements	Example study set identifying hip and knee replacements for calendar years 201	jrispoli	1,913	3/11/2020					
Dr Moore as Attending Provider	Example study set where Dr. Moore is attending provider for CY 2014.	jrispoli	5,942	6/4/2020	×				
ICU Cases	Example study set for ICU cases defined by rev code for CY 2016 and 2017.	adebruhl	8,158	3/11/2020					
Cardiac Program	Example study set including business rules for patients to be included in cardiac \ldots	jrispoli	245,688	3/11/2020					
Encounter Viewer Test	Testing Encounter Viewer	admin	489	6/15/2020	×				
 Utilization Measures 									
Cases Utilizing Respiratory Services	Cases with Respiratory Services Rev Group code.	jrispoli	14,736	4/27/2020	 				
Cases Utilizing Emergency Room	Cases with Emergency Room Rev Group code.	jrispoli	106,579	4/27/2020	 				
Cases Utilizing Ventilator	Cases with with ventilator MSDRG	jrispoli	921	4/27/2020	×				
Cases Utilizing ICU	Cases with ICU Rev Group code.	ASnow	8,166	4/27/2020	×				

COVID-19 patient population definitions

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 COVID-19 Population and Utilization and 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 for your organization.

Searching for definitions

In the Search Definitions field, type information specific to the definition, including the name, description, and the last processed date. The table will filter the list based on the definitions that meet the search requirements.

Adding, editing, or cloning population definitions

TIP: Instead of adding a new definition from scratch, you can clone an existing definition, and edit it.

To add, edit, or clone a population definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Population Builder.



2. Do one of the following:

- To add a definition, click Add Population Definition at the top of the page.
- To edit or clone a definition, click the definition to highlight it, and click the notepad icon.

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Population Builder										
Population Definitions	Add Popul	ation Definition Process Batchet	Definitions			Al Sync	Launch Population	s Report	Search Definiti	2718 Q
Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence			
COVID-19 Populations										^
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	 	 Image: A second s	×		-	
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	× .		×			
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	×		×		•	
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	 Image: A second s	add to Batch	× .		C 🖬	0

3. In the Add/Edit Definition screen, to clone a definition, click Clone.

Decision Support		
≡		
Population Definitions > Edit Edit Definition: Pediatrics		
Name:	Group:	Description:
Pediatrics	Kaufman Hall Example Study Sets 🔻	Example study set limited to patients age at admission 0-17 for calendar years 2016 and 2017.
Active: No In Axiom Intelligence: Yes		
Clone Process Save		

4. When adding or editing a definition, complete the following options, and click Save:

NOTE: The system requires you to save the definition before adding or editing definition criteria.

Option	Description
Name	Type the name for the definition.
Group	Select an existing group or type a new name used to group together definitions. This is an optional field. Examples might include Centers of Excellence, entity, etc. NOTE: This group name is only used to help group definitions on the definition list page. They are not used for reporting or any
	other purpose at this time.
Description	Type a description of the definition.

Option	Description
Active	 To activate the definition for processing, click the toggle to Yes. To deactivate the definition so that it is not available for processing, click the toggle to No.
	NOTE: Definitions cannot be activated if they do not include a valid filter. Only active definitions can be processed.
In Axiom Intelligence	 To include the defined populations in Axiom Intelligence, click the toggle to Yes. To exclude the defined populations from Axiom Intelligence, click the toggle to No. NOTE: Flagged definitions are sent to Axiom Intelligence by clicking ALSume on the Depulation Definitions home page.
	clicking Al Sync on the Population Delinitions nome page.

5. Click Save.

NOTE: You cannot add criteria until you first save the definition.

6. To add a criteria, click +Add New Criteria. To edit a criterion, highlight it, and click in the column cells. Complete the following fields.

Option	Description
Criteria Name	Type a name for the criteria.
Criteria Description	Type a description for the criteria.
Criteria Filter	Click the funnel icon 🝸 to set up or select an existing filter using the Filter Wizard.
	IMPORTANT: The system processes each criteria only as an OR statement. To build criteria that includes AND criteria, use the Filter Wizard.

- 7. To delete a criteria, click the criteria to highlight it, and click the trash bin icon 🤳.
- 8. After making the criteria changes, click **Save**.
- 9. To process this definition individually, click **Process**. When the process job is complete, the date will update in the **Last Processed** column of the Population Definitions home page.

TIP: To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see Processing population definitions.

Deleting population definitions

Deleting a definition removes all of the tagged encounters as well as the definition from the system.

TIP: We recommend only using this action for definitions that will never be used again in the future. For definitions that you want to keep but not use currently, we recommend archiving the definition instead. For more information, see Archiving population definitions.

IMPORTANT: You cannot undo this action.

To delete a population definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Population Builder.

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Data Management > Data Extensibility >				
Data Enhancement & Refinement				
Service Lines > Population > Episodic Grouper > Encounter > Viewer >				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting	 			

2. Click the definition to highlight it, and click the trash can icon.

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	Population Name	Population Description		Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence			
* C	OVID-19 Populations											
	Exposure to COVID-19	Cases where COVID-19 is suspected		ASnow	3,546	4/27/2020	 Image: A second s	 Image: A set of the set of the	×		-	
	Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present		ASnow	44,491	4/27/2020	× .		×			
	COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes		adebruhl	3,390	4/27/2020	 		×		-	
	COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired		jrispoli	108	4/27/2020	×	add to Batch	×	œ	H 0	

3. Review the warning message prompt, and click **OK**.

Archiving population definitions

Archiving allows you to keep the definition in the system while removing all the tagged encounters from the database, helping to decrease data bloat.

TIP: If this definition will never be used again in the future, you may want to consider deleting it entirely from the system. For more information, see Deleting population definitions.

To archive a population definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Population Builder.

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Enterprise Decision Support			
Data Control			
Data Management > Data Extensibility >			
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Service Lines > Population > Episodic Grouper > Encounter > Viewer >			
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Costing Process > Costing Process > Checklist			
Reporting			

2. Click the definition to highlight it, and click the storage box icon.

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Рор	ulation Definitions	Add F	Population Definition Process Batched E	Definitions			Al Sync	Launch Populations Report	t Search Definition	Q
	Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence		
4 C	OVID-19 Populations									-
	Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	×	×	×	-	
	Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	×		×		
	COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	×		×	•	
	COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	×	add to Batch	×	C2 🔳	b .

3. At the warning message prompt, click **OK**.

Reactivating an archived definition

To reactivate an archived definition:

1. Click the definition to highlight it, and click the notepad icon.

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	Population Name	Population Description		Created By	Er	ncounters	Last Processed	Active	Batched	Axiom Intelligence					
	COVID-19 Populations														^
	Exposure to COVID-19	Cases where COVID-19 is suspected		ASnow		3,546	4/27/202	· 🗸	×	×					
	Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	t J	ASnow		44,491	4/27/202	· 🗸		×					
	COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	4	adebruhl		3,390	4/27/202	· 🗸		×			•		
	COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	j	rispoli		108	4/27/202) 🗸	add to Batch	×			C2 🖬	0	

- 2. Click the Active toggle to Yes.
- 3. Optionally, to push the population definition to Axiom Intelligence, click the In Axiom Intelligence toggle to Yes.
- 4. Click Save.
- 5. To process the definition, click Process.

TIP: To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see Processing population definitions.

Processing population definitions

Before you can process a definition, it must be activated. Active definitions are indicated by a check mark in the Active column of the Population Definitions home page. You can also select multiple definitions for batch processing.

Process individual definitions

To process an individual definition:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Population Builder.

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Service Lines > Population > Episodic Grouper > Encounter > Viewer >				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting				

2. In the table, click the definition to highlight it, and click the notepad icon.

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-	COVID-19 Populations											-
	Exposure to COVID-19	Cases where (COVID-19 is suspected		ASnow	3,546	4/27/20	020 🗸	~	~		
3	Signs & Symptoms of C	Cases where s	signs and symptoms of COVI	D-19 are	ASnow	44,491	4/27/20	020 🗸		~	•	
	COVID-19 Cases	COVID-19 Cas	es defined by ICD Diagnosis	codes	adebruhl	3,390	4/27/20	020 🗸	add to Bat	×	2	
	COVID-19 Deaths	COVID-19 Cas	es where Discharge Status =	Expired	jrispoli	108	4/27/20	020 🗸		~		

3. Click Process.

Decision Support		
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Population Definitions > Edit Edit Definition: Pediatrics		
Name:	Group:	Description:
Pediatrics	Kaufman Hall Example Study Sets 🔹	Example study set limited to patients age at admission 0-17 for calendar years 2016 and 2017.
Active: Yes In V n Intelligence: Yes Clone Process Save		

Batch process definitions

To batch process definitions:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Launch Population Builder.

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Enterprise Decision Support				
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Costing Process > Costing Process > Checklist				
Reporting				

2. For each definition to include in the batch, click the **Batched** column to add a check mark. To remove a definition from the batch, click the check mark to remove it.

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Po	pulation Definition	IS	Add Population Definition	on Pr	ocess Batched Definition	ons	Al Sync	Launch Pop	ulations Repo	rt Search	Definitions		Q	
	Population Name	Population De	escription		Created By	Encounters	Last Processe	d Active	Batched	Axiom Intel	lig			
	COVID-19 Populations													
	Exposure to COVID-19	Cases where	COVID-19 is suspected		ASnow	3,546	4/27/202	20 🗸	~	×				
	Signs & Symptoms of C	Cases where	signs and symptoms of COV	/ID-19 are	ASnow	44,491	4/27/202	20 🗸		/ 🗸				
	COVID-19 Cases	COVID-19 Cas	es defined by ICD Diagnosi	s codes	adebruhl	3,390	4/27/202	20 🗸	add to Bat			C I		
	COVID-19 Deaths	COVID-19 Cas	es where Discharge Status	= Expired	jrispoli	108	4/27/202	20 🗸	Ma	irk Definition to	be includ	ed in a b	atch	

- 3. Above the definition table, click **Process Batched Definitions**.
- 4. In the Scheduled Processing Settings dialog, do one of the following, and click OK:
 - To run the batch process immediately, click **Run Now**.
 - To schedule the batch to run, click **Schedule**, and complete the dates, day of the week, and time fields.

Including or excluding population definition data in Axiom Intelligence reports

From the Population Builder utility, you can determine the data from the population definitions to include in Axiom Definitions reports.

Individual definitions

To include or exclude an individual population definition data in Axiom Intelligence reports:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Population Builder.

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Service Lines > Population > Episodic Grouper > Encounter > Viewer >			
Cost Accounting			
Costing Process > Costing Process > Checklist			
Reporting			

2. In the list of definitions, click the definition to highlight it, and click the notepad icon.

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	Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intellig	
-	COVID-19 Populations								*
	Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	×	×	×	
	Signs & Symptoms of C	Cases where signs and symptoms of COVID-19 are	ASnow	44,491	4/27/2020	×		×	•
	COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	×	add to Bat	×	2
	COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	~		×	

3. In the Add/Edit Definition screen, click the In Axiom Intelligence toggle to Yes to include it, or click No to exclude it.

Decision Support			
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Population Definitions > Edit			
Edit Definition: Pediatrics			
Name:	Group:		Description:
Pediatrics	Kaufman Hall Example Study Sets	•	Example study set limited to patients age at
			admission 0-17 for calendar years 2016 and 2017.
Active: Yes In Axiom Intelligence: Yes			
Clone Process Save			

Multiple definitions

To include or exclude multiple definition data in Axiom Intelligence reports:

In the Populations Definitions home page, for each definition, click the definition to highlight it, and then click the Axiom Intelligence column to add or remove the check mark.

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	Population Name	Population Description		Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence		
-	COVID-19 Populations										^
	Exposure to COVID-19	Cases where COVID-19 is suspected		ASnow	3,546	4/27/2020	 Image: A second s	× .	~		
	Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present		ASnow	44,491	4/27/2020	× .		~	-	
	COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes		adebruhl	3,390	4/27/2020	×		~		
	COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired		jrispoli	108	4/27/2020	×		~		

Working with Service Lines

The Service Line Schemas utility allows you to quickly and easily create, manage, and process the tagging of encounters with service lines for reporting purposes. You can create up to eight schemas with an unlimited number of service line definitions. Definitions allow you to specify which encounters to evaluate and tag.

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When configuring a schema, you can also create an unlimited number of groups that give you the flexibility to organize encounters in different ways. Let's say your organization has a Center of Excellence. You can create a group for this and add values that addresses each center, such as Neurosciences, Cardiology, Cancer, etc. You can then create reports using these different groups.

TIP: This feature is optional, but if you plan on using groups, we recommend that you plan out your groups first, and then apply them starting with the first schema you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.

Summary Groups				
Group 1	Group 1 Name:			
Group 2	Center of Excellence			
Group 3	Group 1 Values:			
Group 4	Stoup I futuoo.			- 1
Group 5	Name		Service Lines	
Group 6	Neursciences	Û	1	
Group 7	Heart Center	Û	0	- 1
Group 8	Neonatolgy	Û	0	
Group 9	Cancer	Ĥ	1	- 1
Group 10	Other			
•Add Group	Add Values		U	*

When you process a schema, the Axiom system evaluates each encounter against the definition criteria in an order that you define. When an encounter meets the criteria, the system removes it from further evaluation and tags it in the Axiom database with the service line so that it is not counted more than once.

Managing service line schemas

The Service Line Schemas utility allows you to configure, manage, and process up to eight schemas. For each schema, you can add, clone, edit, delete, and order definitions.

For details on how the Service Line Schema utility works, see Working with Service Lines.

Accessing service line schemas

From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Service Lines.

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Data > Data Extensibility > Management				
Data Enhancement & Refinement				
Service Lines > Population > Episodic Grouper > Encounter > Viewer				
Cost Accounting				
Costing Process > Costing Process > Checklist				
Reporting				

Adding or editing a service line schema configuration

To add or edit a service line schema configuration:

- 1. Do one of the following:
 - To add a schema, click Add Service Line Schema at the top of the page.
 - To edit the configuration of a schema, click the schema to highlight it, and click the cog wheel icon.

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Service Serv	Line Schemas vice Line Schemas		Add Service Line Schema	E	Show only ctive	Search S	chemas	Q
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2. In the Configure Schema dialog, complete the following fields in the Summary tab:

NOTE: If your organization imports schemas from outside the Axiom system, some of the options in this dialog may not be available.

Option	Description						
Name	Type a name for the schema.						
	IMPORTANT: If service lines are imported, any name changes will also need to be made to the import map so that the data loads correctly the next time it is loaded into the system. For more information, see Implementing service lines.						
Description	Type a description of the schema.						
Туре	Do one of the following:						
	 If you are importing the schema, click Client Imported. For more information, see Implementing service lines. 						
	 To set up, manage, and process the schemas and service line definitions in Axiom, click Axiom. 						
Active	Do one of the following:						
	 To include the schema when processing schemas, click the toggle to On. 						
	 To exclude the schema when processing schemas, click the toggle to Off. 						
	IMPORTANT: If you exclude the schema from processing, the data related to this schema will not be available in Axiom Intelligence reporting.						

Option	Description					
Schema #	Select the available number to assign the schema.					
	NOTE: The drop-down list defaults to the next available number, but you can select any available number in the list. The number does not correspond to any kind of processing order. The system only allows up to eight schemas, so if all the available slots are full, the number will be grayed out.					
Mark as Primary Reporting Schema	Click the check box to identify this as the main reporting schema used for Axiom Intelligence reports.					
	NOTE: You can point any Axiom Intelligence report to any of schema listed in Axiom Enterprise Decision Support. However, using this check box provides a quick and easy way to switch schemas without having to manually configure it in Axiom Intelligence.					
	TIP: On the Service Line Schema home page, a star icon in the # column identifies the primary reporting schema.					

3. In the Groups tab, do the following:

TIP: This feature is optional, but if you plan on using groups, we recommend that you plan your groups first, and then apply them starting with the first schema and corresponding service lines definitions you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.

- a. To add one or more groups, click + Add Group.
- b. In the Group Name field, type a friendly name for the group.
- c. In the Group Values section, to add one or more values, click + Add Values.
- d. In the Name column, type a name of the value.
- e. To delete a value, if needed, click the trash can icon next to the value.
- 4. After making additions or edits, click Save.

- 5. Add or edit service line definitions.
- 6. Process the schemas.

Deleting a service line schema

IMPORTANT: Deleting a schema deletes all associated service line definitions and groups as well as current and historical data. This action cannot be undone.

To delete a service line schema:

1. Click the schema to highlight it, and click the trash can icon.

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								D	elete	schem	ia		

- 2. Review the warning prompt.
- 3. To continue with the deletion process, click **OK**.

Implementing service lines

Before you begin setting up service lines, you need to decide how you want to add, manage, and process them. You can choose one of the following options:

- Axiom rule-based service lines You add, manage, and process schemas and definitions all within Axiom, which runs each encounter through a series of filters to determine what encounters to assign to a service line. You can create up to eight service line schemas that include an unlimited number of service line definitions. You order the definitions the way you want the system to evaluate each encounter. Each night, the system automatically processes and tags each encounter using a job in Axiom Scheduler. You can also activate or deactivate definitions, as needed. For example, let's say you want to add a new service line at the beginning of the fiscal year. You can add the new service line definition at any time but keep it inactive until you are ready to use it.
- Client imported service lines If your organization uses a third-party application to define service lines—such as Sg2, Truven Health Analytics, or even your own host system—you can import them directly into Axiom without needing to create an entire set of service line rules from scratch. This allows you to continue managing and processing service lines outside the Axiom system, and simply import them with the help of a job in Axiom Scheduler.

NOTE: Once you choose a method on how to manage and process schemas, you should continue to use that method. Do not mix methods.

Importing third-party service lines

This section walks you through the best practice for importing third-party service lines into Axiom. You should first familiarize yourself with Axiom's import and scheduling capabilities before completing these steps.

TIP: During the implementation process, your Syntellis Implementation Consultant can help you complete these steps. If you need help after implementation, create a support case with Syntellis Support.

To import service lines:

- 1. In the Service Line Schemas utility, create the schemas and service lines to be imported.
- 2. Create an import to map the data from your raw data file that includes the encounters and service lines to the \Axiom\Table Library\DSS\Service Line Builder\Enc_ServiceLineStaging table.

NOTE: Only users assigned both the DSS Admin and the CostDSS Import Admin role profiles can complete steps 2 and 3 in this procedure.

 Create a Scheduler job to run the \Axiom\Imports Library\DSS\Import Enc_Serviceline from staging import to move the data from the Enc_ServiceLineStaging table to the Enc_ServiceLine table.

If the service lines happen to be imported before creating them in Axiom (as described in step 1 above), the system will still create the schemas for you. Axiom makes these easy to identify by displaying them as *******Schema Created From Client Import****** in the Service Line Schemas utility. You will simply need to update the schema or service line definition by doing the following:

• Update the name.

IMPORTANT: Use caution when changing the name since it maps to the schema or service line with the same name in the imported file. If you change the name, you will also need to change it in the mapping of the imported file so that the data loads correctly.

- Type a description of the schema or service line.
- Activate the schema or service line when ready to push data to Axiom Intelligence for reporting (schemas or service lines imported in this way are automatically set to inactive).
- Identify a schema as the main reporting schema used for Axiom Intelligence reports, if applicable.

 The encounter filters do not display in the service line definitions nor can you process schemas because it is assumed that encounters have already been processed and tagged outside the Axiom system. Importing just provides a way to get this information into the Axiom database for reporting purposes.

Managing service line definitions

Schemas are comprised of one or more service line definitions. The system uses these definitions to identify the encounters to evaluate and tag with the specified service line. You can create an unlimited number of definitions for a schema. For details on how the Service Line Schema utility works, see Working with Service Lines.

Accessing definitions

To access definitions:

1. From the Enterprise Decision Support home page, in the Data Enhancement & Refinement section, click Service Lines.

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Data Management > Data Extensibility >			
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Service Lines > Population > Episodic Grouper > Encounter > Viewer >			
Cost Accounting			
Costing Process Costing Process Checklist			
Reporting			

2. In the list of schemas, click the schema to highlight it, and click the notepad icon.
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vice Line Schemas | | Add Service Line Schema | | Show only active | Search Schema | 15 | Q | |
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Adding or editing definitions

To add or edit definitions:

- 1. Open the service line schema.
- 2. Do any of the following:
 - To add a definition, click Add Service Line Definition at the top of the page.
 - To clone a definition, click the definition to highlight it, and click the double page icon.
 - To edit a definition, click the definition to highlight it, and click the notepad icon.

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3. In the Service Line Assignment page, complete the following fields:

Option	Description
Name	Type a name for the definition.
	IMPORTANT: If service lines are imported, any name changes will also need to be made to the import map so that the data loads correctly the next time it is loaded into the system. For more information, see Implementing service lines.
Description	Type a description of the definition.

Option	Description
Туре	Indicates if the schema was imported or created in Axiom. This field is not editable and is set at the schema configuration.
Active	Do one of the following:
	 To include the definition when processing the schema, click the toggle to On. To exclude the definition when processing the schemas, click the toggle to Off. IMPORTANT: If you exclude the definition from
	processing, the information will not be available in Axiom Intelligence reporting.
Filters	Use the Filter Wizard to define the encounters for the system to evaluate for service line tagging. For instructions on writing filter syntax, see Filter criteria syntax.
	TIP: The system only evaluates encounter data, so by default, the system evaluates all of the data in the Encounter table. Because of this, the Filter Wizard defaults to the Encounter table. However, you can limit processing scope with a filter that points to other subsets of tables that include encounter IDs. For example, if you have a diagnostic table that includes the encounter sequence, you can narrow down the filter to that diagnostic, and the system will only process those encounters.
	NOTE: If service lines are imported, the filter option does not display because it is assumed that encounters are processed and tagged outside the Axiom system in the service line application used by your organization. For more information, see Implementing service lines.

Option	Description
Group Mapping	If applicable, select the group to associate the definition. For example, let's say your organization creates a group named Neurology. Any definitions created for neurology across schemas can be included in the Neurology group.
	TIP: Groups are an optional feature that provide a flexible way for your organization to group encounters, such as Centers of Excellence (Neurology, Dermatology, Cancer, Cardiology, and so on). Groups are set up at the schema configuration level. For more information, see Adding or editing a service line schema configuration.

- 4. Click Save.
- 5. Click the definition in the list to highlight it, and click the double arrow icon. Place the definition in the order in which you want the system to evaluate and tag encounters.

Ordering definitions instructs the system how to evaluate the encounters. Once an encounter meets a definition's criteria, the system tags that encounter with the service line, and removes it from further evaluation and tagging. This process prevents the system from counting an encounter more than once.

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≡			☆ ?
Service Line Schemas > PHC Service Line Defir	nition	Add Service Line Definition Process Schema	Show only active Search Definitions Q
Priority	Name	Description	Active
1	Dermatology-IP	Dermatology-IP	✓ ^
2	Dermatology-OP	Dermatology-OP	✓ ▼
3	Neurology-IP	Neurology-IP	🖌 🕑 🖓 🚺
4	Neurology-OP	Neurology-OP	×
5	Cardiology-IP	Cardiology-IP	✓
6	Cardiology-OP	Cardiology-OP	✓

6. In the **Move Service Line Definition** dialog, from the **After** drop-down, select the location in which to move the definition, and click **OK**.

TIP: Place the definitions in order from most to least important.

For example, let's say there are six definitions. The definition currently in position 3 can be moved after positions 1, 4, 5, and 6. Positions 2 and 3 are not listed because the definition already resides after position 2 and exists as position 3.

NOTE: If there are only two definitions in the list, you can only change the order by moving the definition in position 1 to position 2.

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Service Line Schemas >	PHC Definition	Add Service Line Definition	on Process Schema		Show only active	Search Definitions	
Priority	Name	D	escription			Active	
1	Dermatology-IP	D	ermatology-IP			×	
2	Dermatology-OP	D	ermatology-OP			×	
3	Neurology-IP	N	leuroloav-IP			×	
4	Neurology-OP	Move Service Line D	Definition	×		×	
5	Cardiology-IP	Neurology-IP				×	
6	Cardiology-OP	After				×	
		1 - Dermatology-IP 4 - Neurology-OP 5 - Cardiology-IP 6 - Cardiology-OP		• Q •			

7. After making your changes, process the schema.

Deleting a definition

IMPORTANT: Deleting a definition removes all current and historical data. This action cannot be undone. If your organization imports schema definitions, make sure to also remove the definition from the imported file.

To delete a definition:

- 1. Open the service line schema.
- 2. Click the definition to highlight it, and click the trash can icon.

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	Service Line Schemas > PHC Service Line Defin	ition	Add Service Line Defir	ition Process Scher	na	Show only act	ve Se	arch Definit	ions	Q	t
	Priority	Name		Description			Act	ive			
	1	Dermatology-IP		Dermatology-IP			~	•			^
	2	Dermatology-OP		Dermatology-OP			~	•			
	3	Neurology-IP		Neurology-IP			~	•	@ @ 1	Û	
	4	Neurology-OP		Neurology-OP			~	•			
	5	Cardiology-IP		Cardiology-IP			~	•			
	6	Cardiology-OP		Cardiology-OP			•	•			

Processing service line schemas

This procedure walks you through the steps of processing service lines immediately so you can update your Axiom Intelligence reports with the latest data. The system also is set up to process service lines overnight as well using a Scheduler job.

Service line schemas need to be processed under the following conditions:

- Adding a definition
- Editing a definition, including the filter
- Changing the definition order

NOTE: If your organization imports service lines from another application, you cannot process them because it is assumed that encounters are processed and tagged outside Axiom. For more information, see Implementing service lines.

To process service line schemas:

- 1. Open the schema.
- 2. Click the schema to highlight it, and click the notepad icon.

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	E						☆ ?
	Service Line Schemas > PHC Service Line Defin	ition	Add Service Line Defin	ition Process Schema	Show only active	Search Definitio	ons Q
	Priority	Name		Description		Active	-
	1	Dermatology-IP		Dermatology-IP		×	4
	2	Dermatology-OP		Dermatology-OP		×	V
	3	Neurology-IP		Neurology-IP		× [₢ � ! ㅎ
	4	Neurology-OP		Neurology-OP		×	
	5	Cardiology-IP		Cardiology-IP		×	
	6	Cardiology-OP		Cardiology-OP		×	-

- 3. At the top of the page, click **Process Schema**.
- 4. At the Process Schema Now prompt, click OK.
- 5. At the confirmation prompt, click **OK**.

The **Service Line Assignments** - **Results** page opens as a separate browser tab to indicate the status of the processing job. To see an update on the job status, click the refresh button in your browser.

To navigate back to the Service Line Schema utility page, simply click the Service Lines tab in your browser.

	↓											
<u> </u>	Service Lines - PHC	× 🔺 Axiom	Software									
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Syste	em Administration						43	L ⁴⁴	••		AX	10 M
≡	#									C	☆	?
Serv	vice Line Assignmer	nts Results										
	ID				Result	Start Time		Durati	on		Jser	▲
~	1895374				Success	Today at 8:34 AM		a tew s	secona	s a	amin	-
	✓ Job: Service Line A	Assignments		Server: scheduler	Success	Today at 8:34 AM		a few s	second	S		
	Task: Process Ser	rvice Line Assignments	3		Success	Today at 8:34 AM		a few s	second	s		
>	1895345				Success	Today at 6:55 AM		2 minu	ites	a	dmin	-
>	1895017				Success	Last Friday at 3:46 PM		3 minu	ites	a	admin	
>	1895015				Success	Last Friday at 3:43 PM		2 minu	ites	a	admin	
>	1895013				Failed	Last Friday at 3:41 PM		a few s	second	s a	dmin	
>	1895011				Failed	Last Friday at 3:39 PM		a few s	second	s a	dmin	
>	1895009				Failed	Last Friday at 3:37 PM		a few s	second	s a	admin	
>	1894995				Success	Last Friday at 3:28 PM		a few s	second	s a	dmin	
>	1894728				Success	08/12/2020		a minu	ite	a	dmin	
>	1894133				Success	08/05/2020		2 minu	ites	a	admin	

Creating and Maintaining Statistics

Statistic accounts are used to determine allocation or reclass dollar amounts. Departments that include the statistic account receive their weighted share of the allocated or reclassed balances from the source department or account.

The Manual Statistics page allows you to define statistic values by department for existing statistic accounts in addition to writing statistics into departments for newly created pseudo-accounts.

When a new statistic is created using a pseudo-account of a general statistic account that may not necessarily exist in a particular department, the input manual statistic writes to the department along with any related manually input values. The system saves these to the CGL for reference in any reclass or allocation step.

To view and manage your statistic accounts, from the Enterprise Decision Support home page, in the **Data Control** section, click **Data Management > Statistics > Manual Statistics**.

The Manual Statistics pages displays a list of all the statistics accounts set up by your organization. To order a column in ascending order, click the column header until the up arrow displays. To order by descending, click the column header until the down arrow displays.

Cost Accounting

Setup Guide > Data Management > Statistics > Manual Statistics Manual Statistics + Add Statistic Account									
Account 🕇 🗲	Account Description								
100	Total Admissions								
103	Total Discharges								
104	Total Discharges Babies (Nursery or NICU)								
105	Total Births								
110	Total Patient Days								
111	Total Nursery Days								
112	Total Women & Child Patient Days								

Adding or editing a statistic account

To add or edit a statistic account:

1. From the Enterprise Decision Support home page, in the Data Control section, click Data Management > Statistics > Manual Statistics.

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∉ Home				
Enterprise Decision Support				
Data Control				
Data Data Extensibility >				
$\int_{a=b=0}^{a=-\frac{1}{2}}$ Data Enhancement & Refinement				
Service Lines > Population > Episodic Grouper > Encounter > Viewer >				
Cost Accounting				
Costing Process > Costing Process > Checklist >				
Reporting				

- 2. Do one of the following:
 - To add a new account, click + Add Statistic Account.
 - To edit an account, select the account to highlight it, and then click the notepad icon

Cost Accounting			 G	¢	JI.	AX	1 O M
≡						☆	?
Setup Guide > Data Management > Setup Guide > Data Management > S	Statistics > Manual Statistics						
+ Add Statistic Account Account ↑	Account Description						
90000001000	Manual Statistic - Biomed_Labor						^
90000001001	Manual Statistic - Biomed_Repairs	ر اس					
90000001002	Manual Statistic - Biomed_Maintanance						
90000001010	Manual Statistic - EVS - Laundry Dollars Statistic						
90000001020	Manual Statistic - SQFT						
90000001030	Manual Statistic - EMP Count						
90000001040	Manual Statistic - Oregon Misc Revenue Acct						

3. In the Account Name field, type the name or description for the account number.

NOTE: The account number is system generated.

Edit Existing Sstic | Manual Statistic - Biomed_Repairs

1000	1001001	Manual Statistic - Biomed_	Repairs												
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Α1		x Dept													
	A	В	С	D	E	F		G H	4 1	J	ł	<	LI	N	Ν
1	Dept 💌	Description 💌	Oct 💌	Nov	Dec	🔽 Jan	🔽 Fe	b 💌 Mar	💌 Apr	💌 May	💌 Jun	🔽 Jul	🗖 🗖 Aug	💌 Se	p 💌
2	100010000	Balance Sheet	()	0	0	0	0	0	0	0	0	0	0	0
3	100060000	Administration	()	0	0	0	0	0	0	0	0	0	0	0
4	100060001	Allocated Expenses	()	0	0	0	0	0	0	0	0	0	0	0
5	100060100	Research Institute	()	0	0	0	0	0	0	0	0	0	0	0
5	100060200	Administration- VP	()	0	0	0	0	0	0	0	0	0	0	0
7	100060300	Administration- Director	()	0	0	0	0	0	0	0	0	0	0	0
3	100060400	Community Benefit	()	0	0	0	0	0	0	0	0	0	0	0
)	100060500	Physician Relations	()	0	0	0	0	0	0	0	0	0	0	0
0	100060600	Patient Access Willamette Mem	()	0	0	0	0	0	0	0	0	0	0	0
1	100060601	Central Scheduling	()	0	0	0	0	0	0	0	0	0	0	0
2	100060602	Patient Access Oregon Memoria	()	0	0	0	0	0	0	0	0	0	0	0
3	100060604	Preauthorization	()	0	0	0	0	0	0	0	0	0	0	0
4	100060620	Patient Access Tigard	()	0	0	0	0	0	0	0	0	0	0	0
5	100060640	Registration Services Prescott	()	0	0	0	0	0	0	0	0	0	0	0
6	100060700	Creative Print Studio	()	0	0	0	0	0	0	0	0	0	0	0
7	100060800	Corporate Compliance	()	0	0	0	0	0	0	0	0	0	0	0
8	100060900	Center for Learning and Innovat	()	0	0	0	0	0	0	0	0	0	0	0
9	100060901	Hospital Education	()	0	0	0	0	0	0	0	0	0	0	0
0	100061000	I.S. Administration	()	0	0	0	0	0	0	0	0	0	0	0
1	100061003	I.S. Project Management Office	()	0	0	0	0	0	0	0	0	0	0	0
2	100061004	I.S. Informatics	()	0	0	0	0	0	0	0	0	0	0	0
3	100061005	I.S. Business Services	()	0	0	0	0	0	0	0	0	0	0	0
4	100061300	HR Strategic Planning & HR BI	()	0	0	0	0	0	0	0	0	0	0	0
5	100061301	HR Organizational Developmen	()	0	0	0	0	0	0	0	0	0	0	0
26	100061600	PE- Quality	()	0	0	0	0	0	0	0	0	0	0	0
															>

4. In the spreadsheet, enter statistics in the columns for the departments you want to use the new account.

NOTE: The months that display depends on how your fiscal year is set up in the system. You can only enter numeric values in the month columns.

Click the arrow in a column header to sort and/or filter the data in the column. You can also reference the CGL table while working in this dialog by clicking ^{III} Open CGL Table above the table.

- 5. After making your changes, do one of the following:
 - To save changes to the CGL table and keep the window open to continue making changes, click **Apply**.
 - To save changes to the CGL table and close the window, click Save.

Using the Filter Wizard

You can use or create your own filters to customize the data to view. The Filter Wizard walks you through the process of building complex limit query filters rather than having to construct them manually. You can create and save new filters for future use as well as use and edit existing filters.

Using an existing filter

To use an existing filter:

1. Next to the **Preview** field, click the folder icon.

Preview 🕒 🔁 🗙

- 2. In the Filter Library dialog, select the filter to use, and click OK.
- 3. In the Filter Wizard dialog, click Apply.
- 4. Click OK.

Creating a filter

TIP: You can create a new filter from an existing filter by selecting it from the folder icon in the **Preview** field, and then follow these steps to make the appropriate changes. Make sure to give the filter a new name so that you do not overwrite the existing filter.

1. On the left side of the dialog, select the table column on which you want to base the filter. After you select a table column, the values in that column display in the right side of the dialog.

(a) Filter Wizard			>
Define criteria for the filter, based on table C	ClinicalCoreMea	sure	
Search Q	×	Search	Q ×
PrimaryService ServiceLine1 ServiceLine2 ServiceLine3 ServiceLineLastUpdated	▲ = <>	 (no value) ✓ Allergy and Immunology ✓ Breast Health Burns - Medical Burns and Wounds 	
BillType		Cancer - Medical	
- DillStatua	•	Cancer - Surgical	-

- 2. In the right side of the dialog, type or select the value on which to base the filter. You can type into the field above the list of values to filter the list or to specify a value. If one or more values are selected, then those items are used in the filter. Otherwise, whatever you type into the field is used by the filter.
- 3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than.



4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, edit your selections made above.

NOTE: For instructions on writing filter syntax, see Filter criteria syntax.

Search	Q >		Search	Q	ж
PrimaryService		▲ =	(no value)		-
Servicel inel		<>	Allergy and Immunology		
GerviceLineT			✓ Breast Health		
ServiceLine2			Burns - Medical		
ServiceLine3			Burns and Wounds		
📠 ServiceLineLastU	pdated		Burns		
📷 BillType			Cancer - Medical		
DillOtatua		-	Cancer - Surgical		-

- 5. Do one of the following:
 - If the filter criteria statement is finished, click **OK**. The Filter Wizard uses the statement in the Preview box (you do not have to click **Apply** in this case).
 - To create a compound filter, click **Apply** to move the current criteria statement into the **Filter** box. Then, repeat Steps a-d to create another criteria statement. When the next statement is complete, click **AND** or **OR** to join it to the prior statement.
- 6. In the File name field, type a name for the filter.
- 7. In the **Description** field, type a description of what the filter does.
- 8. Click Save.
- 9. In the Filter Wizard dialog, click **OK**.

Filter criteria syntax

Several areas of Axiom Enterprise Decision Support use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

Table.Column='Value'

- *Table* is the name of the database table.
- Column is the name of the column in the database table.
- Value is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

• To filter data by regions, the filter criteria statement might be: DEPT.Region='North'. This would limit data to only those departments that are assigned to region North in the Region column.

• To filter data by a single department, the filter criteria statement might be: DEPT.Dept=100. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

Operators

The criteria statement operator can be one of the following: =, >,<,<>,<=,>=. Greater than or less than statements can only be used with numeric values. For example:

```
ACCT.Acct>1000
```

SQL IN and LIKE syntax can also be used. For example:

DEPT.Region IN ('North','South')

Compound criteria statements

You can use AND and OR to combine multiple criteria statements. If you are creating long compound criteria statements with multiple ANDs or ORs, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR ACCT.Acct=200)
```

NOTES:

- When filtering on multiple values in the same column, you must use OR to join the statements, not AND. In the example above, if the statement was instead DEPT.Region='North' AND DEPT.Region='South', that statement would return no data because no single department belongs to both the North and South regions. When you use OR, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL IN syntax to create a compound statement for values in the same column. For example, the statement DEPT.Region='North' OR DEPT.Region='South' can also be written as DEPT.Region IN ('North', 'South'). The Filter Wizard uses IN syntax by default.

Using criteria statements in functions

If you are using a criteria statement in a function, such as GetData, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1", "DEPT.Region='North'", "GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

Referencing blank values in filters

If a string column contains a blank value, you may want to create a filter that includes or excludes records with these blank values. For SQL Server, the blank value is stored as an empty string. This empty string is indicated with empty quotation marks in the filter. For example: ACCT.CMAssign=' ' or ACCT.CMAssign<>' '

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

Dept.VP='O'Connor'

Invalid. This construction does not work because Axiom Enterprise Decision Support reads it as Dept.VP='O' and then does not know what to do with the rest of the text.

Dept.VP='0''Connor'

Valid. The extra apostrophe tells Axiom Enterprise Decision Support that the apostrophe is part of the string value and is not the closing apostrophe.

NOTE: This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom Enterprise Decision Support will construct the appropriate syntax for you.

Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is YYYY-MM-DDTHH:MM:SS for DateTime and YYYY-MM-DD for Date.

If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.