Reporting Guide

Axiom Enterprise Decision Support

Version 2020.3

AXIOM

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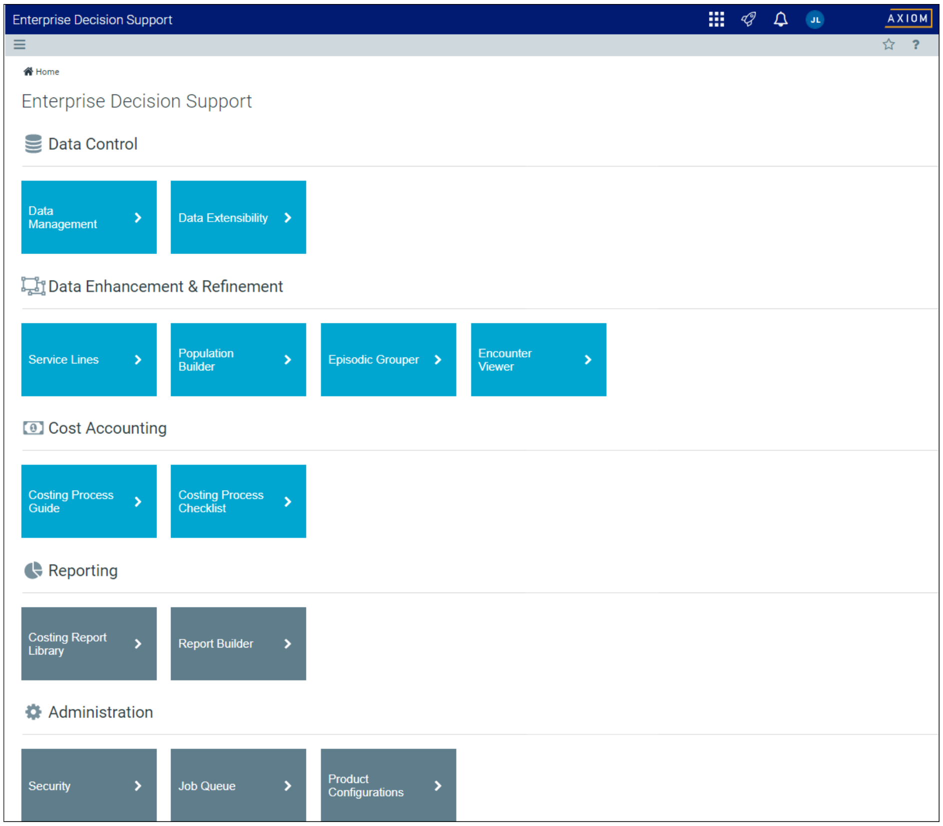
Working with Axiom Enterprise Decision Support

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



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:

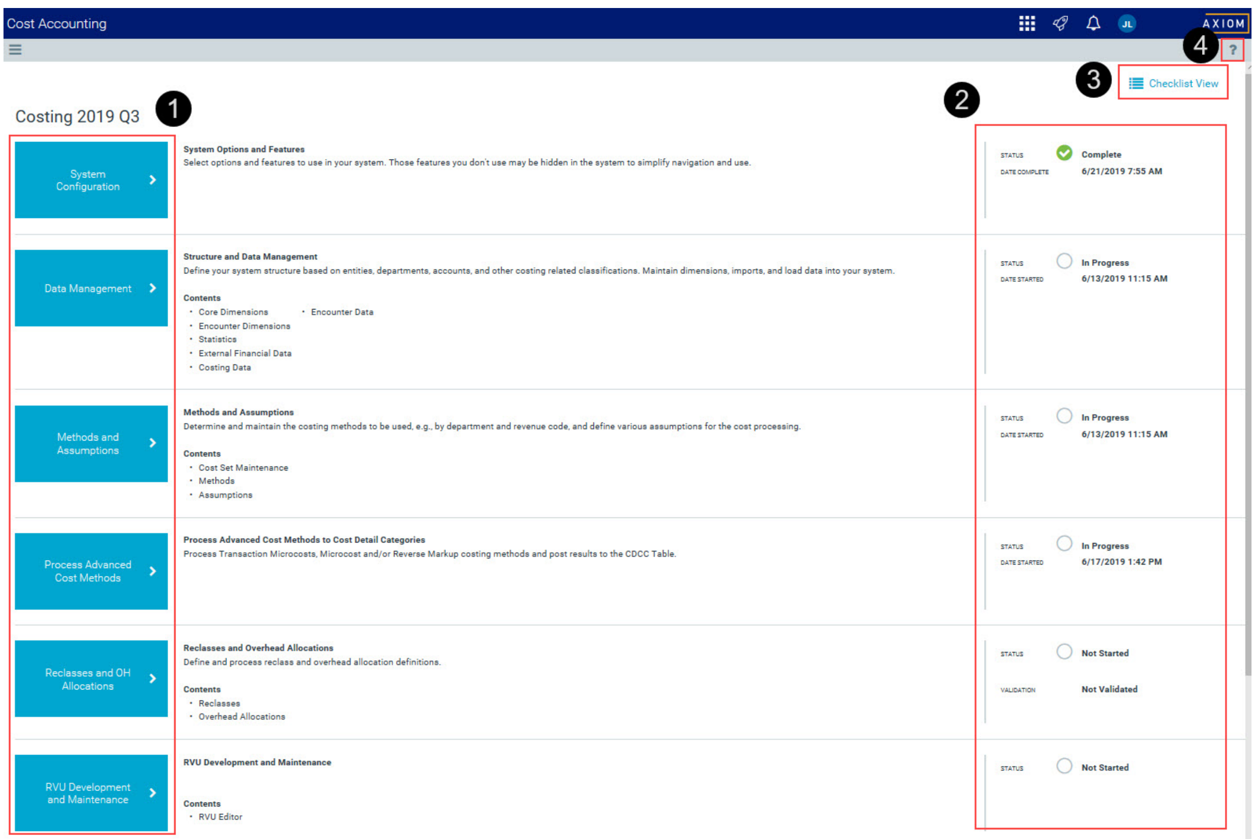
1. Tasks are grouped together into similar areas and sub-areas. For example, you can find all of the tasks associated with setting up and managing methods and assumptions in the Method and Assumptions section. Next to the card, the page displays a description. Click the card to navigate to the task(s) for that area.
2. 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.

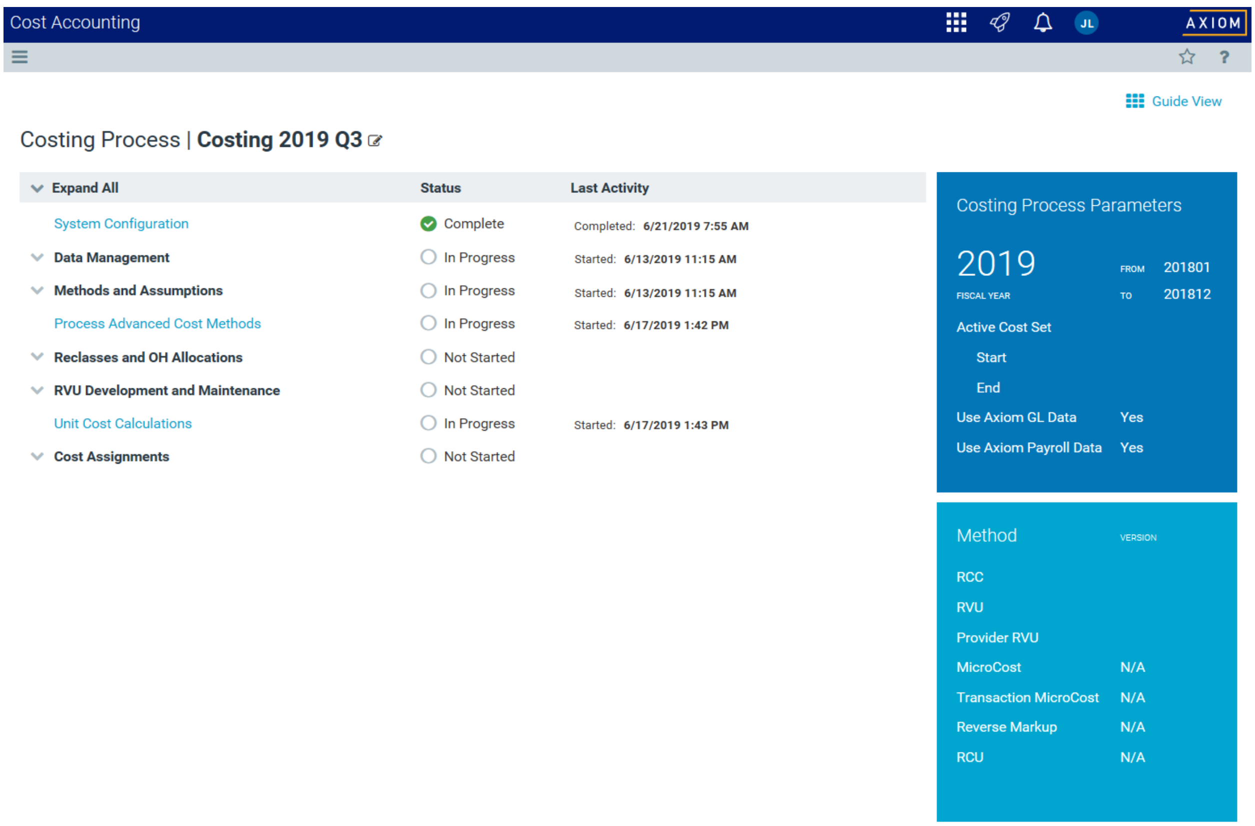
4. If you need help configuring a specific area, click the question mark in the upper right corner of each screen. A help panel displays conceptual information or contextual instructions for the page that displays. For more detailed help, the instructions include links to fuller topics in the online 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.



Checklist View

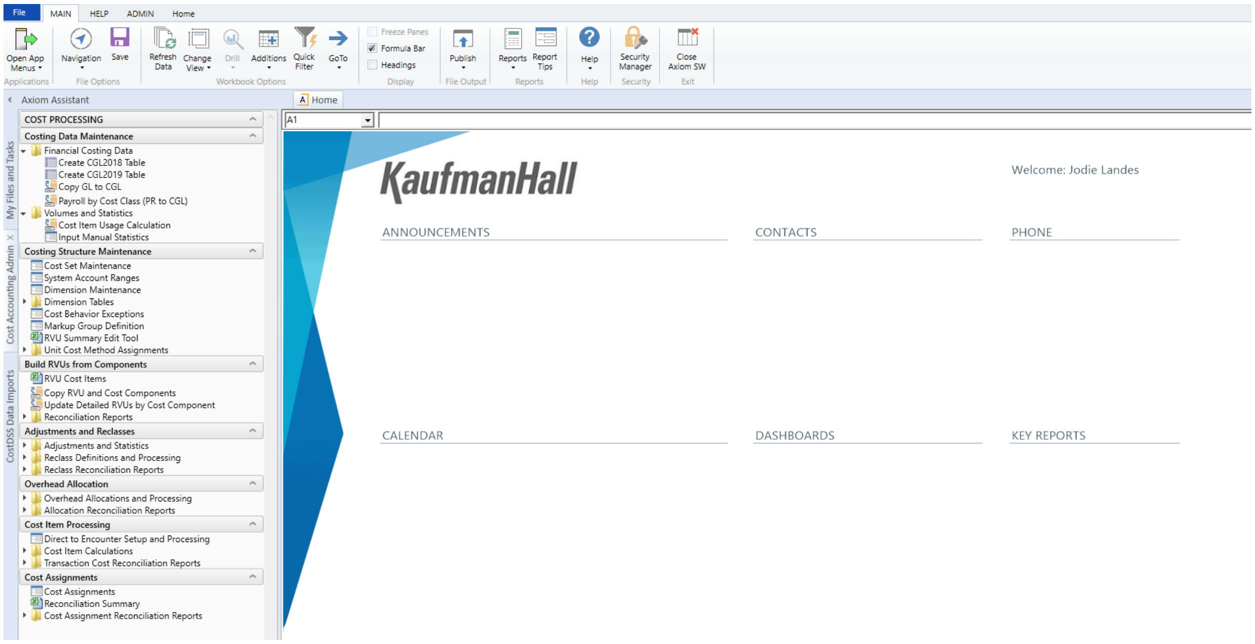
From the Costing Process Guide, the Checklist View offers administrators an easy and convenient way to manage and track each of tasks required to set up the costing process. You can add, edit, clone, and delete processes as well as toggle to view different costing processes. The page also displays the 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.



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.



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 the reporting capabilities and instructions of 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.

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Web Client Reports

This section describes and provides instructions for several reports and dashboards created using Axiom Intelligence.

Axiom Intelligence reports

Axiom Intelligence includes pre-defined role-based dashboard reports that provide insight into your health network and services to help you manage your business and maximize performance across the continuum, ensuring the proper care at the rate place, time, and by the correct provider.

The following tables lists the pre-defined reports and dashboards available in Axiom Intelligence for Axiom Enterprise Decision Support:

Report	Description
COVID-19 Population and Utilization Analysis Dashboard	Provides a visualization of the impact of the COVID-19 patient population on your organization, including monitoring ongoing and dynamic changes to volume and demographics as well as cost utilization data.
Health Network Summary Dashboard	Provides an easy and clear way to understand your overall performance as well as identify opportunities for improvement by showing data for patients, volume, Case Mix Index (CMI), ALOS, and margin analysis.
Inpatient Service Line Dashboard	Displays a view of all the inpatient data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.
Outpatient Service Line Dashboard	Displays a view of all the outpatient data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.
Professional Service Line Dashboard	Displays a view of all the professional billing data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

Axiom Clinical Performance Measures (CPM)

NOTE: Axiom Clinical Performance Measures is only accessible if your organization has a license for Axiom CPM.

Axiom Enterprise Decision Support with Clinical Performance Measures (CPM) helps organizations establish a comprehensive view of service line performance across financial and clinical performance measures. Reports and analytics facilitate the conversation between finance and clinical process improvement teams, highlighting opportunities where quality and cost outcomes could be improved.

The following tables lists the reports included in the CPM Dashboard:

Report	Description
Inpatient Executive Summary	Displays KPI views of clinical and financial data to help inform and drive decision making for executives.
Inpatient Volume Analysis report	Provides volume trends and details for inpatient cases. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Critical Care Utilization Analysis report	Provides benchmarking data regarding inpatient cases that required critical care. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
ALOS Analysis report	Provides benchmarking data regarding the Average Length of Stay for your organization. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Margin Analysis report	Provides regarding details regarding margin analysis across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Mortality Analysis report	Provides KPI metrics and details regarding mortality rates at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Readmission Analysis report	Provides KPI metrics and details regarding readmission rates at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

Report	Description
Patient Safety Indicator (PSI) Analysis report	Provides metrics and details regarding PSI at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Hospital Acquired Condition (HAC) Analysis report	Provides metrics and details regarding HAC at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.
Cost of Quality Variation report	Provides KPI measurements and other details related to determining potential cost savings opportunities. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

Axiom Intelligence reporting

Using Axiom Intelligence reporting, you can perform ad-hoc analysis and explore your data using interactive data visualization tools. The Axiom Intelligence reporting solution leverages Microsoft Power BI to provide access to industry-leading business intelligence reporting.

NOTE: Axiom Intelligence reporting is a cloud-based feature that is only available in Axiom Cloud systems. Axiom Intelligence reports rely on an engineered data model and specifically licensed features, which are only available in conjunction with certain Axiom Enterprise Decision Support products. If you currently license Axiom Enterprise Decision Support industry-specific products, please review your Product Release Notes for details regarding the availability of Axiom Intelligence reporting. Alternatively, if you would like to independently use Microsoft PowerBI to query your existing Axiom Enterprise Decision Support data set, please refer to this article to instruct your information technology professionals to establish an OData connection.

About Axiom Intelligence reporting

Using Axiom Intelligence reporting, you can visually explore your Axiom Enterprise Decision Support data. Axiom Intelligence reports display data using a variety of interactive data visualization tools, such as charts, tables, maps, matrices, and KPIs. You can easily filter and drill this data to gain insights into your organization.

Axiom Intelligence reports can be created, viewed, and edited from the Report Designer in the Web Client. Axiom Intelligence reports are stored in the Reports Library just like other reports.

NOTE: Axiom Intelligence reporting is a cloud-based feature that is only available in Axiom Cloud systems. Axiom Intelligence reports rely on an engineered data model and specifically licensed features, which are only available in conjunction with certain Axiom Enterprise Decision Support products. If you currently license Axiom Enterprise Decision Support industry-specific products, please review your Product Release Notes for details regarding the availability of Axiom Intelligence reporting. Alternatively, if you would like to independently use Microsoft PowerBI to query your existing Axiom Enterprise Decision Support data set, please refer to this article to instruct your information technology professionals to establish an OData connection.

Architecture of Axiom Intelligence reporting

The Axiom Intelligence reporting solution leverages Microsoft Power BI to provide access to industry-leading business intelligence reporting. The Axiom Cloud provides the necessary infrastructure to support using Power BI as part of your Axiom Enterprise Decision Support system.

Axiom Intelligence reporting requires a defined data *model* that specifies the Axiom Enterprise Decision Support data to be available in reports. This model is provided by your Axiom Enterprise Decision Support product installation, and is designed to provide access to the most useful data for business intelligence reporting. All data within the model can be used in Axiom Intelligence reports. Currently, Axiom Enterprise Decision Support does not support modifying the provided model or creating additional custom models.

The model data is cached for access in Axiom Intelligence reports, to provide optimal performance as you explore the data. If changes are made to the data in Axiom Enterprise Decision Support, the data must be synchronized in order to update the data available to Axiom Intelligence reports. This synchronization can occur on demand, or at scheduled intervals, or in response to certain triggering events. For more information, see Managing data for Axiom Intelligence reporting.

Creating and accessing Axiom Intelligence reports

Axiom Intelligence reports are created in Axiom Enterprise Decision Support using an embedded Microsoft Power BI editor. You can create a new report and launch this editor using the Report Designer in the Web Client. For more information, see Managing Axiom Intelligence reports.

The data source shown in the report editor is the Axiom Enterprise Decision Support data defined in the product model. You can use this data in a wide array of Power BI visualizations, and set up various interactivity options for the report, such as filtering and drilling. For more information, see Using the Axiom Intelligence report editor.

End users can view Axiom Intelligence reports using the Web Client browser. In the Web Client, Axiom Intelligence reports can be accessed as follows:

- Using the Report Designer page
- Using the Navigation panel in the Web Client Task Bar
- Using links within a form home page (or within other forms and web reports)

Axiom Intelligence reports are also visible in the Desktop Client in the Reports Library. When an Axiom Intelligence report is launched from that location, it opens in the Web Client browser. For more information, see Viewing Axiom Intelligence reports.

Axiom Intelligence reports use the ABI file type, and are distinguished from other types of reports using a special icon .

Security considerations

Security for Axiom Intelligence reporting is controlled as follows:

- **File security** is controlled using the **Files** tab of security, just like any other report type in Axiom Enterprise Decision Support. Users can only see and open report files if they have at least read-only access, and they can only edit report files if they have read/write access. Additionally, any user with read/write access to a folder in the Reports Library (or access to My Documents) can create a new report file.

- **Data security** is controlled using the **AI Tables** tab of security. This is a special area of security that controls data access within Axiom Intelligence reports only. While users are viewing or editing Axiom Intelligence reports, their access to data is limited according to the permissions defined on the AI Tables tab. Table permissions defined on the **Tables** tab do *not* affect data access in Axiom Intelligence reports.

Data security for Axiom Intelligence reports is cached along with the report data. If any changes are made to security that impact access to Axiom Intelligence data, the model must be synchronized so that the changes take effect. This synchronization happens automatically when saving changes to security settings. For more information, see Managing security for Axiom Intelligence reporting.

Viewing Axiom Intelligence reports

In the Report Designer, you can browse all of the Axiom Intelligence reports that are available to you, and open them to view report data using business intelligence tools and visualizations. In order to open an Axiom Intelligence report, you must have at least read-only access to the report, as defined in Axiom Enterprise Decision Support security. Axiom Intelligence reports can be opened from either the Web Client or the Desktop Client.

This topic discusses the default way to access and view Axiom Intelligence reports. Your system may be designed so that you can open these reports in other ways, such as:

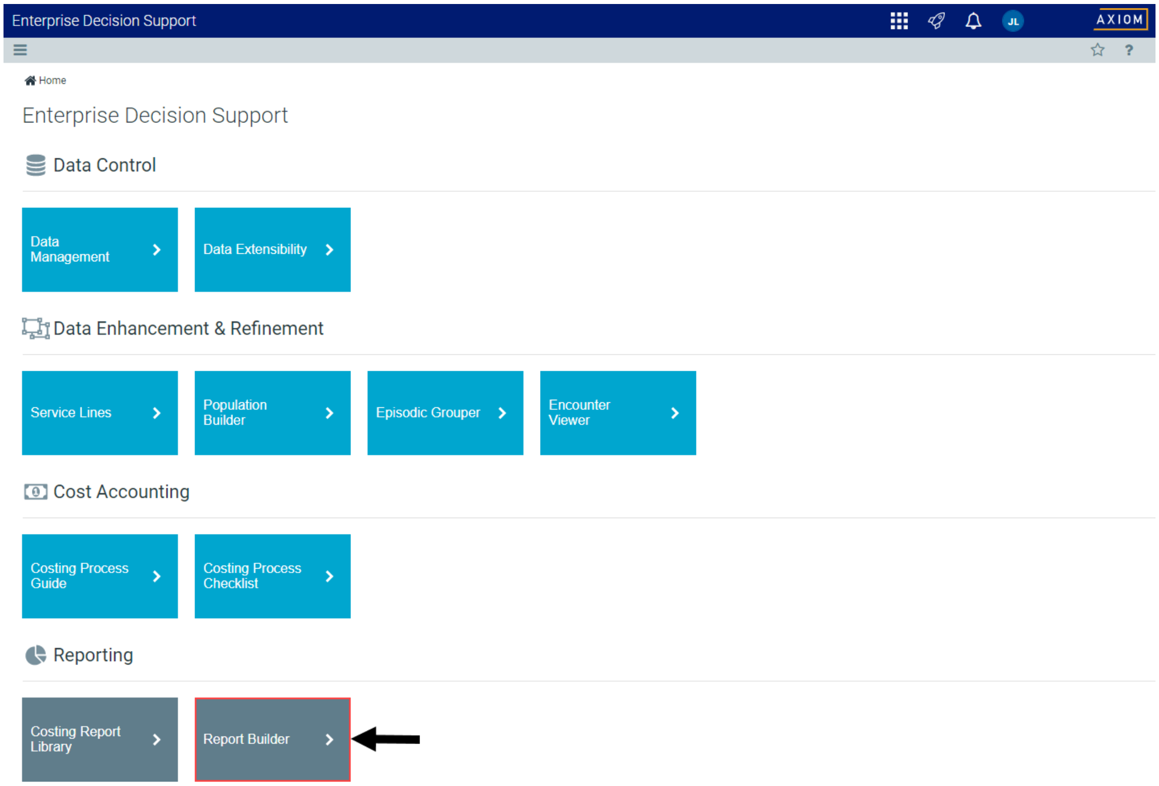
- Using the Navigation panel in the Web Client
- Using links within your home page or other files
- Using links within a task pane or ribbon tab in the Desktop Client

Opening an Axiom Intelligence report using the Web Client

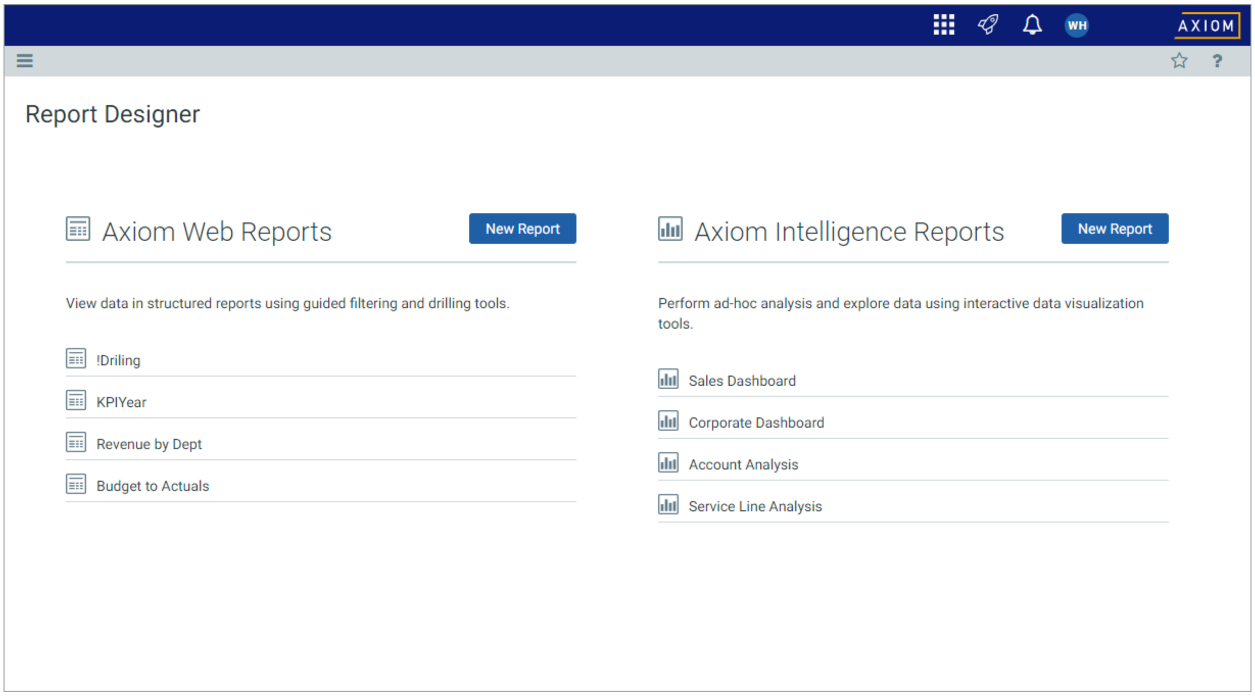
You can open Axiom Intelligence reports using the Report Designer page in the Web Client.

To access the Report Designer page:

- From the Enterprise Decision Support home page, in the **Reporting** section, click **Report Builder**.



All of the Axiom Intelligence reports that you have permission to access are listed underneath the **Axiom Intelligence Reports** header. To open a report, click on it.



Example Report Designer page

Reports are displayed in last-modified order, with the most recently created or modified reports on top. You can hover your cursor over a report to see when the report was last modified and by whom.

▶ Opening an Axiom Intelligence report using the Desktop Client

You can open Axiom Intelligence reports from the Reports Library in the Desktop Client (Excel Client or Windows Client). You can differentiate Axiom Intelligence reports from other types of Axiom Enterprise Decision Support reports using the following icons:

- Axiom form
- Axiom Intelligence report
- Web report
- Spreadsheet Axiom file

To open an Axiom Intelligence report:

1. On the **Axiom** tab, in the **Reports** group, click **Reports** to bring up the Reports menu.

> **NOTE:** In systems with installed products, this feature may be present on a different ribbon tab, such as the **Main** tab.

> **TIP:** You can also open reports from the Explorer task pane or Axiom Explorer.

2. Use the Reports Library folders at the bottom of the menu to navigate to the specific report that you want to open, and then click on it.

The Axiom Intelligence report opens in the Web Client using your default browser.

▶ Viewing data in an Axiom Intelligence report

When you open an Axiom Intelligence report, it displays a configured set of Axiom Enterprise Decision Support data using *visualizations*. Visualizations are items such as charts, tables, maps, matrices, and KPIs. The report may contain other visual elements for navigation, drilling, and filtering.

Depending on the report configuration, you can explore and filter the data using features such as:

- **Filtering**: Data can be filtered in various ways.
  - You can use the **Filters** pane along the right-hand side of the screen to filter the entire report, the current report page, or the currently selected visualization. These filters may be saved in the report, or you can apply new filters as needed using the Filter Library panel.
  - Selecting a field in a visualization can filter other visualizations that use the same field.
  - The report may contain drop-down lists, slicers, or other visual elements that can be used to filter data.
- **Drilling**: Visualizations can be associated with hierarchies, so that you can drill down the hierarchy to see the visualization data at different levels.
- **Bookmarks**: You can use bookmarks to view designated areas of interest and apply predefined filters. Click the **Show Report Bookmarks** icon to show the Bookmarks panel, and then select from defined bookmarks (if present).

For more information on what you can do when viewing a report, see the Power BI documentation.

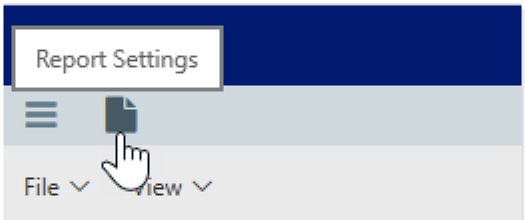
> **NOTE:** Data in Axiom Intelligence reports is not live. Recent changes to Axiom Enterprise Decision Support data may not be available in Axiom Intelligence reports if the data has not been synchronized. For more information on how Axiom Intelligence data is managed, see Managing data for Axiom Intelligence reporting.

▶ Changing the color theme for an Axiom Intelligence report

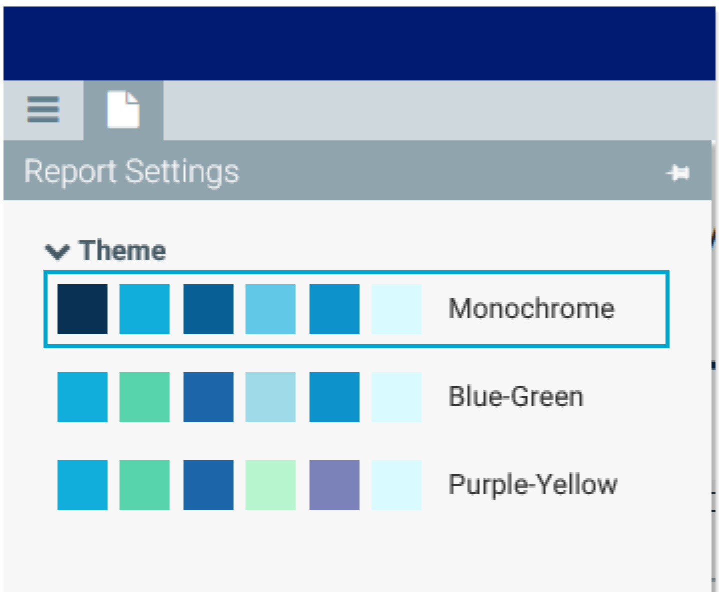
Axiom Intelligence reports use a specified color theme in visualizations and other report elements. When viewing an Axiom Intelligence report, you can change the color scheme as needed. Changing the color scheme to use a different set of colors may make it easier to review certain visualizations.

When an Axiom Intelligence report is open in viewing mode, any color scheme changes only apply to the current report session. If you want to change the default color scheme for the report, you must make the change in the report editor and save the report.

1. Click the **Report Settings** icon in the Web Client Task Bar.



2. In the Report Settings panel, select the desired theme.



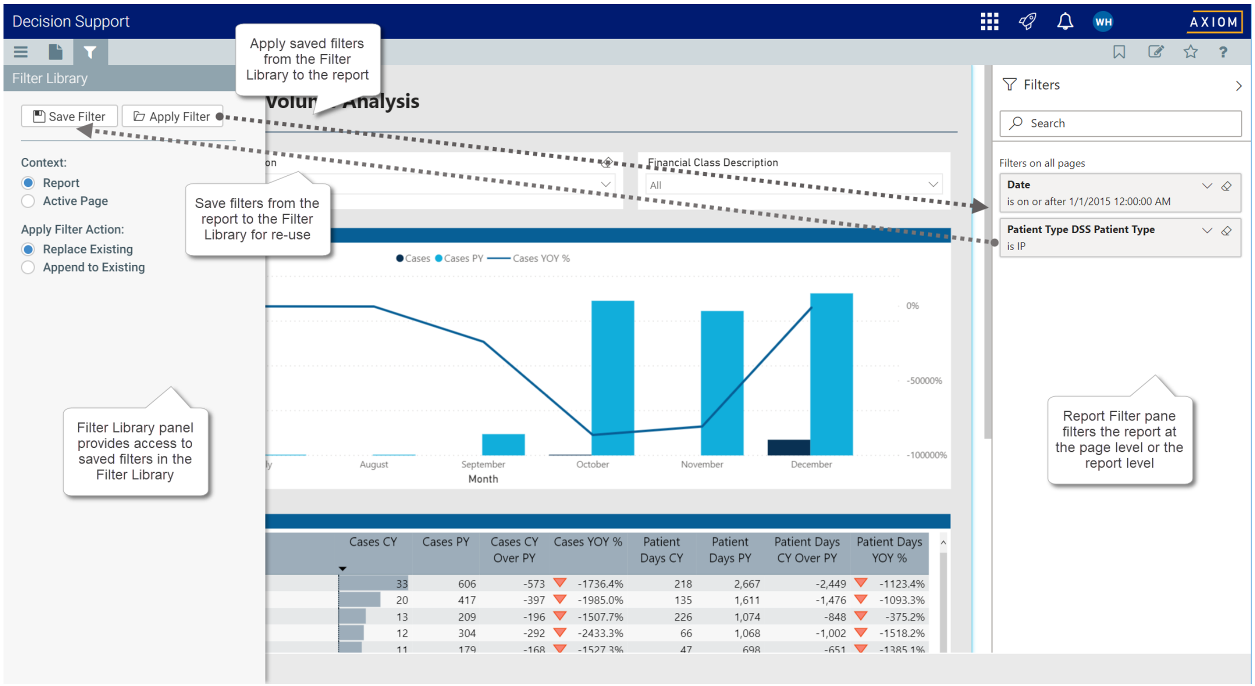
The report updates to use the specified theme.

Using saved filters in Axiom Intelligence reports

Filters that are used often in Axiom Intelligence reports can be saved to the centralized Filter Library for reuse. Once a filter has been saved, you can open any Axiom Intelligence report and apply the filter to that report.

The ability to save and reuse filters can improve ease-of-use by allowing you to easily apply frequently used filters, without needing to define the filter each time. Additionally, when using the Filter Library, you can change report filters without needing the ability to edit the report.

The Filter Library panel is available to any user who has at least read permission to one or more Axiom Intelligence filters in the Filters Library. If you do not have this access, then the filter icon does not display on the task bar.



Example report showing relationship between Filter Library panel and the Filter pane

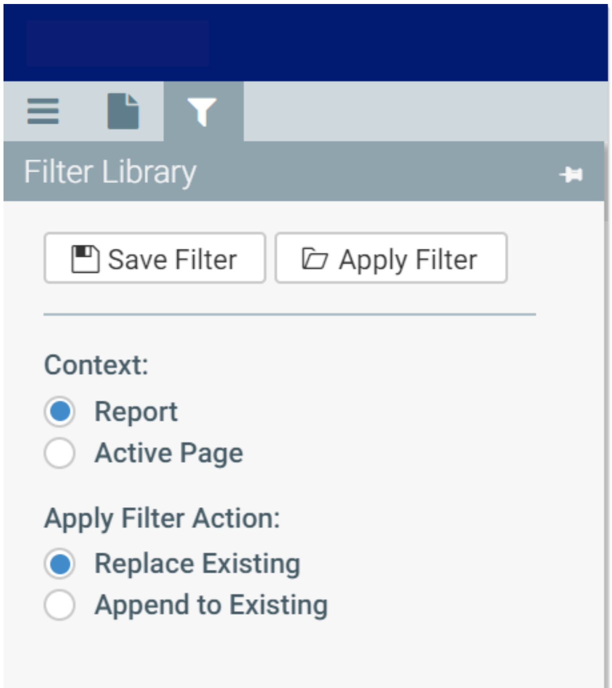
Applying a saved filter

While you are in an Axiom Intelligence report, you can apply a saved filter in the Filter Library to that report. When applying a saved filter, you can choose to apply it at the page level or the report level, and you can choose whether to overwrite existing filters or append to existing filters. The data in the page or report is then refreshed according to the applied filter.

Saved filters can be applied to any Axiom Intelligence report, whether it is in view-only mode or edit mode. If the report is in view-only mode, then the filter will apply to the current session only. If the report is in edit mode, and you choose to save the report after applying the filter, then the filter will become saved in the report.

To apply a saved filter to an Axiom Intelligence report:

1. Click the **Filter Library** icon in the Web Client Task Bar.



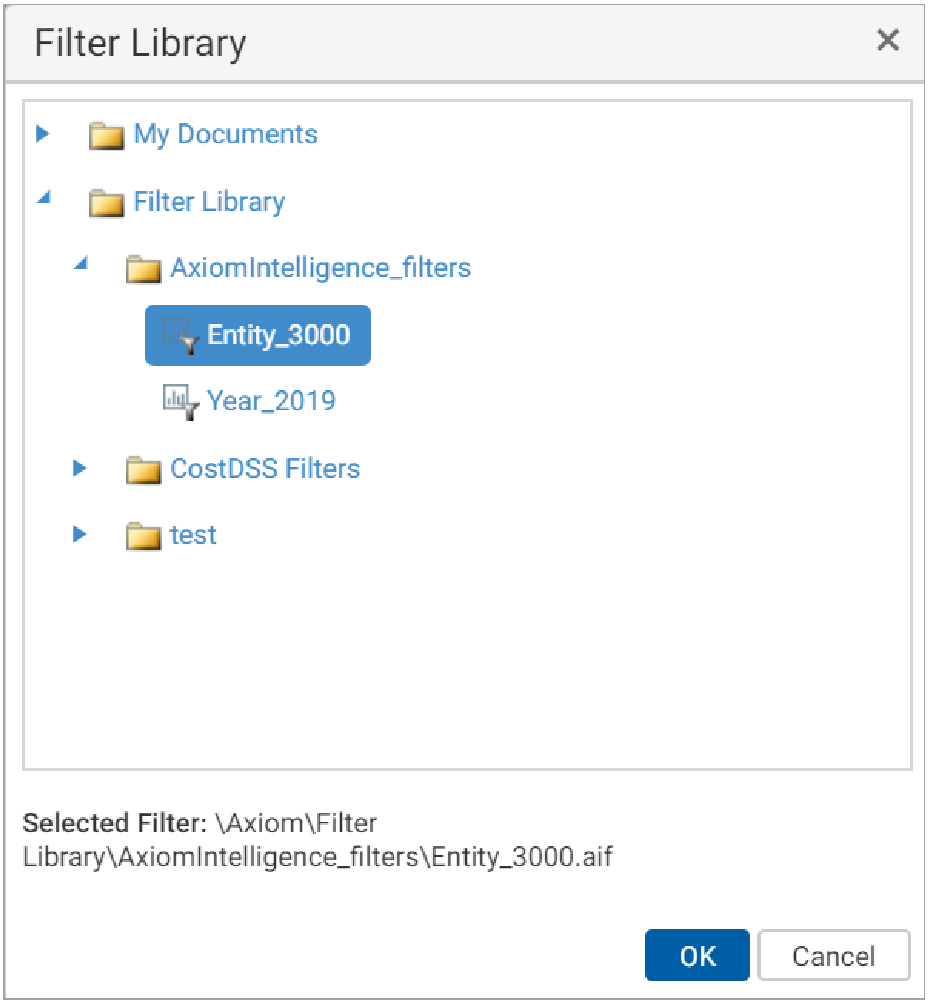
Filter Library panel

2. In the **Filter Library** panel, review and set the following options as needed:

Item	Description
Context	Specifies the context where the filter will be applied. Select one of the following: • **Report**: Apply the filter to all pages of the report. The filter will be placed in the **Filters on all pages** section of the report's Filter pane. • **Active Page**: Apply the filter to the current page of the report. The filter will be placed in the **Filters on this page** section of the report's Filter pane.
Apply Filter Action	Specifies whether the applied filter overwrites the existing filters or is appended to the existing filters: • **Replace Existing**: The selected filter replaces any existing filters in the specified context. • **Append to Existing**: The selected filter is added to any existing filters in the specified context.

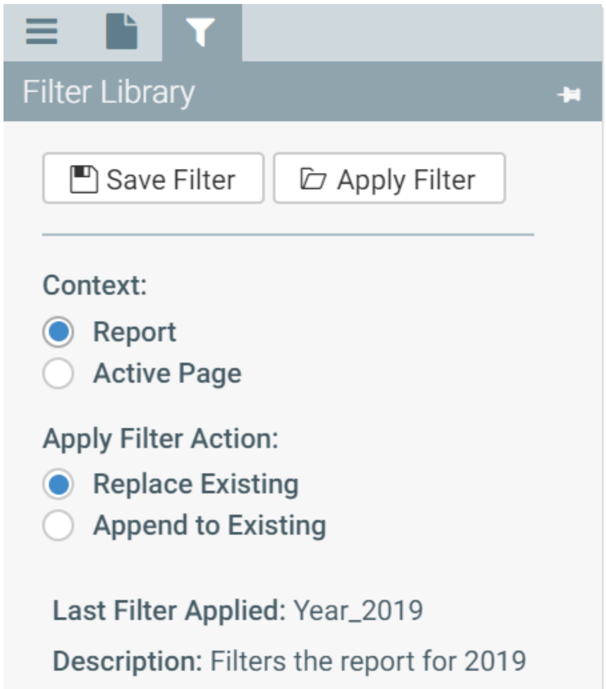
3. Click **Apply Filter** to select the filter to apply.
4. In the **Filter Library** dialog, select the filter that you want to apply, and then click **OK**.

   This dialog shows all Axiom Intelligence filters that you have rights to access, as determined by your security permissions to the Filter Library.



Example Filter Library dialog

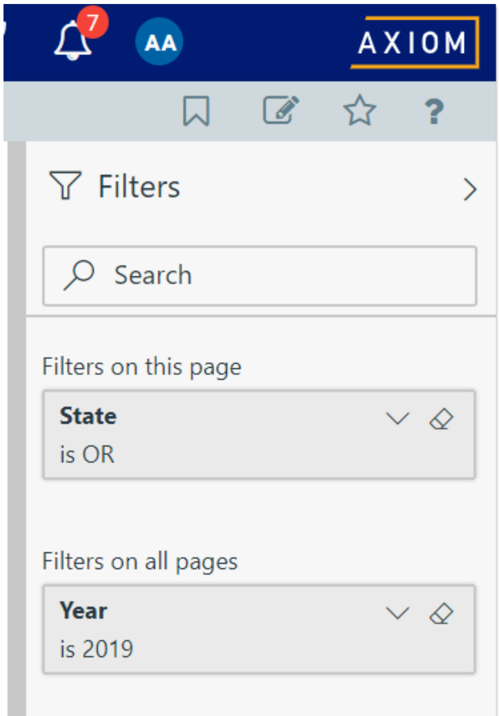
The selected filter is applied to the context specified in the Filter Library panel, using the specified action. If the selected filter includes multiple filter cards, all of the cards are added to the context. Additionally, the last filter that you applied displays at the bottom of the Filter Library panel, for reference.



Example Filter Library showing the last filter applied

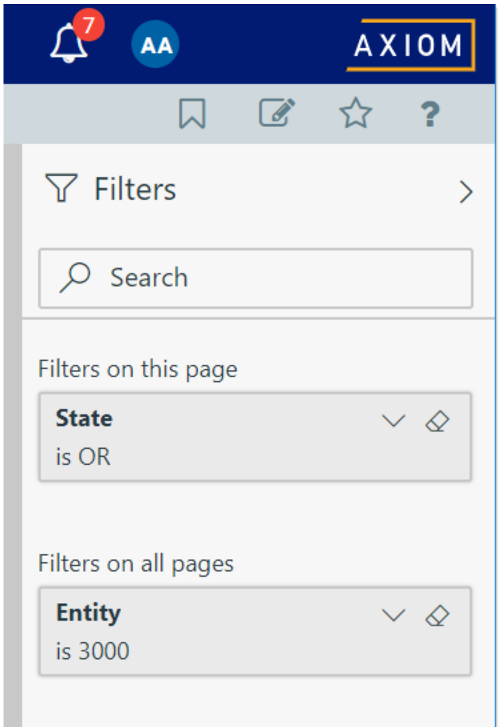
NOTE: Axiom Enterprise Decision Support does not perform any validation to determine whether the selected filter is relevant to the current report or page. Depending on the report configuration and the data shown, the selected filter may have no impact on the report or the page.

For example, imagine that you are in the following report. This report has an existing Year filter that is applied to all pages of the report.



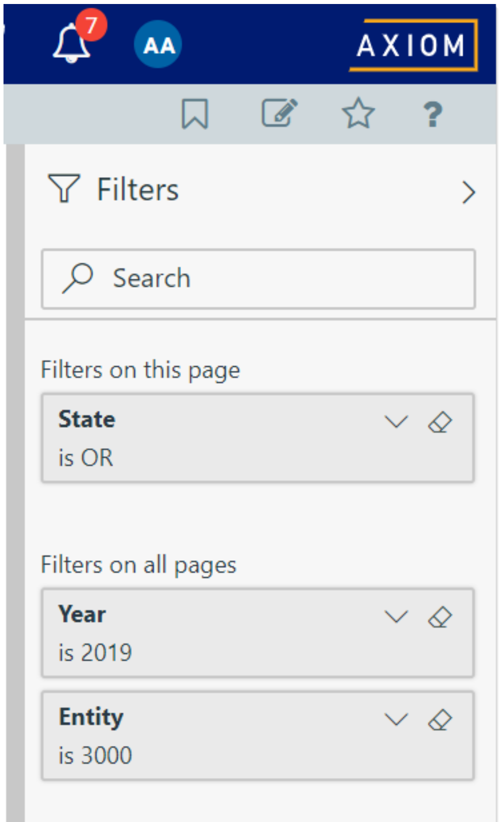
Starting filters in report

Then, you use the Filter Library panel to apply a filter. The Filter Library panel is currently configured as Context=Report and Apply Filter Action=Replace Existing. Your selected filter therefore overwrites the current report-level filter, so that the previous Year filter is now replaced by an Entity filter.



Report-level filter has been replaced with filter from library

If instead the Filter Library panel had been configured as Apply Filter Action=Append to Existing, then you would now have two report-level filters—the existing filter of Year and the newly applied filter of Entity.



Report-level filter has been appended with filter from library

And if instead the Filter Library panel had been configured as Context=Active Page, then the report-level filter would have been left as is, and the filter would have overwritten or been appended to the page-level filters.

Saving a filter

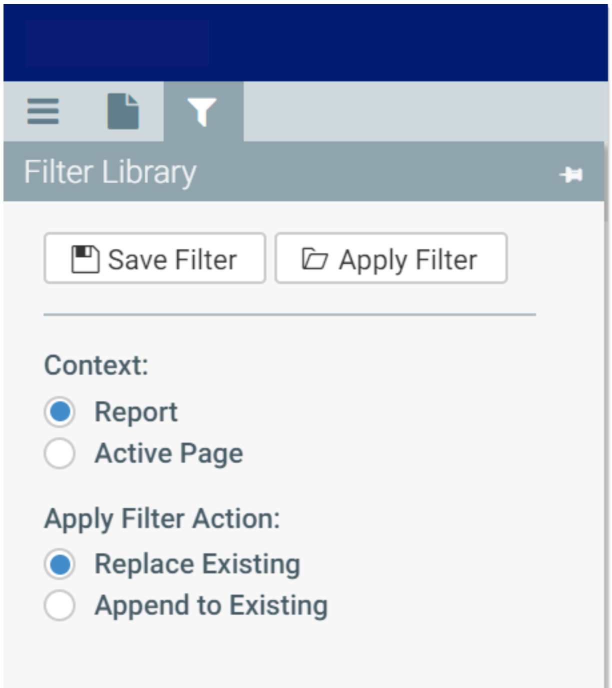
While you are in an Axiom Intelligence report, you can save the current report-level filter or page-level filter to the Filter Library for reuse. When saving a filter, all filter cards in the selected context are saved. For example, if you are saving the report-level filter, and there are currently three filter cards in the **Filters on all pages** section of the **Filter** pane, then all three cards are saved in the filter. If later the saved filter is applied to another report, all three filter cards will be applied.

NOTE: When you save a filter, the context is only used to determine which filters are being saved from the report. The context is not flagged on the saved filter. Once a filter is saved, it can then be applied to any context.

In order to save a new filter, you must have read/write permission to at least one folder in the Filter Library, or have access to the My Documents folder. In order to overwrite an existing filter, you must have read/write permission to the filter file. If you do not have read/write access to any Filter Library folder or file, then the **Save Filter** button does not display on the Filter Library panel.

To save an Axiom Intelligence report filter to the Filter Library:

1. Click the **Filter Library** icon in the Web Client Task Bar.



Filter Library panel

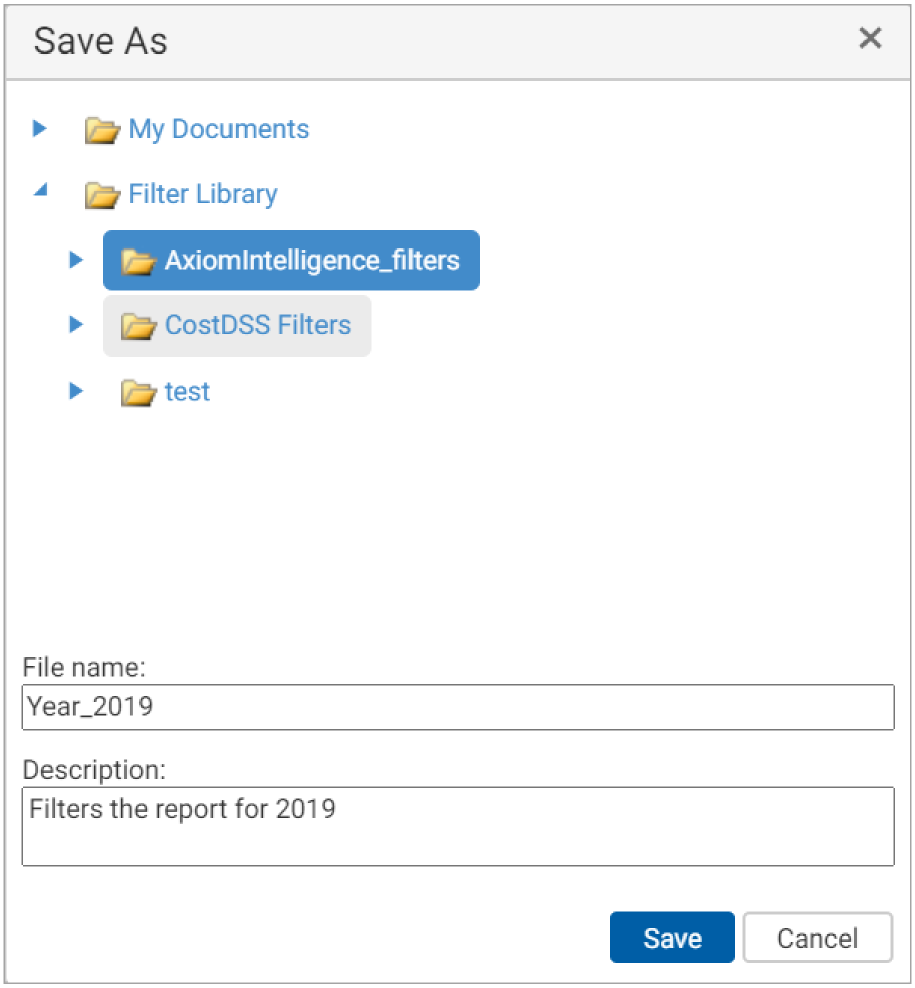
2. In the **Filter Library** panel, review and set the **Context** to specify which report filters will be saved to the Filter Library:

   - **Report**: Select this option to save the filters in the **Filters on all pages** section of the report's Filter pane.

   - **Active Page**: Select this option to save the filters in the **Filters on this page** section of the report's Filter pane.

3. Click **Save Filter** to save the filters in the specified context.

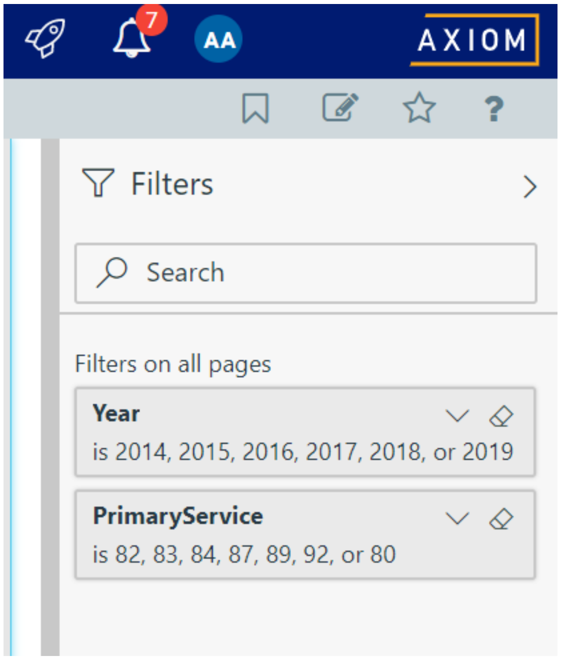
4. In the **Save As** dialog, select the folder where you want to save the filter, then enter the **File name** and optional **Description**. Click **Save** to save the filter to the specified location.



Keep in mind the following:

- If the filter is saved to a folder in the Filter Library, then any user with permission to that folder will be able to apply the filter to their reports. Users can view the descriptions when selecting filters to apply, so it is recommended to define a description that explains what the filter will do.
- If you have access to the My Documents folder, you can save the filter to that location. In this case, only you will be able to reuse the filter.

For example, imagine that you are in the following report and you want to save the current report-level filter for reuse in other reports.



Example report-level filter with two filter cards

When you save this filter (with the Filter Library context set to **Report**) both of the filter cards in the **Filters on all pages** section are saved to a single filter file in the Filter Library. If that saved filter is then applied to another report, both filter cards will be applied to the context specified for the apply action. Although the filter was saved from the report-level context, once it is saved it can be applied to either the report-level or the page-level.

Editing or deleting a filter

Saved Axiom Intelligence filters cannot be edited directly. If you want to edit the filter contents, you must do the following:

- Apply the saved filter to a report.
- Edit the filter in the report as desired.
- Save the filter from the report, and select the same file name and folder location as the existing filter. The existing filter will be overwritten with the new filter.

If a filter needs to be deleted, this can only be done in the Desktop Client, using Axiom Explorer or the Explorer task pane. It is not possible to delete filters using the Filter Library panel in the Web Client.

More information for administrators

User access to filters is controlled by security access to the Filter Library, as defined on the Files tab of the Security Manager. For users who should only be able to apply filters, you can grant read-only access to the necessary files and folders. For users who should be able to save and apply filters, you can grant read/write access to the necessary files and folders.

Managing Axiom Intelligence reports

You can create Axiom Intelligence reports to perform ad-hoc analysis and explore Axiom Enterprise Decision Support data using interactive data visualization tools.

In order to create an Axiom Intelligence report, you must have read/write access to at least one folder in the Reports Library, as defined in Axiom Enterprise Decision Support security. Also, if you have access to My Documents, you can create and save Axiom Intelligence reports there.

You can start the report creation process from either the Web Client or the Desktop Client. However, all Axiom Intelligence report creation and editing activity takes place in the Web Client. If you initiate report creation from the Desktop Client, you are automatically taken to the Web Client.

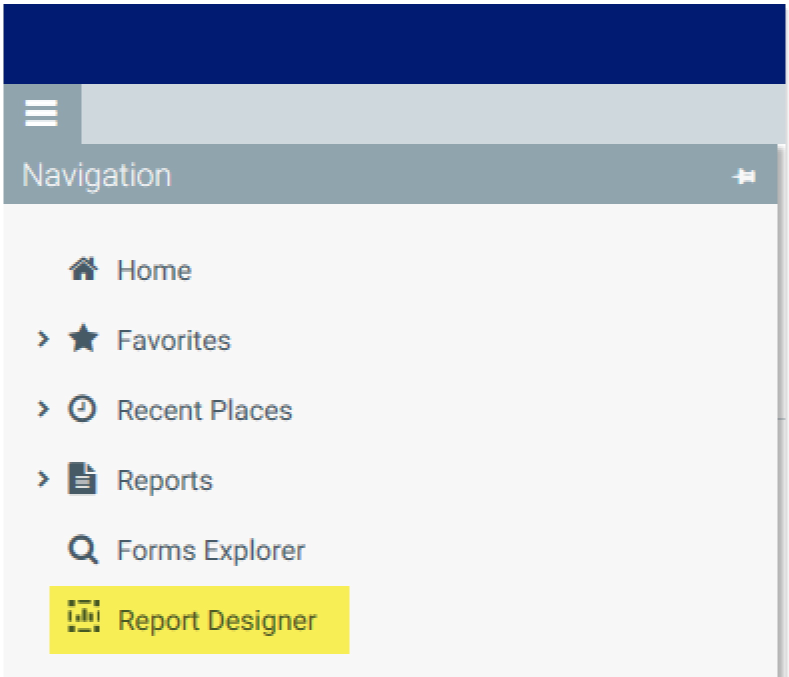
> **NOTE:** Axiom Intelligence reporting is a cloud-based feature that is only available in Axiom Cloud systems. Axiom Intelligence reports rely on an engineered data model and specifically licensed features, which are only available in conjunction with certain Axiom Enterprise Decision Support products. If you currently license Axiom Enterprise Decision Support industry-specific products, please review your Product Release Notes for details regarding the availability of Axiom Intelligence reporting. Alternatively, if you would like to independently use Microsoft PowerBI to query your existing Axiom Enterprise Decision Support data set, please refer to this article to instruct your information technology professionals to establish an OData connection.

▶ Creating an Axiom Intelligence report in the Web Client

In the Web Client, you can create new Axiom Intelligence reports using the Report Designer page.

To create an Axiom Intelligence report in the Web Client:

1. Click the menu icon ☰ in the left side of the Task Bar to open the Navigation panel. Then, select **Report Designer**.

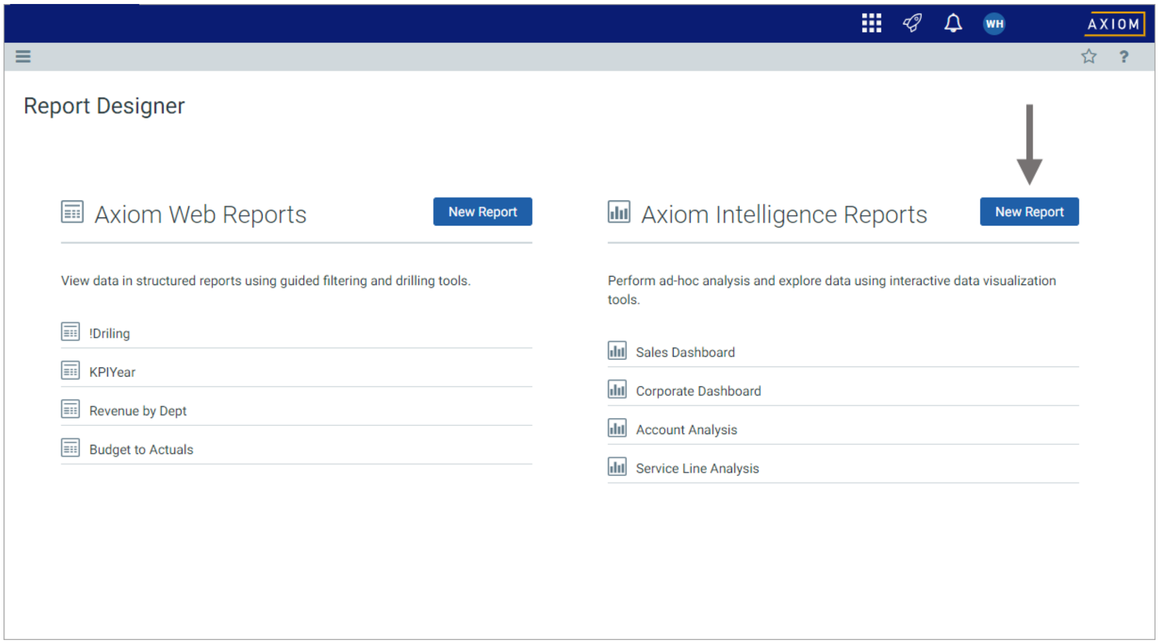


Alternatively, you can go to directly to the Report Designer page as follows:

Example Cloud URL	`https://`*`ClientName`*`.axiom.cloud/Reports` Where *ClientName* is the name of your Axiom Cloud system.
Example On-Premise URL	`http://`*`ServerName`*`/Axiom/Reports` Where *ServerName* is the name of the Axiom Application Server, and Axiom is the default name of the virtual directory.

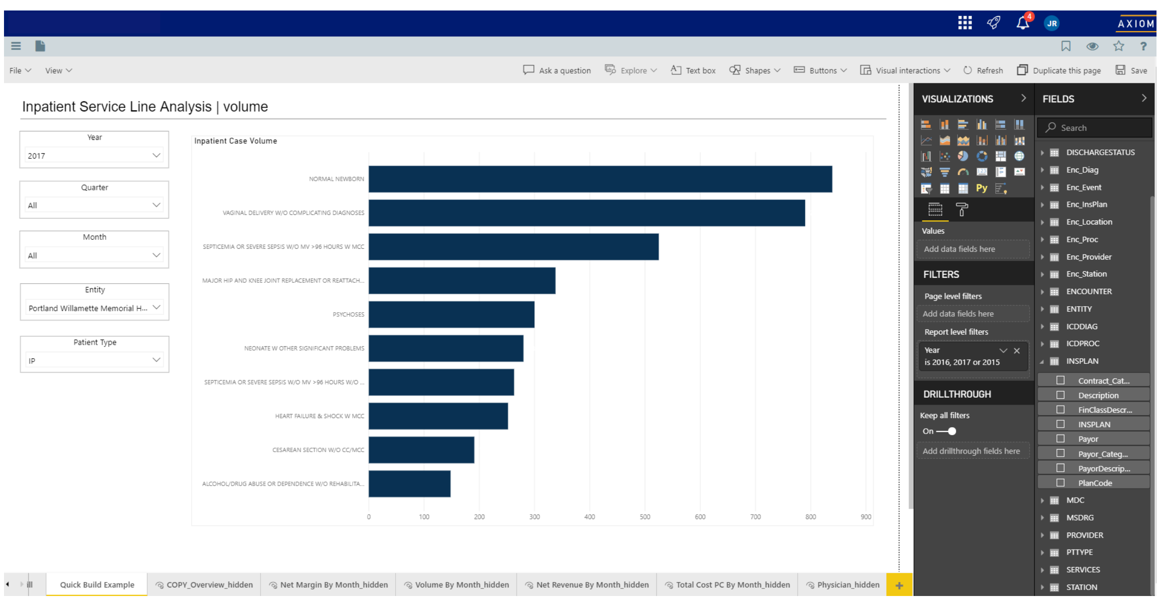
NOTE: If you do not see the Report Designer in the Navigation panel, this may mean that your organization's Navigation panel has not been updated (or that your organization has customized the panel to exclude it).

2. In the Report Designer page, click the **New Report** button to the right of the **Axiom Intelligence Reports** header.



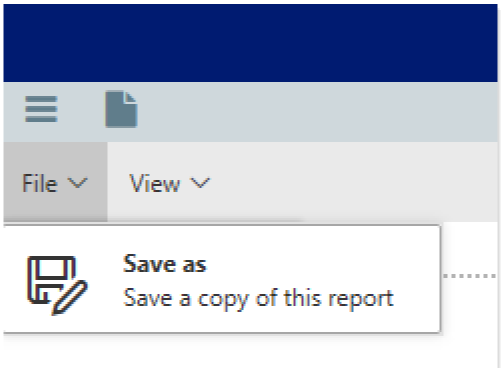
A new Axiom Intelligence report opens in the report editor.

3. Using the report editor, add visualizations to the report and configure them to show the desired data. For more information, see Using the Axiom Intelligence report editor.

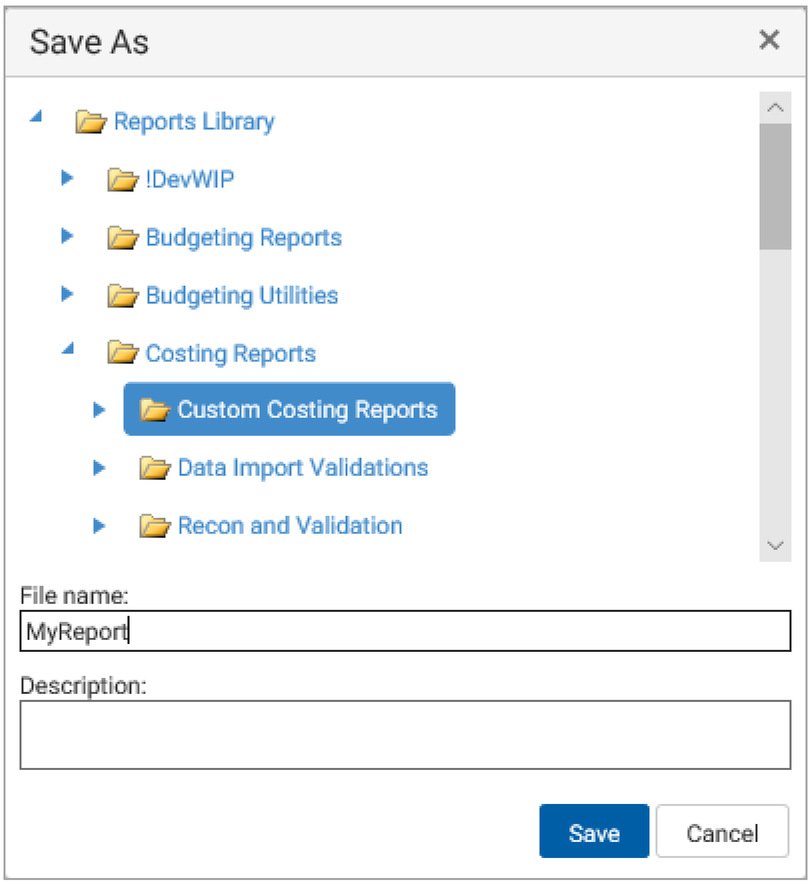


Example Axiom Intelligence report in the report editor

4. In the left-hand side of the report editor toolbar, click **File** > **Save As**.



5. In the **Save As** dialog, select the folder where you want to save the report, then enter the **File name** and optional **Description**. Click **Save** to save the report to the specified location.

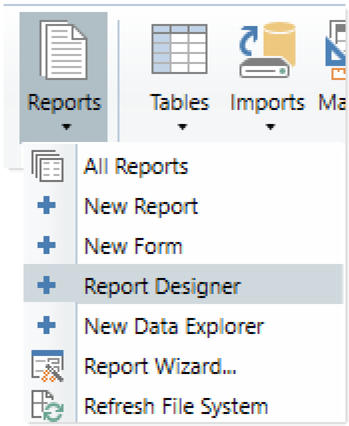


Creating an Axiom Intelligence report in the Desktop Client

In the Desktop Client (Excel Client or Windows Client), you can access the Report Designer page from the Reports menu.

To create an Axiom Intelligence report in the Desktop Client:

- On the **Axiom** tab, in the **Reports** group, select **Reports > Report Designer**.



> **NOTE:** In systems with installed products, this feature may be present on a different ribbon tab, such as the **Main** tab.

The Web Client opens to the Report Designer page. From this point, all creation activities take place in the Web Client, and the steps are the same as described in the previous section.

Editing an Axiom Intelligence report

You can edit existing Axiom Intelligence reports as needed, as long as the report was not installed by a product package. You must have read/write access to the report file in order to edit it, as defined in Axiom Enterprise Decision Support security.

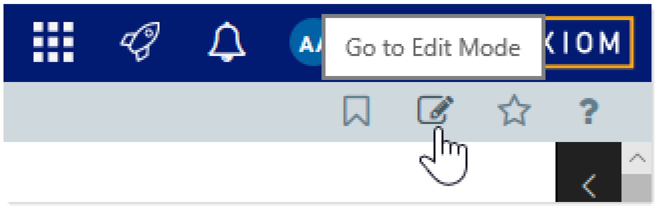
Axiom Intelligence reports can only be edited in the Web Client. Although you can open existing Axiom Intelligence reports from within the Desktop Client, you cannot edit them in that client. Once the report is open, all editing activities take place in the Web Client.

Only one user at a time can open an Axiom Intelligence report for editing. If another user attempts to edit the report while it is locked to another user, then it can only be opened as read-only. When a report is opened as read-only in the editor, no changes can be saved, but Save As can be used to save a copy of the file. Although the report is locked for editing, other users can continue to view the report as normal.

Product-controlled Axiom Intelligence reports are locked and cannot be edited. However, if you have read/write access to the locked report, then you can open the report as read-only in the editor for purposes of saving a copy of it with a new name.

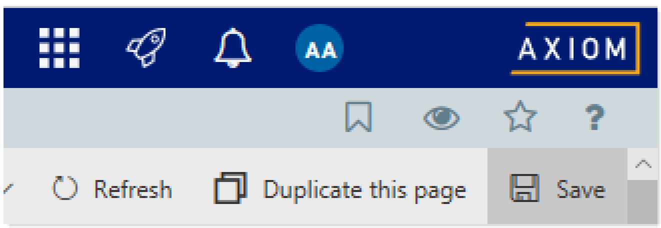
To edit an Axiom Intelligence report:

1. Open the report that you want to edit.
2. In the right-hand side of the task bar, click the **Go to Edit Mode** icon .

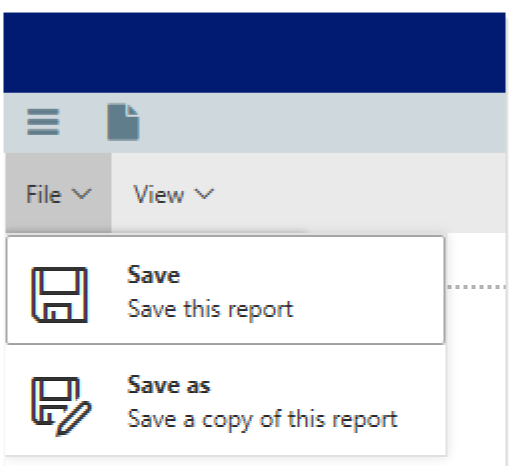
   The report opens in the report editor.

3. Using the report editor, make changes to the report as desired. For more information, see Using the Axiom Intelligence report editor.
4. In the right-hand side of the report editor toolbar, click **Save** to save your changes.

   You can also click the **Go to Preview Mode** icon at any time to view and interact with the report as end users will see it. The report is automatically saved before you enter preview mode. To return to the report editor from preview mode, click the **Go to Edit Mode** icon again.

   If you want to save a new copy of the report instead of modifying the existing report, you can use **File > Save As** in the left-hand side of the report editor toolbar. If you have opened the report as read-only, then Save As is the only option.

▶ Deleting an Axiom Intelligence report

Axiom Intelligence reports cannot be deleted in the Web Client; they must be deleted in the Desktop Client.

You can delete an Axiom Intelligence report if you have read/write permission to the parent folder, and if the report was not installed by a product package. Product-controlled Axiom Intelligence reports are locked and cannot be deleted.

To delete an Axiom Intelligence report:

1. On the **Axiom** tab, in the **Administration** group, click **Manage > Axiom Explorer**.

   > **TIP:** You can also use the Explorer task pane to delete an Axiom Intelligence report.

   > **NOTE:** In systems with installed products, this feature may be located on the **Admin** tab. Click **System Browser** to open Axiom Explorer.

2. Navigate to the **Reports Library**, and then locate the report that you want to delete.
3. Right-click the report and then select **Delete**.

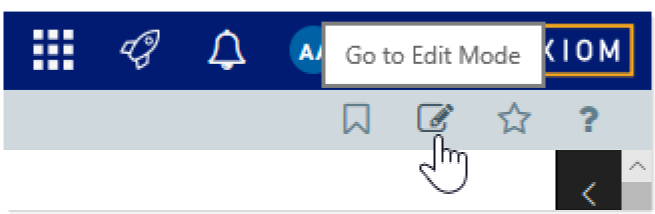
Using the Axiom Intelligence report editor

Using the Axiom Intelligence report editor, you can add visualizations and other elements to your report, and define the data shown in each visualization.

Axiom Intelligence reports leverage Microsoft Power BI to provide access to industry-leading business intelligence reporting. This topic provides a brief overview of the features available when creating reports. For more information on using visualizations, filters, and other features in the report editor, see the Power BI documentation.

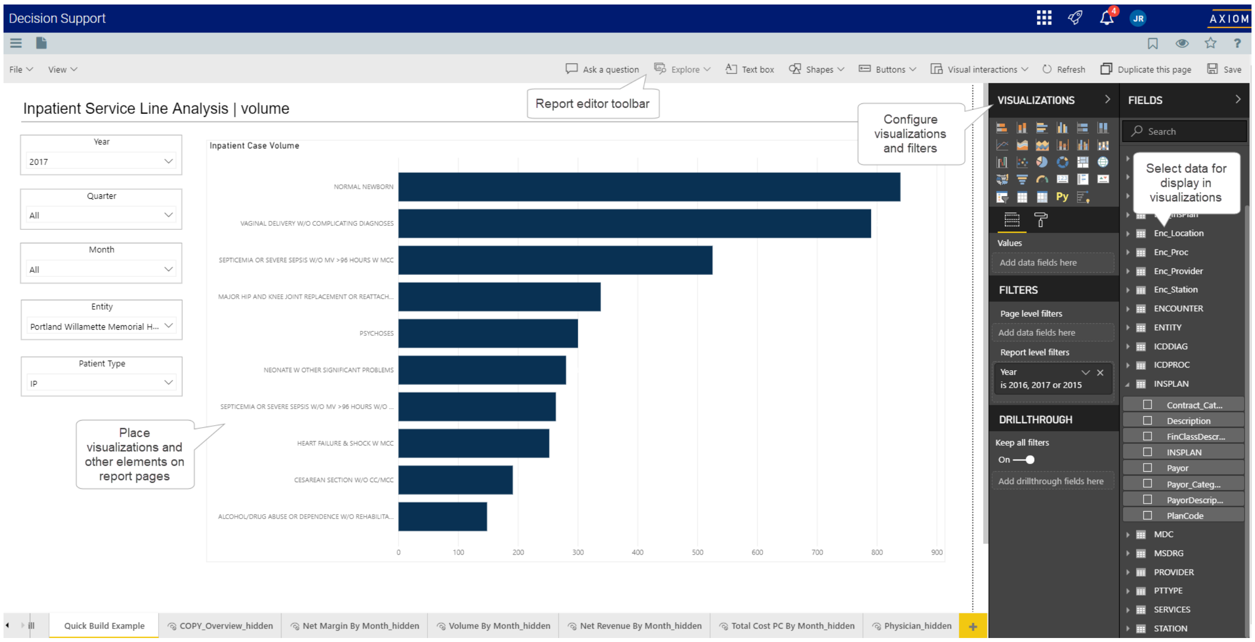
The Axiom Intelligence report editor is available as follows:

- When you create a new Axiom Intelligence report, the new report is automatically opened in the editor.
- When viewing an existing Axiom Intelligence report, you can switch to edit mode. Open the report that you want to edit, then click the edit icon in the Task Bar.



▶ Report editor overview

The Axiom Intelligence report editor uses Microsoft Power BI technology embedded within Axiom Enterprise Decision Support. When you open an Axiom Intelligence report in edit mode, a third toolbar becomes available to provide access to report editing features. The panels along the right-hand side of the editor provide access to visualizations and your Axiom Enterprise Decision Support data.



Example Axiom Intelligence report editor

To create the report, you can add data visualizations and other report elements to the report canvas. You can move items by dragging and dropping them to different areas of the canvas, and you can resize items by clicking and dragging the frame handles.

Axiom Intelligence reports can have multiple pages. To add new pages or delete pages, use the page controls at the bottom of the editor. To configure display options for the report and its pages, use the **View** menu.

▶ Fields and visualizations

The **Fields** panel along the right-hand side of the editor displays the available Axiom Enterprise Decision Support data for the report. The data available to Axiom Intelligence reports is determined by your Axiom Intelligence model, which is provided as part of the product installation. Currently, the model cannot be modified.

The available fields are based on the table data in your Axiom Enterprise Decision Support system. Some fields may directly correspond to tables and columns in Axiom Enterprise Decision Support, while others may represent transformations or calculations of table data. See your product documentation for more information on the data included in the model.

NOTE: The Fields panel shows all data fields used by the model, regardless of whether the current user has access to data in that field (as defined by that user's permissions on the **AI Tables** tab in security). When a field is used in the report, the data resulting from that field depends on the user's security permissions.

Axiom Enterprise Decision Support data can be viewed in the report using visualizations. You can create and configure visualizations using the **Visualizations** panel along the right-hand side of the editor. Each visualization is a different way to display data, including various chart types, tables, maps, matrices, cards, and KPIs.

You can create new visualizations in any of the following ways:

- Click in an empty area of the report (so that nothing is selected), then select a visualization. The selected visualization is added to the report. You can then add data to the visualization by selecting fields in the Fields panel.
- Click in an empty area of the report (so that nothing is selected), then select a field from the Fields panel. A visualization is automatically added to the report, displaying data from the selected field. You can then change the visualization type by selecting a different visualization, and add more fields to the visualization.
- Drag and drop a field from the Fields panel to a blank area of the report. A visualization is automatically added to the report, displaying data from the field. You can then change the visualization type by selecting a different visualization, and add more fields to the visualization.

Once a visualization has been added to the report, you can further configure it by using the **Fields**, **Format**, and **Analytics** tools within the Visualizations panel. The available options depend on the visualization type.

For more information on using visualizations, see the Power BI documentation.

NOTE: Data in Axiom Intelligence reports is not live. Recent changes to Axiom Enterprise Decision Support data may not be available in Axiom Intelligence reports if the data has not been synchronized. For more information on how Axiom Intelligence data is managed, see Managing data for Axiom Intelligence reporting.

Filters

There are several different levels of filters available in Axiom Intelligence reports to filter data. Filters can be set in the **Filters** section of the **Visualization** panel.

- **Visual level filters** apply to specific visualizations in the report. Select the visualization in the report that you want to filter, then configure the filters. By default, all fields that are currently used in the visualization are available for filtering. If you want to filter by a field that is not displayed in the visualization, you can drag and drop the field to this area.

- **Page level filters** apply to all visualizations on the current report page. Go to the page that you want to filter, then drag and drop fields to this area in order to filter by those fields.
- **Report level filters** apply to all visualizations in the report. Drag and drop fields to this area in order to filter by those fields.

NOTE: When defining page-level and report-level filters, you can leverage the Filter Library to store frequently-used filters and apply saved filters. For more information, see Using saved filters in Axiom Intelligence reports.

When viewing the report, end users can interact with these filters to change the data shown in the report.

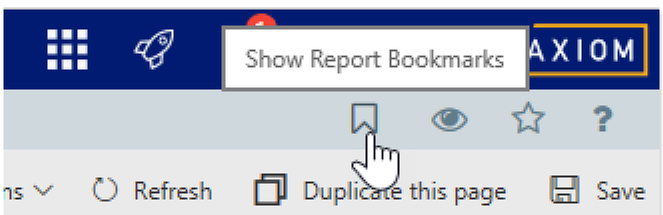
For more information on using filters, see the Power BI documentation.

Bookmarks

You can create bookmarks within the report in order to:

- Direct end users to certain pages or visualizations within the report
- Save pre-set filter configurations

To work with bookmarks, click the **Show Report Bookmarks** icon in the Web Client Task Bar .



The Bookmarks panel opens along the right-hand side of the editor. You can configure the report a desired way, and then use this panel to save that configuration as a bookmark. When end users view the report, they can select bookmarks to load the saved configurations. For more information on using bookmarks, see the Power BI documentation.

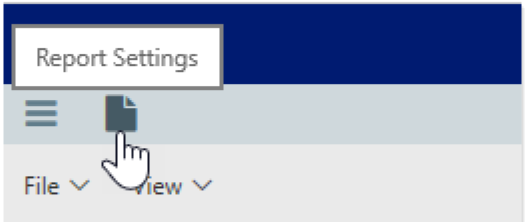
Report settings

Using the **Report Settings** panel, you can configure various general settings for an Axiom Intelligence report, such as:

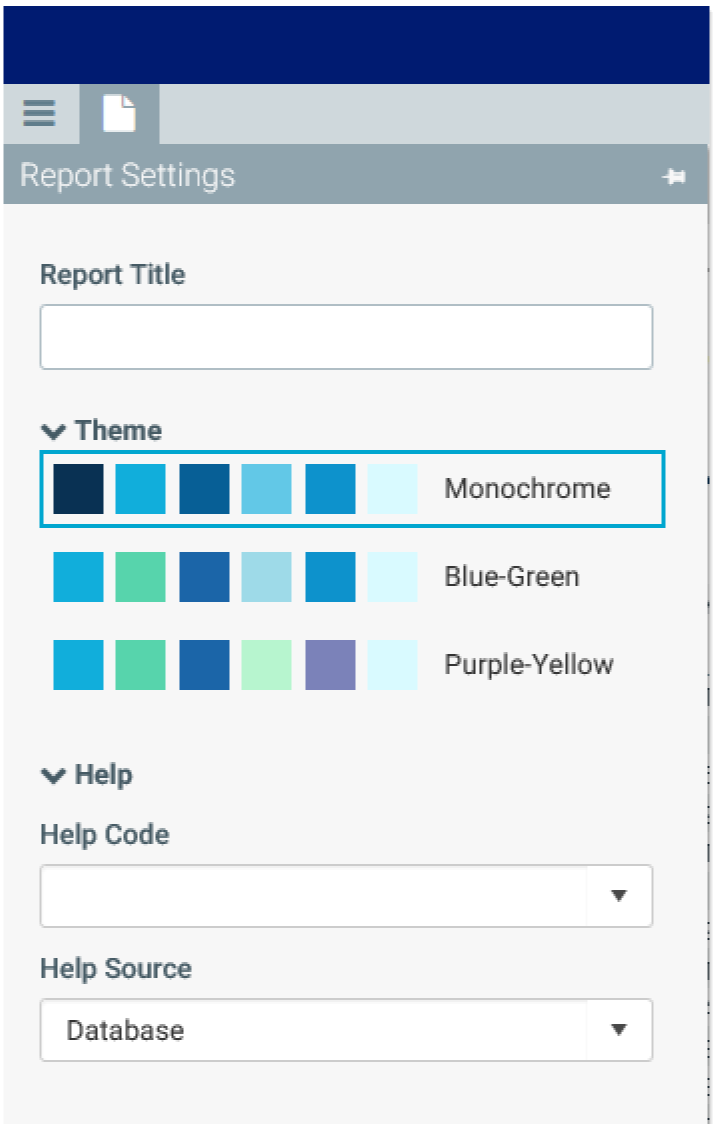
- An optional report title to display in the browser tab
- The color theme to apply to the report

To configure report settings:

1. Click the **Report Settings** icon in the Web Client Task Bar.



2. In the Report Settings panel, complete the settings as needed.

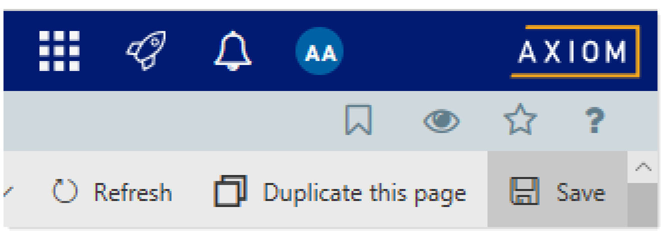


The following settings are available:

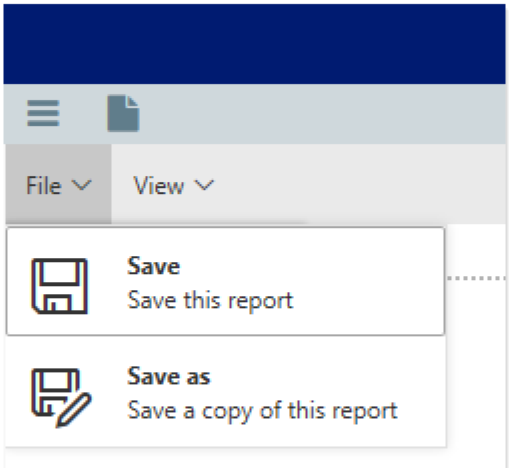
Item	Description
Report Title	Optional. Defines alternate title text to display in the browser tab instead of the full file name. By default, the file name is used as the report title.
Theme	Specifies the color theme to apply to the report. The theme affects colors used in visualizations and other report elements. The color theme can also be changed when viewing the report, to change the colors used in the current session only.
Help Code	Optional. Associates the report with a custom help code, to provide report-specific help. Clients can select any help code as defined in the Custom Help Admin area. Reports installed by a product package may use a help code from the product help file.
Help Source	By default, this is set to **Database** and should be left as is for client use. Reports installed by a product package may use the **Product** help source in order to display help from the applicable product help file.

Previewing and saving the report

At any time, you can save the current report configuration by clicking **Save** in the right-hand side of the report editor toolbar.

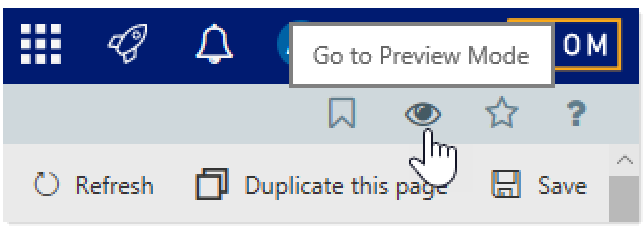


If you want to save a copy of the report, click **File** > **Save as** in the left-hand side of the report editor toolbar. You can also save the current report using this menu.

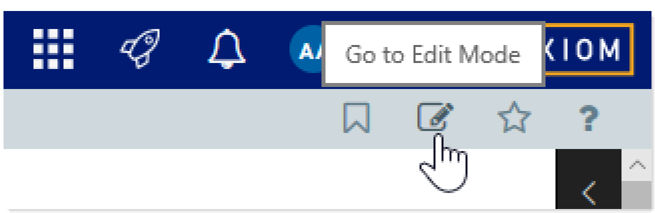


If you want to see how end users can interact with the report, you can use the preview feature.

- To preview the report, click **Go to Preview Mode** in the right-hand side of the task bar. This automatically saves the report, and then opens it in viewer mode. You can then test the end user experience as needed.



- To return to the editor and make further changes, click **Go to Edit Mode** in the right-hand side of the task bar.



When you navigate away from the report or close the browser tab, you will be prompted to save the report as follows:

- If you have not saved the report since entering edit mode, you will be prompted to save.
- If you have saved the report once during the current edit session, you will not be prompted to save.
- Each time you switch from edit mode to preview, then back to edit mode, the save prompt is reset and will display again if you do not save.

Managing security for Axiom Intelligence reporting

Security for Axiom Intelligence reporting is controlled as follows:

- **File security** is controlled using the **Files** tab of security, just like any other report type in Axiom Enterprise Decision Support. Users can only see and open report files if they have at least read-only access, and they can only edit report files if they have read/write access. Additionally, any user with read/write access to a folder in the Reports Library (or access to My Documents) can create a new report file.
- **Data security** is controlled using the **AI Tables** tab of security. This is a special area of security that controls data access within Axiom Intelligence reports only. While users are viewing or editing Axiom Intelligence reports, their access to data is limited according to the permissions defined on the AI Tables tab. Table permissions defined on the **Tables** tab do *not* affect data access in Axiom Intelligence reports.

Any permission changes made to the AI Tables tab do not take effect immediately. Security changes must be synchronized before they apply to the static data set used by Axiom Intelligence reporting.

▶ How Axiom Intelligence security permissions work

To define security for Axiom Intelligence data, you can grant full or filtered access on a per table basis, for the tables used in the Axiom Intelligence model. This security is applied only when users are viewing data within Axiom Intelligence reports.

Security permissions for Axiom Intelligence data are not configured in the same way as table permissions set on the **Tables** tab. For example:

- Data access in Axiom Intelligence reports is always read-only. Axiom Intelligence reports do not support saving data. "Full access" in this context does not mean read/write access; it means the user is eligible to view all eligible data for the table within Axiom Intelligence reports.
- Table types cannot be used when configuring security for Axiom Intelligence data. Security is set at the table level only.
- The permissions set on the **AI Tables** tab have no impact on the permissions set on the **Tables** tab, and vice versa. For example, a user can have full access to a table within Axiom Enterprise Decision Support (via the Tables tab), but no access to the same table within Axiom Intelligence reports (via the AI Tables tab).

Additionally, the configuration of the Axiom Intelligence model impacts the way that Axiom Intelligence security permissions are applied to tables. Generally speaking, product-delivered models are configured as follows:

- Tables with lookup relationships are configured to have dependent security in Axiom Intelligence reporting. This means that if a table has a lookup to a reference table, any AI security filters defined on the lookup reference table apply to both tables.

For example, imagine that you have a table named Encounter with a lookup to the Entity table. If the Entity table has an AI filter defined of Entity=3000, this filter also applies to the Encounter table. This is different from regular Axiom Enterprise Decision Support table security, where filters defined on lookup reference tables only apply when the lookup reference table is the primary table for the query.

- Models are configured so that AI security can be set on certain important reference tables. This security is then inherited by other tables that look up to these securable tables. This simplifies the security setup and allows full use of business intelligence features within reports.
- If a table in the model is not flagged as securable, and does not look up to a securable table, then all users have access to the data in that table within Axiom Intelligence reports. This should be reserved for supporting tables that do not contain financial data or other sensitive data.

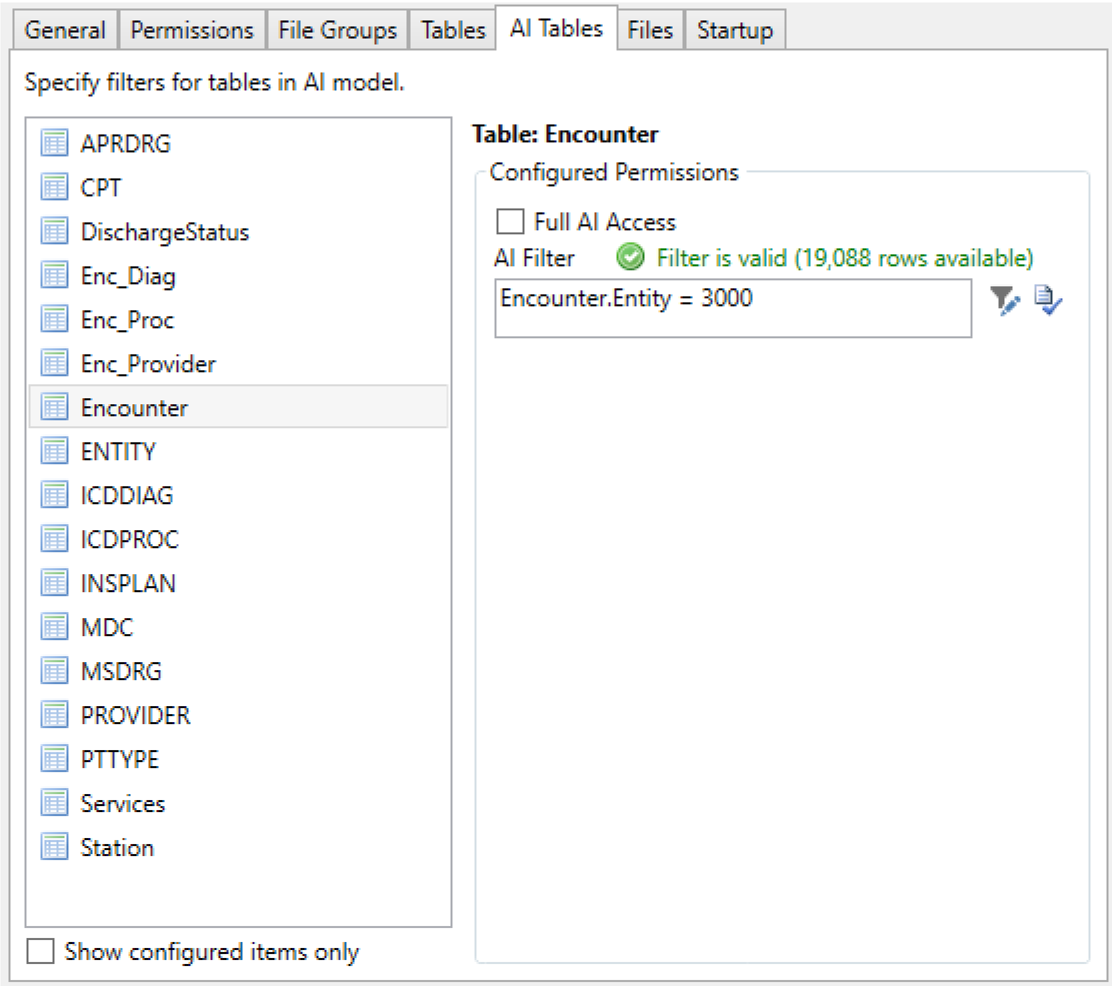
Role inheritance and subsystem restrictions work as normal for Axiom Intelligence data permissions.

▶ Configuring security for Axiom Intelligence data

Access to data in Axiom Intelligence reports is controlled using the **AI Tables** tab. You can configure permissions at the user and/or role level. If subsystems are used, the subsystem must also configure permissions on this tab, to define the boundary of allowed permissions for users in that subsystem.

The left-hand side of the tab lists the tables that have been flagged as "securable" in the Axiom Intelligence data model. As discussed in the previous section, product-delivered models are typically configured so that only important reference tables are configured as securable. Any security defined on these reference tables applies to the reference table itself, and any tables that look up to the reference table.

When you select a table in the list, you can configure the security settings for the user or role within the **Configured Permissions** section in the right-hand side of the tab.



Example AI Tables tab

For each table, you can grant full or filtered access to its data as follows:

Item	Description
Full AI Access	Selecting this option means the user is eligible to view all data in this table, within Axiom Intelligence reports. If this option is enabled, the **AI Filter** box is hidden because it no longer applies.
AI Filter	Defining a filter means the user is eligible to view all data in the table that meets the filter, within Axiom Intelligence reports. To define a filter, type the filter into the **Filter** box, or use the Filter Wizard. After defining a filter, you can validate the filter syntax by clicking the **Validate filter** button.

As discussed in the previous section, the user's eligibility to view data from a table may be further impacted by the security permissions set on tables with lookup relationships. For example, a user might have **Full AI Access** enabled for the Dept table, but if that table looks up to another securable table, then the ability to view data in the Dept table is also impacted by the user's permissions on the lookup reference table.

If neither option is configured, then the user has no access to data in the table, within Axiom Intelligence reports.

Synchronizing security updates

When the Axiom Intelligence model and data are initially synchronized, the current security settings as defined on the **AI Tables** tab are applied as well. If any changes are made in Axiom Enterprise Decision Support security that impact access to Axiom Intelligence data, these changes must be synchronized or else they will not take effect in Axiom Intelligence reports.

The following types of security changes affect Axiom Intelligence reporting:

- Any changes to the AI Tables tab, for any user, role, or subsystem
- Adding a user to a role or a subsystem, if the role or subsystem has defined permissions on the AI Tables tab
- Removing a user from a role or a subsystem, if the role or subsystem has defined permissions on the AI Tables tab

When you save security settings in the Security Manager dialog, or using Open Security in Spreadsheet, or using a Save Type 4 report, the security settings are automatically synchronized with Axiom Intelligence reporting. This means that saving security may take longer in systems with Axiom Intelligence reporting enabled.

Managing data for Axiom Intelligence reporting

Axiom Intelligence reports use a subset of Axiom Enterprise Decision Support data that has been selected to support the most useful data analytics. This data set is static to provide optimal query performance while exploring your data, but the data set can be refreshed as needed with the latest data.

Defining the available data

The data available to Axiom Intelligence reports is determined by the data *model*. This model is predefined and provided by the product package installation.

The data model is designed to provide access to the data that is deemed most useful to analytical reporting, based on the data structures used by the product. The data model determines the fields that are available for use in Axiom Intelligence reports. Some fields may directly correspond to tables and columns in Axiom Enterprise Decision Support, while others may represent transformations or calculations of table data. See your product documentation for more information on the data included in the model.

Currently, data models cannot be customized to include additional fields or to remove existing fields.

▶ Refreshing the available data

When you install a product package that includes an Axiom Intelligence data model, the model and its data are made available to Axiom Intelligence reporting. This creates the initial data set used for reporting. If any changes are made to the data in Axiom Enterprise Decision Support after the package installation, this data is not available to Axiom Intelligence reporting until the data is synchronized.

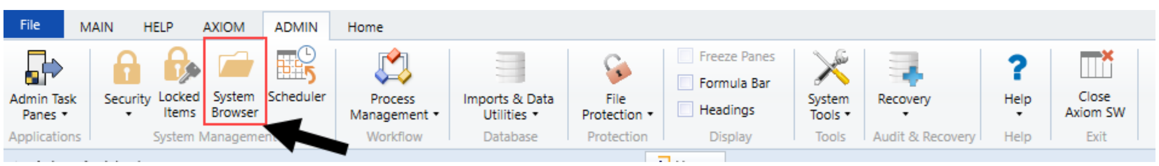
Axiom Enterprise Decision Support uses a Scheduler event handler named **System.ProcessBITable** to synchronize data for Axiom Intelligence reporting. This event can synchronize all data, or synchronize data for a specific table—for example, if the table has just been modified. This event can be run using a Raise Event Scheduler task or using a RunEvent command or function. The reserved variable name **Table** can be used to pass in an optional table name.

The Axiom product that provided the data model will also provide a built-in methodology to trigger this event handler and synchronize the data. The product may be designed to synchronize data after specific activities are performed in the software (such as after running an import or a particular data utility), and/or it may be designed to synchronize data at regular intervals using a scheduled job. The product may also provide a way for you to manually trigger the data synchronization as needed from an Axiom form or from a custom task pane.

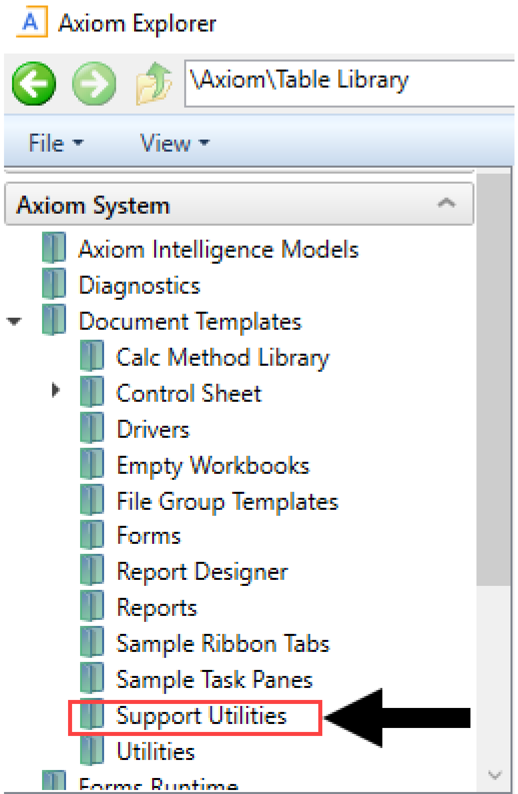
Setting the fiscal year for Axiom Intelligence

To set the fiscal year for Axiom Intelligence:

1. In the **Admin** ribbon tab of the Desktop Client, click **System Browser**.



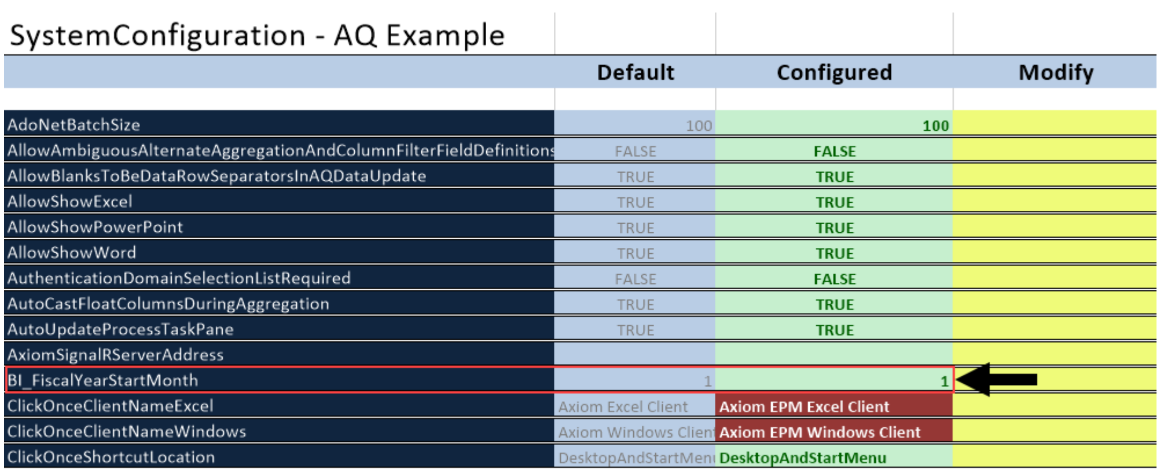
2. In the **Axiom System** area, click **Document Templates > Support Utilities**.



3. Double-click **SystemConfigurationTemplate**.

4. In the **Main** ribbon tab, click **Refresh Data**.

5. In the **BI_FiscalYearStartMonth** row (row 20), type the number for the corresponding fiscal year start month.



SystemConfiguration - AQ Example

	Default	Configured	Modify
AdoNetBatchSize	100	100	
AllowAmbiguousAlternateAggregationAndColumnFilterFieldDefinitions	FALSE	FALSE	
AllowBlanksToBeDataRowSeparatorsInAQDataUpdate	TRUE	TRUE	
AllowShowExcel	TRUE	TRUE	
AllowShowPowerPoint	TRUE	TRUE	
AllowShowWord	TRUE	TRUE	
AuthenticationDomainSelectionListRequired	FALSE	FALSE	
AutoCastFloatColumnsDuringAggregation	TRUE	TRUE	
AutoUpdateProcessTaskPane	TRUE	TRUE	
AxiomSignalRServerAddress			
BI_FiscalYearStartMonth	1	1	
ClickOnceClientNameExcel	Axiom Excel Client	Axiom EPM Excel Client	
ClickOnceClientNameWindows	Axiom Windows Clien	Axiom EPM Windows Client	
ClickOnceShortcutLocation	DesktopAndStartMen	DesktopAndStartMenu	

6. In the **Main** ribbon tab, click **Save**.

7. In the **Admin** ribbon tab, click **Scheduler**.

8. Manually run the **SyncBIModel** event scheduler to complete the process.

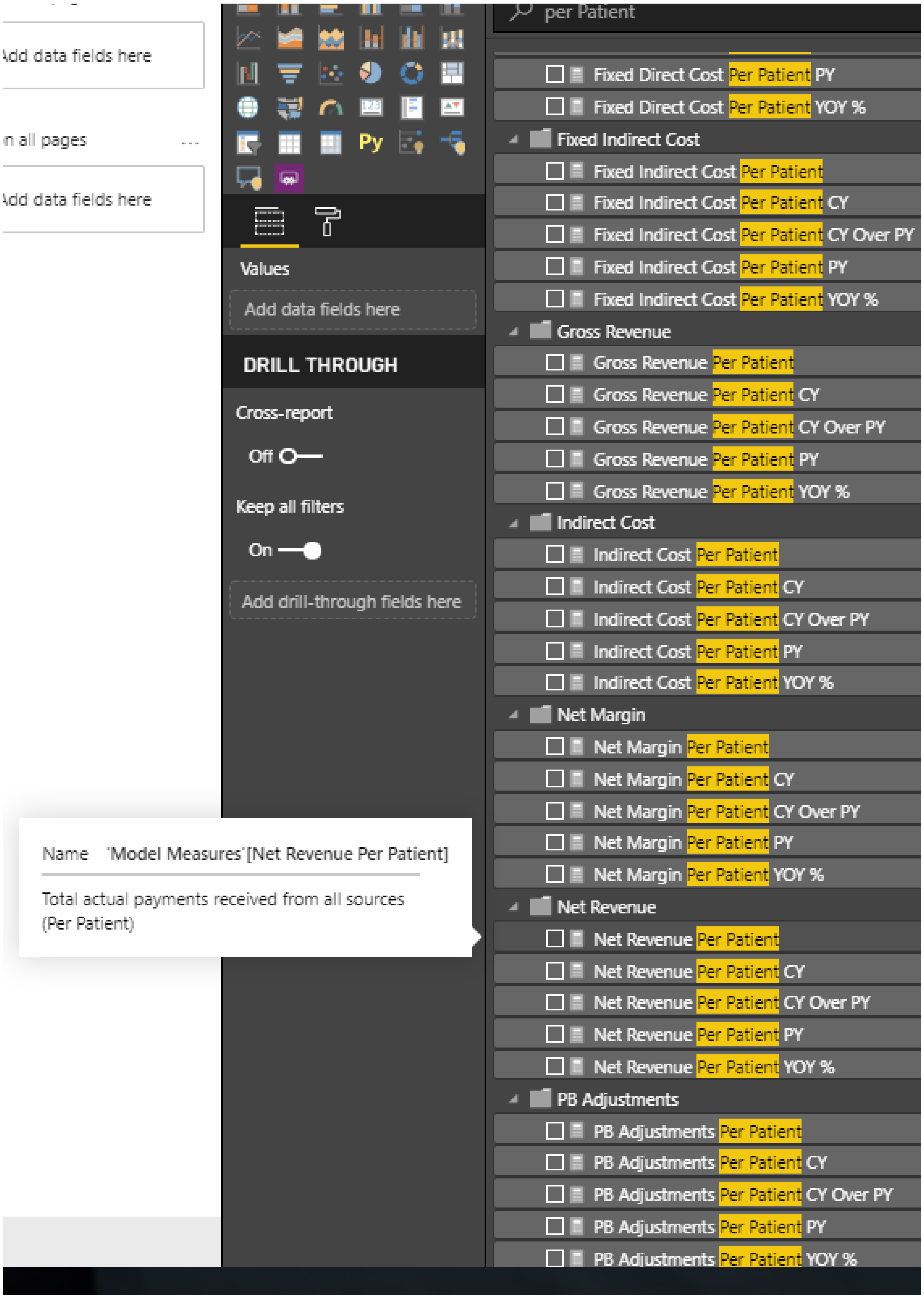
Selecting a unique patient measure type

This utility allows you to select the unique patient identifier type used by your organization, which can be use in Axiom Intelligence to create reports and dashboards centered around specific patient data. Options include Patient ID, Medical Record Number, or MPI.

After the unique patient identifier type is configured, the system syncs the model (performed automatically as part of a Scheduler job) so that your organization can use the following measures to create Axiom Intelligence reports and dashboards:

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

> **TIP:** In the search field at the top of the **Fields** panel in Axiom Intelligence, type **Per Patient** to find all of the measures that include the Per Patient measurement type.

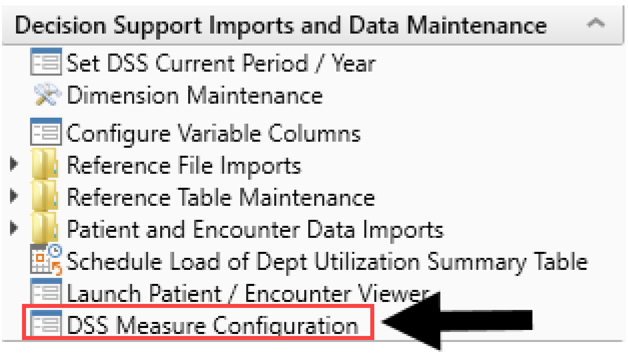


NOTE: Only DSS admins have access to this utility.

To select a patient measure for Axiom Intelligence reporting:

1. From the **DSS Admin** task pane of the Desktop Client, in the **Decision Support Imports and Data Maintenance** section, double-click **DSS Measure Configuration**.

   NOTE: The utility opens in a separate web browser.

2. From the **Select a column** drop-down, select the unique patient identifier used by your organization.

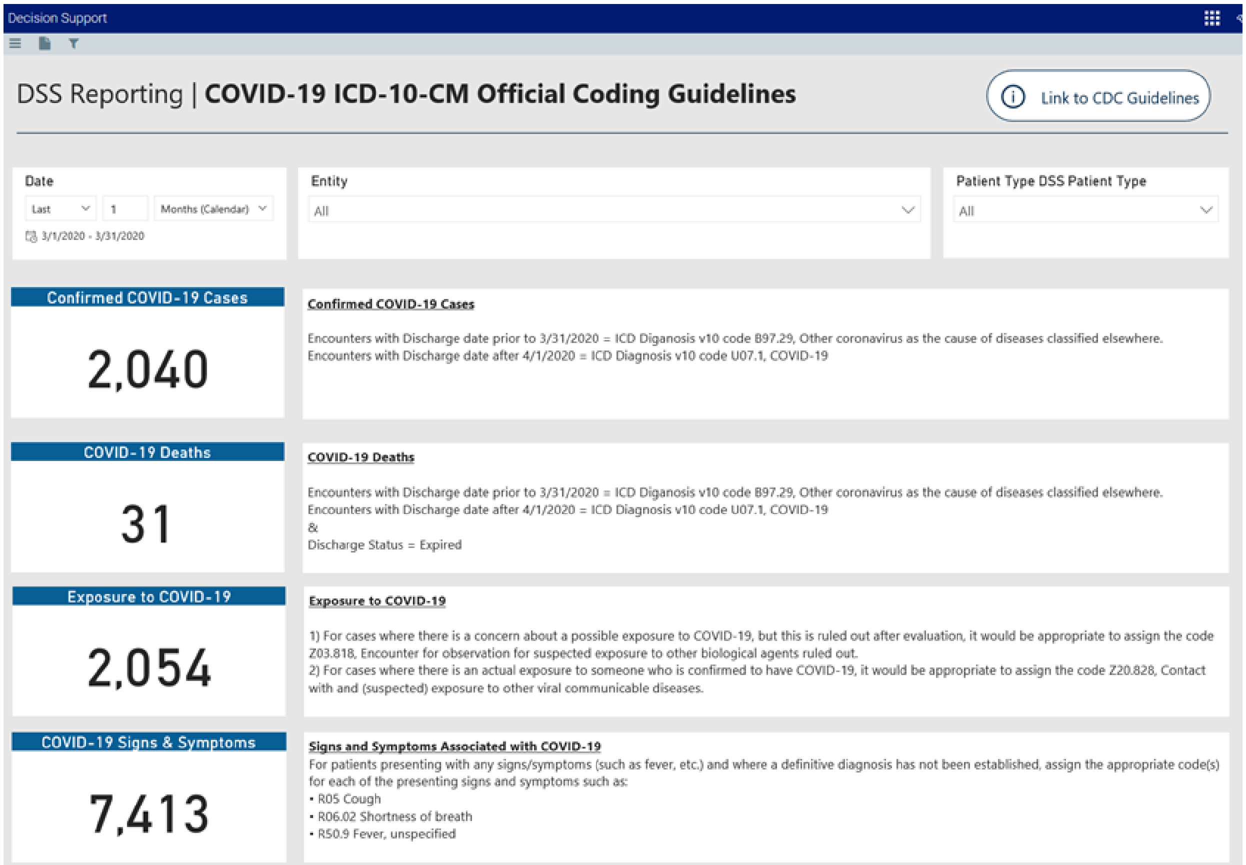
3. Click **Save**.

Pre-defined Axiom Intelligence reports

Axiom Intelligence includes pre-defined role-based dashboard reports that provide insight into your health network and services to help you manage your business and maximize performance across the continuum, ensuring the proper care at the rate place, time, and by the correct provider.

▶ COVID-19 Population and Utilization Analysis Dashboard

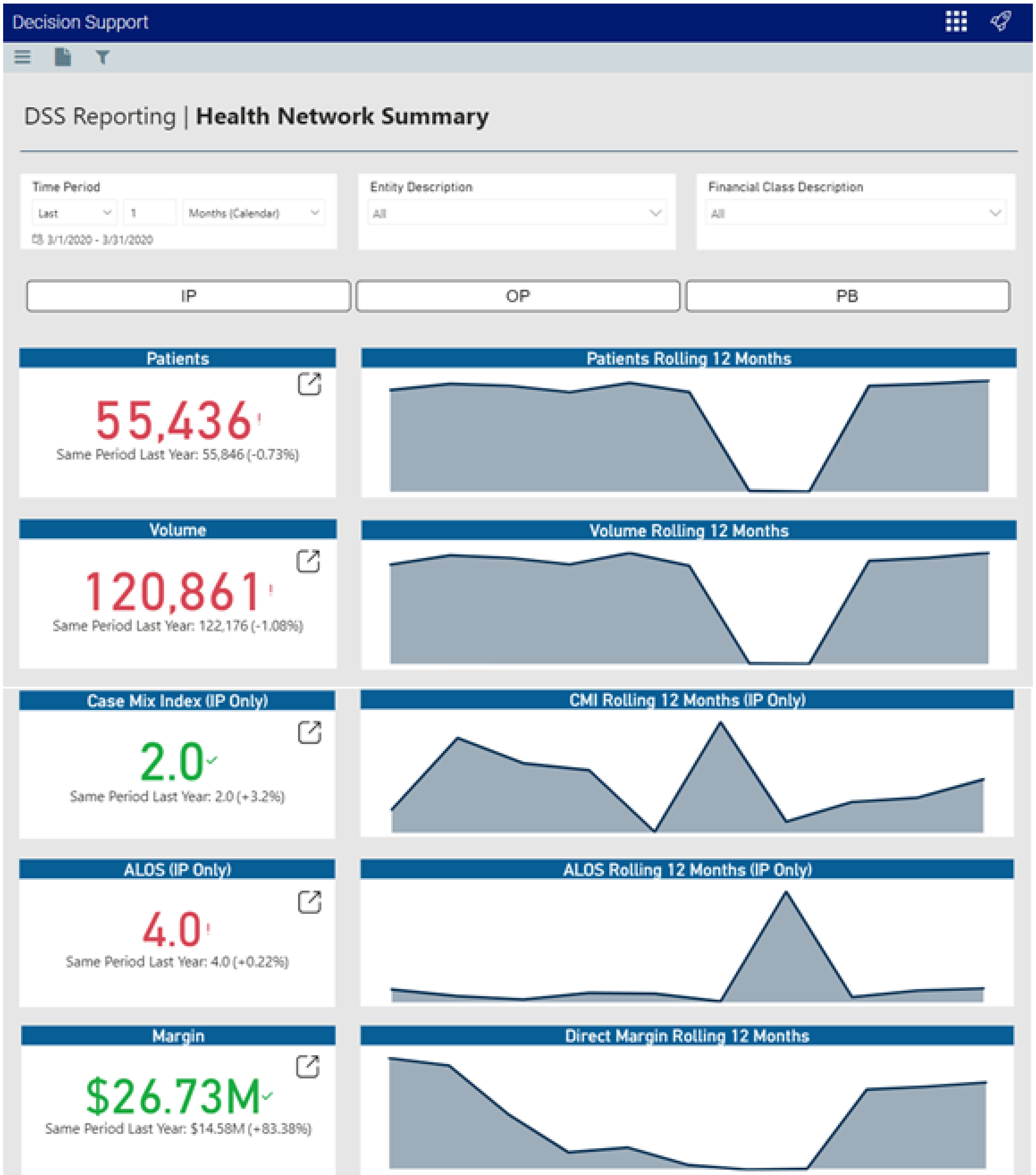
The COVID-19 Population and Utilization Analysis Dashboard provides a visualization of the impact of the COVID-19 patient population on your organization, including monitoring ongoing and dynamic changes to volume and demographics as well as cost utilization data.



For more information, see Using the COVID-19 Population and Utilization Analysis Dashboard.

Health Network Summary Dashboard

The Health Network Summary Dashboard provides an easy and clear way to understand your overall performance as well as identify opportunities for improvement by showing data for patients, volume, Case Mix Index (CMI), ALOS, and margin analysis.

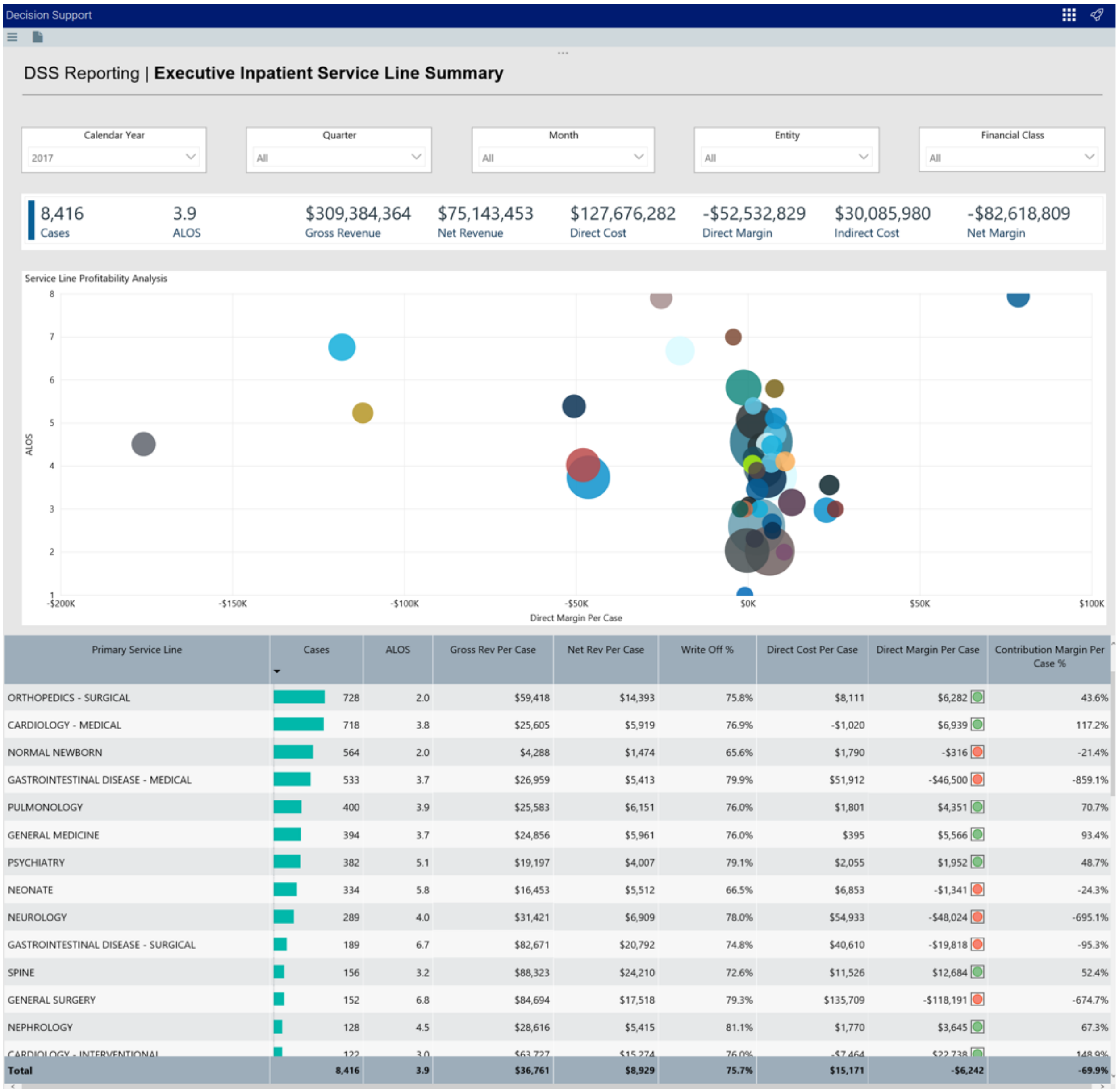


For more information, see Using the Health Network Summary Dashboard.

Inpatient Service Line Dashboard

This dashboard displays a view of all the inpatient data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

NOTE: This dashboard requires that your organization uses DSS PtType, and Service Line uses PrimaryService.name.



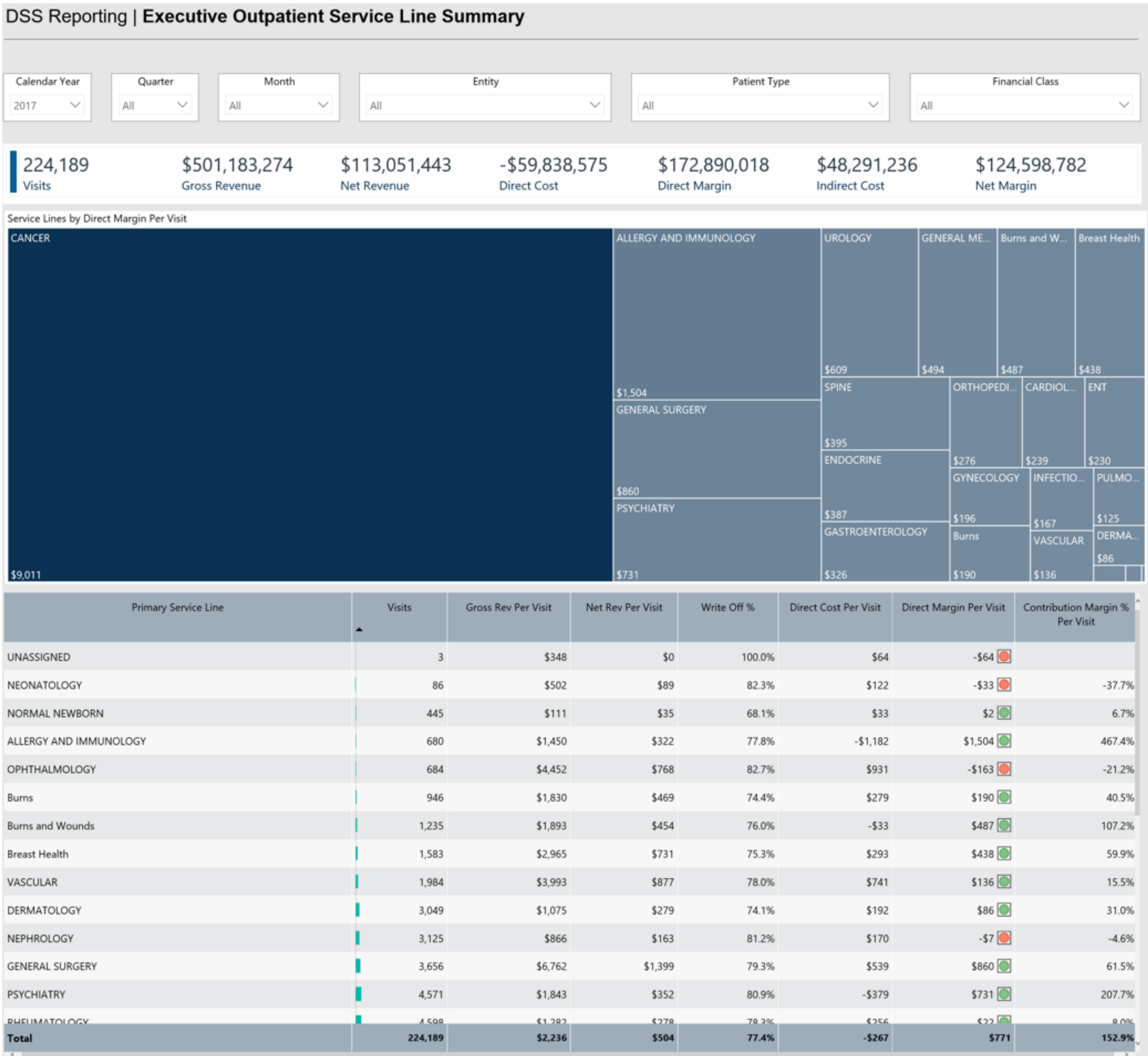
Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
ORTHOPEDICS - SURGICAL	728	2.0	$59,418	$14,393	75.8%	$8,111	$6,282	43.6%
CARDIOLOGY - MEDICAL	718	3.8	$25,605	$5,919	76.9%	-$1,020	$6,939	117.2%
NORMAL NEWBORN	564	2.0	$4,288	$1,474	65.6%	$1,790	-$316	-21.4%
GASTROINTESTINAL DISEASE - MEDICAL	533	3.7	$26,959	$5,413	79.9%	$51,912	-$46,500	-859.1%
PULMONOLOGY	400	3.9	$25,583	$6,151	76.0%	$1,801	$4,351	70.7%
GENERAL MEDICINE	394	3.7	$24,856	$5,961	76.0%	$395	$5,566	93.4%
PSYCHIATRY	382	5.1	$19,197	$4,007	79.1%	$2,055	$1,952	48.7%
NEONATE	334	5.8	$16,453	$5,512	66.5%	$6,853	-$1,341	-24.3%
NEUROLOGY	289	4.0	$31,421	$6,909	78.0%	$54,933	-$48,024	-695.1%
GASTROINTESTINAL DISEASE - SURGICAL	189	6.7	$82,671	$20,792	74.8%	$40,610	-$19,818	-95.3%
SPINE	156	3.2	$88,323	$24,210	72.6%	$11,526	$12,684	52.4%
GENERAL SURGERY	152	6.8	$84,694	$17,518	79.3%	$135,709	-$118,191	-674.7%
NEPHROLOGY	128	4.5	$28,616	$5,415	81.1%	$1,770	$3,645	67.3%
CARDIOLOGY - INTERVENTIONAL	122	3.0	$63,727	$15,274	76.0%	-$7,464	$22,738	148.9%
Total	**8,416**	**3.9**	**$36,761**	**$8,929**	**75.7%**	**$15,171**	**-$6,242**	**-69.9%**

For more information, see Using the Inpatient Service Line Dashboard.

▶ Outpatient Service Line Dashboard

This dashboard displays a view of all the outpatient data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

NOTE: Requires that your organization uses DSS PtType, and Service Line uses PrimaryService.name.



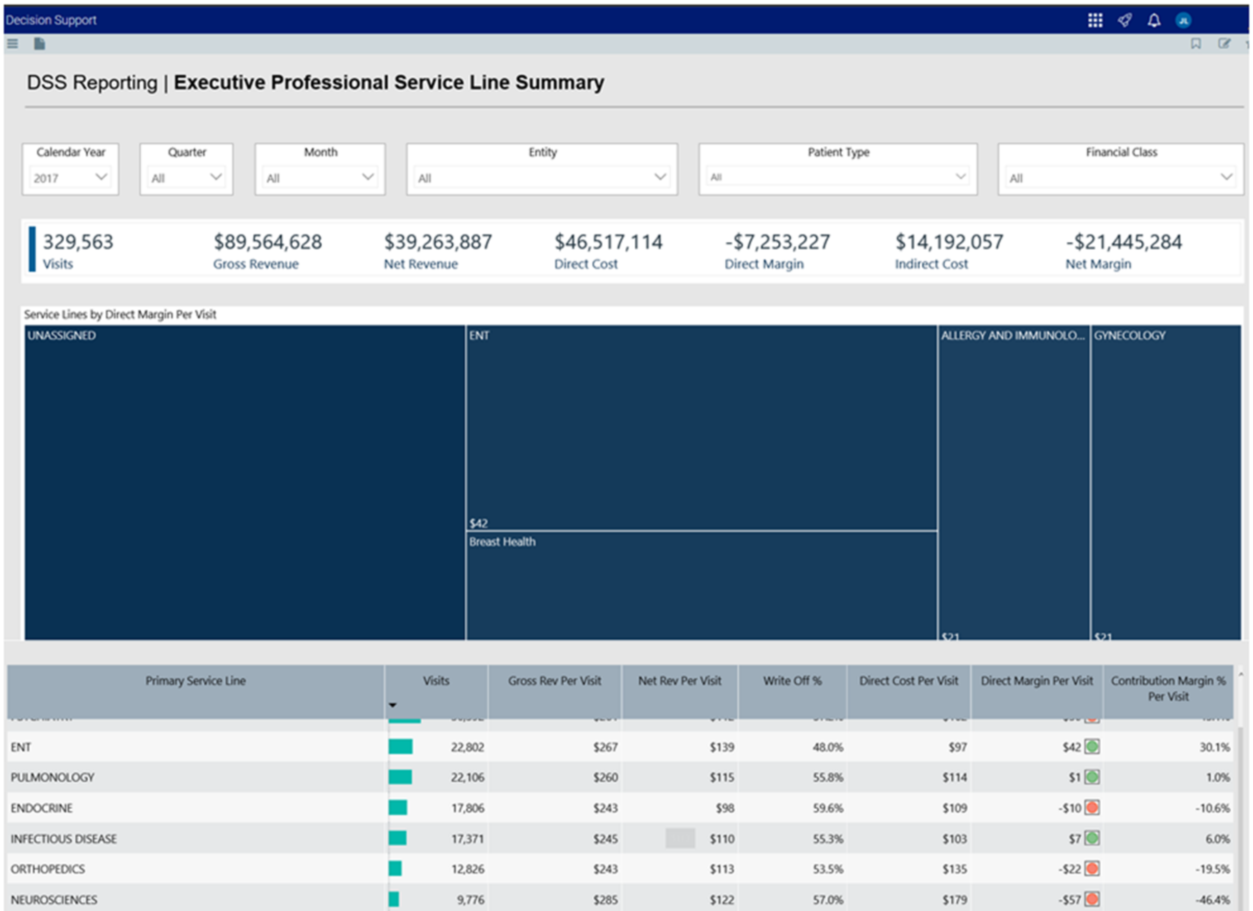
Primary Service Line	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
UNASSIGNED	3	$348	$0	100.0%	$64	-$64	
NEONATOLOGY	86	$502	$89	82.3%	$122	-$33	-37.7%
NORMAL NEWBORN	445	$111	$35	68.1%	$33	$2	6.7%
ALLERGY AND IMMUNOLOGY	680	$1,450	$322	77.8%	-$1,182	$1,504	467.4%
OPHTHALMOLOGY	684	$4,452	$768	82.7%	$931	-$163	-21.2%
Burns	946	$1,830	$469	74.4%	$279	$190	40.5%
Burns and Wounds	1,235	$1,893	$454	76.0%	-$33	$487	107.2%
Breast Health	1,583	$2,965	$731	75.3%	$293	$438	59.9%
VASCULAR	1,984	$3,993	$877	78.0%	$741	$136	15.5%
DERMATOLOGY	3,049	$1,075	$279	74.1%	$192	$86	31.0%
NEPHROLOGY	3,125	$866	$163	81.2%	$170	-$7	-4.6%
GENERAL SURGERY	3,656	$6,762	$1,399	79.3%	$539	$860	61.5%
PSYCHIATRY	4,571	$1,843	$352	80.9%	-$379	$731	207.7%
Total	**224,189**	**$2,236**	**$504**	**77.4%**	**-$267**	**$771**	**152.9%**

For more information, see Using the Outpatient Service Line Dashboard.

Professional Service Line Dashboard

This dashboard displays a view of all the professional billing data for service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

NOTE: Requires that your organization uses DSS PtType, and Service Line uses PrimaryService.name.



For more information, see Using the Professional Service Line Dashboard.

Using the COVID-19 Population and Utilization Analysis Dashboard

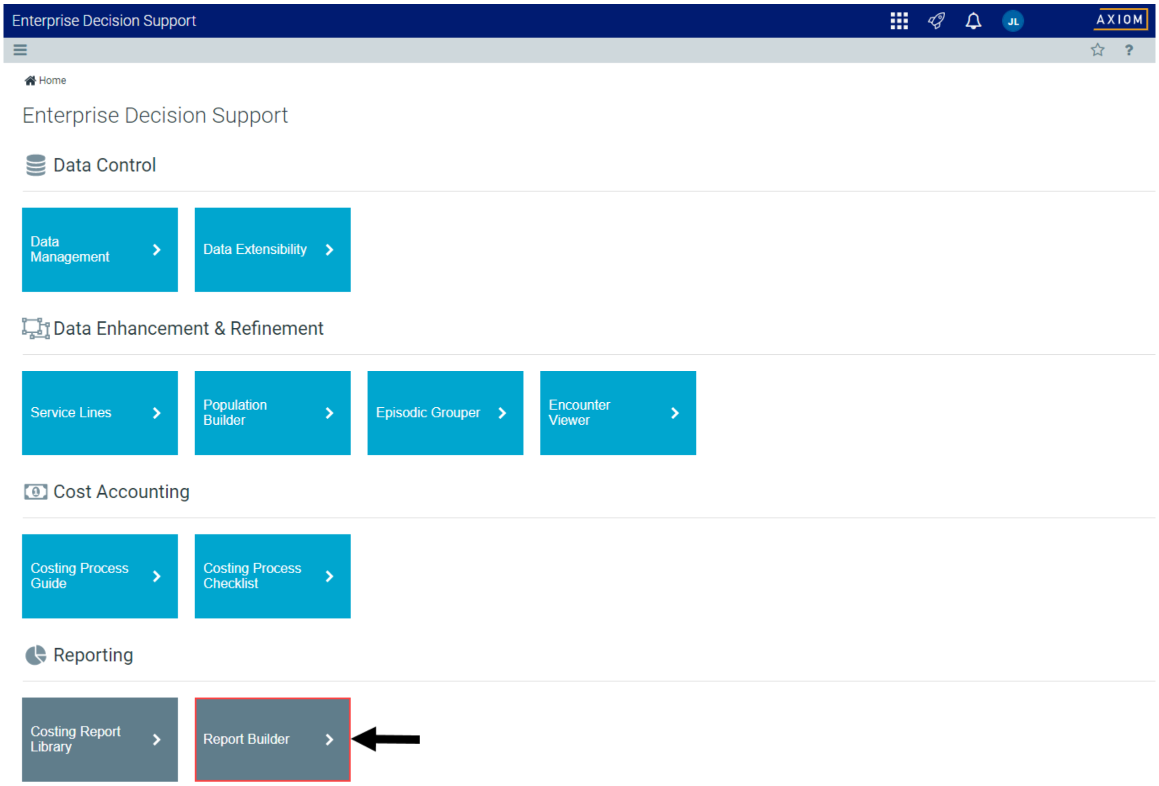
▶ Overview

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

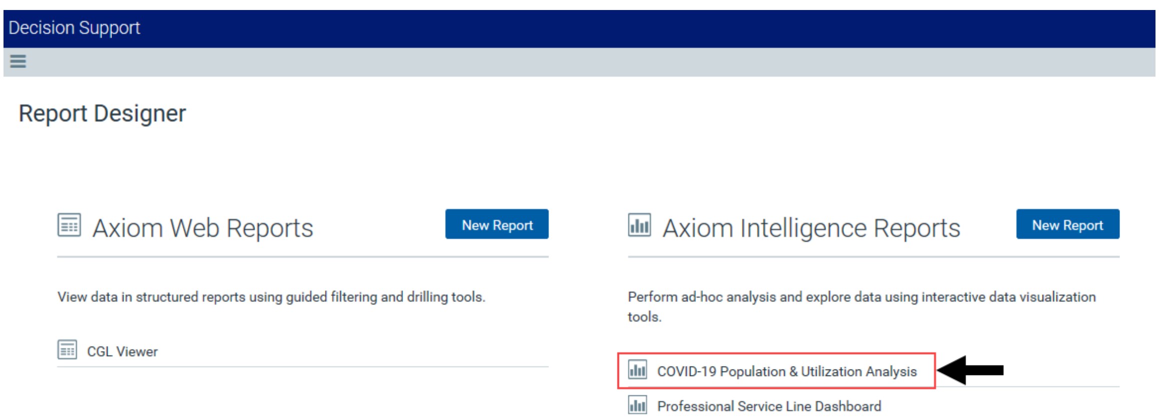
▶ Opening the dashboard

To open the dashboard:

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



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

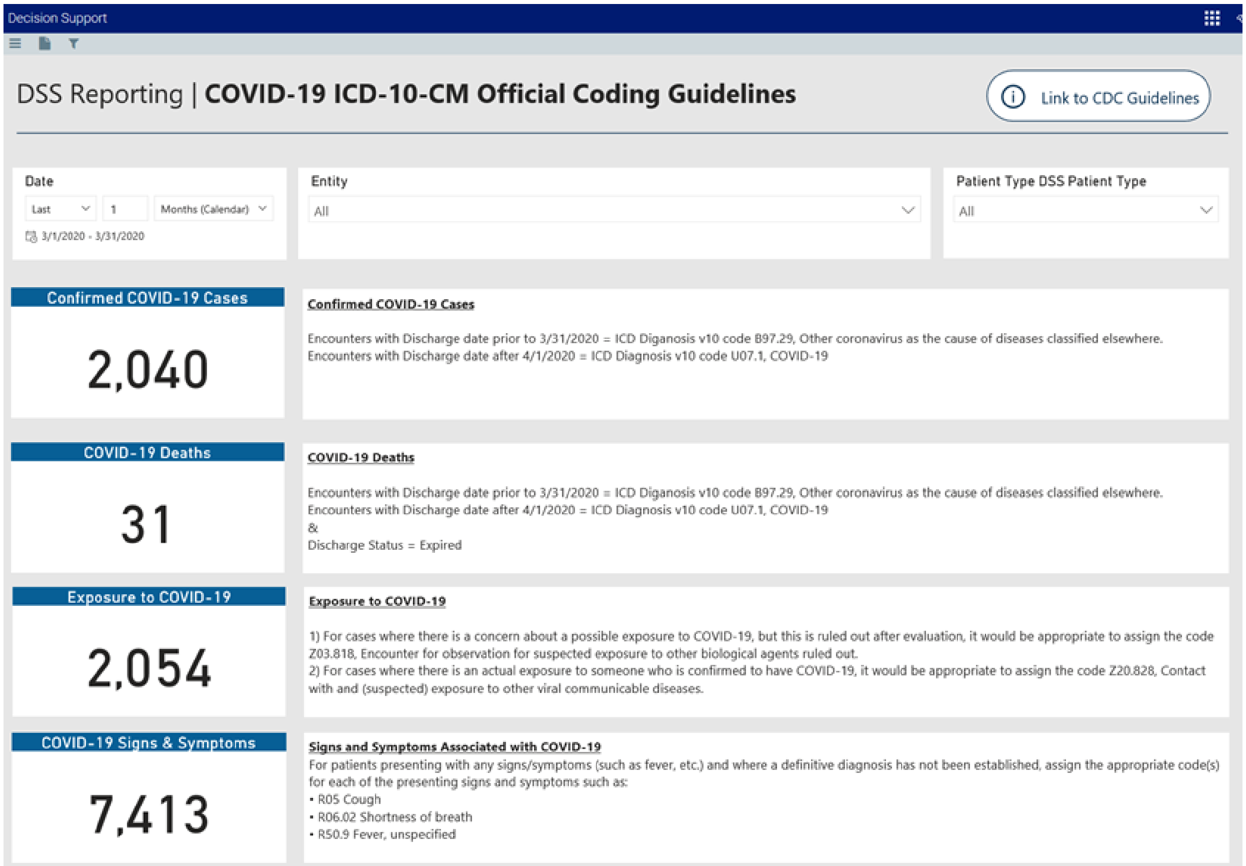


Navigating the dashboard

The COVID-19 ICD-10-CM Coding Guidelines page serves as the main home page for the dashboard and includes the following sections:

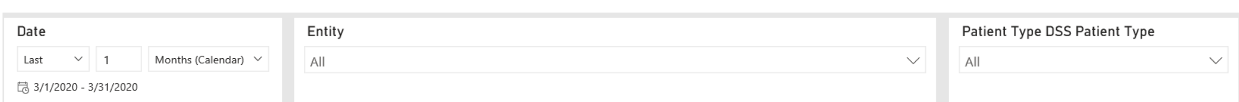
- Confirmed COVID-19 Cases
- COVID-19 Deaths
- Exposure to COVID-19

- Signs and Symptoms Associated with COVID-19



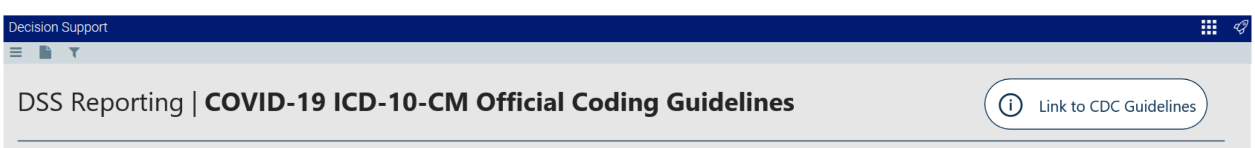
Slicers

This section allows you to filter data by date (days, weeks, months, years), entity, and patient type. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views. The data will dynamically update with the selection of the different parameters.



Link to CDC Guidelines

The dashboard includes a link to the guidelines created by the CDC used to create the COVID-19 population definitions in Axiom Enterprise Decision Support.



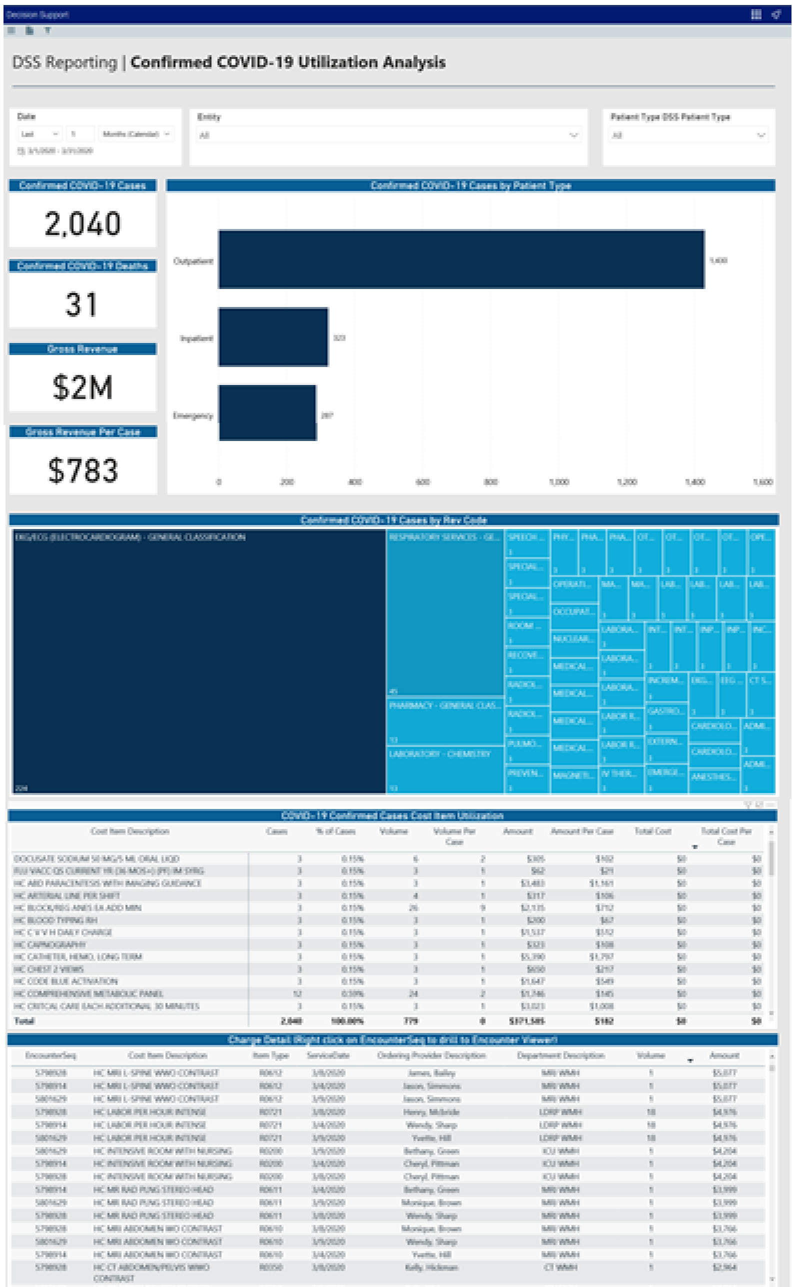
COVID-19 Population Analysis report

This report provides visualization and data details related to the ongoing and dynamic changes to volumes and understand these new populations across demographic, geographic, and operational sectors.

For more information, see COVID-19 Population Analysis report.

COVID-19 Utilization Analysis report

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



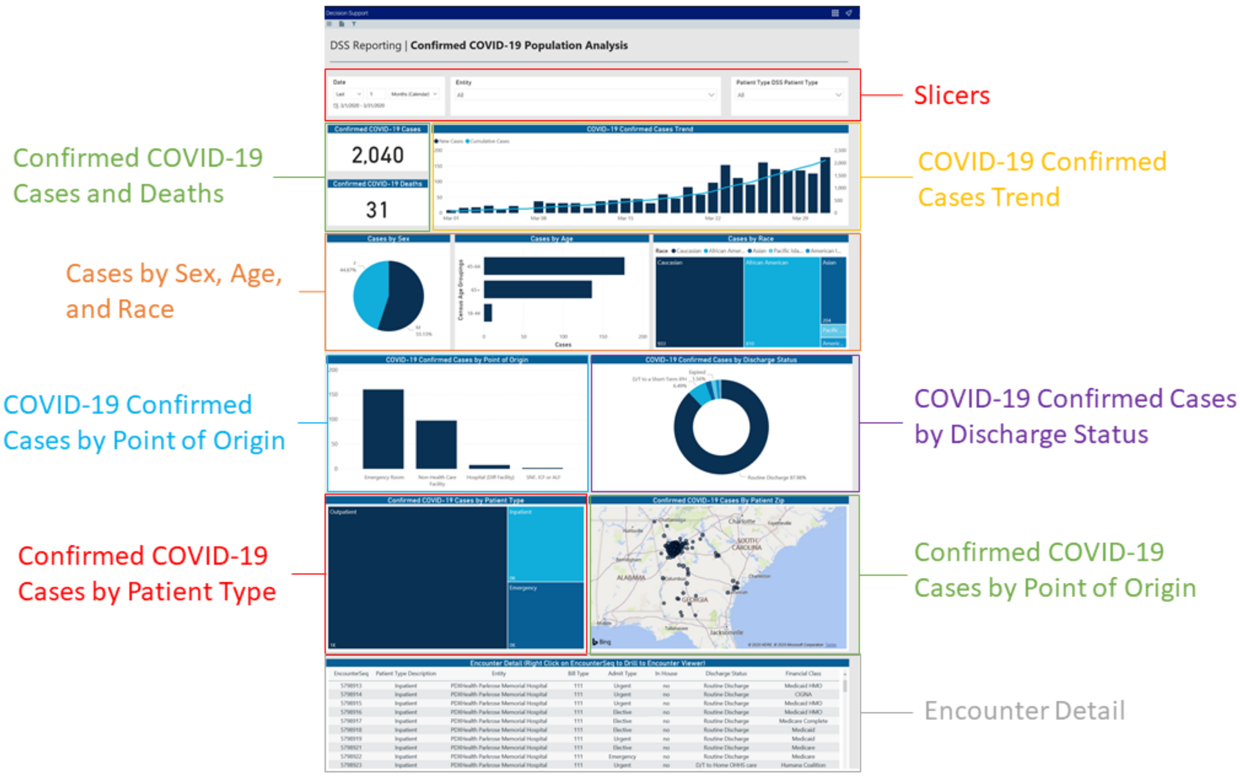
For more information, see COVID-19 Utilization Analysis report.

COVID-19 Population Analysis report

Overview

This page provides demographic, geographic, and operational data regarding COVID-19 patient populations.

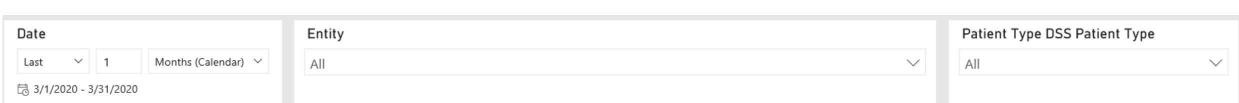
To return to the dashboard home page, click the COVID-19 CDC Coding tab at the bottom of the page.



The following sections describe the different areas of this page.

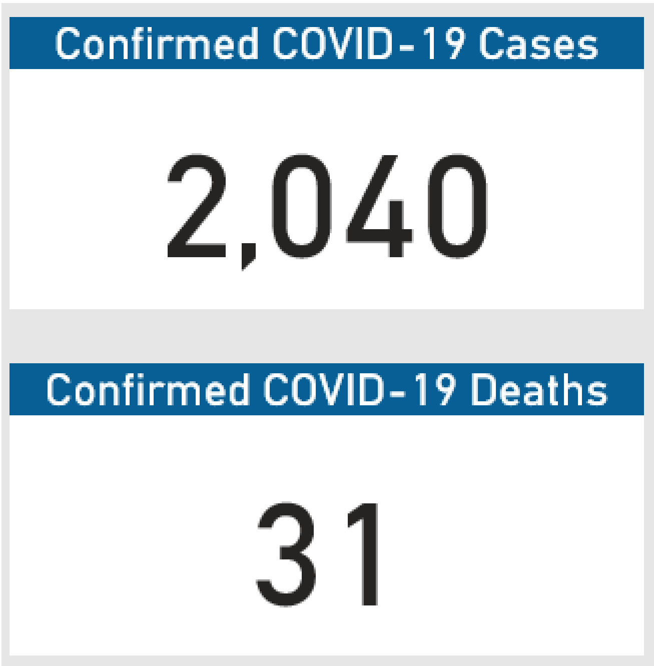
Slicers

This section allows you to filter data by date (days, weeks, months, years), entity, and patient type. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views. The data and visuals in the report will dynamically update with the selection of the different parameters.



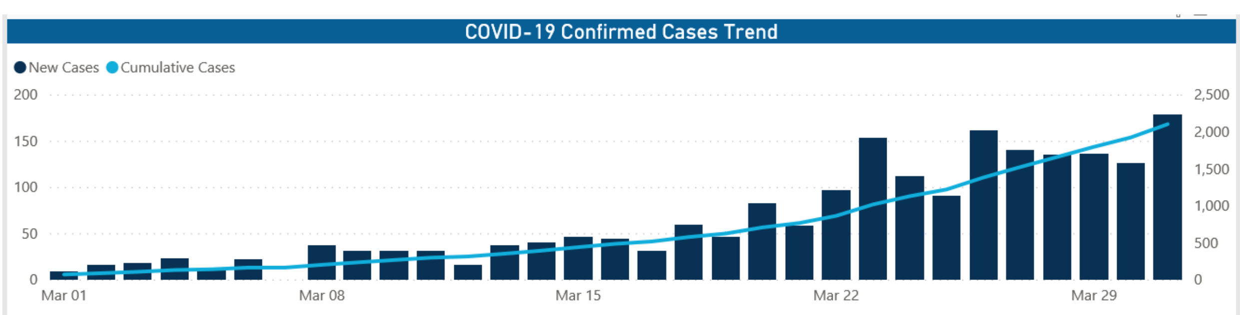
Confirmed COVID-19 Cases and Deaths

This section displays the number of COVID-19 cases and deaths across the population based on the parameters set in the Slicer section.



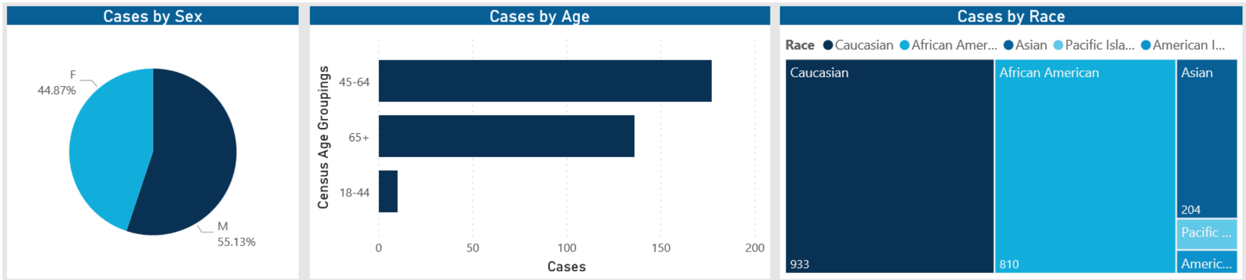
COVID-19 Confirmed Cases Trend

This bar chart displays the number of new cases and a trend line of cumulative cases over time. Hover your cursor over each bar to view a tool tip with details regarding the date and the number of cases for that date.



Cases by Sex, Age, and Race

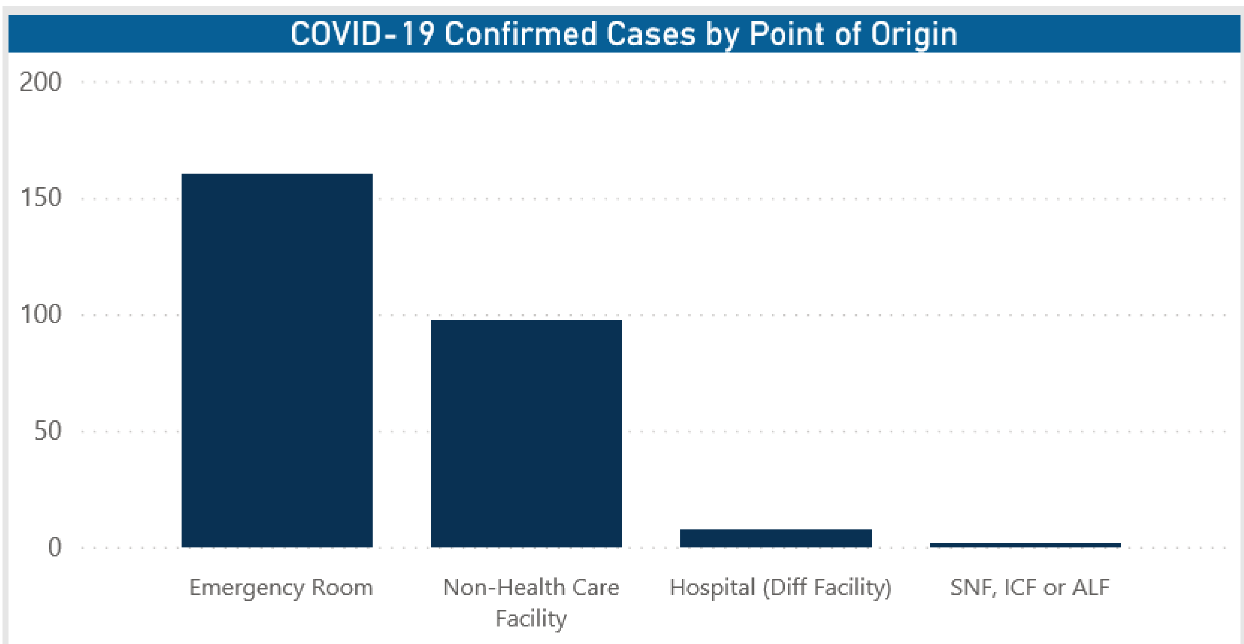
These visuals display demographic information for the COVID-19 patient population. Hover your cursor over the chart elements to view a tool tip with the number of each type (the Cases by Sex chart also displays the percentage of total patients for each sex).



Click image to view full size

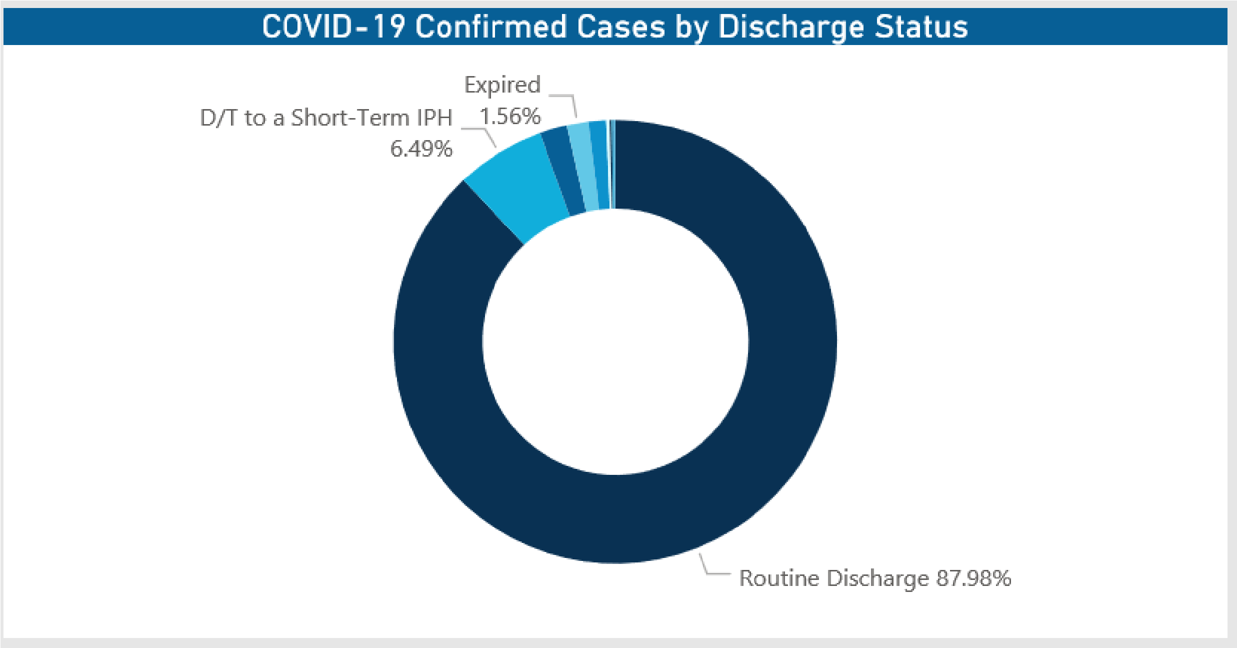
COVID-19 Confirmed Cases by Point of Origin

This chart shows the location in patients are admitted. Hover your cursor over each bar to view a tool tip with a description of the admittance location description and the number of patients admitted at that location.



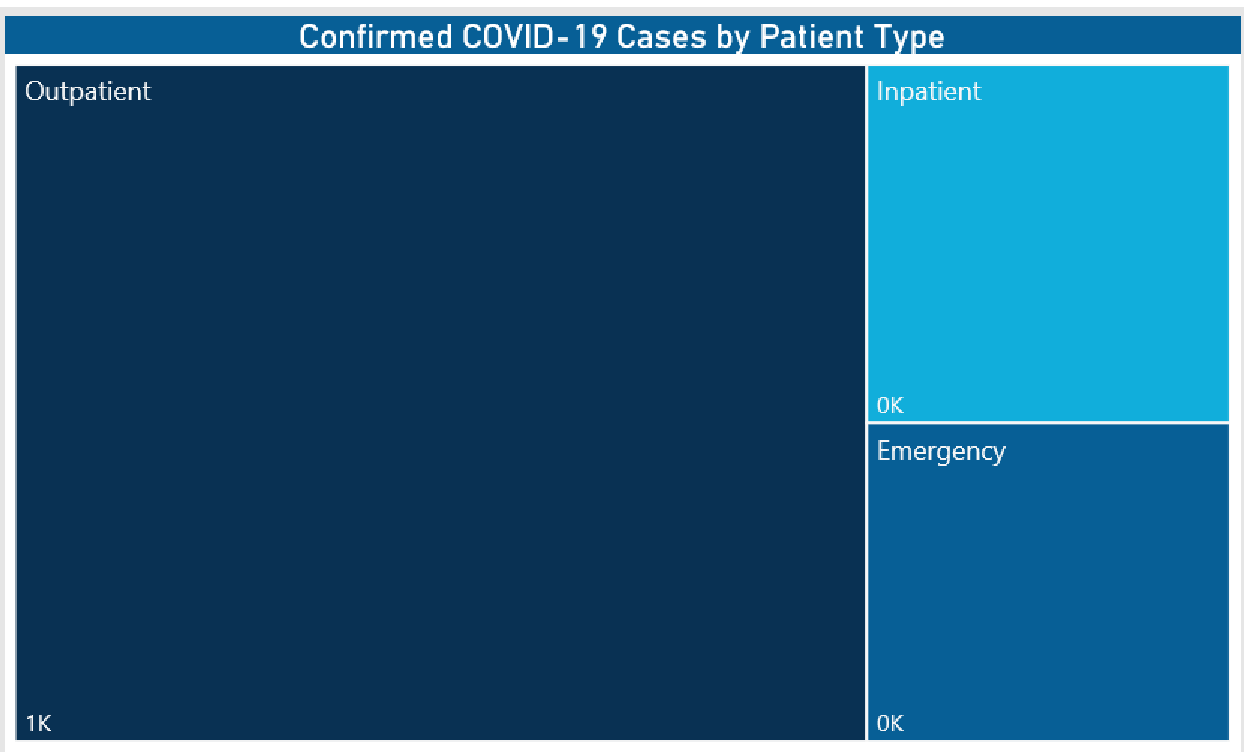
COVID-19 Confirmed Cases by Discharge Status

This visual shows a breakdown percentage of patients by discharge status. Hover your cursor over the individual sections of the visual to view a tool tip of the discharge status description and number of patients with that status.



Confirmed COVID-19 Cases by Patient Type

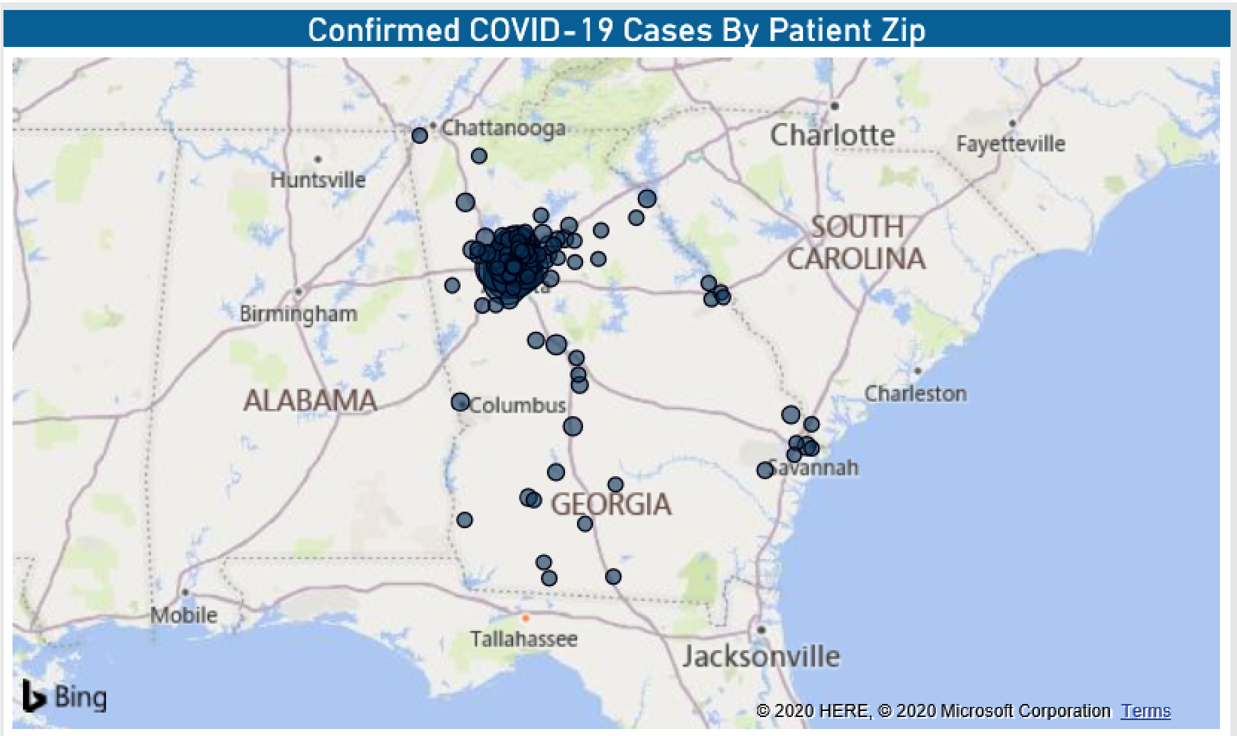
This graph provides a visual representation of the number of patients by type. Hover your cursor over each square to view a tool tip with the patient type description and number of cases for that type.



Confirmed COVID-19 Cases by Patient Zip

This section displays the cases by location using a map. From here, you can do the following:

- Zoom in and out of the map by using the scroll button on your mouse. You can move the map by holding down the left mouse button and moving the mouse to the area to view.
- View the zip code and number of visits for that zip code by hovering your cursor over a dot on the map.
- View information about visits specific to that zip code by clicking a dot on the map, and the sections on the page will adjust accordingly.



Encounter Detail

This table displays the details for each encounter for the population. From this table, you can do the following:

- Change the report visuals for a specific encounter by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
- Drill through the data by right-clicking the row, and then selecting **Drill Through**.

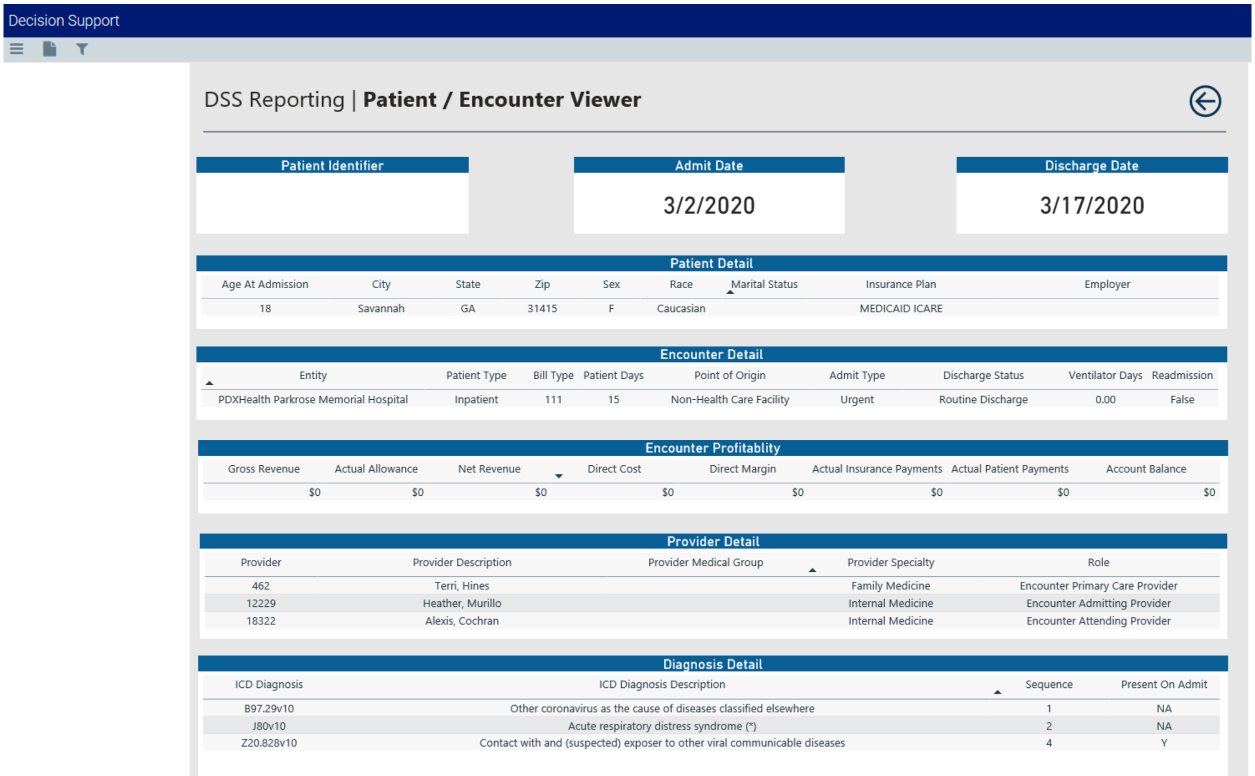
Encounter Detail (Right Click on EncounterSeq to Drill to Encounter Viewer)							
EncounterSeq	Patient Type Description	Entity	Bill Type	Admit Type	In House	Discharge Status	Financial Class
5798913	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	Routine Discharge	Medicaid HMO
5798914	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	Routine Discharge	CIGNA
5798915	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	Routine Discharge	Medicaid HMO
5798916	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicaid HMO
5798917	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicare Complete
5798918	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicaid
5798919	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	Routine Discharge	Medicaid
5798921	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicare
5798922	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Emergency	no	Routine Discharge	Medicare
5798923	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	D/T to Home OHHS care	Humana Coalition
5798925	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Emergency	no	D/T to a FHCF	Worker's Comp
5798926	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicare
5798927	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	CIGNA
5798928	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicaid HMO
5798929	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	D/T to SNF Medicare cert	Medicaid HMO
5798930	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Elective	no	Routine Discharge	Medicare Complete
5798931	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	Routine Discharge	Medicaid
5798932	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	D/T to SNF Medicare cert	Medicaid
5798933	Inpatient	PDXHealth Parkrose Memorial Hospital	111	Urgent	no	D/T to SNF Medicare cert	Medicare Complete

Encounter Viewer

When you drill through to a specific encounter from the Encounter Detail table, the Patient/Encounter View page displays, which includes details regarding:

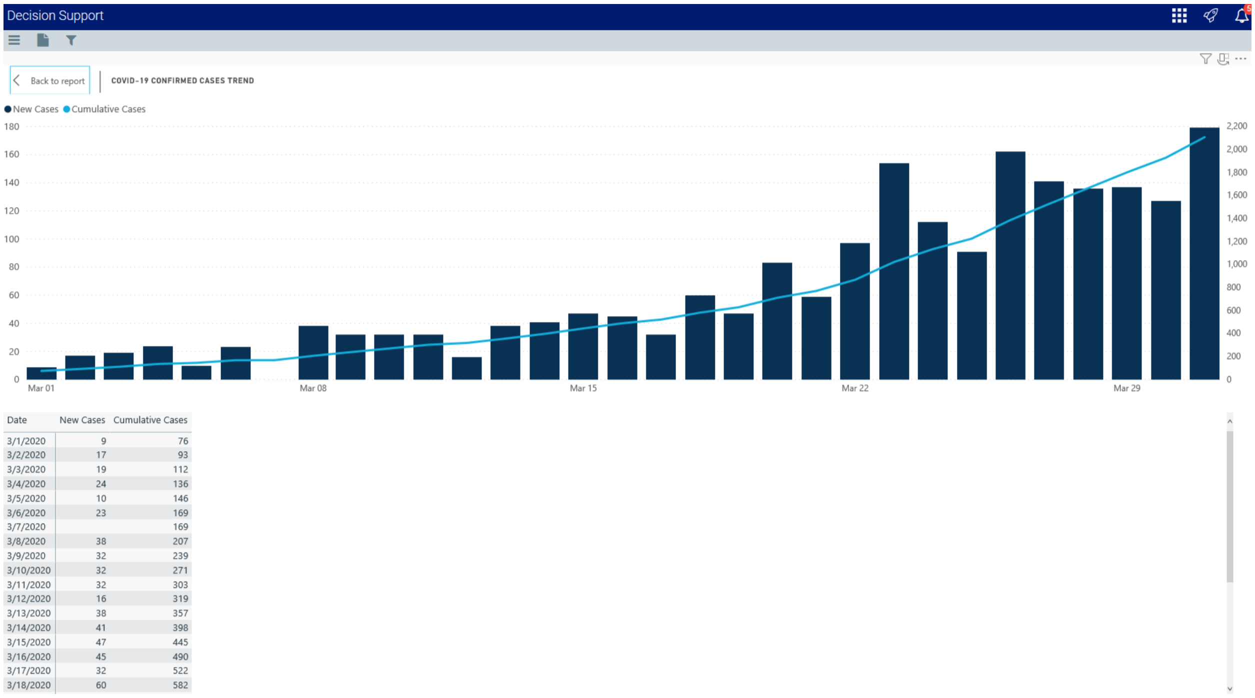
- Patient Identifier
- Admit Date
- Discharge Date
- Patient Detail
- Encounter Detail
- Encounter Profitability
- Provider Detail
- Diagnosis Detail
- Procedure Detail
- CPT Detail
- Charge Detail

In each table section, you can sort the information by columns in ascending or descending order by clicking the column header. To return to the COVID-19 Population Analysis report, click the arrow in the upper-right corner of the page.



Viewing data in table format

You can view the underlying data for the visualizations and tables in the report by right-clicking the graph or table, and clicking **Show as a table**. A data table displays underneath the graph or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



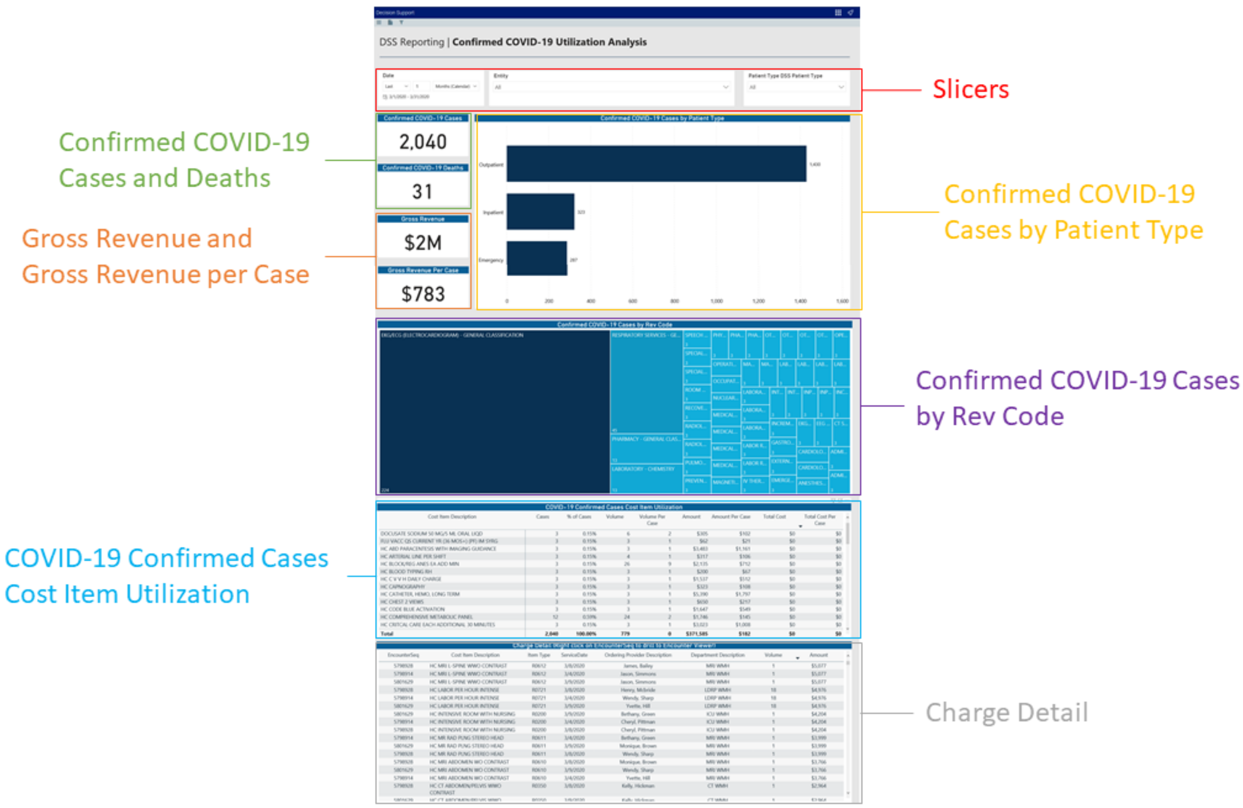
Date	New Cases	Cumulative Cases
3/1/2020	9	76
3/2/2020	17	93
3/3/2020	19	112
3/4/2020	24	136
3/5/2020	10	146
3/6/2020	23	169
3/7/2020		169
3/8/2020	38	207
3/9/2020	32	239
3/10/2020	32	271
3/11/2020	32	303
3/12/2020	16	319
3/13/2020	38	357
3/14/2020	41	398
3/15/2020	47	445
3/16/2020	45	490
3/17/2020	32	522
3/18/2020	60	582

COVID-19 Utilization Analysis report

Overview

This page provides the data related to the utilization activity and cost of critical resources needed to care for COVID-19 patient populations.

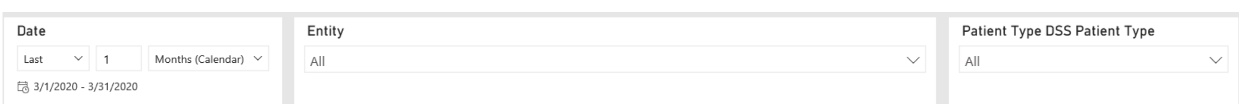
To return to the dashboard home page, click the COVID-19 CDC Coding tab at the bottom of the page.



The following sections describe the different areas of this page.

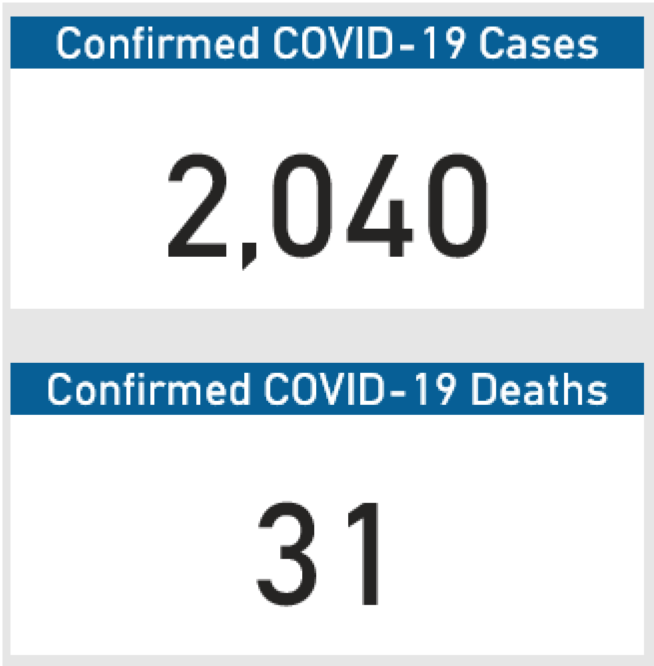
Slicers

This section allows you to filter data by date (days, weeks, months, years), entity, and patient type. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views. The data and visuals in this report will dynamically update with the selection of the different parameters.



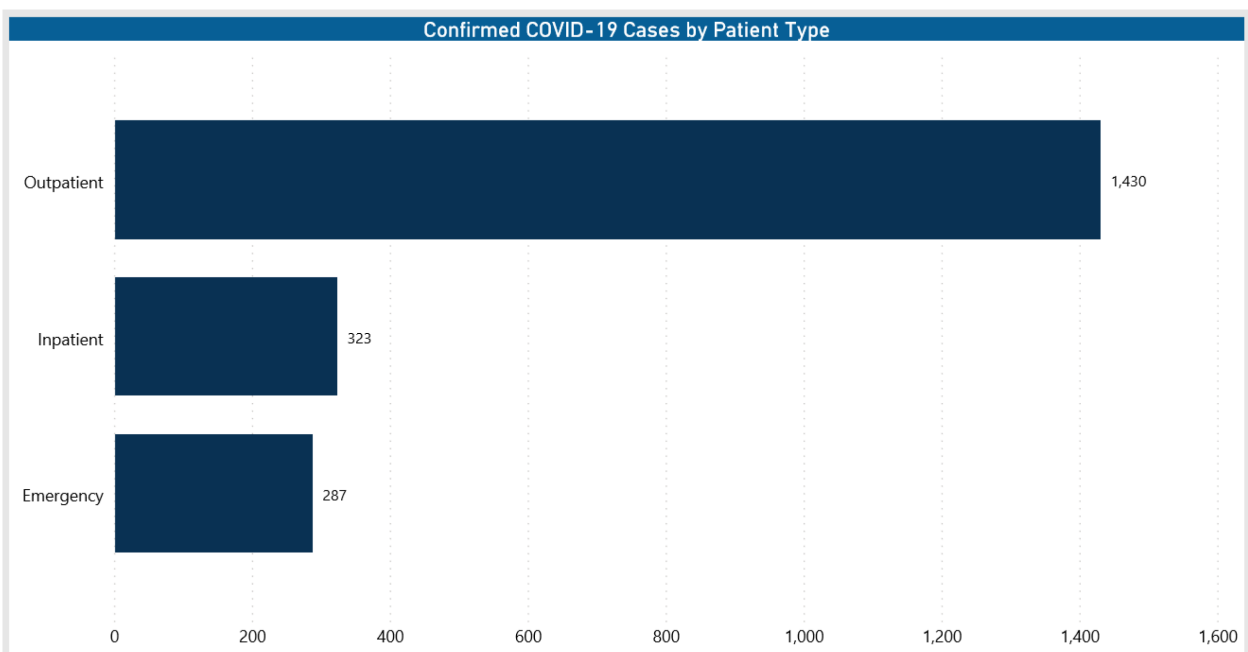
Confirmed COVID-19 Cases and Deaths

This section displays the number of COVID-19 cases and deaths across the population based on the parameters set in the Slicer section.



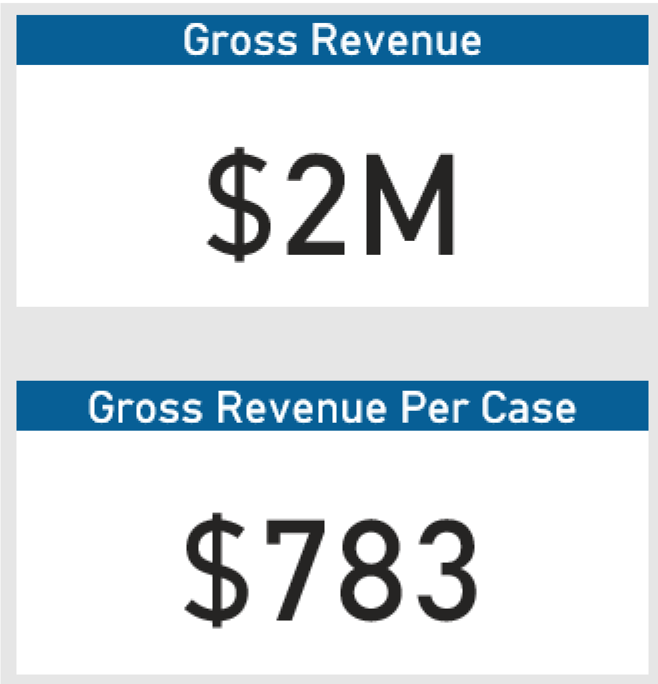
Confirmed COVID-19 Cases by Patient Type

This bar chart displays the number of cases by patient types. Hover your cursor over each bar to view a tool tip with details regarding the patient type description and the number of cases for that type.



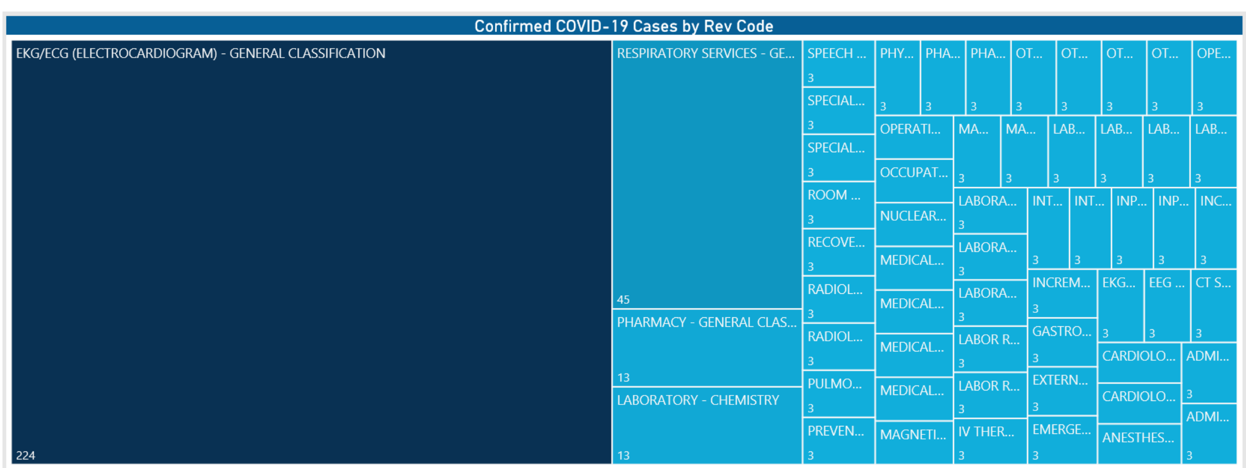
Gross Revenue and Gross Revenue per Case

This section displays the gross revenue and gross revenue per case across the population based on the parameters set in the Slicer section.



Confirmed COVID-19 Cases by Rev Code

This graph provides a visual representation of the number of COVID-19 cases by revenue code. Hover your cursor over each square to view a tool tip with the revenue code description and number of cases for that revenue code.



COVID-19 Confirmed Cases Cost Item Utilization

This table displays the charge details data for each encounter, including the following:

- Encounter Sequence
- Cost Item Description
- Item Type
- Service Date
- Ordering Provider Description
- Department Description
- Volume
- Amount

From this table, you can do the following:

- Change the report visuals for a specific encounter by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.

COVID-19 Confirmed Cases Cost Item Utilization

Cost Item Description	Cases	% of Cases	Volume	Volume Per Case	Amount	Amount Per Case	Total Cost	Total Cost Per Case
DOCUSATE SODIUM 50 MG/5 ML ORAL LIQD	3	0.15%	6	2	$305	$102	$0	$0
FLU VACC QS CURRENT YR (36 MOS+) (PF) IM SYRG	3	0.15%	3	1	$62	$21	$0	$0
HC ABD PARACENTESIS WITH IMAGING GUIDANCE	3	0.15%	3	1	$3,483	$1,161	$0	$0
HC ARTERIAL LINE PER SHIFT	3	0.15%	4	1	$317	$106	$0	$0
HC BLOCK/REG ANES EA ADD MIN	3	0.15%	26	9	$2,135	$712	$0	$0
HC BLOOD TYPING RH	3	0.15%	3	1	$200	$67	$0	$0
HC C V V H DAILY CHARGE	3	0.15%	3	1	$1,537	$512	$0	$0
HC CAPNOGRAPHY	3	0.15%	3	1	$323	$108	$0	$0
HC CATHETER, HEMO, LONG TERM	3	0.15%	3	1	$5,390	$1,797	$0	$0
HC CHEST 2 VIEWS	3	0.15%	3	1	$650	$217	$0	$0
HC CODE BLUE ACTIVATION	3	0.15%	3	1	$1,647	$549	$0	$0
HC COMPREHENSIVE METABOLIC PANEL	12	0.59%	24	2	$1,746	$145	$0	$0
HC CRITCAL CARE EACH ADDITIONAL 30 MINUTES	3	0.15%	3	1	$3,023	$1,008	$0	$0
Total	**2,040**	**100.00%**	**779**	**0**	**$371,585**	**$182**	**$0**	**$0**

Charge Detail

This table displays the charge item information for encounters, including the following:

- Encounter Sequence
- Cost Item Description
- Item Type
- Service Date
- Ordering Provider Description
- Department Description
- Volume
- Amount

From this table, you can do the following:

- Change the report visuals for a specific encounter by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
- Drill through the data by right-clicking the row, and then selecting **Drill Through**.

Charge Detail (Right click on EncounterSeq to drill to Encounter Viewer)

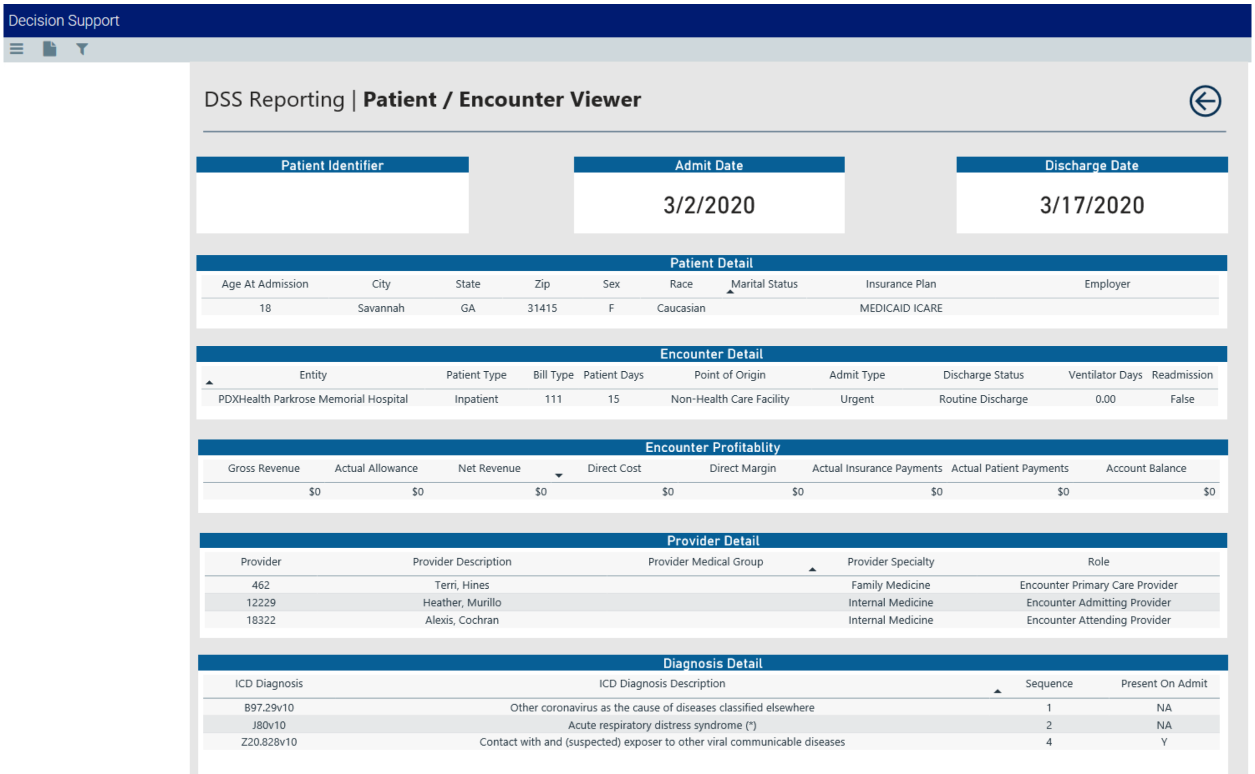
EncounterSeq	Cost Item Description	Item Type	ServiceDate	Ordering Provider Description	Department Description	Volume	Amount
5798928	HC MRI L-SPINE WWO CONTRAST	R0612	3/8/2020	James, Bailey	MRI WMH	1	$5,077
5798914	HC MRI L-SPINE WWO CONTRAST	R0612	3/4/2020	Jason, Simmons	MRI WMH	1	$5,077
5801629	HC MRI L-SPINE WWO CONTRAST	R0612	3/9/2020	Jason, Simmons	MRI WMH	1	$5,077
5798928	HC LABOR PER HOUR INTENSE	R0721	3/8/2020	Henry, Mcbride	LDRP WMH	18	$4,976
5798914	HC LABOR PER HOUR INTENSE	R0721	3/4/2020	Wendy, Sharp	LDRP WMH	18	$4,976
5801629	HC LABOR PER HOUR INTENSE	R0721	3/9/2020	Yvette, Hill	LDRP WMH	18	$4,976
5801629	HC INTENSIVE ROOM WITH NURSING	R0200	3/9/2020	Bethany, Green	ICU WMH	1	$4,204
5798914	HC INTENSIVE ROOM WITH NURSING	R0200	3/4/2020	Cheryl, Pittman	ICU WMH	1	$4,204
5798928	HC INTENSIVE ROOM WITH NURSING	R0200	3/8/2020	Cheryl, Pittman	ICU WMH	1	$4,204
5798914	HC MR RAD PLNG STEREO HEAD	R0611	3/4/2020	Bethany, Green	MRI WMH	1	$3,999
5801629	HC MR RAD PLNG STEREO HEAD	R0611	3/9/2020	Monique, Brown	MRI WMH	1	$3,999
5798928	HC MR RAD PLNG STEREO HEAD	R0611	3/8/2020	Wendy, Sharp	MRI WMH	1	$3,999
5798928	HC MRI ABDOMEN WO CONTRAST	R0610	3/8/2020	Monique, Brown	MRI WMH	1	$3,766
5801629	HC MRI ABDOMEN WO CONTRAST	R0610	3/9/2020	Wendy, Sharp	MRI WMH	1	$3,766
5798914	HC MRI ABDOMEN WO CONTRAST	R0610	3/4/2020	Yvette, Hill	MRI WMH	1	$3,766

Encounter Viewer

When you drill through to a specific encounter from the Charge Detail table, the Patient/Encounter View page displays, which includes details regarding:

- Patient Identifier
- Admit Date
- Discharge Date
- Patient Detail
- Encounter Detail
- Encounter Profitability
- Provider Detail
- Diagnosis Detail
- Procedure Detail
- CPT Detail
- Charge Detail

In each table section, you can sort the information by columns in ascending or descending order by clicking the column header. To return to the COVID-19 Population Utilization report, click the arrow in the upper-right corner of the page.



▶ Viewing data in table format

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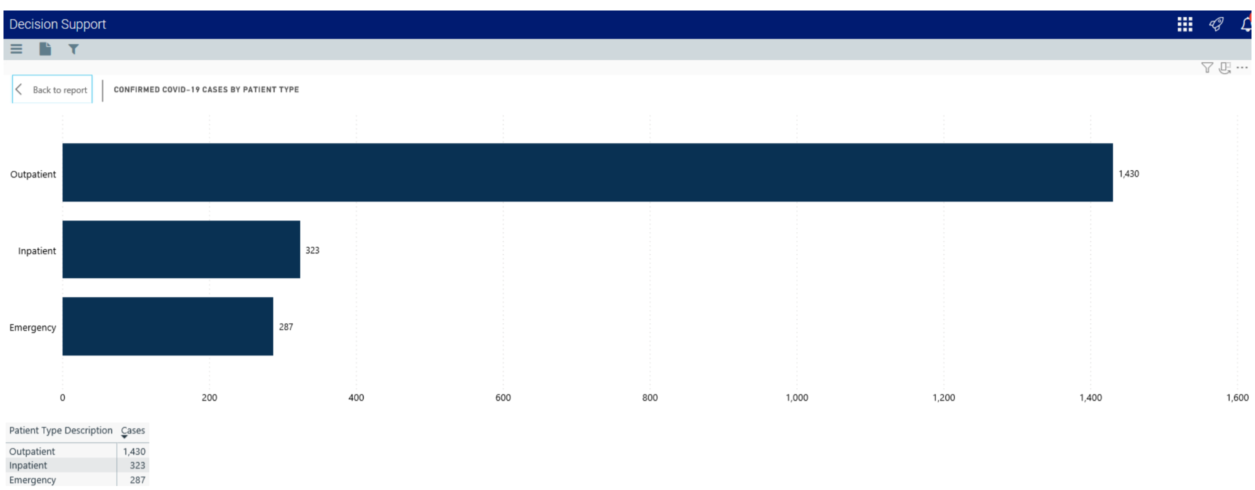


Using the Health Network Summary Dashboard

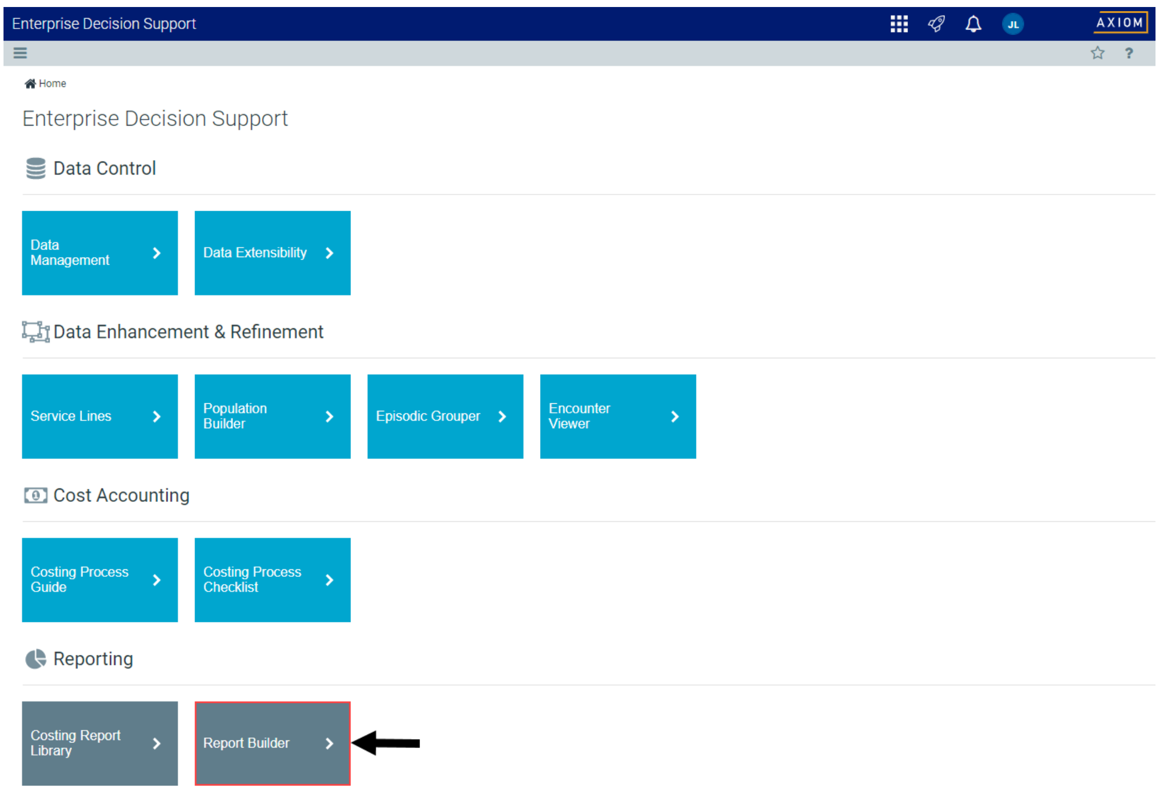
▶ Overview

The Health Network Summary Dashboard provides data regarding patients, volume, Case Mix Index (CMI) ALOS, and margin analysis to help you view and manage performance and identify areas of improvement.

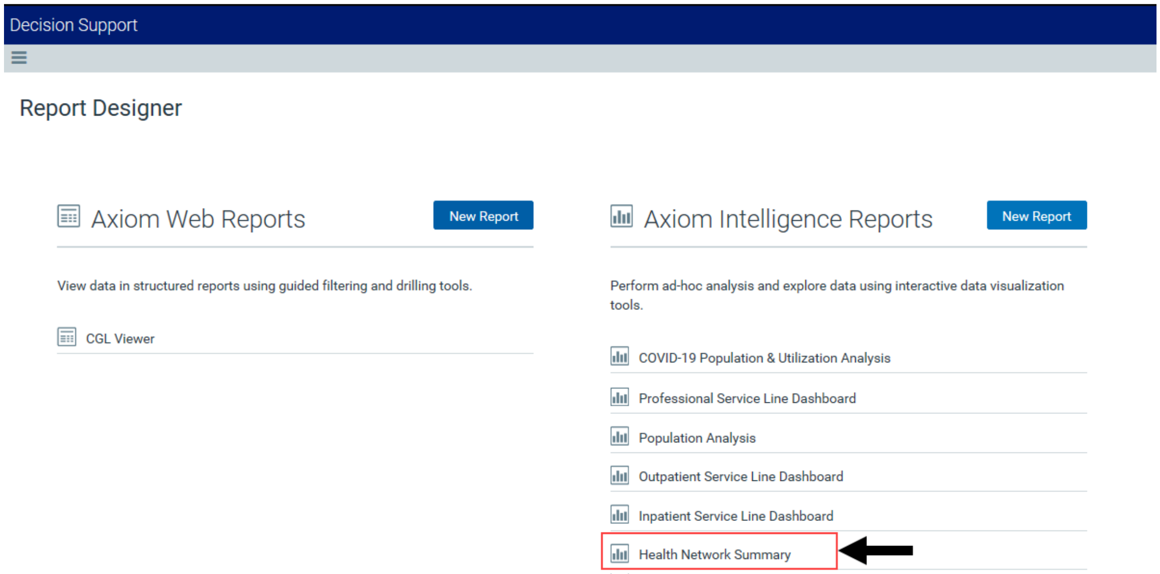
▶ Opening the dashboard

To open the dashboard:

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

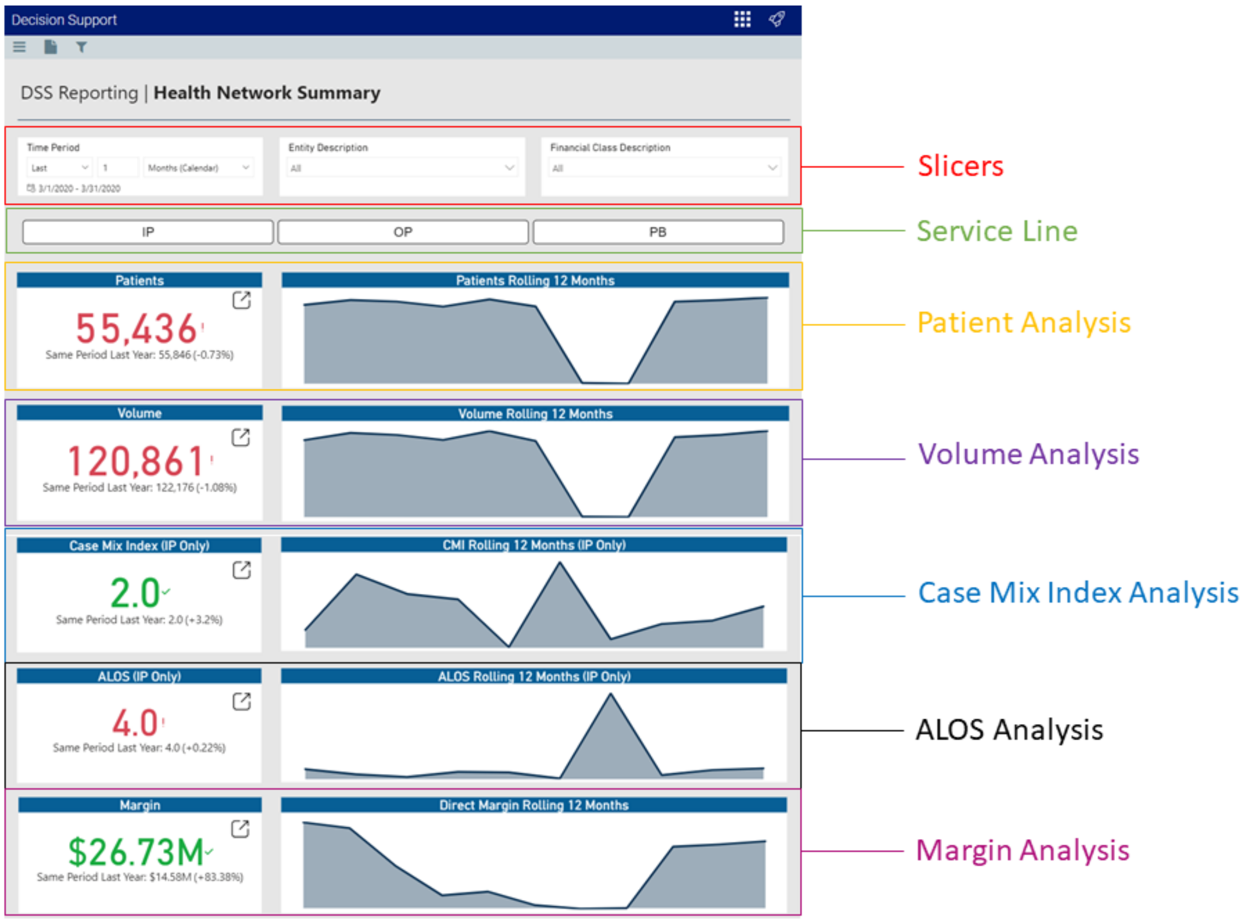


2. In the Axiom Intelligence Reports section, click **Health Network Summary**.



▶ Navigating the dashboard

The Health Network Summary page serves as the main home page for the dashboard and includes the following sections:



Slicers

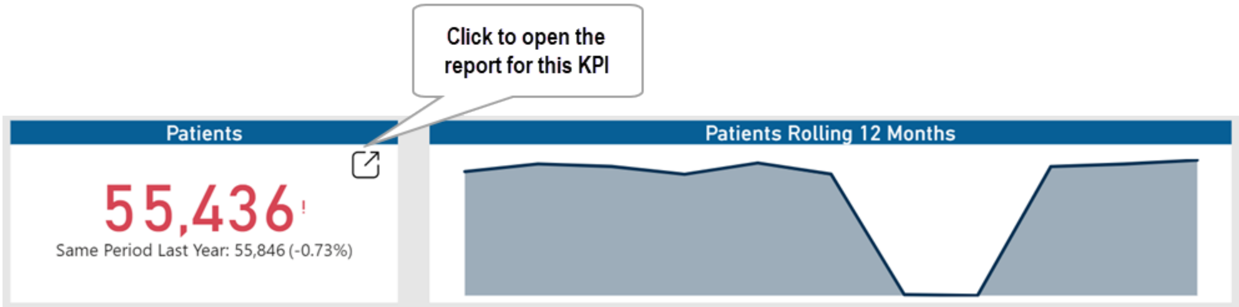
This section allows you to filter data by time (days, weeks, months, years), entity, and financial class. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.

Service Line Selector

This section allows you to view the dashboard metrics by service line type. When you click a service line button, the KPI data changes dynamically specific to that service line. To view the data for all the service lines again, click the service line button again to disengage the filter.

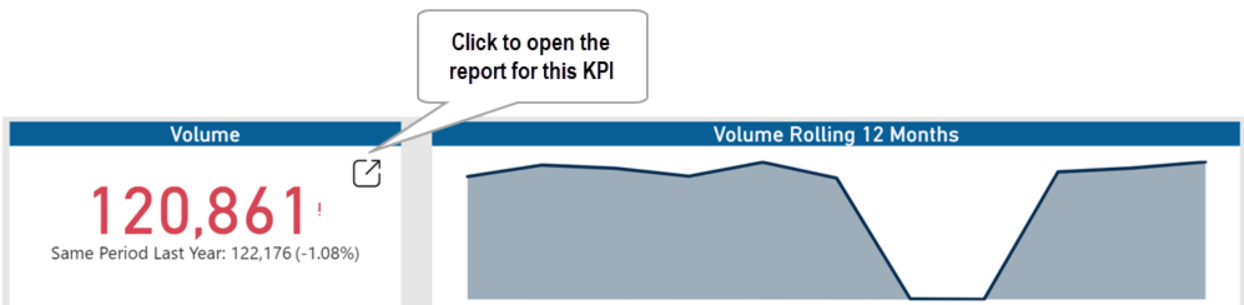
Patient Analysis

The Patients KPI card shows the number of patients based on the criteria selected in the Slicer and Service Line Selector sections, including the percentage of change over the same period the previous year. The Patients Rolling 12 Months card displays a graph of the number of patients over a rolling 12-month period. Hover your cursor over the graph to see the number of patients for a specific month. To open the report that includes the data behind this KPI, click the drill icon in the **Patients** card.



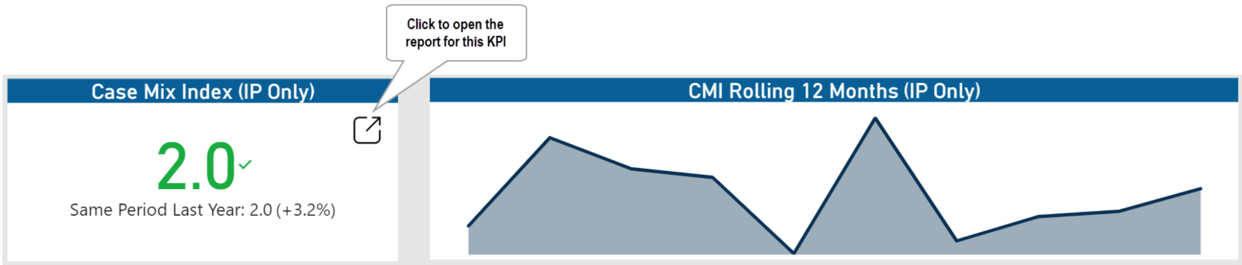
Volume Analysis

The Volume KPI card shows the case volume based on the criteria selected in the Slicer and Service Line Selector sections, including the percentage of change over the same period the previous year. The Volume Rolling 12 Months card displays a graph of the number of cases over a rolling 12-month period. Hover your cursor over the graph to see the number of cases for a specific month. To open the report that includes the data behind this KPI, click the drill icon in the **Volume** card.



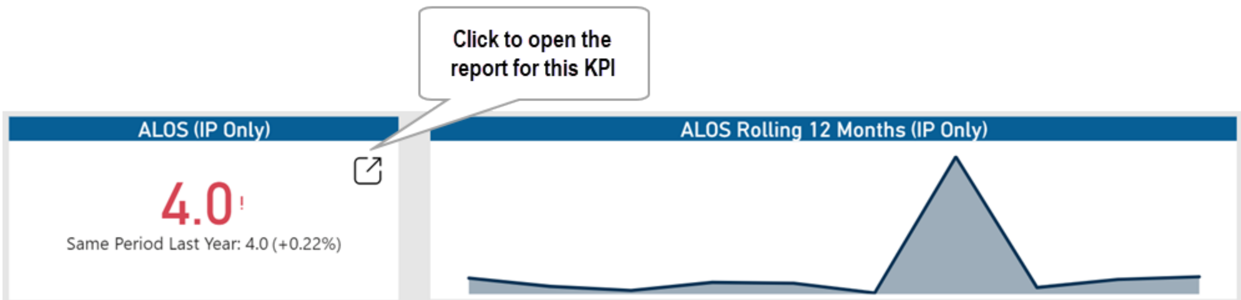
Case Mix Index Analysis

The Case Mix Index KPI card shows the Case Mix Index (CMI) for In Patient based on the criteria selected in the Slicer, including the percentage of change over the same period the previous year. The CMI Rolling 12 Months card displays a graph of CMI data over a rolling 12-month period. Hover your cursor over the graph to see the CMI data for a specific month. To open the report that includes the data behind this KPI, click the drill icon in the **Case Mix Index** card.



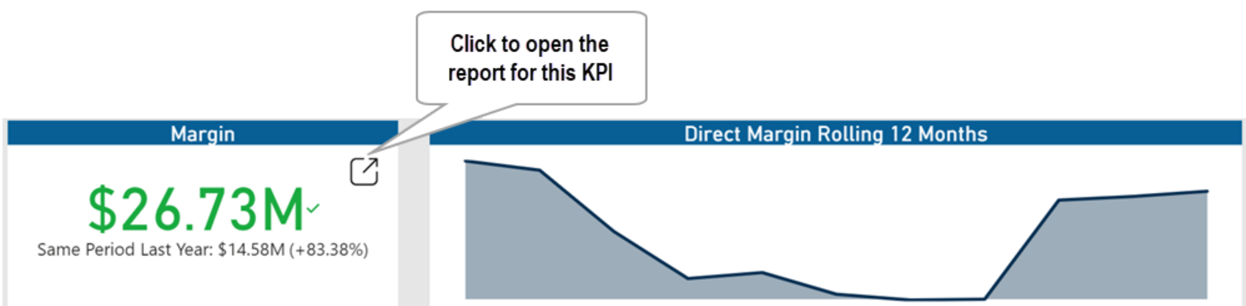
ALOS Analysis

The ALOS KPI card shows the Average Length of Stay (ALOS) for In Patient based on the criteria selected in the Slicer, including the percentage of change over the same period the previous year. The ALOS Rolling 12 Months card displays a graph of the ALOS for patients over a rolling 12-month period. Hover your cursor over the graph to see the days for a specific month. To open the report that includes the data behind this KPI, click the drill icon in the **ALOS** card.



Margin Analysis

The Margin KPI card shows the profit margin based on the criteria selected in the Slicer and Service Line Selector sections, including the percentage of change over the same period the previous year. The Direct Margin Rolling 12 Months card displays a graph of the direct margin dollars over a rolling 12-month period. Hover your cursor over the graph to see the amount for a specific month. To open the report that includes the data behind this KPI, click the drill icon in the **Margin** card.



Viewing data in table format

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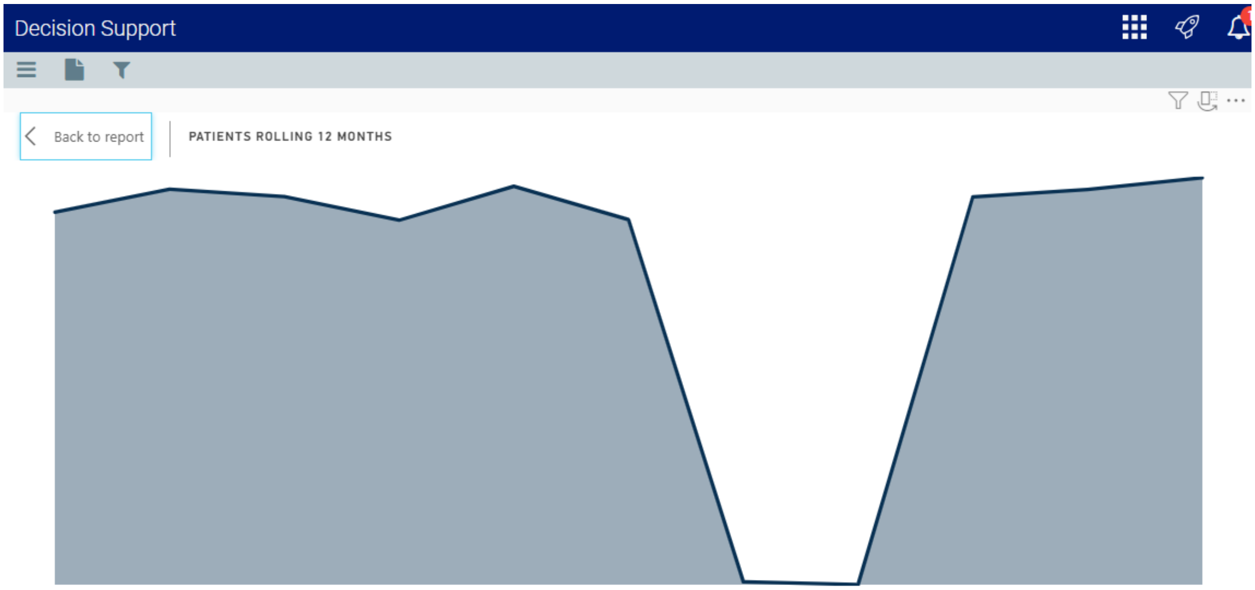


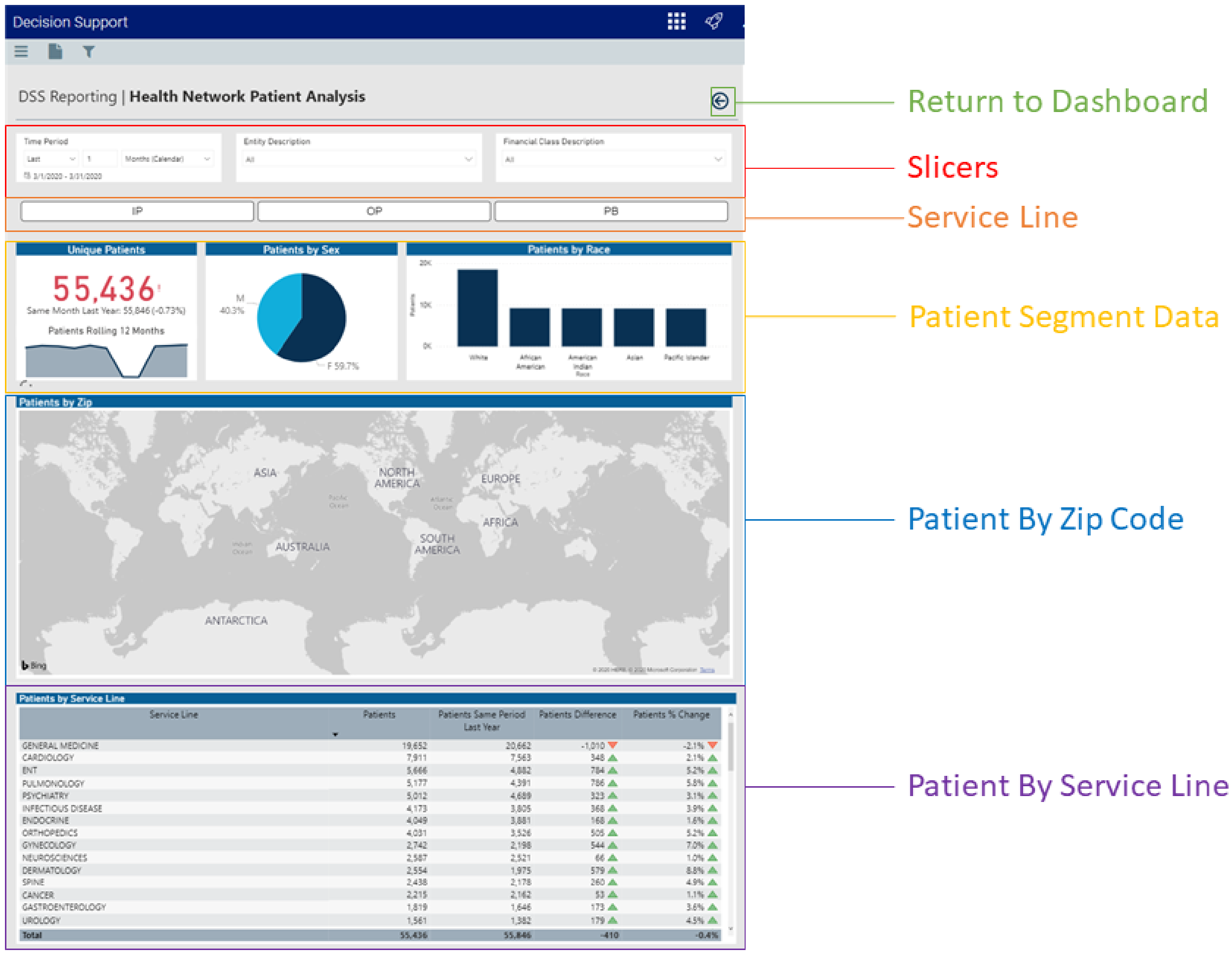
Year Month	Patients
Apr 2019	50,748
May 2019	53,883
Jun 2019	52,855
Jul 2019	49,650
Aug 2019	54,278
Sep 2019	49,736
Oct 2019	385
Dec 2019	1
Jan 2020	52,824
Feb 2020	53,850
Mar 2020	55,436

Patient Analysis report

Overview

This page provides **TBD**.

To return to the Health Network Summary Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

▶ Slicers

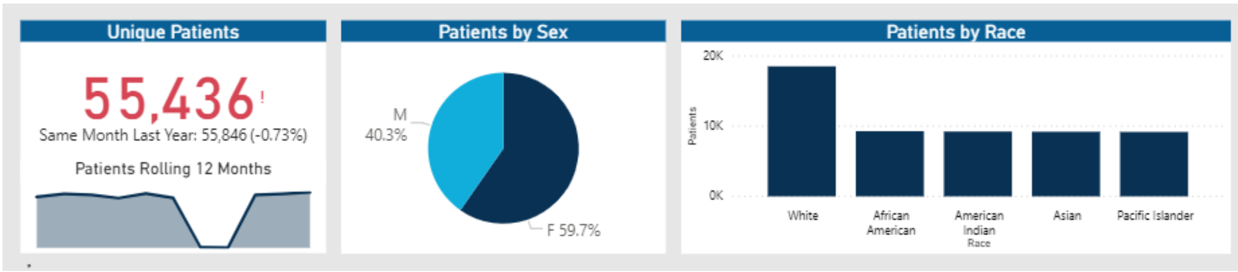
This section allows you to filter data by time (days, weeks, months, years), entity, and financial class. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.

▶ Service Line Selector

This section allows you to view the report metrics by service line type. When you click a service line button, the KPI data changes dynamically specific to that service line. To view the data for all the service lines again, click the service line button again to disengage the filter.

Patient Segment Data

TBD



Patient by Zip

TBD

Patient by Service Line

TBD

Patients by Service Line

Service Line	Patients	Patients Same Period Last Year	Patients Difference	Patients % Change
GENERAL MEDICINE	19,652	20,662	-1,010 ▼	-2.1% ▼
CARDIOLOGY	7,911	7,563	348 ▲	2.1% ▲
ENT	5,666	4,882	784 ▲	5.2% ▲
PULMONOLOGY	5,177	4,391	786 ▲	5.8% ▲
PSYCHIATRY	5,012	4,689	323 ▲	3.1% ▲
INFECTIOUS DISEASE	4,173	3,805	368 ▲	3.9% ▲
ENDOCRINE	4,049	3,881	168 ▲	1.6% ▲
ORTHOPEDICS	4,031	3,526	505 ▲	5.2% ▲
GYNECOLOGY	2,742	2,198	544 ▲	7.0% ▲
NEUROSCIENCES	2,587	2,521	66 ▲	1.0% ▲
DERMATOLOGY	2,554	1,975	579 ▲	8.8% ▲
SPINE	2,438	2,178	260 ▲	4.9% ▲
CANCER	2,215	2,162	53 ▲	1.1% ▲
GASTROENTEROLOGY	1,819	1,646	173 ▲	3.6% ▲
UROLOGY	1,561	1,382	179 ▲	4.5% ▲
Total	**55,436**	**55,846**	**-410**	**-0.4%**

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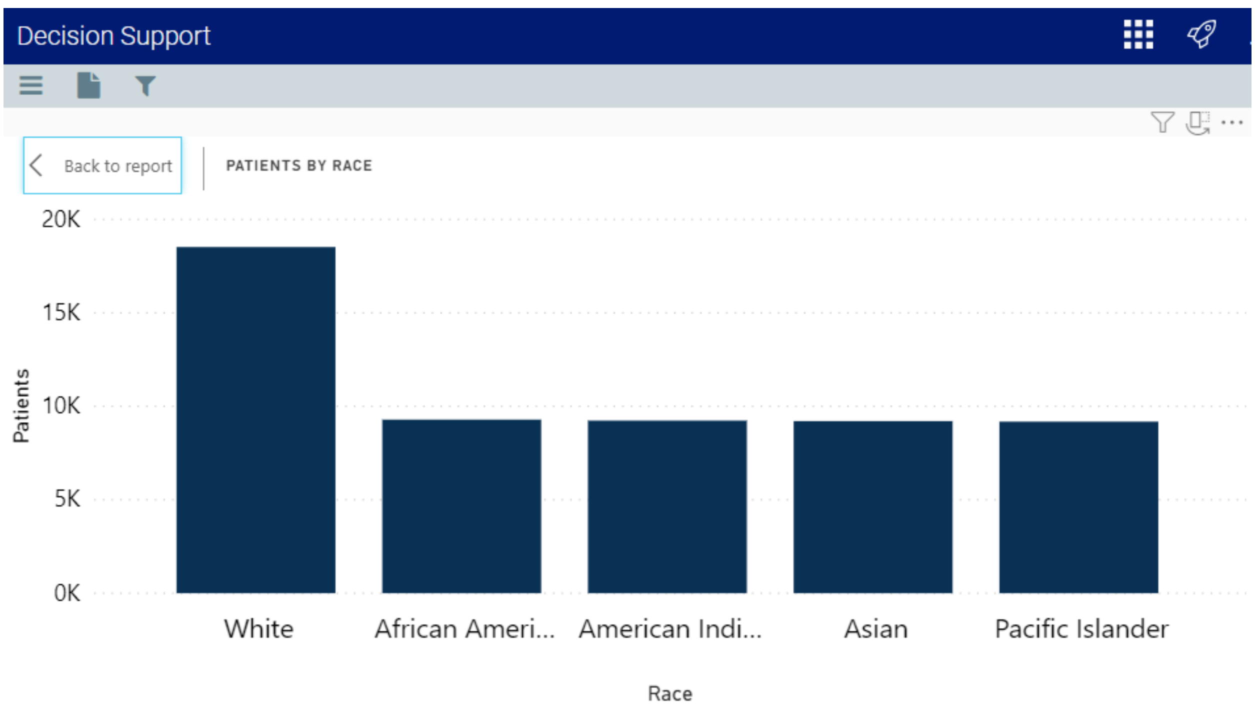

Race	Patients
White	18,523
African American	9,289
American Indian	9,236
Asian	9,208
Pacific Islander	9,180

Volume Analysis report

Overview

This page provides **TBD**.

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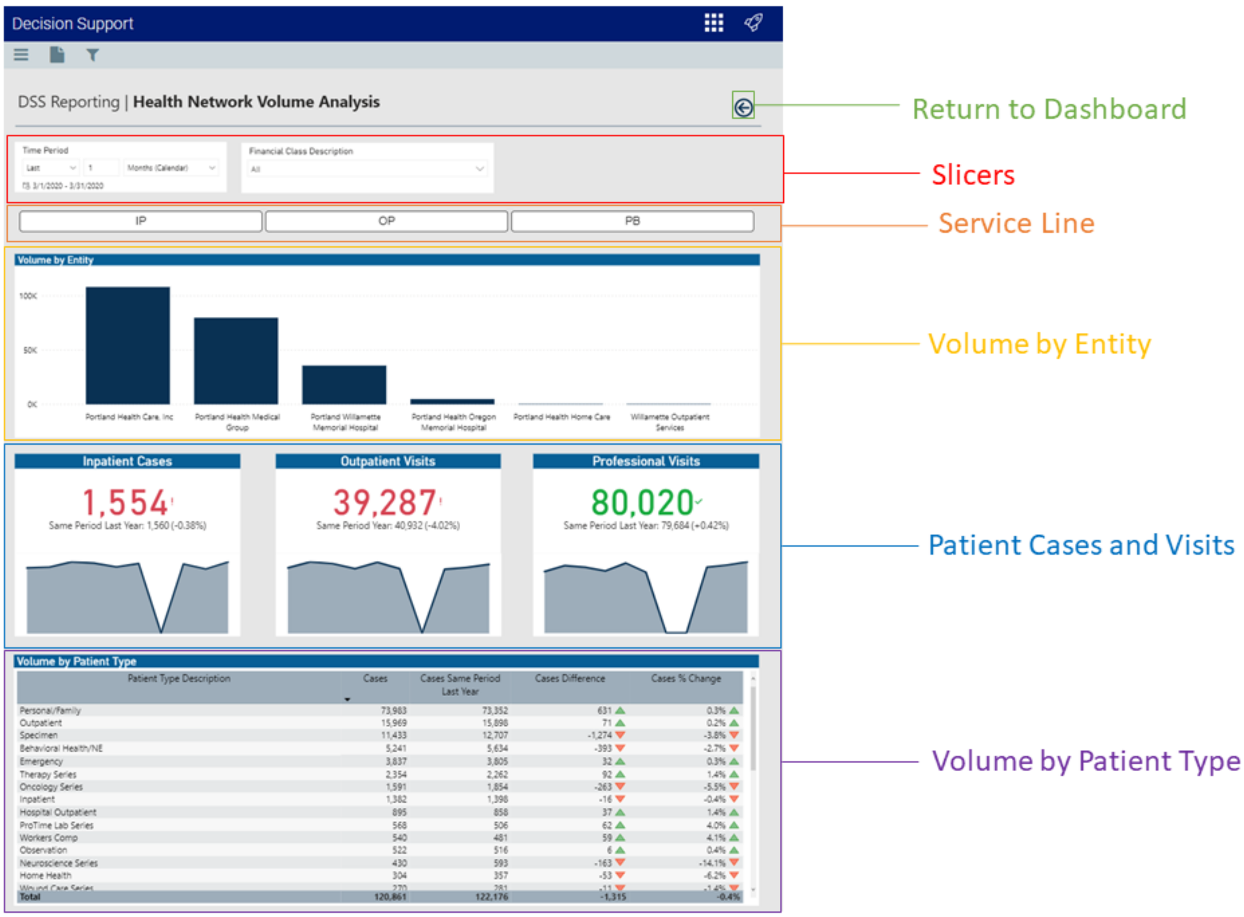

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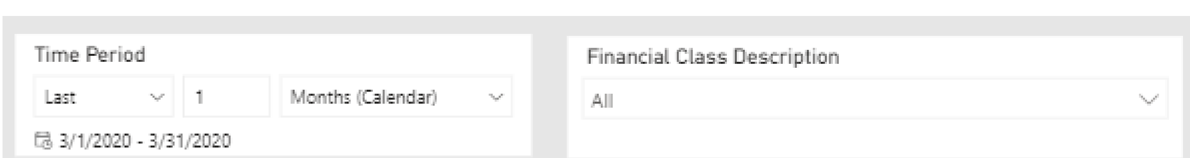
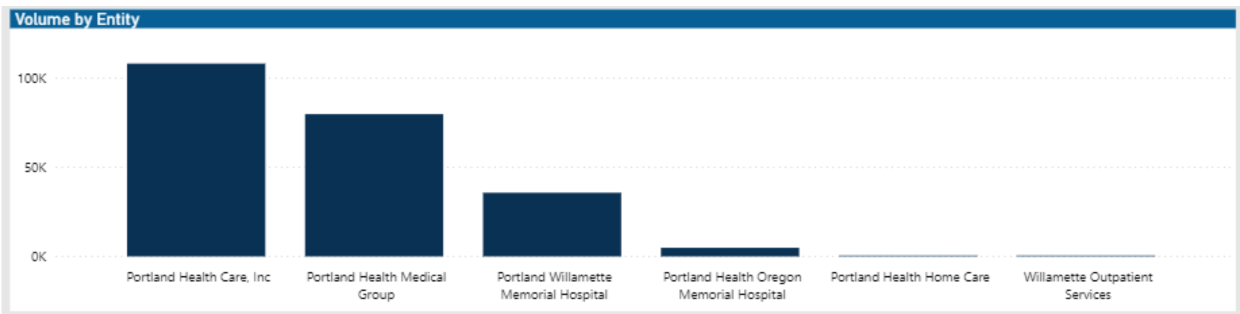


Service Line Selector

This section allows you to view the report metrics by service line type. When you click a service line button, the KPI data changes dynamically specific to that service line. To view the data for all the service lines again, click the service line button again to disengage the filter.

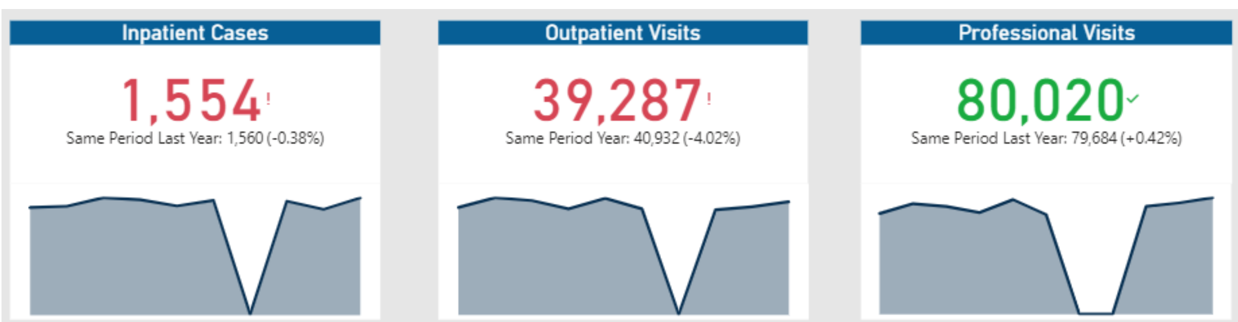
Volume by Entity

TBD



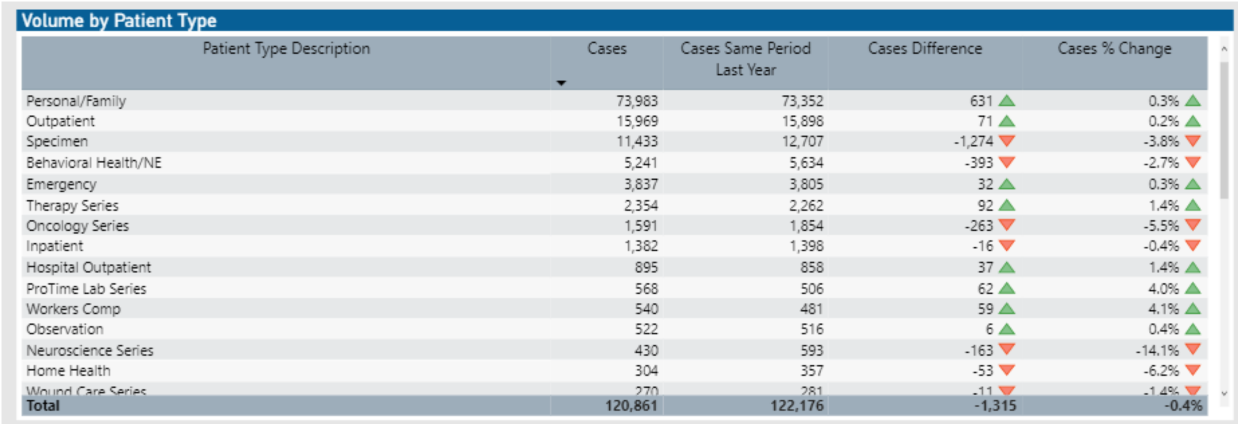
Patient Cases and Visits

TBD



Volume by Patient Type

TBD



Volume by Patient Type

Patient Type Description	Cases	Cases Same Period Last Year	Cases Difference	Cases % Change
Personal/Family	73,983	73,352	631	0.3%
Outpatient	15,969	15,898	71	0.2%
Specimen	11,433	12,707	-1,274	-3.8%
Behavioral Health/NE	5,241	5,634	-393	-2.7%
Emergency	3,837	3,805	32	0.3%
Therapy Series	2,354	2,262	92	1.4%
Oncology Series	1,591	1,854	-263	-5.5%
Inpatient	1,382	1,398	-16	-0.4%
Hospital Outpatient	895	858	37	1.4%
ProTime Lab Series	568	506	62	4.0%
Workers Comp	540	481	59	4.1%
Observation	522	516	6	0.4%
Neuroscience Series	430	593	-163	-14.1%
Home Health	304	357	-53	-6.2%
Wound Care Series	270	281	-11	-1.4%
Total	**120,861**	**122,176**	**-1,315**	**-0.4%**

Viewing data in table format

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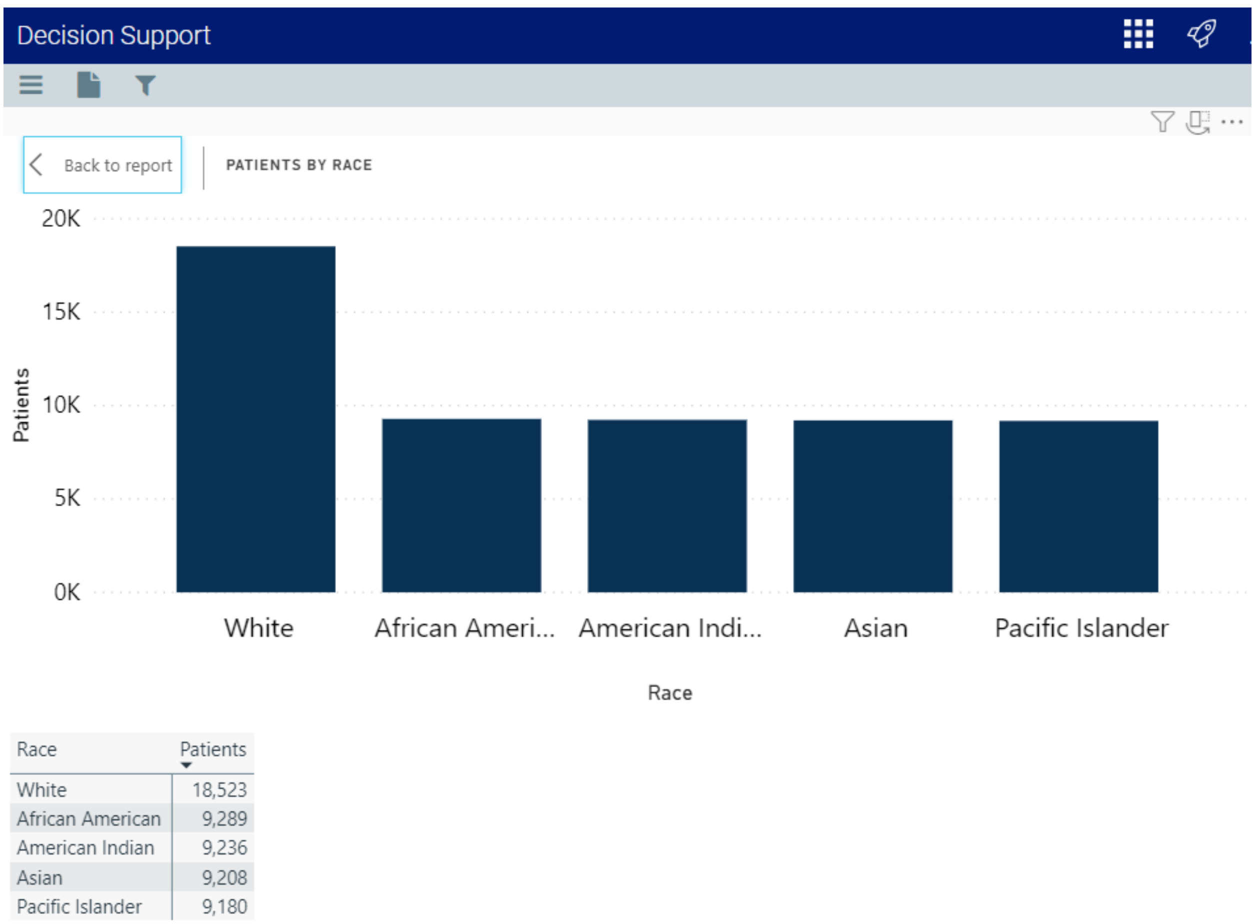

Race	Patients
White	18,523
African American	9,289
American Indian	9,236
Asian	9,208
Pacific Islander	9,180

Case Mix Index Analysis report

▶ Overview

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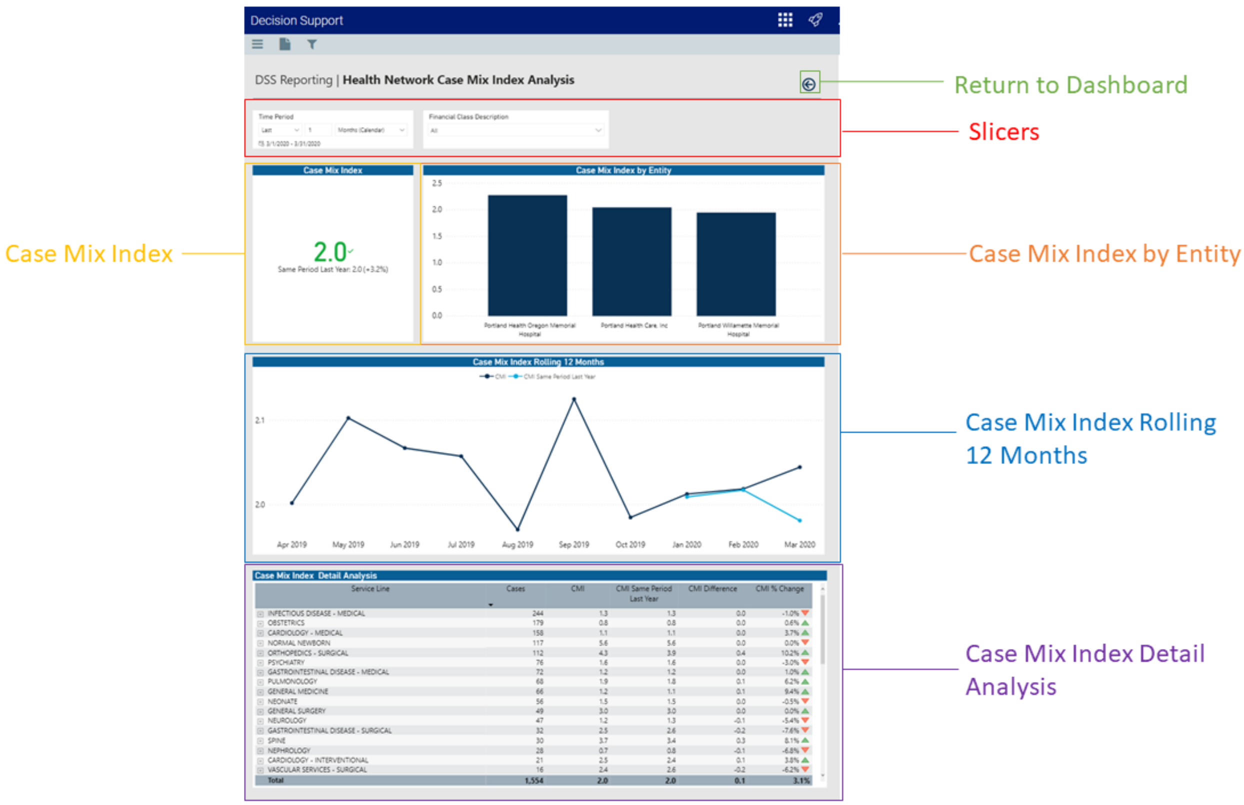

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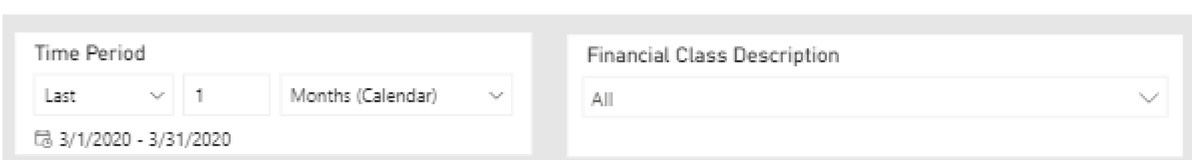
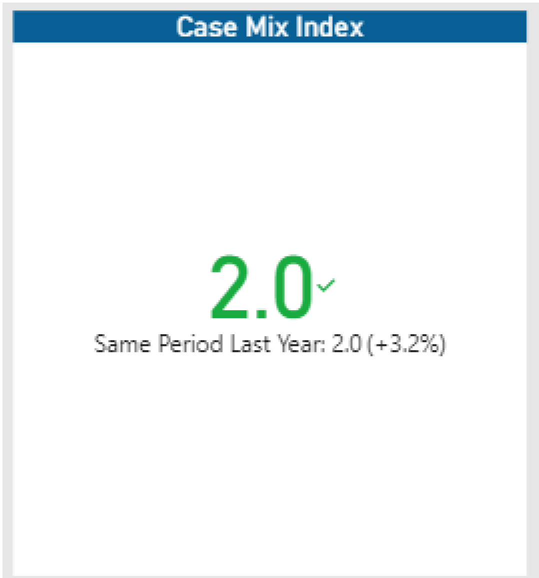


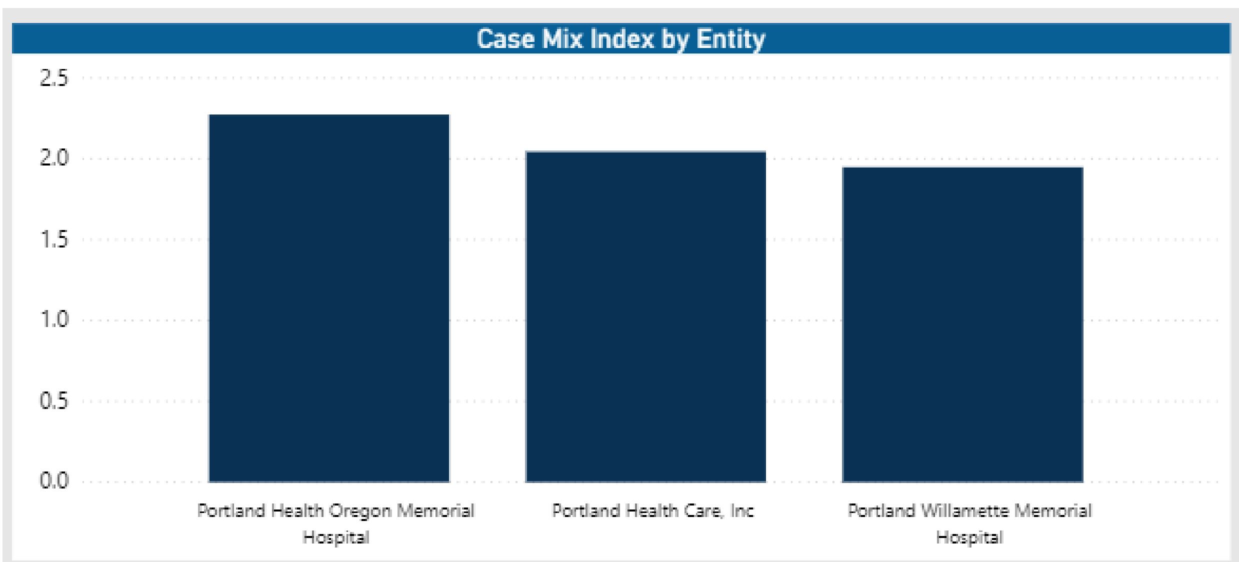
▶ Case Mix Index

TBD



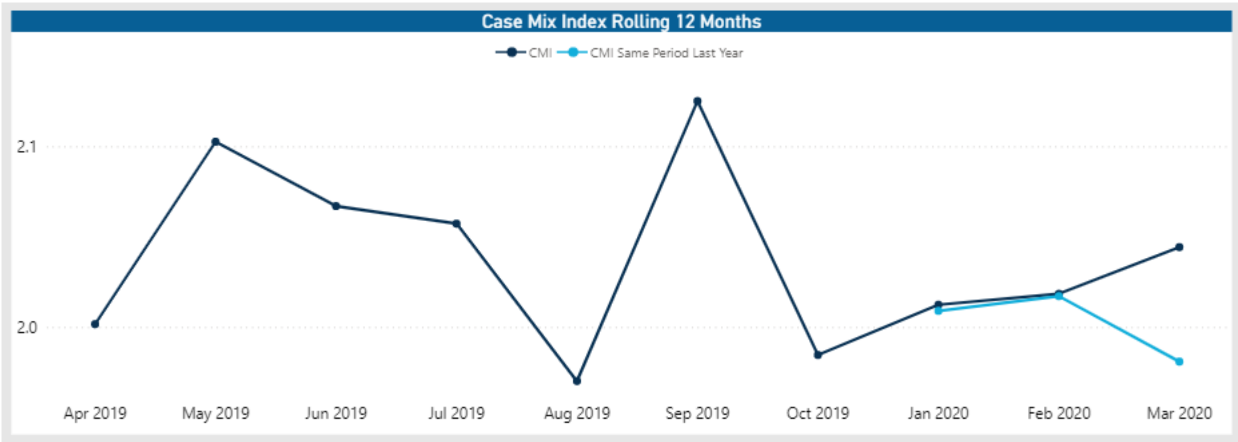
Case Mix Index by Entity

TBD



Case Mix Index Rolling 12 Months

TBD



Case Mix Index Detail Analysis

TBD

Case Mix Index Detail Analysis

Service Line	Cases	CMI	CMI Same Period Last Year	CMI Difference	CMI % Change
INFECTIOUS DISEASE - MEDICAL	244	1.3	1.3	0.0	-1.0%
OBSTETRICS	179	0.8	0.8	0.0	0.6%
CARDIOLOGY - MEDICAL	158	1.1	1.1	0.0	3.7%
NORMAL NEWBORN	117	5.6	5.6	0.0	0.0%
ORTHOPEDICS - SURGICAL	112	4.3	3.9	0.4	10.2%
PSYCHIATRY	76	1.6	1.6	0.0	-3.0%
GASTROINTESTINAL DISEASE - MEDICAL	72	1.2	1.2	0.0	1.0%
PULMONOLOGY	68	1.9	1.8	0.1	6.2%
GENERAL MEDICINE	66	1.2	1.1	0.1	9.4%
NEONATE	56	1.5	1.5	0.0	-0.5%
GENERAL SURGERY	49	3.0	3.0	0.0	0.0%
NEUROLOGY	47	1.2	1.3	-0.1	-5.4%
GASTROINTESTINAL DISEASE - SURGICAL	32	2.5	2.6	-0.2	-7.6%
SPINE	30	3.7	3.4	0.3	8.1%
NEPHROLOGY	28	0.7	0.8	-0.1	-6.8%
CARDIOLOGY - INTERVENTIONAL	21	2.5	2.4	0.1	3.8%
VASCULAR SERVICES - SURGICAL	16	2.4	2.6	-0.2	-6.2%
Total	**1,554**	**2.0**	**2.0**	**0.1**	**3.1%**

Viewing data in table format

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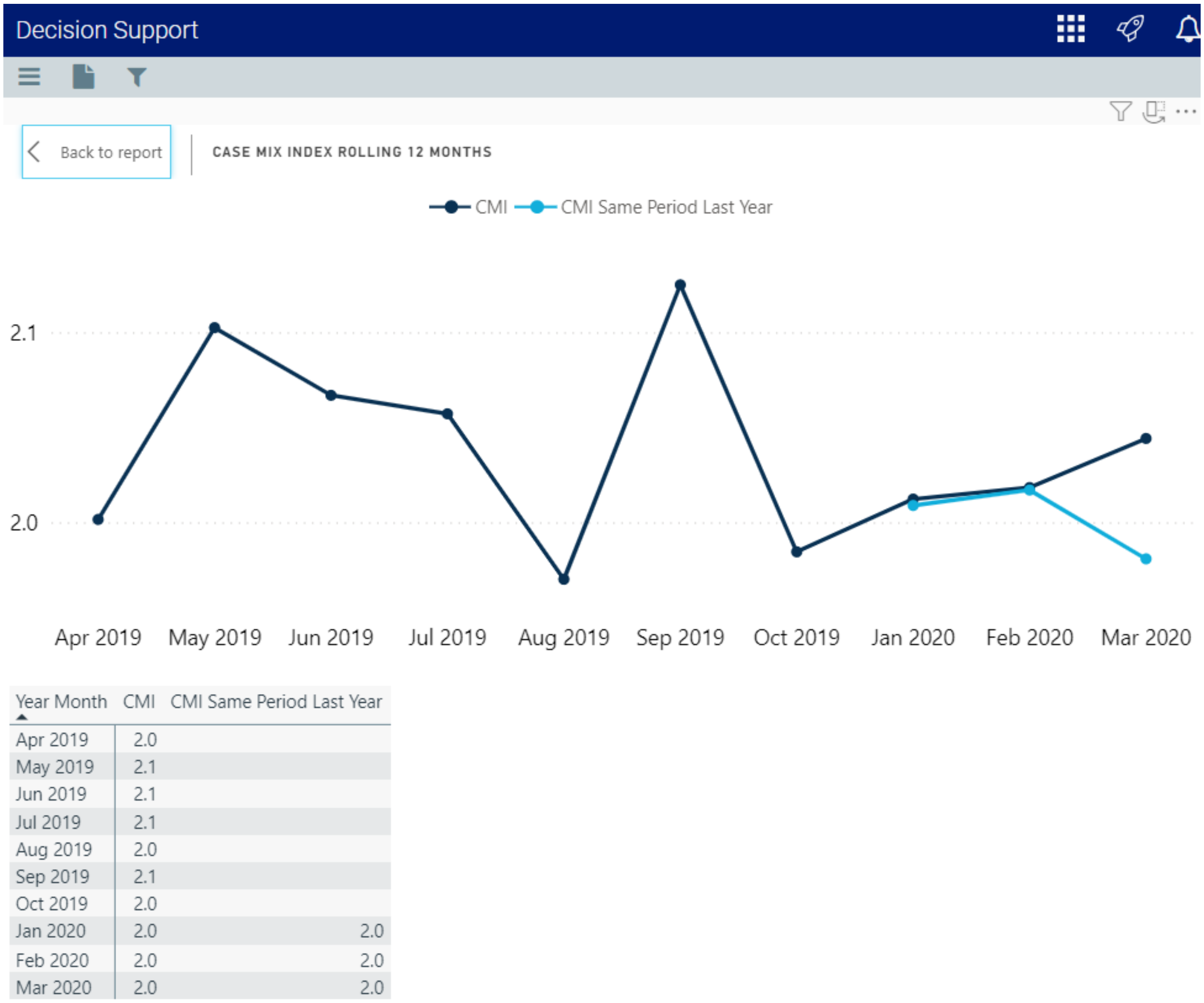


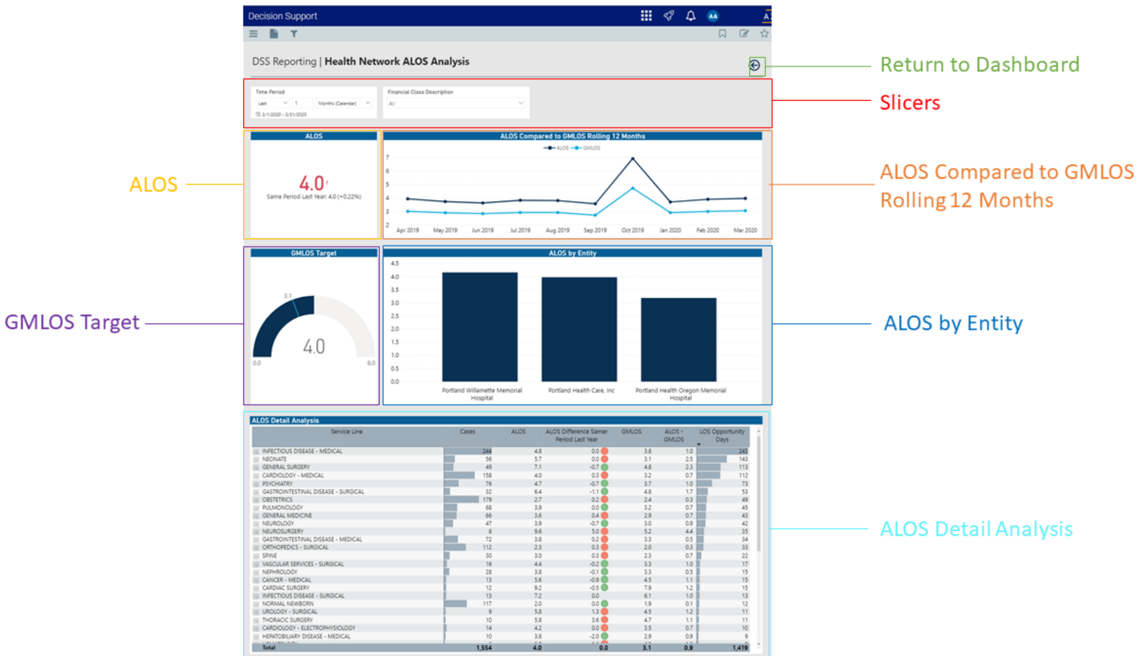
Year Month	CMI	CMI Same Period Last Year
Apr 2019	2.0	
May 2019	2.1	
Jun 2019	2.1	
Jul 2019	2.1	
Aug 2019	2.0	
Sep 2019	2.1	
Oct 2019	2.0	
Jan 2020	2.0	2.0
Feb 2020	2.0	2.0
Mar 2020	2.0	2.0

ALOS Analysis report

▶ Overview

This page provides **TBD**.

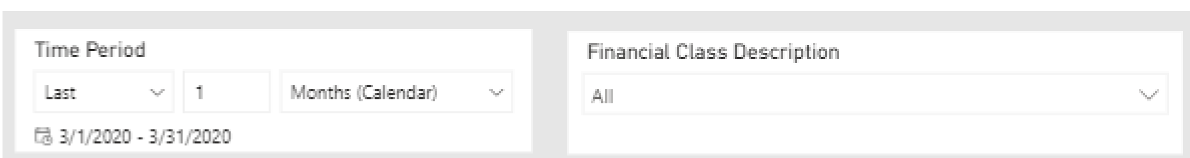
To return to the Health Network Summary Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

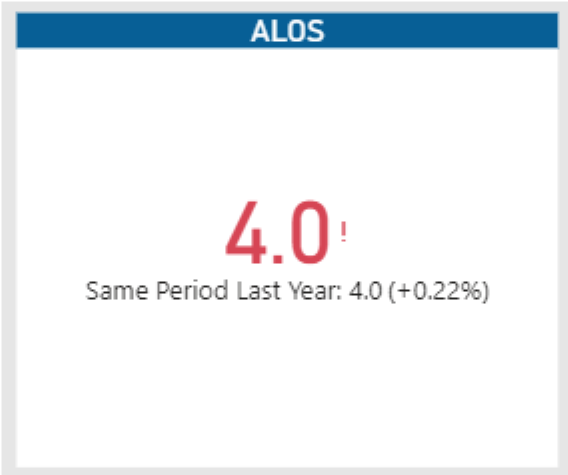
Slicers

This section allows you to filter data by time (days, weeks, months, years) and financial class. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.



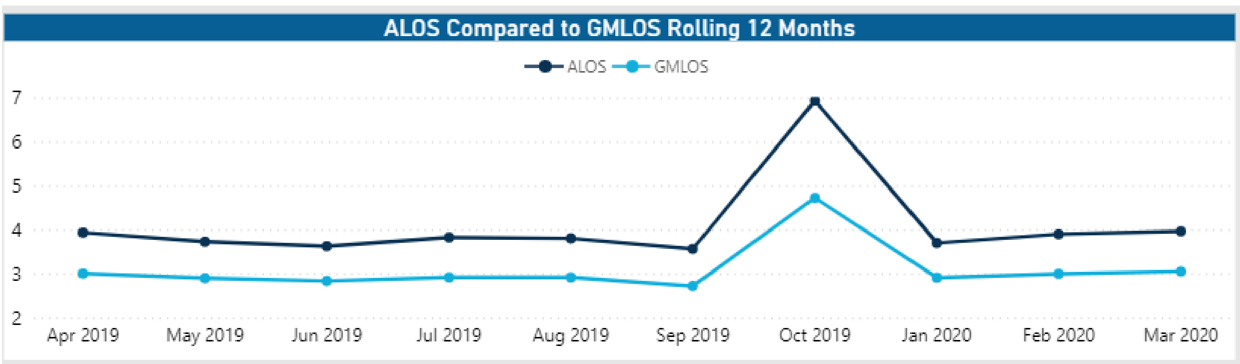
ALOS

TBD



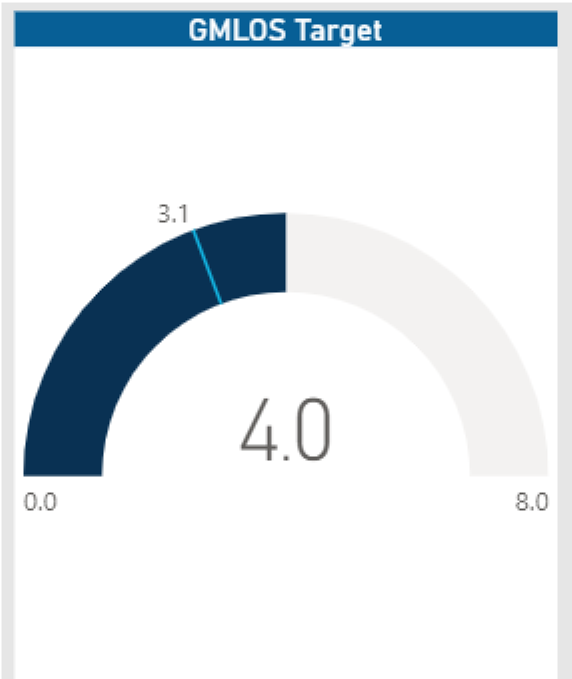
▶ ALOS Compared to GMLOS Rolling 12 Months

TBD



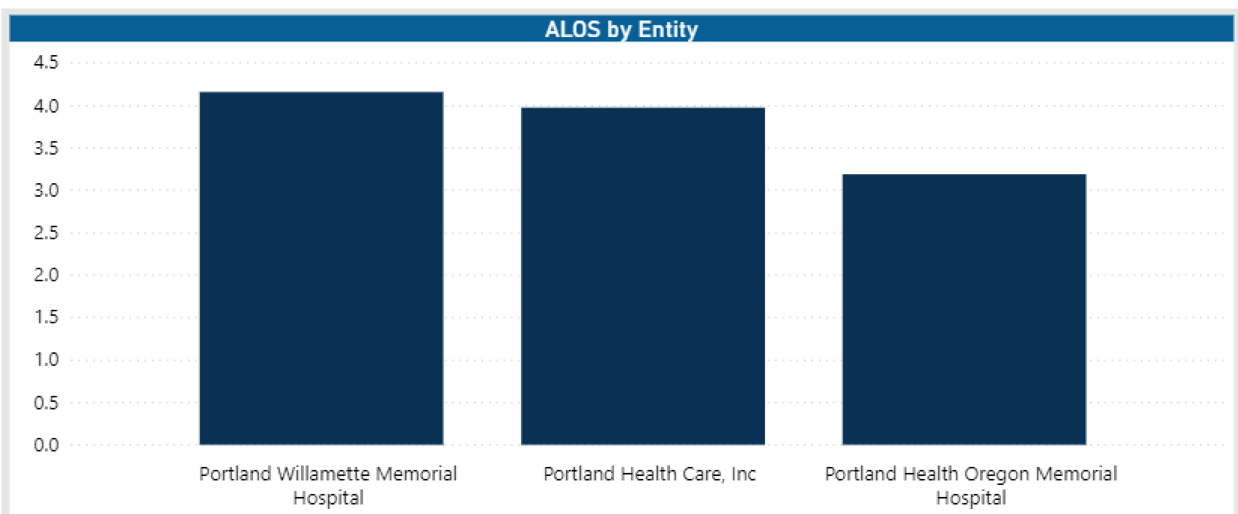
▶ GMLOS Target

TBD



▶ ALOS by Entity

TBD



▶ ALOS Detail Analysis

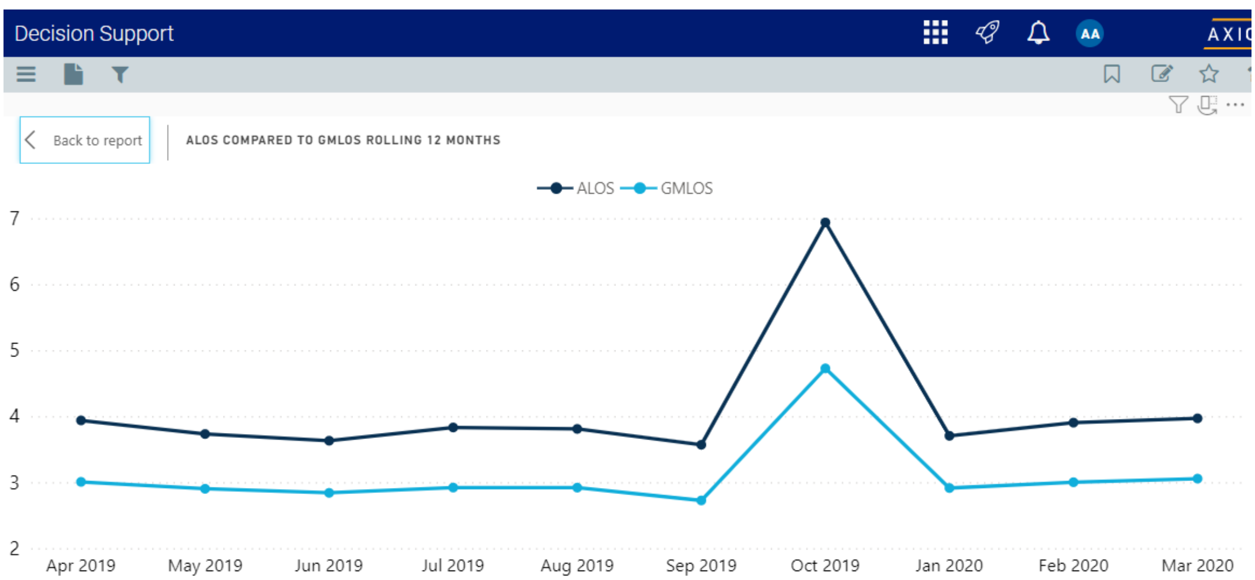
TBD

ALOS Detail Analysis

Service Line	Cases	ALOS	ALOS Difference Samer Period Last Year	GMLOS	ALOS - GMLOS	LOS Opportunity Days
INFECTIOUS DISEASE - MEDICAL	244	4.8	0.0	3.8	1.0	243
NEONATE	56	5.7	0.0	3.1	2.5	143
GENERAL SURGERY	49	7.1	-0.7	4.8	2.3	113
CARDIOLOGY - MEDICAL	158	4.0	0.3	3.2	0.7	112
PSYCHIATRY	76	4.7	-0.7	3.7	1.0	73
GASTROINTESTINAL DISEASE - SURGICAL	32	6.4	-1.1	4.8	1.7	53
OBSTETRICS	179	2.7	0.2	2.4	0.3	49
PULMONOLOGY	68	3.9	0.0	3.2	0.7	45
GENERAL MEDICINE	66	3.6	0.4	2.9	0.7	43
NEUROLOGY	47	3.9	-0.7	3.0	0.9	42
NEUROSURGERY	8	9.6	5.0	5.2	4.4	35
GASTROINTESTINAL DISEASE - MEDICAL	72	3.8	0.2	3.3	0.5	34
ORTHOPEDICS - SURGICAL	112	2.3	0.3	2.0	0.3	33
SPINE	30	3.0	0.3	2.3	0.7	22
VASCULAR SERVICES - SURGICAL	16	4.4	-0.2	3.3	1.0	17
NEPHROLOGY	28	3.8	-0.1	3.3	0.5	15
CANCER - MEDICAL	13	5.6	-0.9	4.5	1.1	15
CARDIAC SURGERY	12	9.2	-0.5	7.9	1.2	15
INFECTIOUS DISEASE - SURGICAL	13	7.2	0.0	6.1	1.0	13
NORMAL NEWBORN	117	2.0	0.0	1.9	0.1	12

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



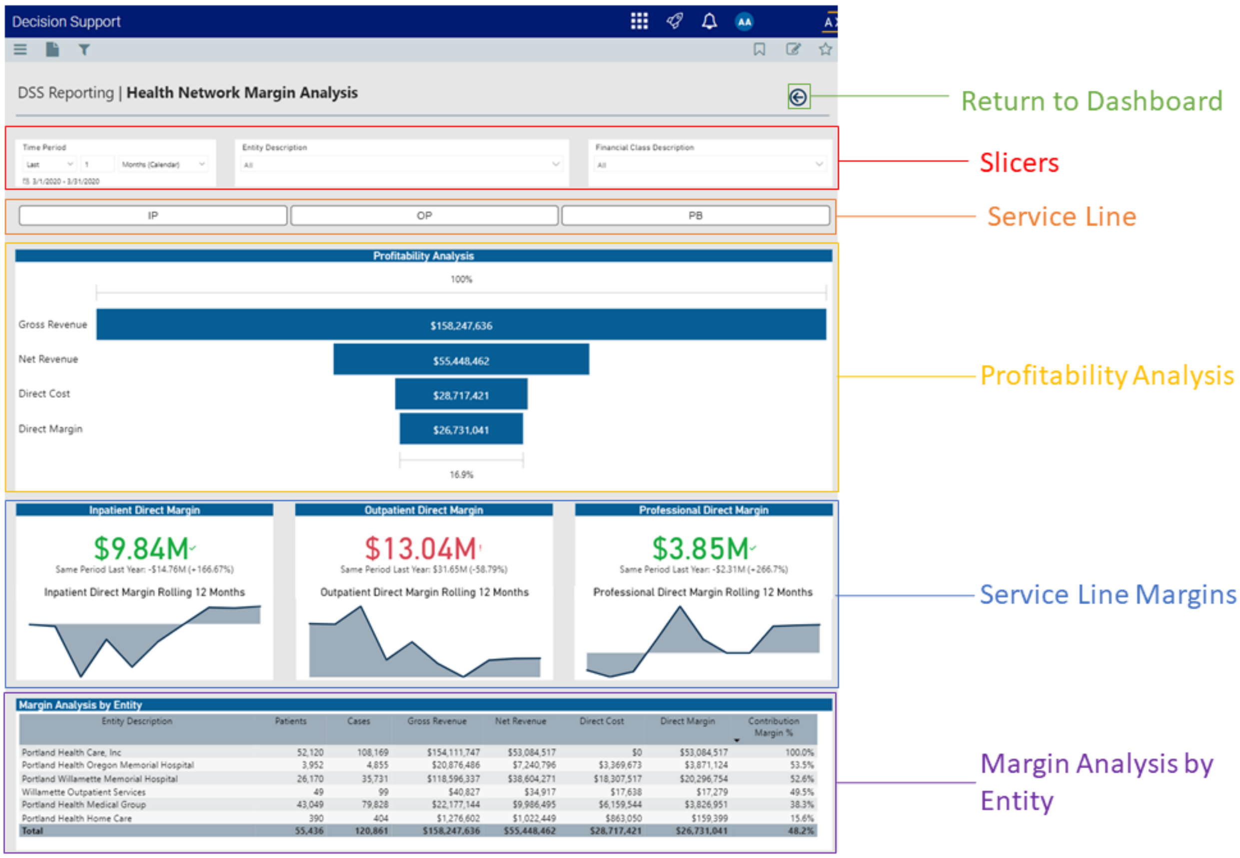
Year Month	ALOS	GMLOS
Apr 2019	3.9	3.0
May 2019	3.7	2.9
Jun 2019	3.6	2.8
Jul 2019	3.8	2.9
Aug 2019	3.8	2.9
Sep 2019	3.6	2.7
Oct 2019	6.9	4.7
Jan 2020	3.7	2.9
Feb 2020	3.9	3.0
Mar 2020	4.0	3.1

Margin Analysis report

Overview

This page provides **TBD**.

To return to the Health Network Summary Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

Slicers

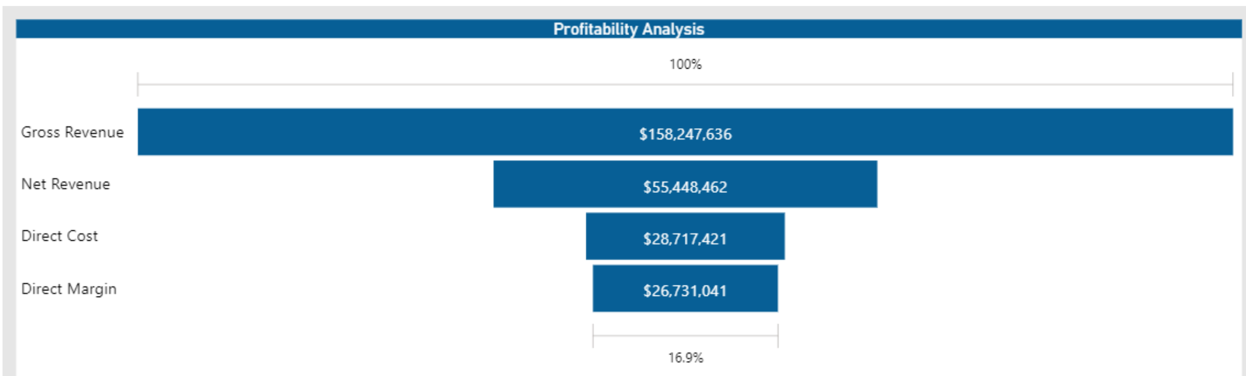
This section allows you to filter data by time (days, weeks, months, years), entity, and financial class. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.

Service Line Selector

This section allows you to view the report metrics by service line type. When you click a service line button, the KPI data changes dynamically specific to that service line. To view the data for all the service lines again, click the service line button again to disengage the filter.

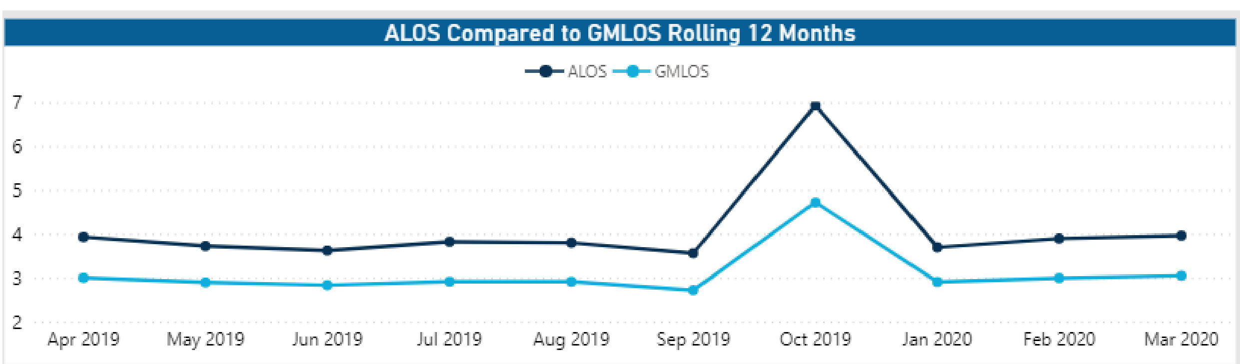
Profitability Analysis

TBD



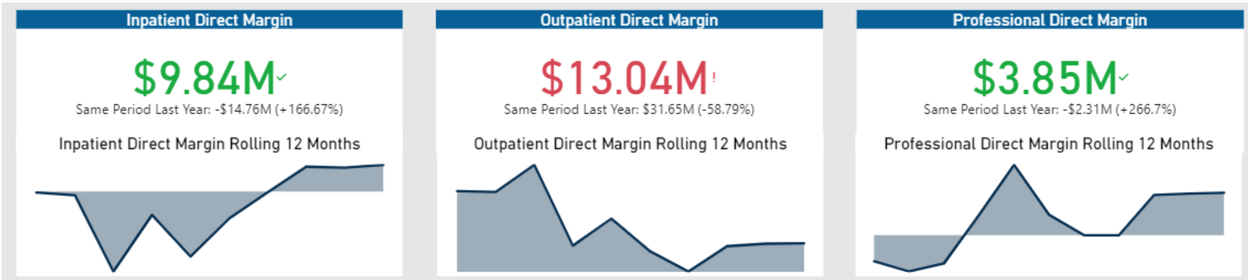
ALOS Compared to GMLOS Rolling 12 Months

TBD



Service Line Margins

TBD



Margin Analysis by Entity

TBD

Margin Analysis by Entity

Entity Description	Patients	Cases	Gross Revenue	Net Revenue	Direct Cost	Direct Margin	Contribution Margin %
Portland Health Care, Inc	52,120	108,169	$154,111,747	$53,084,517	$0	$53,084,517	100.0%
Portland Health Oregon Memorial Hospital	3,952	4,855	$20,876,486	$7,240,796	$3,369,673	$3,871,124	53.5%
Portland Willamette Memorial Hospital	26,170	35,731	$118,596,337	$38,604,271	$18,307,517	$20,296,754	52.6%
Willamette Outpatient Services	49	99	$40,827	$34,917	$17,638	$17,279	49.5%
Portland Health Medical Group	43,049	79,828	$22,177,144	$9,986,495	$6,159,544	$3,826,951	38.3%
Portland Health Home Care	390	404	$1,276,602	$1,022,449	$863,050	$159,399	15.6%
Total	**55,436**	**120,861**	**$158,247,636**	**$55,448,462**	**$28,717,421**	**$26,731,041**	**48.2%**

Viewing data in table format

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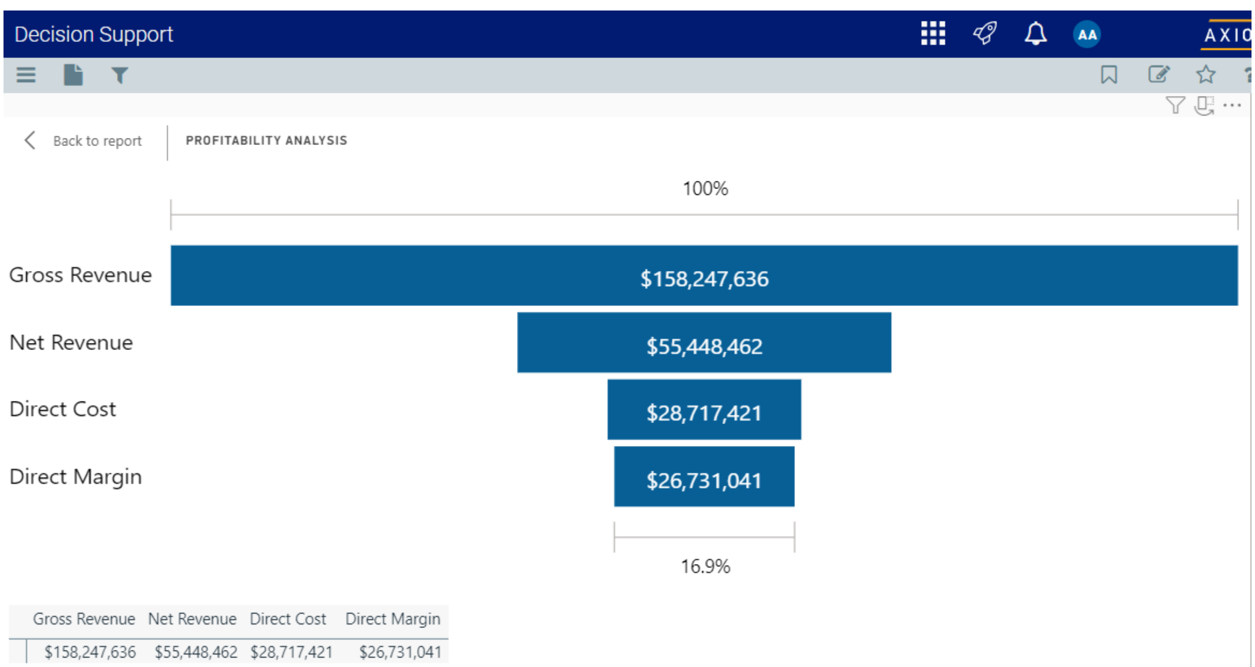


Using the Inpatient Service Line Dashboard

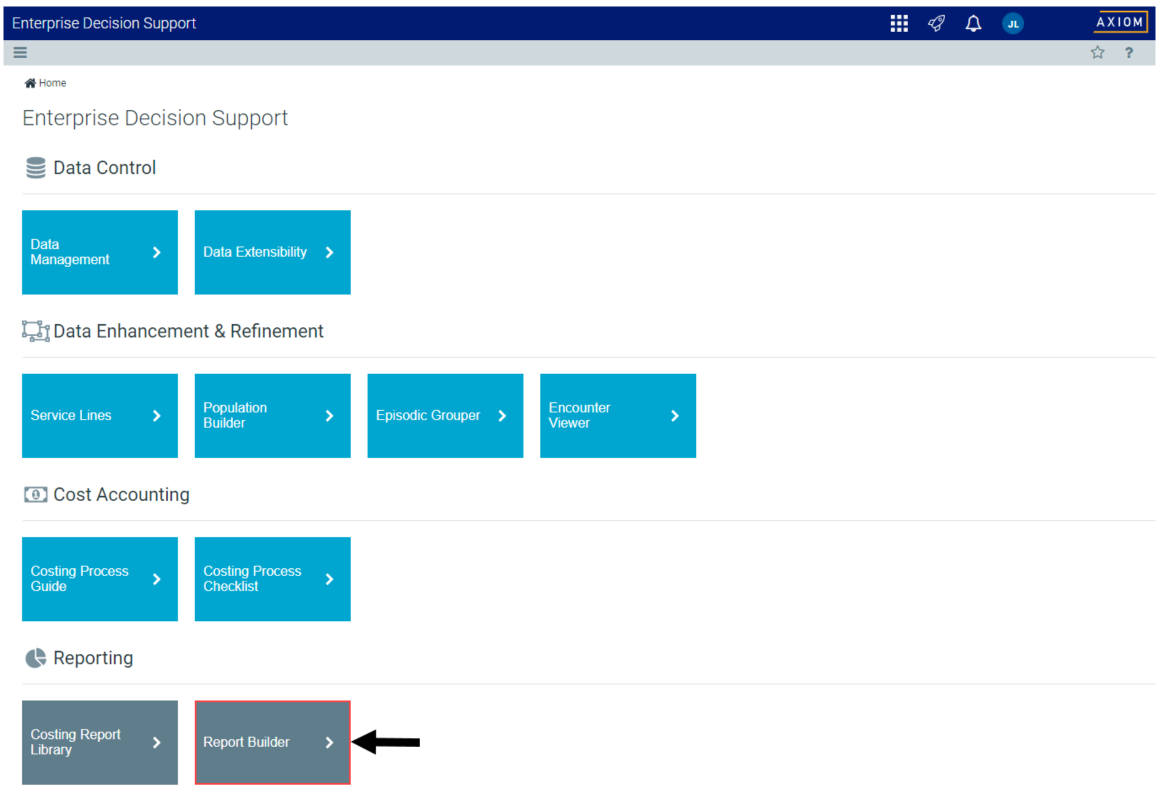
▶ Overview

This dashboard report displays a view of all the inpatient data for your service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

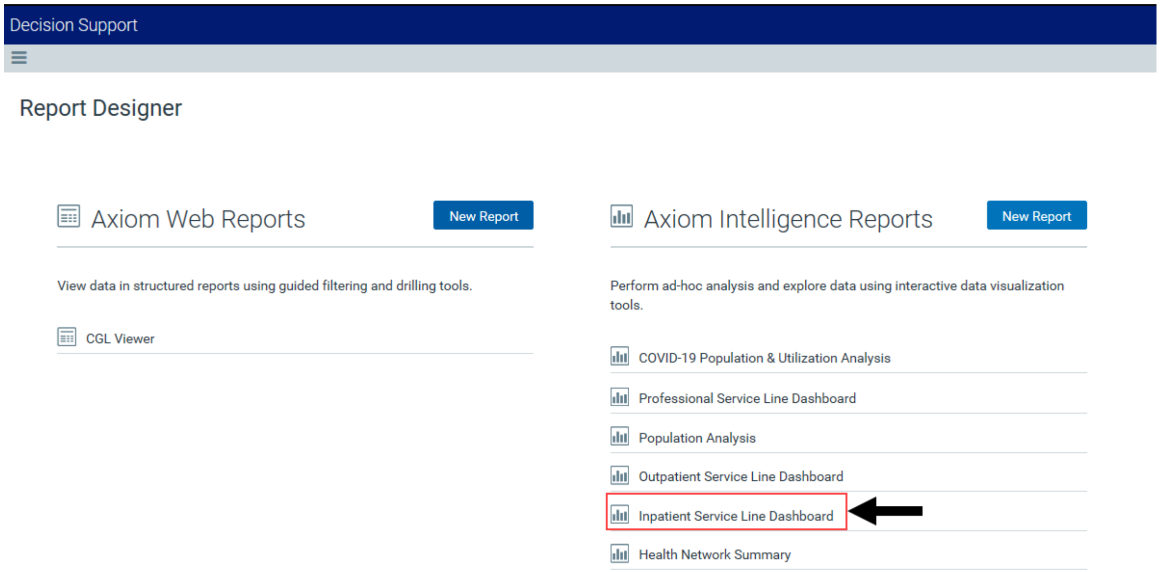
▶ Opening the dashboard

To open the dashboard:

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

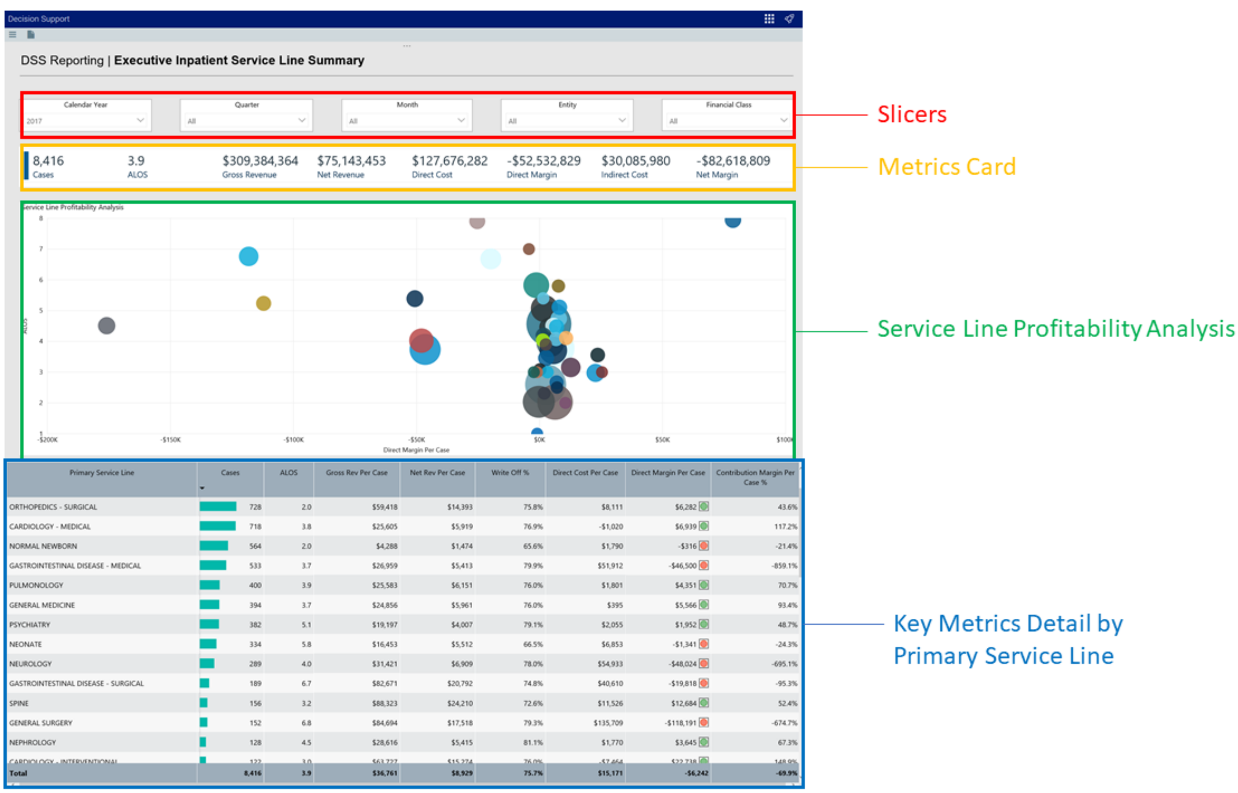


2. In the Axiom Intelligence Reports section, click **Inpatient Service Line Dashboard**.



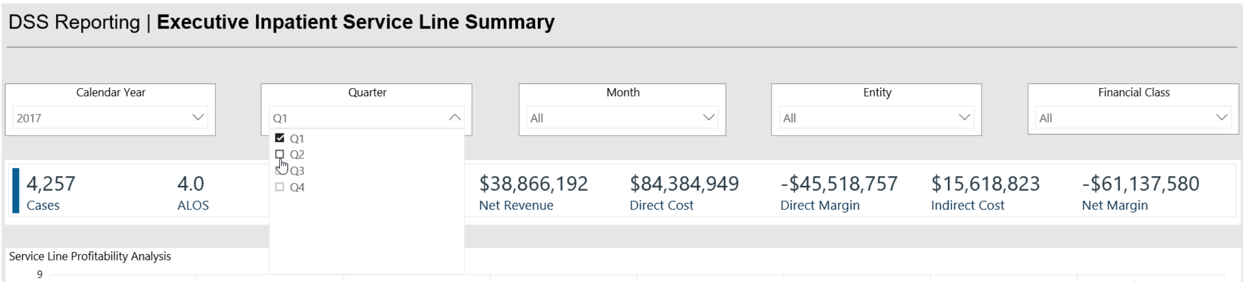
Navigating the dashboard

The Executive Inpatient Service Line Summary page serves as the main home page for the dashboard and includes the following sections:



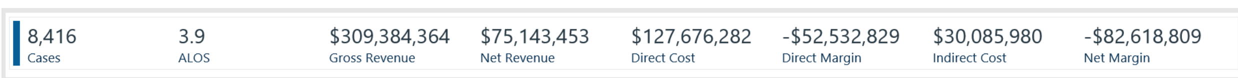
Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, and financial class. From the slicer drop-downs, you can select a combination of the available options to select the parameters to include in the views.



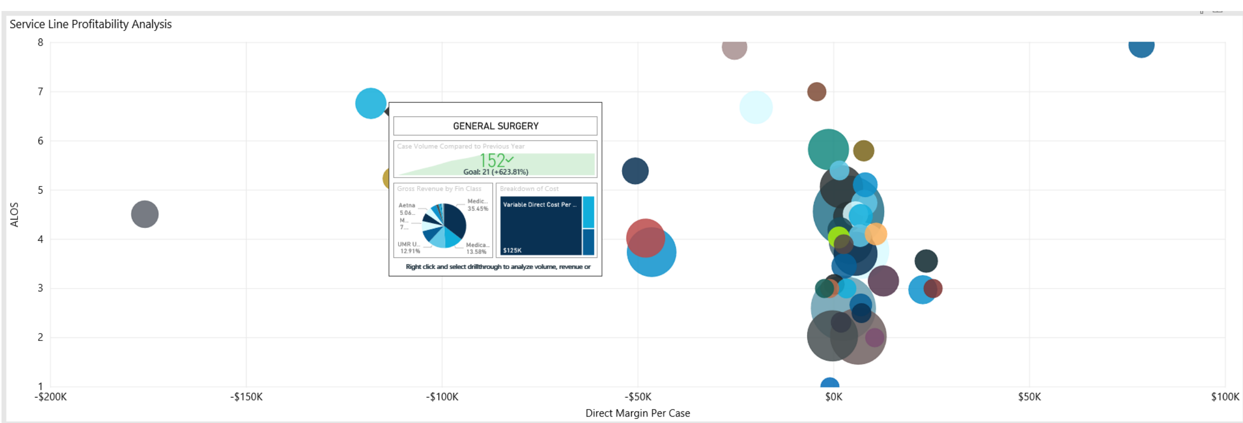
Metrics Card

This section displays KPI data for cases and ALOS, gross and net revenue, direct and indirect cost, and direct and net margin. As you select the different options from the slicer drop-downs, the totals in the Metrics Card adjust accordingly.

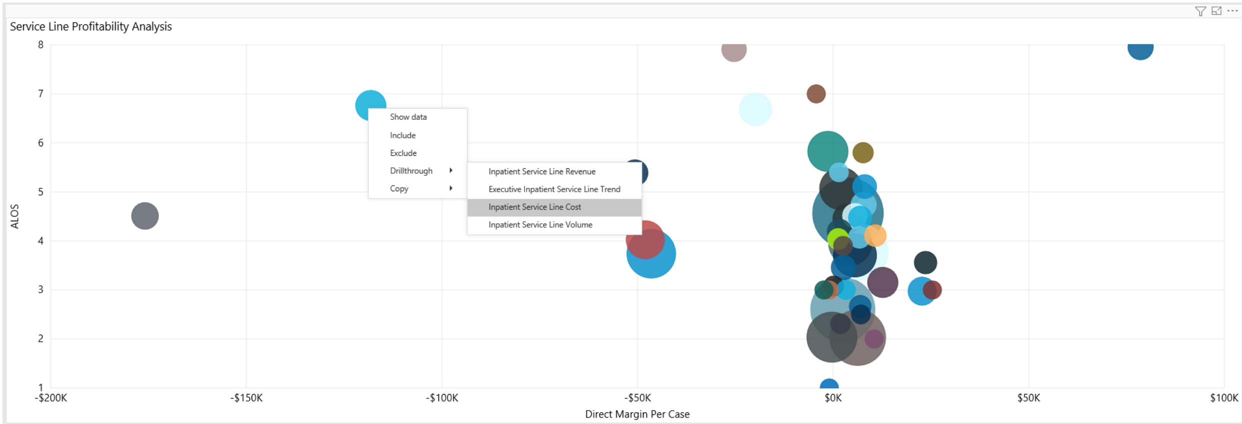


Service Line Profitability Analysis

This section shows a profitability visualization of the direct margin per case vs. the average length of stay. You can view details about a specific service line by placing your cursor on a circle. The system displays a tool tip that provides information on the case volume compared to the previous year, the gross revenue by financial class, and a breakdown of costs.



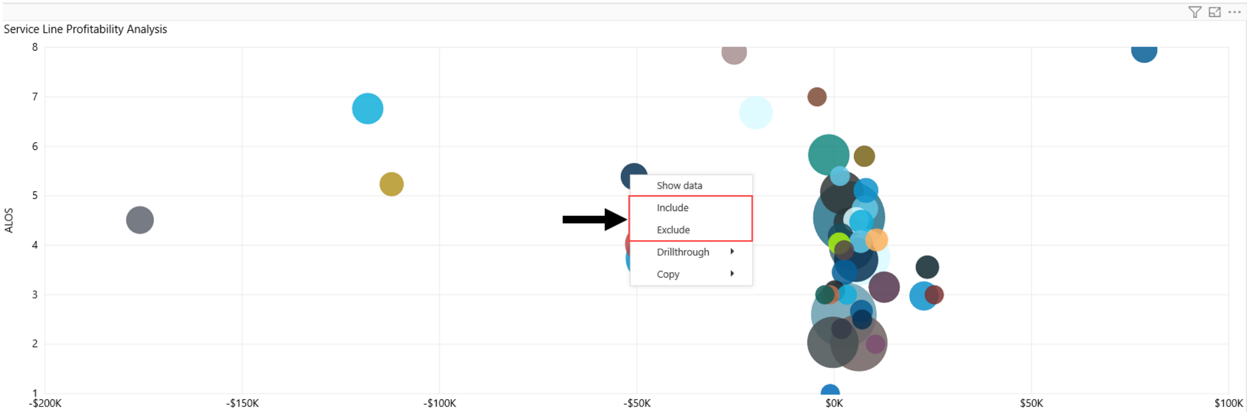
You can drill down further by right-clicking any dot, and from the menu, selecting the drillthrough pages to display. For more information, see Using drillthrough pages in the section below.



To view the underlying data for service lines, right click the row, and click **Show Data**. A data table will display underneath the visualization chart. To return to the Executive Inpatient Service Line Summary page, click **Back to report** in the upper left corner of the page.

Primary Service Name	Direct Margin Per Case	ALOS	Cases
CANCER - MEDICAL	-$50,673	5.4	95
CANCER - SURGICAL	$6,899	4.5	57
CARDIAC SURGERY	$78,584	8.0	85
CARDIOLOGY - ELECTROPHYSIOLOGY	$7,798	4.7	77
CARDIOLOGY - INTERVENTIONAL	$22,738	3.0	122
CARDIOLOGY - MEDICAL	$6,939	3.8	718
DENTAL - MEDICAL	$7,084	2.5	4
DERMATOLOGY	$3,244	3.0	8
ENDOCRINE - MEDICAL	$2,638	3.5	72
ENDOCRINE - SURGICAL	$1,464	5.4	10
GASTROINTESTINAL DISEASE - MEDICAL	-$46,500	3.7	533
GASTROINTESTINAL DISEASE - SURGICAL	-$19,818	6.7	189
GENERAL MEDICINE	$5,566	3.7	394
GENERAL SURGERY	-$118,191	6.8	152
GYNECOLOGY	$6,910	2.7	36
HEMATOLOGY	$6,710	4.1	40
HEPATOBILIARY DISEASE - MEDICAL	$8,051	5.1	64
HEPATOBILIARY DISEASE - SURGICAL	$5,553	4.5	76
INFECTIOUS DISEASE - MEDICAL	$3,777	4.6	1,229
INFECTIOUS DISEASE - SURGICAL	-$25,325	7.9	76
NEONATE	-$1,341	5.8	334
NEPHROLOGY	$3,645	4.5	128
NEUROLOGY	-$48,024	4.0	289
NEUROSURGERY	-$112,136	5.2	51
NORMAL NEWBORN	-$316	2.0	564
OBSTETRICS	$2,455	2.6	1,005
OPHTHALMOLOGY - MEDICAL	-$1,031	3.0	2
OPHTHALMOLOGY - SURGICAL	$10,463	2.0	1
ORTHOPEDICS - MEDICAL	$1,638	4.2	68
ORTHOPEDICS - SURGICAL	$6,282	2.0	728
OTHER	-$2,363	3.0	1
OTOLARYNGOLOGY - MEDICAL	$126	3.1	12

To exclude a service line from the visualization, right click the service line dot, and click **Exclude**. To show only one service line in the visualization, right click the service line square, and click **Include**.



Key Metrics Detail by Primary Service Line

The Key Metrics Detail table shows the values related to profitability for each service line.

Financial Class Description	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
Medicare	52	7.1	$87,773	$17,000	80.6%	$158,117	-$141,117	-830.1%
UMR UHC	26	5.1	$63,930	$19,829	69.0%	$6,173	$13,656	68.9%
Medicare UHC	25	6.6	$69,924	$8,571	87.7%	$515,856	-$507,285	-5918.6%
Medicaid HMO	12	4.9	$78,918	$7,071	91.0%	$9,269	-$2,199	-31.1%
Medicare HMO	10	11.4	$117,941	$14,004	88.1%	-$33,837	$47,841	341.6%
Medicaid	7	7.7	$85,820	$17,618	79.5%	$10,205	$7,413	42.1%

To view the underlying data for service lines, right click the row, and click **Show Data**. A data table will display underneath the service line table. To return to the Executive Inpatient Service Line Summary page, click **Back to report** in the upper left corner of the page.

Decision Support

Back to report

Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
INFECTIOUS DISEASE - MEDICAL	1,229	4.6	$30,798	$7,385	76.0%	$3,607	$3,777	51.2%
OBSTETRICS	1,005	2.6	$18,473	$5,957	67.8%	$3,502	$2,455	41.2%
ORTHOPEDICS - SURGICAL	728	2.0	$59,418	$14,393	75.8%	$8,111	$6,282	43.6%
CARDIOLOGY - MEDICAL	718	3.8	$25,605	$5,919	76.9%	-$1,020	$6,939	117.2%
NORMAL NEWBORN	564	2.0	$4,288	$1,474	65.6%	$1,790	-$316	-21.4%
GASTROINTESTINAL DISEASE - MEDICAL	533	3.7	$26,959	$5,413	79.9%	$51,912	-$46,500	-859.1%
PULMONOLOGY	400	3.9	$25,583	$6,151	76.0%	$1,801	$4,351	70.7%
GENERAL MEDICINE	394	3.7	$24,856	$5,961	76.0%	$395	$5,566	93.4%
PSYCHIATRY	382	5.1	$19,197	$4,007	79.1%	$2,055	$1,952	48.7%
NEONATE	334	5.8	$16,453	$5,512	66.5%	$6,853	-$1,341	-24.3%
Total	**8,416**	**3.9**	**$36,761**	**$8,929**	**75.7%**	**$15,171**	**-$6,242**	**-69.9%**

Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
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PSYCHIATRY	382	5.1	$19,197	$4,007	79.1%	$2,055	$1,952	48.7%
NEONATE	334	5.8	$16,453	$5,512	66.5%	$6,853	-$1,341	-24.3%
NEUROLOGY	289	4.0	$31,421	$6,909	78.0%	$54,933	-$48,024	-695.1%
GASTROINTESTINAL DISEASE - SURGICAL	189	6.7	$82,671	$20,792	74.8%	$40,610	-$19,818	-95.3%
SPINE	156	3.2	$88,323	$24,210	72.6%	$11,526	$12,684	52.4%
GENERAL SURGERY	152	6.8	$84,694	$17,518	79.3%	$135,709	-$118,191	-674.7%
NEPHROLOGY	128	4.5	$28,616	$5,415	81.1%	$1,770	$3,645	67.3%
CARDIOLOGY - INTERVENTIONAL	122	3.0	$63,727	$15,274	76.0%	-$7,464	$22,738	148.9%
VASCULAR SERVICES - SURGICAL	96	4.5	$88,926	$21,520	75.8%	$197,423	-$175,903	-817.4%
CANCER - MEDICAL	95	5.4	$46,664	$16,305	65.1%	$66,978	-$50,673	-310.8%
CARDIAC SURGERY	85	8.0	$227,792	$48,411	78.7%	-$30,174	$78,584	162.3%
CARDIOLOGY - ELECTROPHYSIOLOGY	77	4.7	$94,294	$22,640	76.0%	$14,842	$7,798	34.4%
HEPATOBILIARY DISEASE - SURGICAL	76	4.5	$61,284	$12,344	79.9%	$6,791	$5,553	45.0%
INFECTIOUS DISEASE - SURGICAL	76	7.9	$81,979	$20,364	75.2%	$45,689	-$25,325	-124.4%
ENDOCRINE - MEDICAL	72	3.5	$22,764	$5,578	75.5%	$2,940	$2,638	47.3%
ORTHOPEDICS - MEDICAL	68	4.2	$26,484	$5,233	80.2%	$3,595	$1,638	31.3%
HEPATOBILIARY DISEASE - MEDICAL	64	5.1	$39,218	$8,469	78.4%	$418	$8,051	95.1%
CANCER - SURGICAL	57	4.5	$88,499	$13,114	85.2%	$6,215	$6,899	52.6%
NEUROSURGERY	51	5.2	$94,390	$29,826	68.4%	$141,962	-$112,136	-376.0%
THORACIC SURGERY	43	3.6	$76,145	$19,373	74.6%	-$4,250	$23,623	121.9%
HEMATOLOGY	40	4.1	$36,684	$5,308	85.5%	-$1,402	$6,710	126.4%
UROLOGY - SURGICAL	37	4.1	$53,625	$15,421	71.2%	$4,645	$10,776	69.9%
GYNECOLOGY	36	2.7	$44,954	$11,587	74.2%	$4,676	$6,910	59.6%
Total	**8,416**	**3.9**	**$36,761**	**$8,929**	**75.7%**	**$15,171**	**-$6,242**	**-69.9%**

To exclude a service line from the table, right click the service line row, and click **Exclude**. To show only one service line in the table, right click the service line, and click **Include**.

You can sort the information in the table by clicking the column to toggle between sorting the table data by the column in ascending or descending order.

TIP: An arrow displays in the column in which the data is sorted. An up arrow indicates ascending order. A down arrow indicated descending order.

Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
VASCULAR SERVICES - SURGICAL	96	4.5	$88,926	$21,520	75.8%	$197,423	-$175,903	-817.4%
NEUROSURGERY	51	5.2	$94,390	$29,826	68.4%	$141,962	-$112,136	-376.0%
GENERAL SURGERY	152	6.8	$84,694	$17,518	79.3%	$135,709	-$118,191	-674.7%

Using drillthrough pages

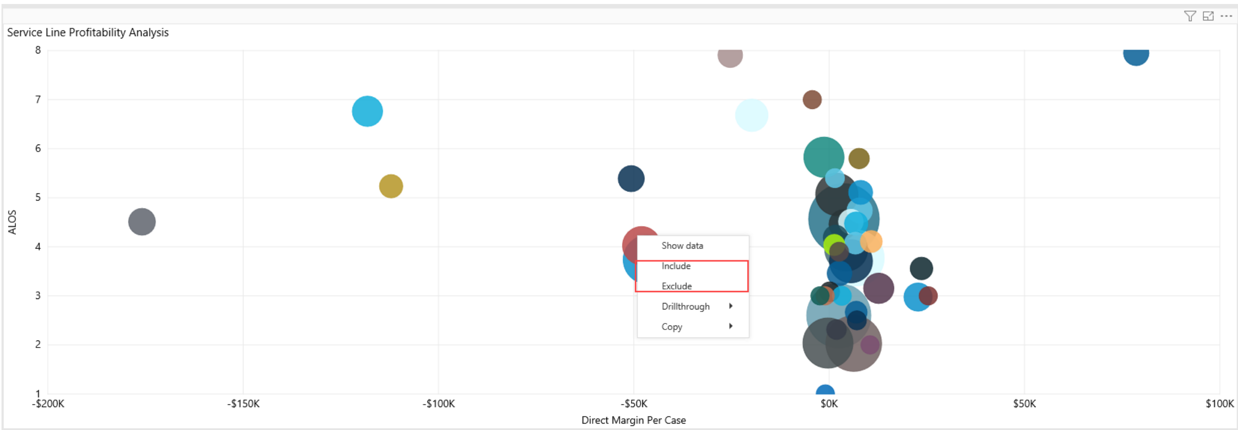
The following is a list of the drillthrough pages available from the Service Line Profitability Analysis and Key Metrics Detail sections of the dashboard:

- Executive Inpatient Service Line Trend report

- Inpatient Service Line Cost report
- Inpatient Service Line Revenue report
- Inpatient Service Line Volume report

Including or excluding data

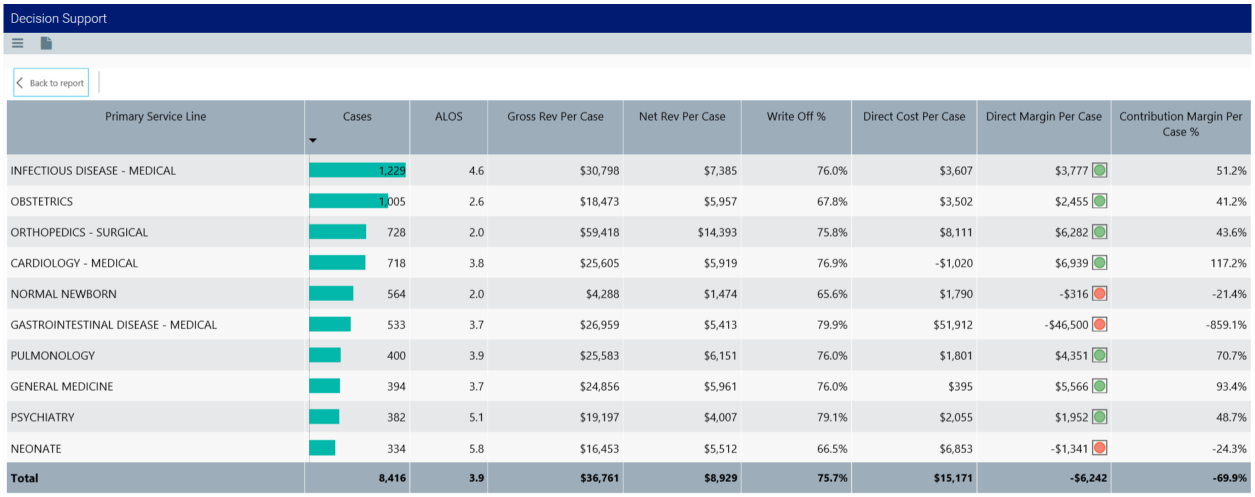
You can exclude data from a visualization chart or a table by right-clicking the image or table row, and clicking **Exclude**. To show only one service line in the visualization or table, right click the image or a table row, and click **Include**. You can also perform this action in the Executive Summary page of the dashboard and the drillthrough pages.



Click image to view full size

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show Data**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
INFECTIOUS DISEASE - MEDICAL	1,229	4.6	$30,798	$7,385	76.0%	$3,607	$3,777	51.2%
OBSTETRICS	1,005	2.6	$18,473	$5,957	67.8%	$3,502	$2,455	41.2%
ORTHOPEDICS - SURGICAL	728	2.0	$59,418	$14,393	75.8%	$8,111	$6,282	43.6%
CARDIOLOGY - MEDICAL	718	3.8	$25,605	$5,919	76.9%	-$1,020	$6,939	117.2%
NORMAL NEWBORN	564	2.0	$4,288	$1,474	65.6%	$1,790	-$316	-21.4%
GASTROINTESTINAL DISEASE - MEDICAL	533	3.7	$26,959	$5,413	79.9%	$51,912	-$46,500	-859.1%
PULMONOLOGY	400	3.9	$25,583	$6,151	76.0%	$1,801	$4,351	70.7%
GENERAL MEDICINE	394	3.7	$24,856	$5,961	76.0%	$395	$5,566	93.4%
PSYCHIATRY	382	5.1	$19,197	$4,007	79.1%	$2,055	$1,952	48.7%
NEONATE	334	5.8	$16,453	$5,512	66.5%	$6,853	-$1,341	-24.3%
Total	**8,416**	**3.9**	**$36,761**	**$8,929**	**75.7%**	**$15,171**	**-$6,242**	**-69.9%**

Primary Service Line	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
INFECTIOUS DISEASE - MEDICAL	1,229	4.6	$30,798	$7,385	76.0%	$3,607	$3,777	51.2%
OBSTETRICS	1,005	2.6	$18,473	$5,957	67.8%	$3,502	$2,455	41.2%
ORTHOPEDICS - SURGICAL	728	2.0	$59,418	$14,393	75.8%	$8,111	$6,282	43.6%
CARDIOLOGY - MEDICAL	718	3.8	$25,605	$5,919	76.9%	-$1,020	$6,939	117.2%
NORMAL NEWBORN	564	2.0	$4,288	$1,474	65.6%	$1,790	-$316	-21.4%
GASTROINTESTINAL DISEASE - MEDICAL	533	3.7	$26,959	$5,413	79.9%	$51,912	-$46,500	-859.1%
PULMONOLOGY	400	3.9	$25,583	$6,151	76.0%	$1,801	$4,351	70.7%
GENERAL MEDICINE	394	3.7	$24,856	$5,961	76.0%	$395	$5,566	93.4%
PSYCHIATRY	382	5.1	$19,197	$4,007	79.1%	$2,055	$1,952	48.7%
NEONATE	334	5.8	$16,453	$5,512	66.5%	$6,853	-$1,341	-24.3%
NEUROLOGY	289	4.0	$31,421	$6,909	78.0%	$54,933	-$48,024	-695.1%
GASTROINTESTINAL DISEASE - SURGICAL	189	6.7	$82,671	$20,792	74.8%	$40,610	-$19,818	-95.3%
SPINE	156	3.2	$88,323	$24,210	72.6%	$11,526	$12,684	52.4%
GENERAL SURGERY	152	6.8	$84,694	$17,518	79.3%	$135,709	-$118,191	-674.7%
NEPHROLOGY	128	4.5	$28,616	$5,415	81.1%	$1,770	$3,645	67.3%
CARDIOLOGY - INTERVENTIONAL	122	3.0	$63,727	$15,274	76.0%	-$7,464	$22,738	148.9%
VASCULAR SERVICES - SURGICAL	96	4.5	$88,926	$21,520	75.8%	$197,423	-$175,903	-817.4%
CANCER - MEDICAL	95	5.4	$46,664	$16,305	65.1%	$66,978	-$50,673	-310.8%
CARDIAC SURGERY	85	8.0	$227,792	$48,411	78.7%	-$30,174	$78,584	162.3%
CARDIOLOGY - ELECTROPHYSIOLOGY	77	4.7	$94,294	$22,640	76.0%	$14,842	$7,798	34.4%
HEPATOBILIARY DISEASE - SURGICAL	76	4.5	$61,284	$12,344	79.9%	$6,791	$5,553	45.0%
INFECTIOUS DISEASE - SURGICAL	76	7.9	$81,979	$20,364	75.2%	$45,689	-$25,325	-124.4%
ENDOCRINE - MEDICAL	72	3.5	$22,764	$5,578	75.5%	$2,940	$2,638	47.3%
ORTHOPEDICS - MEDICAL	68	4.2	$26,484	$5,233	80.2%	$3,595	$1,638	31.3%
HEPATOBILIARY DISEASE - MEDICAL	64	5.1	$39,218	$8,469	78.4%	$418	$8,051	95.1%
CANCER - SURGICAL	57	4.5	$88,499	$13,114	85.2%	$6,215	$6,899	52.6%
NEUROSURGERY	51	5.2	$94,390	$29,826	68.4%	$141,962	-$112,136	-376.0%
THORACIC SURGERY	43	3.6	$76,145	$19,373	74.6%	-$4,250	$23,623	121.9%
HEMATOLOGY	40	4.1	$36,684	$5,308	85.5%	-$1,402	$6,710	126.4%
UROLOGY - SURGICAL	37	4.1	$53,625	$15,421	71.2%	$4,645	$10,776	69.9%
GYNECOLOGY	36	2.7	$44,954	$11,587	74.2%	$4,676	$6,910	59.6%
Total	**8,416**	**3.9**	**$36,761**	**$8,929**	**75.7%**	**$15,171**	**-$6,242**	**-69.9%**

Click image to view full size

Copying data for other reports

If you have permissions to edit or create Axiom Intelligence reports, you can copy visuals to create a new report. For tables, you can also copy values and selections.

To copy, right-click in the section, and select **Copy Visual**, **Copy Selection** (tables only), or **Copy Value** (tables only).

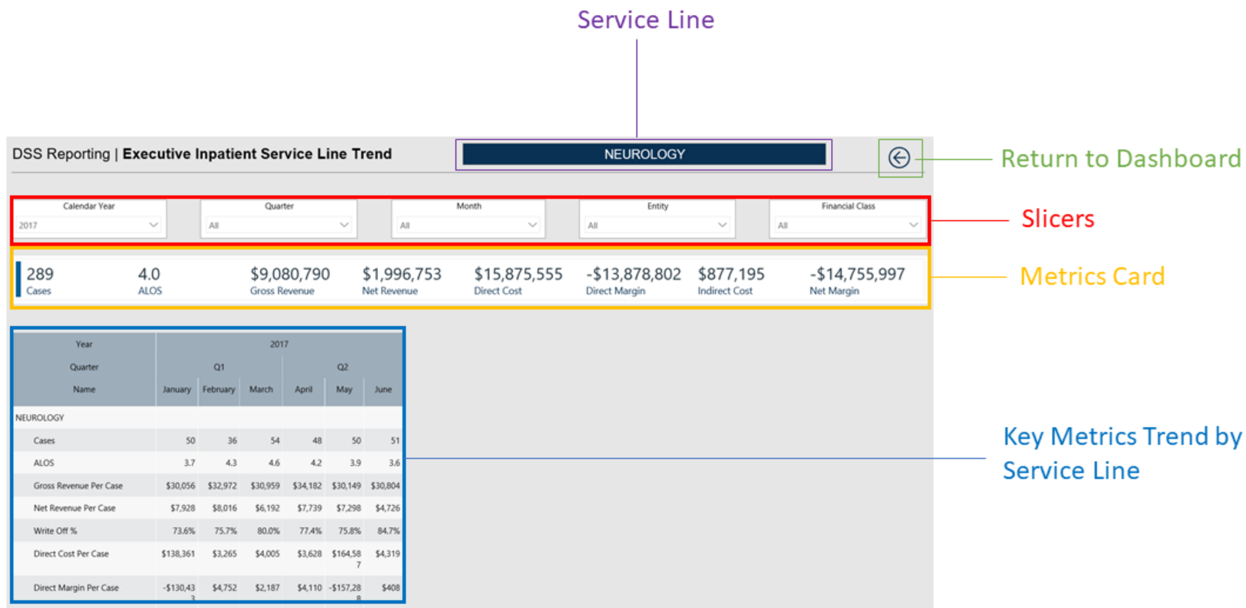
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Executive Inpatient Service Line Trend report

Overview

This page provides trend details for a specific service line selected in the Inpatient Service Line Dashboard.

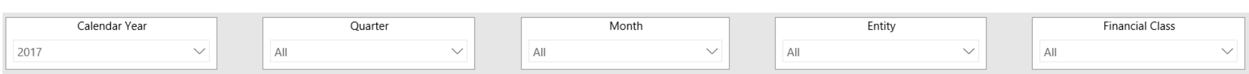
The top of the page displays the service line the page applies to. To return to the Inpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

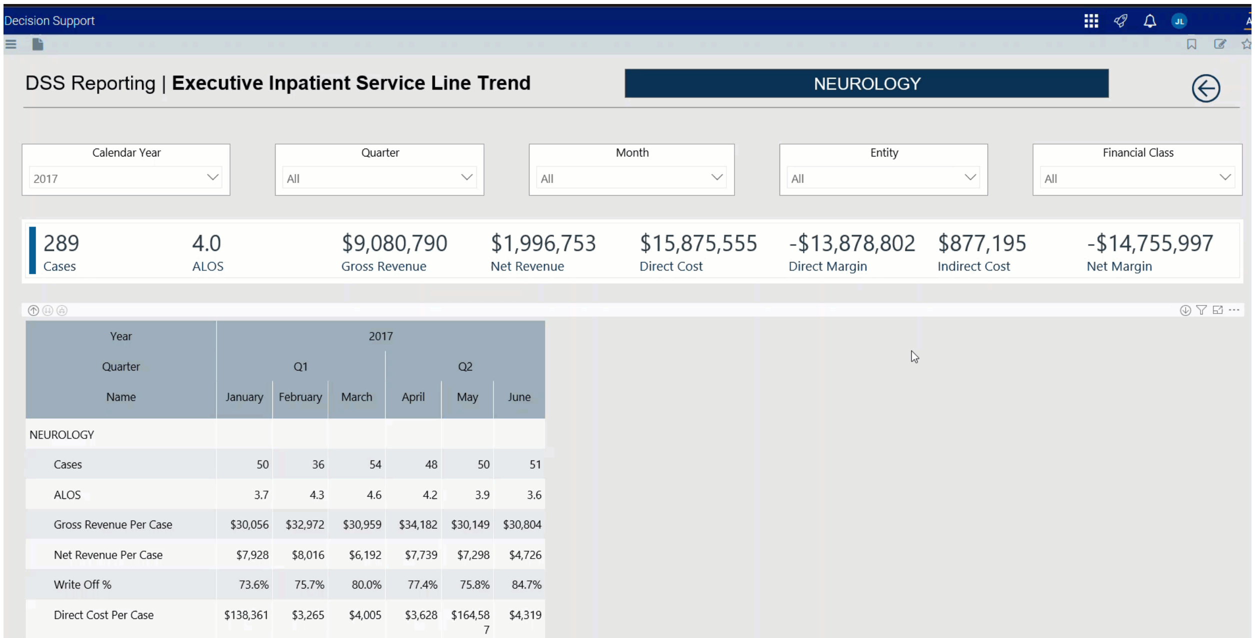
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, and financial class. From the drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



▶ Metrics Card

This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select different columns or rows in the Key Metrics Trend table, the totals in the Metrics Card adjust accordingly.



▶ Key Metrics Trend by Service Line

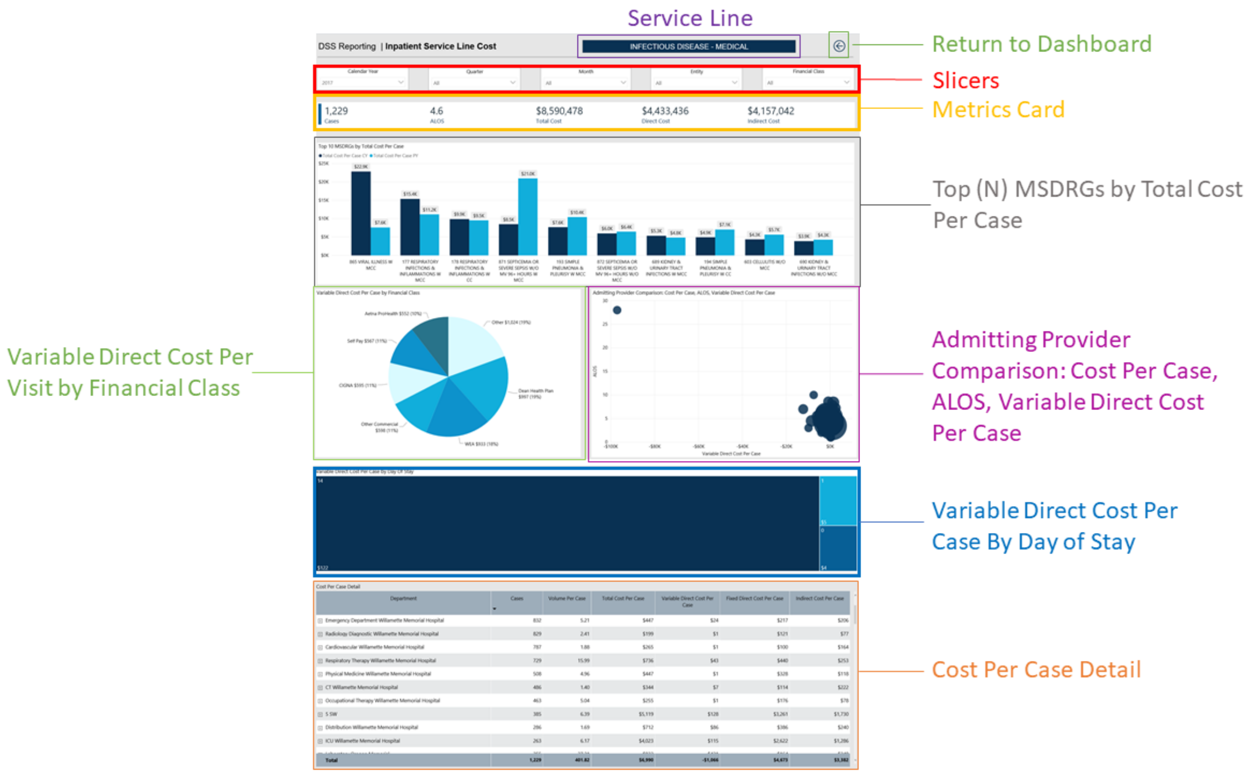
This section displays the values related to profitability for the corresponding service line indicated at the top of the page. From this section, you can click a column or row to view the metric values for that specific row or column. As you click a column, the other columns will gray out to indicate that the information in the Metrics Card is specific to that column. See the animated GIF in the Metrics Card section above to see how this works.

Inpatient Service Line Cost report

▶ Overview

This page provides cost details for a specific service line selected in the Inpatient Service Line Dashboard.

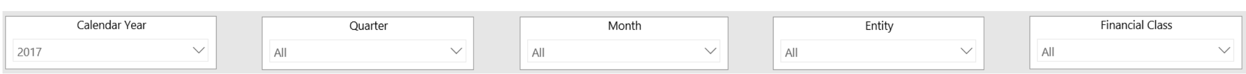
The top of the page displays the service line the page applies to. To return to the Inpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

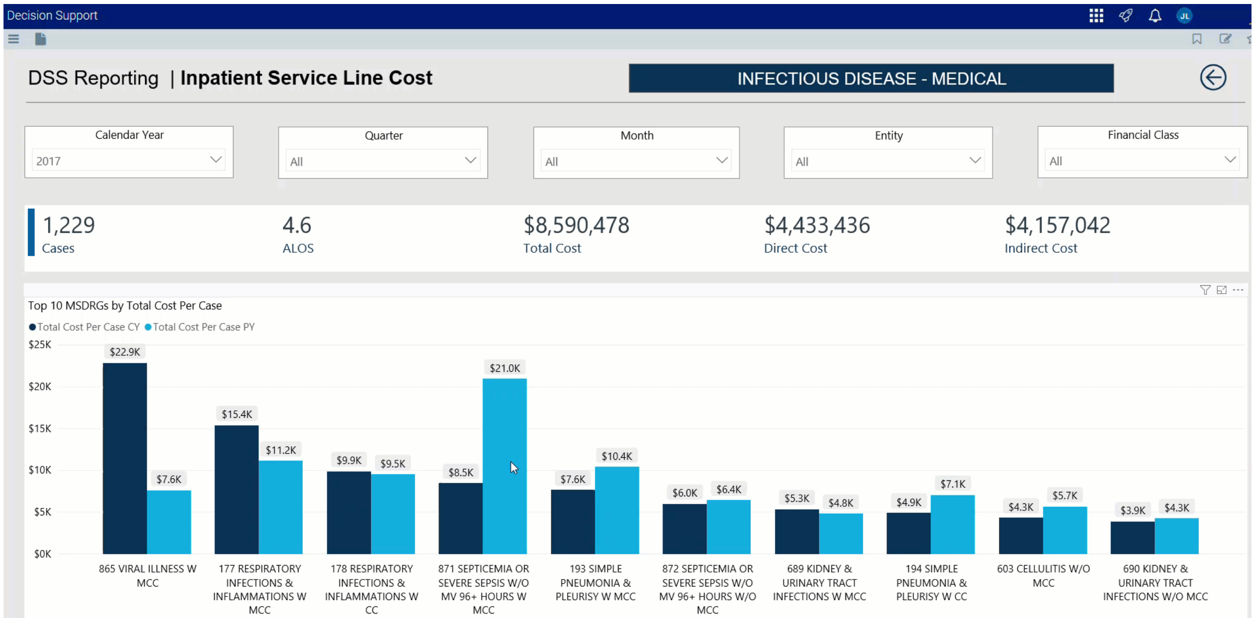
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



▶ Metrics Card

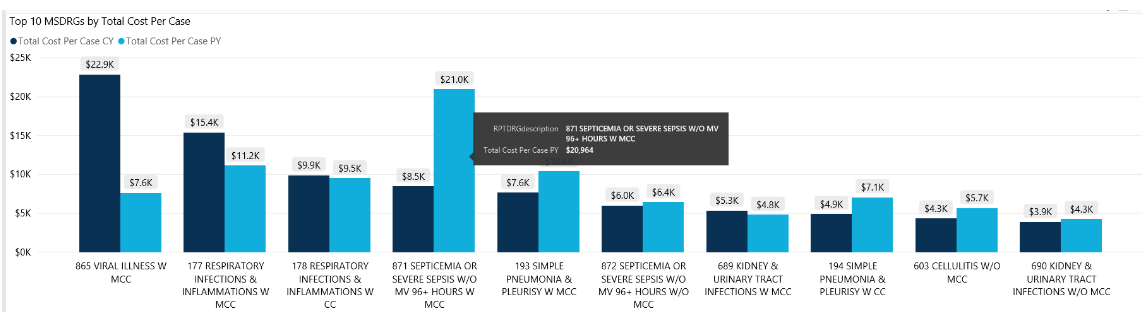
This section displays KPI data for visits, ALOS, total cost, direct and indirect cost. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.



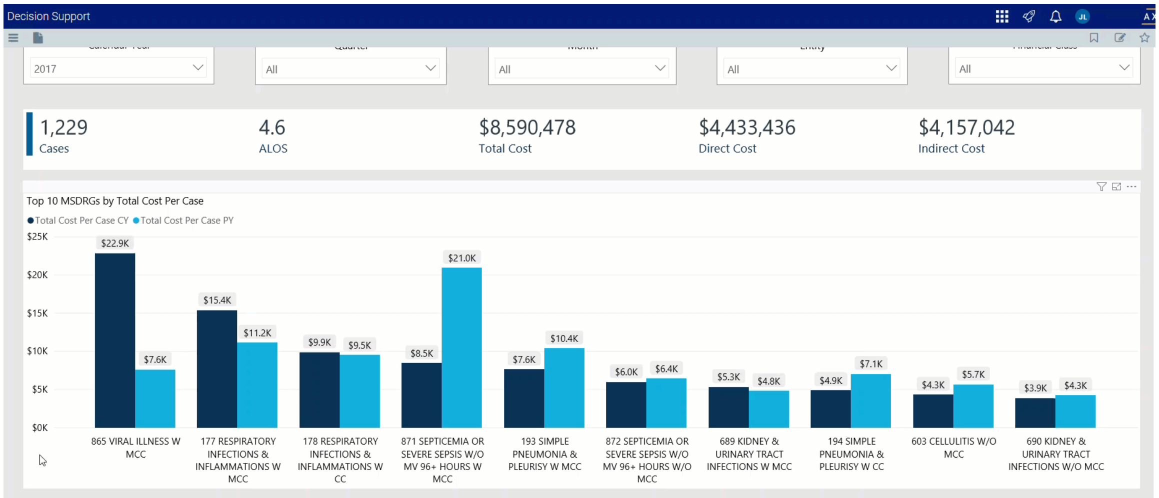
Top (N) MSDRGs By Total Cost Per Case

This bar chart displays the total cost per case for each MSDRG. From this section, you can do the following:

- View cost details about a specific MSDRG by hovering your cursor over a bar. The system displays a tool tip that provides information on the MSDRG description and the total cost per case.



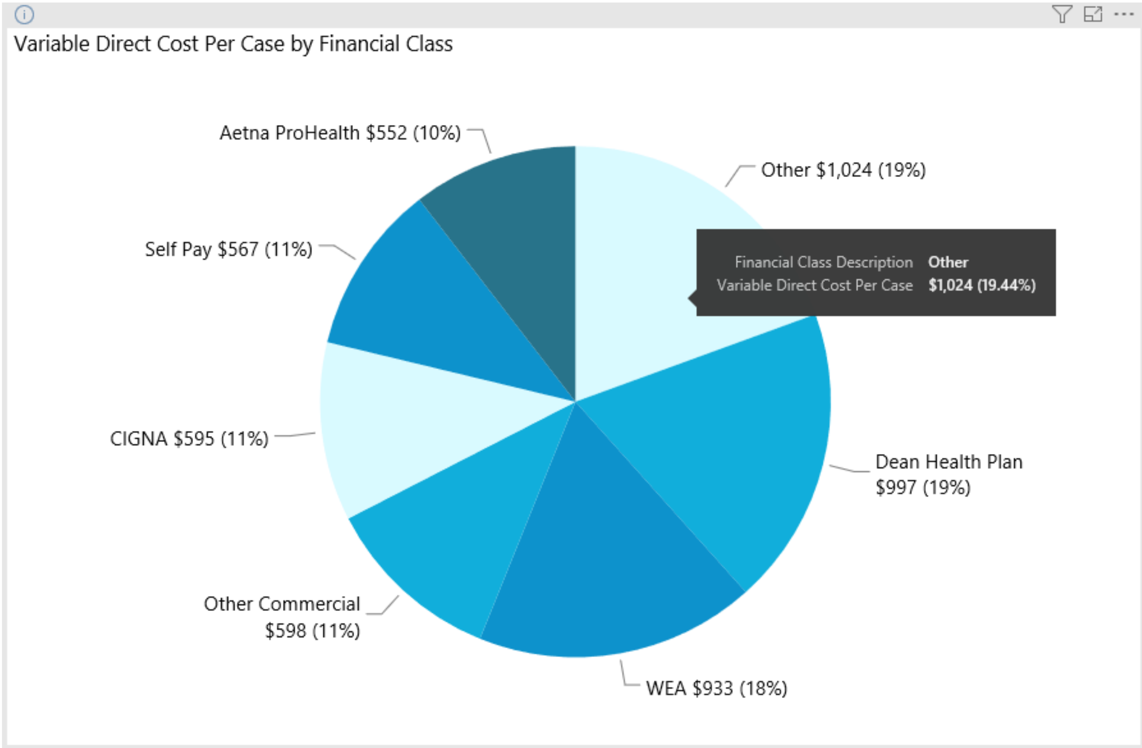
- View cost details for a specific MSDRG by clicking a bar. The system greys out the other bars in the chart and only shows metrics and details for that MSDRG. To enable the MSDRG data in the page again, click the bar again.



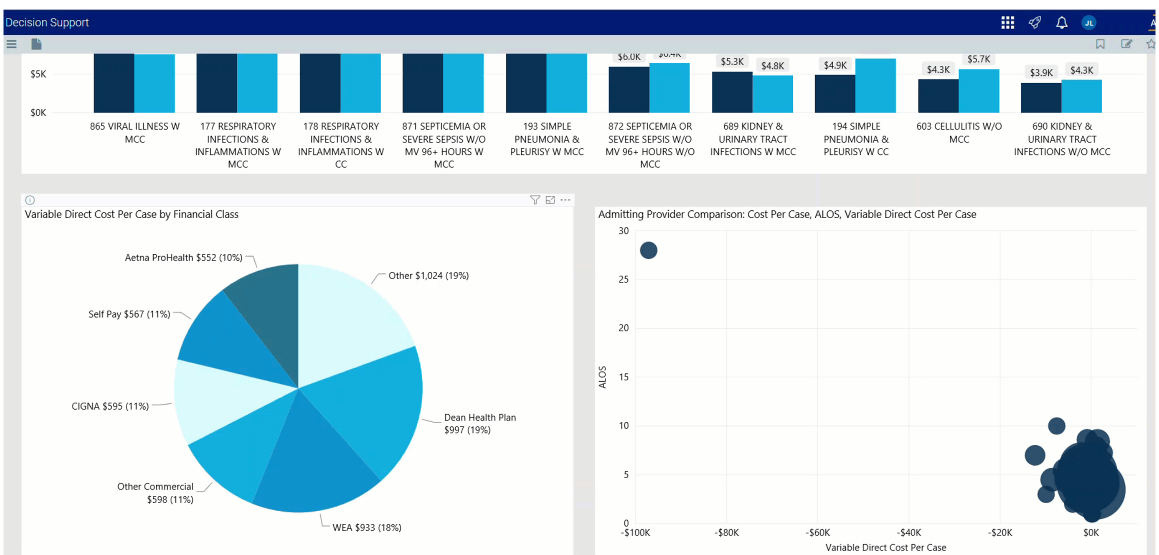
Variable Direct Cost Per Case by Financial Class

This pie chart breaks down the variable direct cost per case across financial classes. From this section, you can do the following:

- View financial class details by hovering your cursor over a slice. The system displays a tool tip that provides a description of the financial class and the variable direct cost per case.



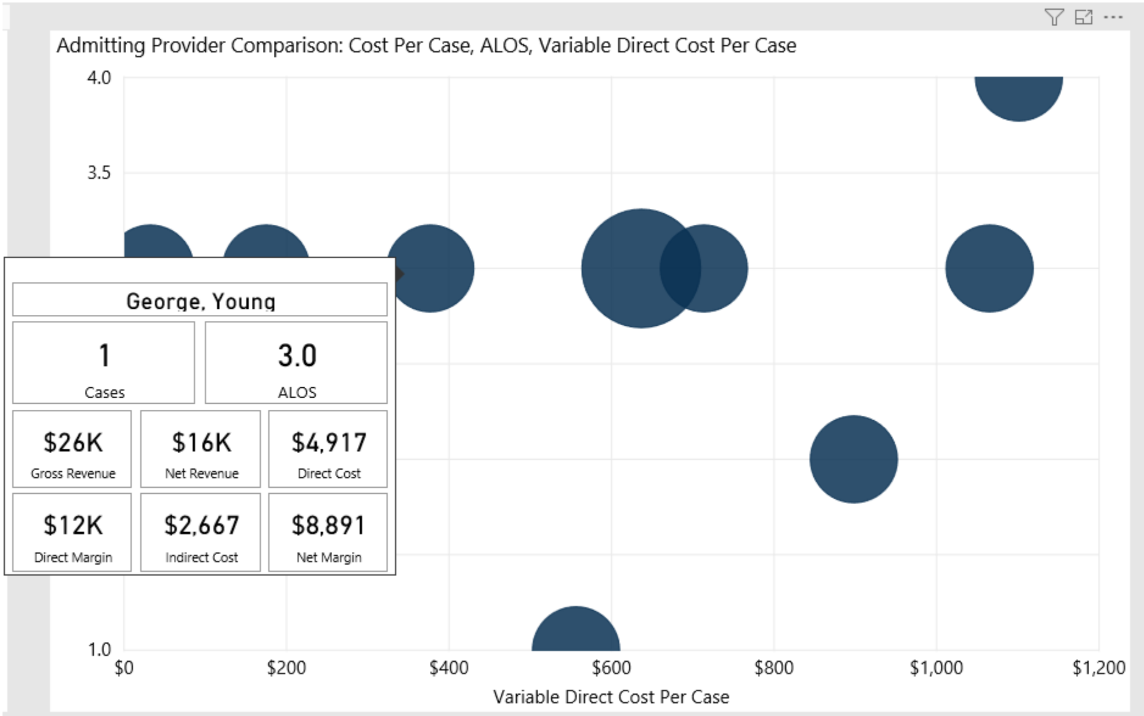
- View details for a specific financial class by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To enable the financial class data in the page again, click the slice again.



▶ Admitting Provider Comparison: Cost Per Case, ALOS, Variable Direct Cost Per Case

This visual shows the variable direct cost per case for each provider. From this section, you can do the following:

- View provider details by hovering your cursor over a circle. The system displays a tool tip with the provider's name, ALOS, gross and net revenue, direct and indirect cost, and direct and net margin.

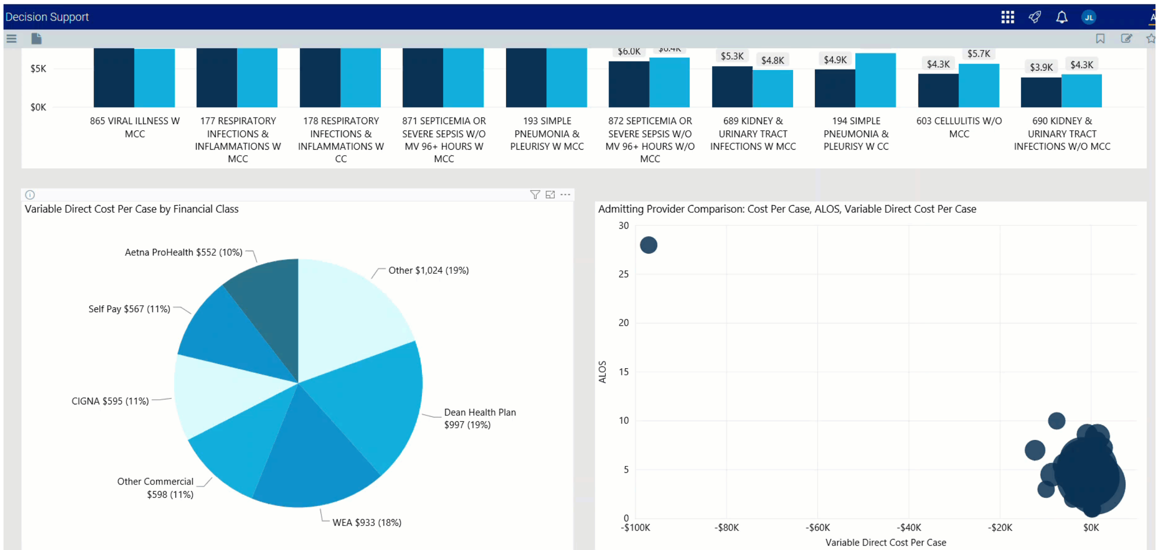


- View details for a specific provider by clicking a circle. The system greys out the details across the page except for data specific to the provider you selected. To enable all of the provider data on the page again, click the circle again.

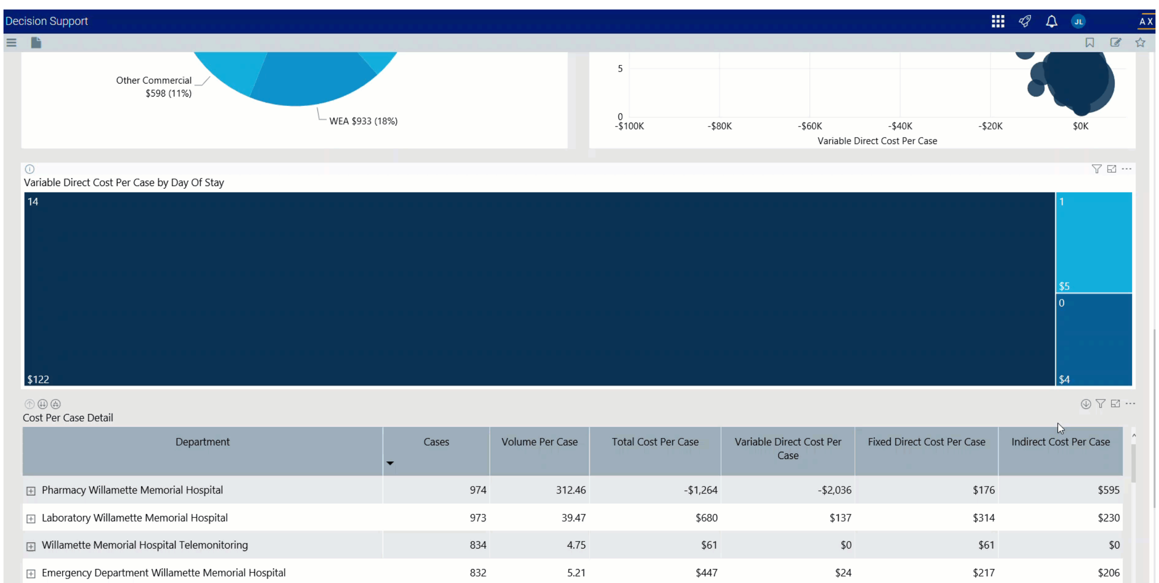
▶ Variable Direct Cost Per Case by Day of Stay

This visual shows the variable direct cost per case by day of stay. From this section, you can do the following:

- View variable direct cost per case by department details by hovering your cursor over a square. The system displays a tool tip with a pie chart that shows the percentages for each department.



- View details for a variable direct cost by clicking a square. The system greys out the details across the page except for data specific to the variable direct cost you selected. To enable the variable cost data on the page again, click the square again.



Department	Cases	Volume Per Case	Total Cost Per Case	Variable Direct Cost Per Case	Fixed Direct Cost Per Case	Indirect Cost Per Case
Pharmacy Willamette Memorial Hospital	974	312.46	-$1,264	-$2,036	$176	$595
Laboratory Willamette Memorial Hospital	973	39.47	$680	$137	$314	$230
Willamette Memorial Hospital Telemonitoring	834	4.75	$61	$0	$61	$0
Emergency Department Willamette Memorial Hospital	832	5.21	$447	$24	$217	$206

▶ Cost Per Case Detail

This section displays the value details related to the cost per case. From this section, you can do the following:

- View the details for a specific department by clicking a row. The system greys out the details for the other departments across the page except for data specific to the department you selected.

- Sort the table by columns in ascending or descending order by clicking the column header.

Cost Per Case Detail

Department	Cases	Volume Per Case	Total Cost Per Case	Variable Direct Cost Per Case	Fixed Direct Cost Per Case	Indirect Cost Per Case
⊞ Pharmacy Willamette Memorial Hospital	974	312.46	-$1,264	-$2,036	$176	$595
⊞ Laboratory Willamette Memorial Hospital	973	39.47	$680	$137	$314	$230
⊞ Willamette Memorial Hospital Telemonitoring	834	4.75	$61	$0	$61	$0
⊞ Emergency Department Willamette Memorial Hospital	832	5.21	$447	$24	$217	$206

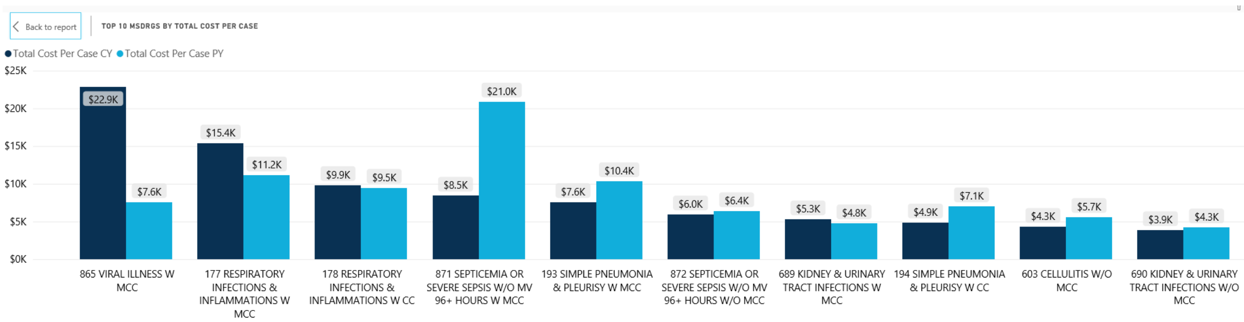
- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Cost Per Case Detail

Department	Cases	Volume Per Case	Total Cost Per Case	Variable Direct Cost Per Case	Fixed Direct Cost Per Case	Indirect Cost Per Case
⊞ Wound Center	6	2.17	$272	$23	$173	$75
⊞ Women's Health Services Willamette Memorial Hospital	2	1.00	$173	$0	$135	$38
⊞ Women's Health Services Oregon Memorial	1	1.00	$120	$4	$82	$34
⊞ Willamette Memorial Hospital Telemonitoring	834	4.75	$61	$0	$61	$0

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



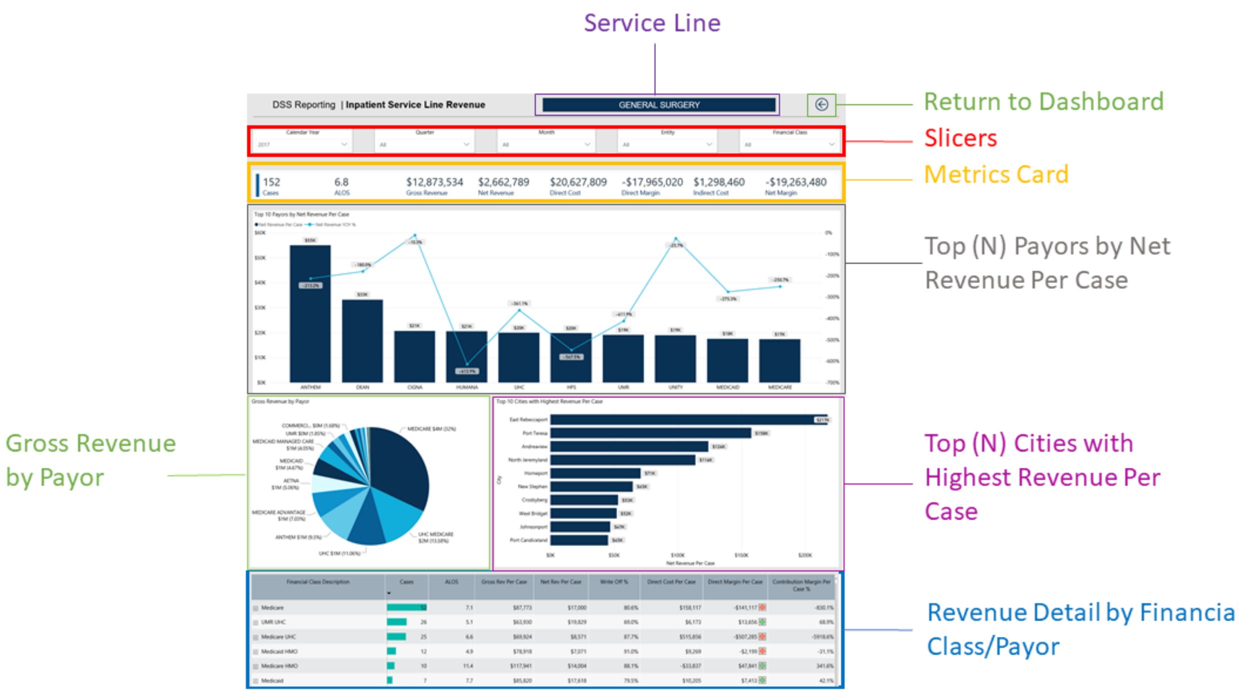
RPTDRGdescription	Total Cost Per Case CY	Total Cost Per Case PY
865 VIRAL ILLNESS W MCC	$22,864	$7,623
177 RESPIRATORY INFECTIONS & INFLAMMATIONS W MCC	$15,402	$11,162
178 RESPIRATORY INFECTIONS & INFLAMMATIONS W CC	$9,894	$9,537
871 SEPTICEMIA OR SEVERE SEPSIS W/O MV 96+ HOURS W MCC	$8,477	$20,964
193 SIMPLE PNEUMONIA & PLEURISY W MCC	$7,640	$10,398
872 SEPTICEMIA OR SEVERE SEPSIS W/O MV 96+ HOURS W/O MCC	$5,994	$6,425
689 KIDNEY & URINARY TRACT INFECTIONS W MCC	$5,342	$4,819
194 SIMPLE PNEUMONIA & PLEURISY W CC	$4,933	$7,067
603 CELLULITIS W/O MCC	$4,344	$5,664
690 KIDNEY & URINARY TRACT INFECTIONS W/O MCC	$3,907	$4,275

Inpatient Service Line Revenue report

Overview

This page provides revenue details for a specific service line selected in the Inpatient Service Line Dashboard.

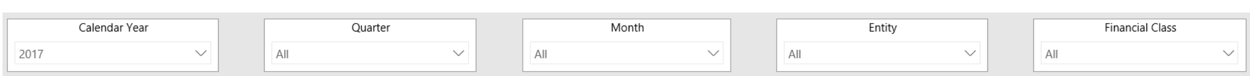
The top of the page displays the service line the page applies to. To return to the Inpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

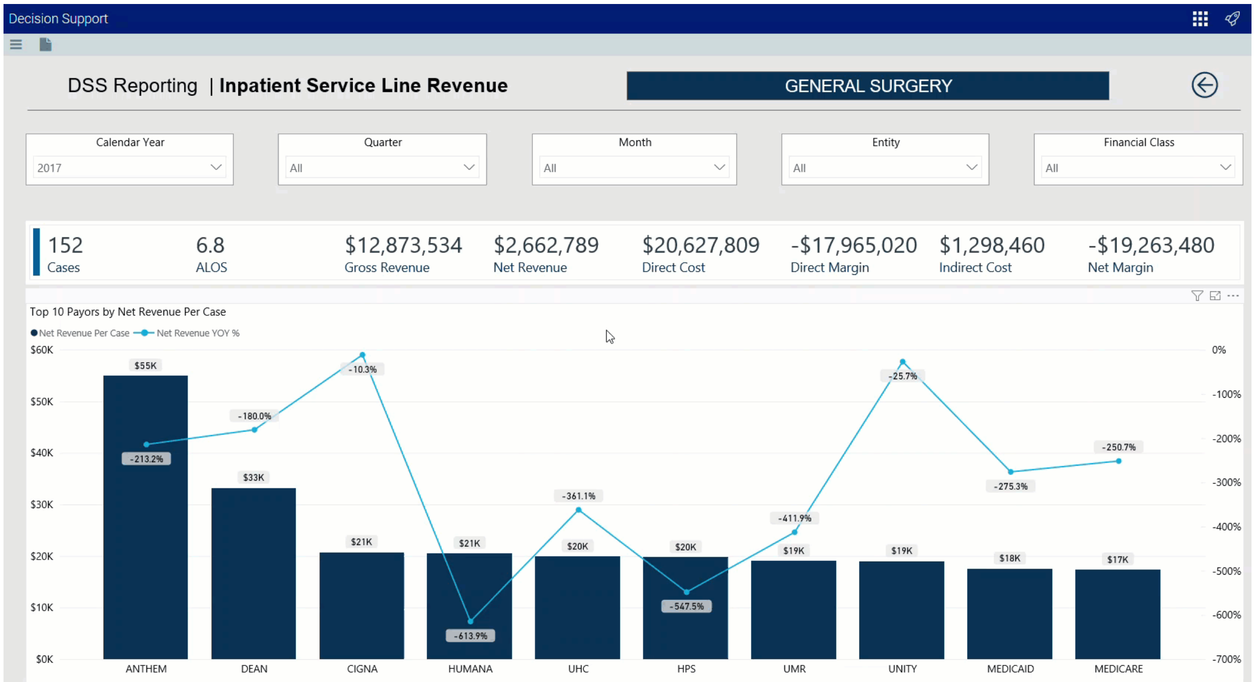
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, and financial class. From the drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



▶ Metrics Card

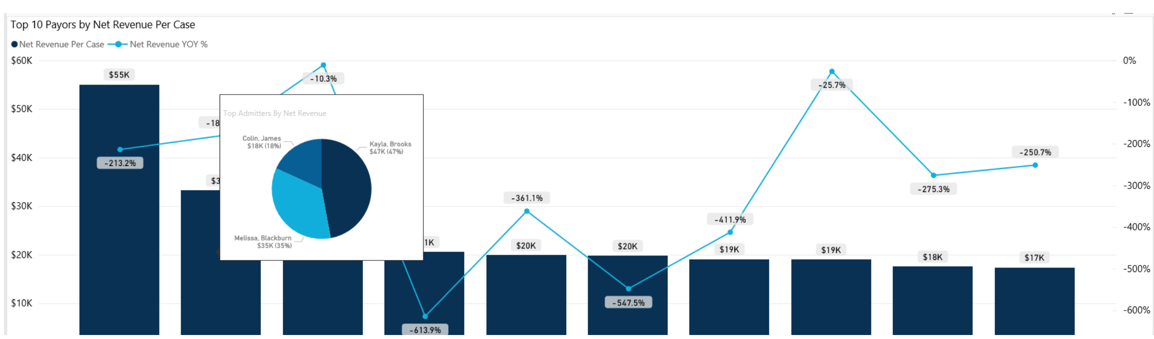
This section displays KPI data for cases, ALOS, gross and net revenue, direct and indirect cost, and direct and net margin. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.



▶ Top (N) Payors by Net Revenue Per Case

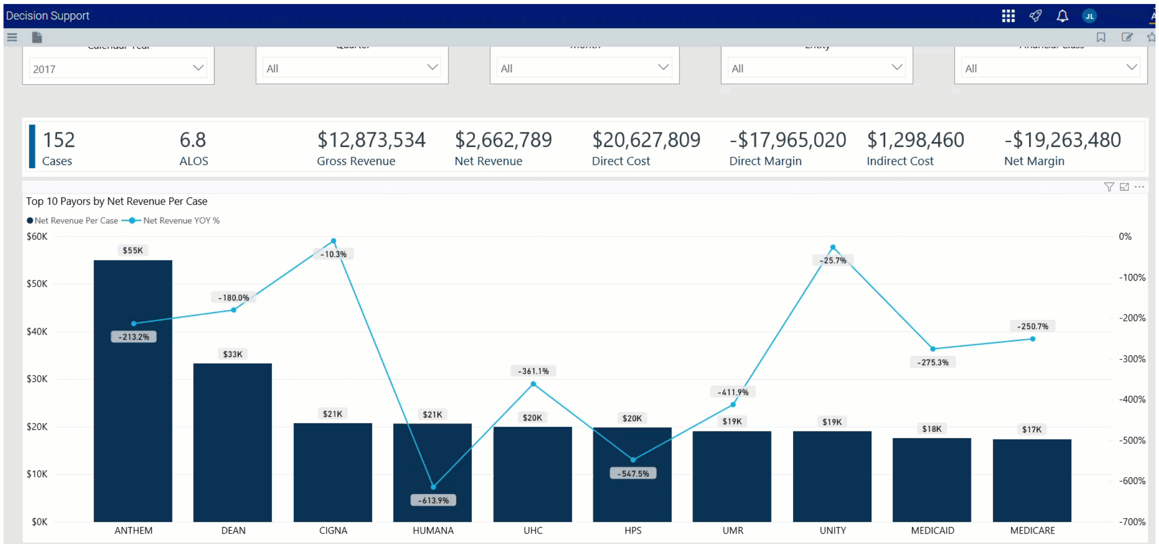
This bar chart displays the net revenue per case for each payor. From this section, you can do the following:

- View the top admitters for each payor hovering your cursor over a bar. The system displays a tool tip that provides a pie chart that segments the admitters by net revenue.



Click image to view full size

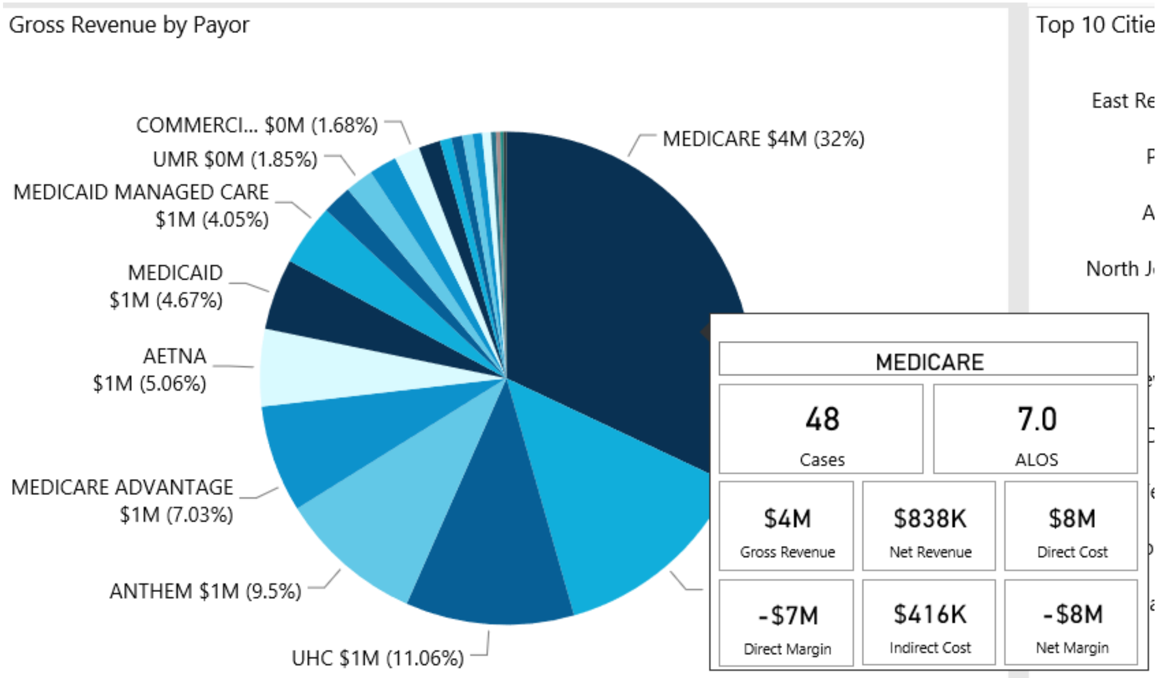
- View revenue details for a specific payor by clicking a bar. The system greys out the other payor bars in the chart and only shows metrics and details for that payor. To show the payor data in the page again, click the bar again.



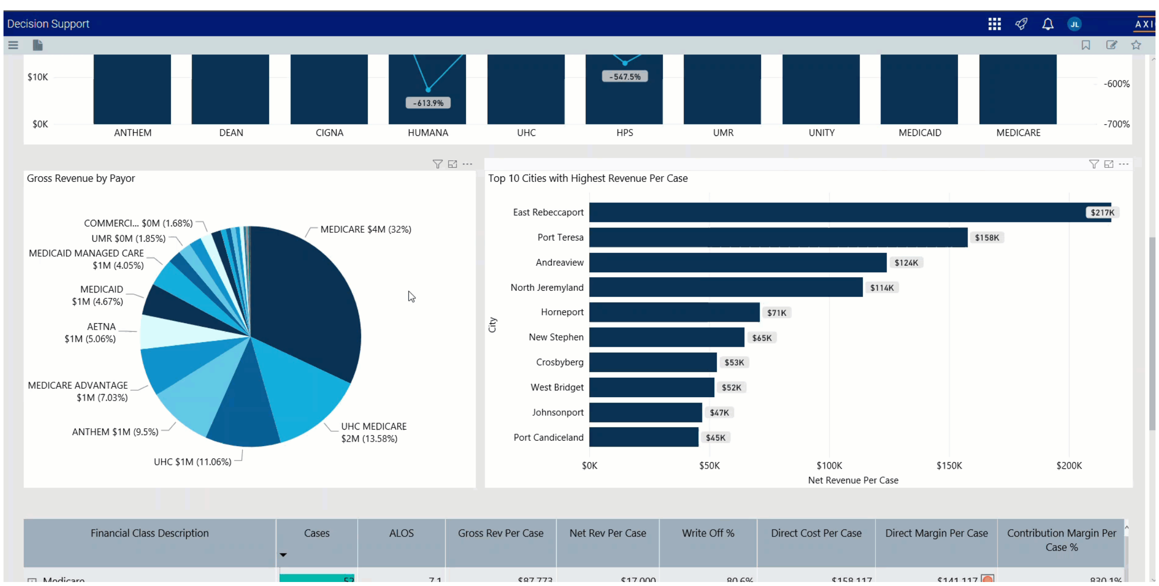
Gross Revenue by Payor

This pie chart breaks down the gross revenue across payors. From this section, you can do the following:

- View payor gross revenue details by hovering your cursor over a slice. The system displays a tool tip that shows the details regarding the number of cases, ALOS, gross and net revenue, direct and indirect cost, and direct and net margin.



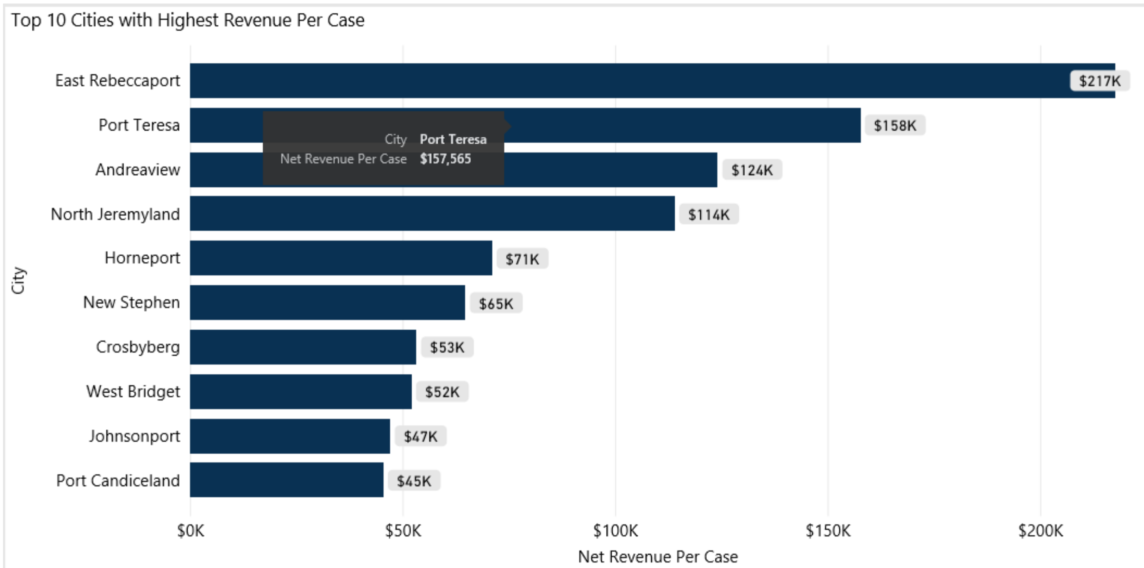
- View details for the gross revenue by payor by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To show the provider data in the page again, click the slice again.



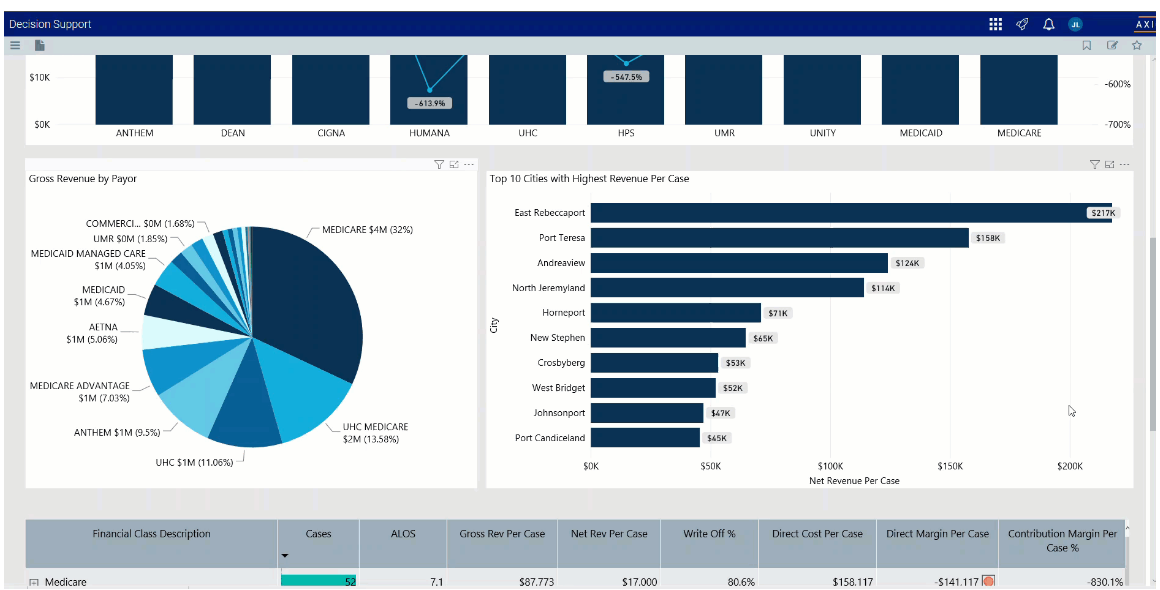
▶ Top (N) Cities with Highest Revenue Per Case

This bar chart shows the top number of cities that have the highest revenue per case. From this chart, you can do the following:

- View details regarding case net revenue for the city by hovering the cursor over a bar to display a tool tip.



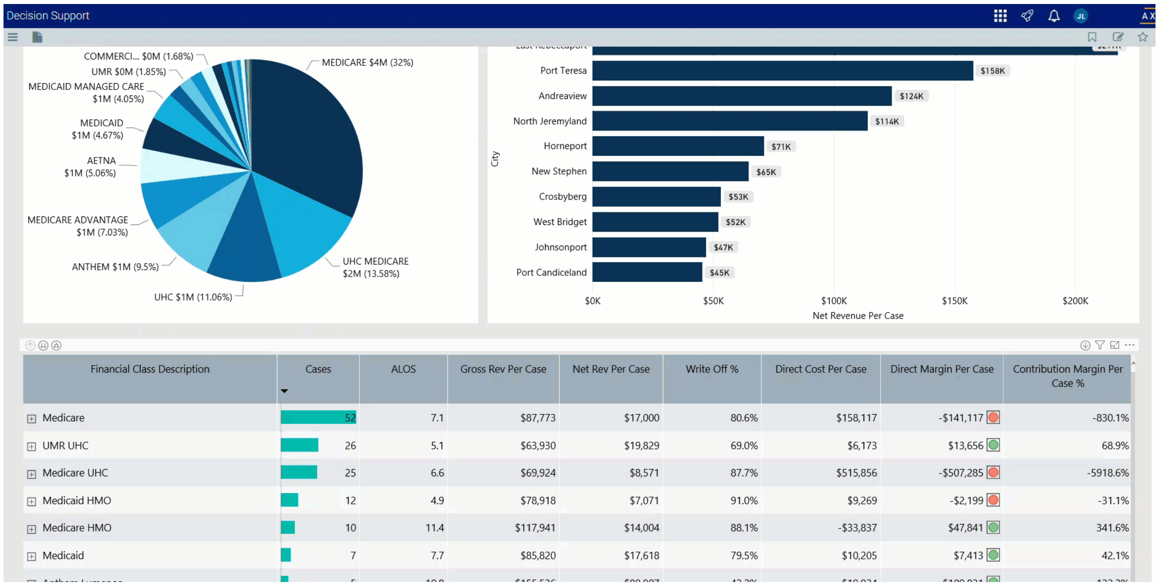
- View details for a specific city by clicking a bar. The system greys out the details across the page except for data specific to the city bar you selected. To enable the city data on the page, click the bar again.



▶ Revenue Detail by Financial Class / Payor

This section displays the values related to revenue by financial class or payor. From this section, you can do the following:

- View the details for a specific financial class by clicking a row. The system greys out the details for the other financial classes across the page except for data specific to the financial class you selected. To enable all of the table data in the page, click the row again.



Financial Class Description	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
Medicare	52	7.1	$87,773	$17,000	80.6%	$158,117	-$141,117	-830.1%
UMR UHC	26	5.1	$63,930	$19,829	69.0%	$6,173	$13,656	68.9%
Medicare UHC	25	6.6	$69,924	$8,571	87.7%	$515,856	-$507,285	-5918.6%
Medicaid HMO	12	4.9	$78,918	$7,071	91.0%	$9,269	-$2,199	-31.1%
Medicare HMO	10	11.4	$117,941	$14,004	88.1%	-$33,837	$47,841	341.6%
Medicaid	7	7.7	$85,820	$17,618	79.5%	$10,205	$7,413	42.1%

- Sort the table by columns in ascending or descending order by clicking the column header.

Financial Class Description	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
Medicare	52	7.1	$87,773	$17,000	80.6%	$158,117	-$141,117	-830.1%
UMR UHC	26	5.1	$63,930	$19,829	69.0%	$6,173	$13,656	68.9%
Medicare UHC	25	6.6	$69,924	$8,571	87.7%	$515,856	-$507,285	-5918.6%
Medicaid HMO	12	4.9	$78,918	$7,071	91.0%	$9,269	-$2,199	-31.1%
Medicare HMO	10	11.4	$117,941	$14,004	88.1%	-$33,837	$47,841	341.6%
Medicaid	7	7.7	$85,820	$17,618	79.5%	$10,205	$7,413	42.1%

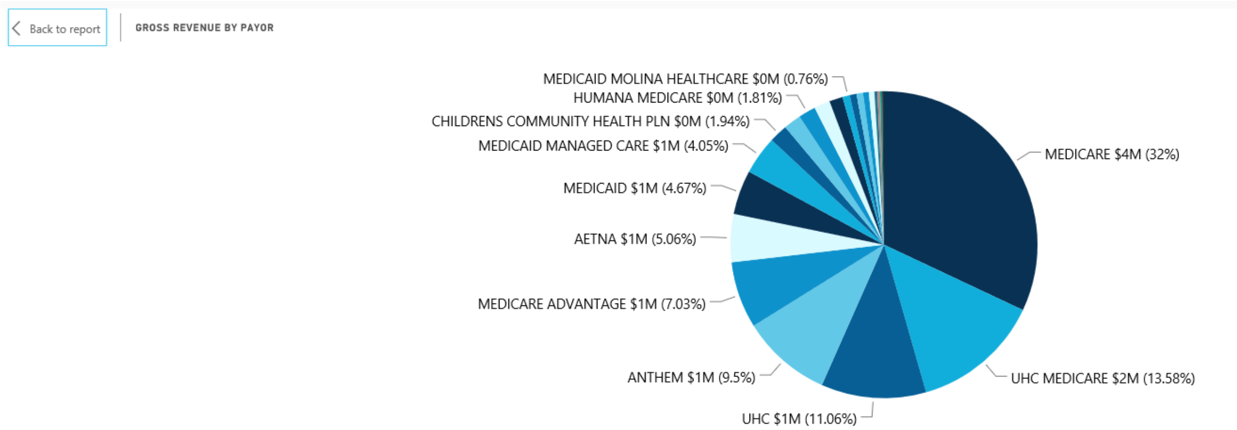
- Drill up or down through the data by right-clicking the row, and selecting **Drill Up** or **Drill Down**.

> **TIP:** You can also view drill down information by clicking + next to the financial class description.

Financial Class Description	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
Other	1	1.0	$46,623	$20,445	56.1%	-$61,342	$81,787	400.0%
Trilogy	1	2.0	$36,828	$19,829	46.2%	$5,408	$14,422	72.7%
UMR UHC	26	5.1	$63,930	$19,829	69.0%	$6,173	$13,656	68.9%
Other Commercial	1	1.0	$75,107	$19,058	74.6%	$3,804	$15,254	80.0%
Medicaid	7	7.7	$85,820	$17,618	79.5%	$10,205	$7,413	42.1%
Medicare	52	7.1	$87,773	$17,000	80.6%	$158,117	-$141,117	-830.1%
Aetna	2	24.0	$325,654	$14,901	95.4%	-$144,305	$159,206	1068.4%
Medicare HMO	10	11.4	$117,941	$14,004	88.1%	-$33,837	$47,841	341.6%
Medicare UHC	25	6.6	$69,924	$8,571	87.7%	$515,856	-$507,285	-5918.6%

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



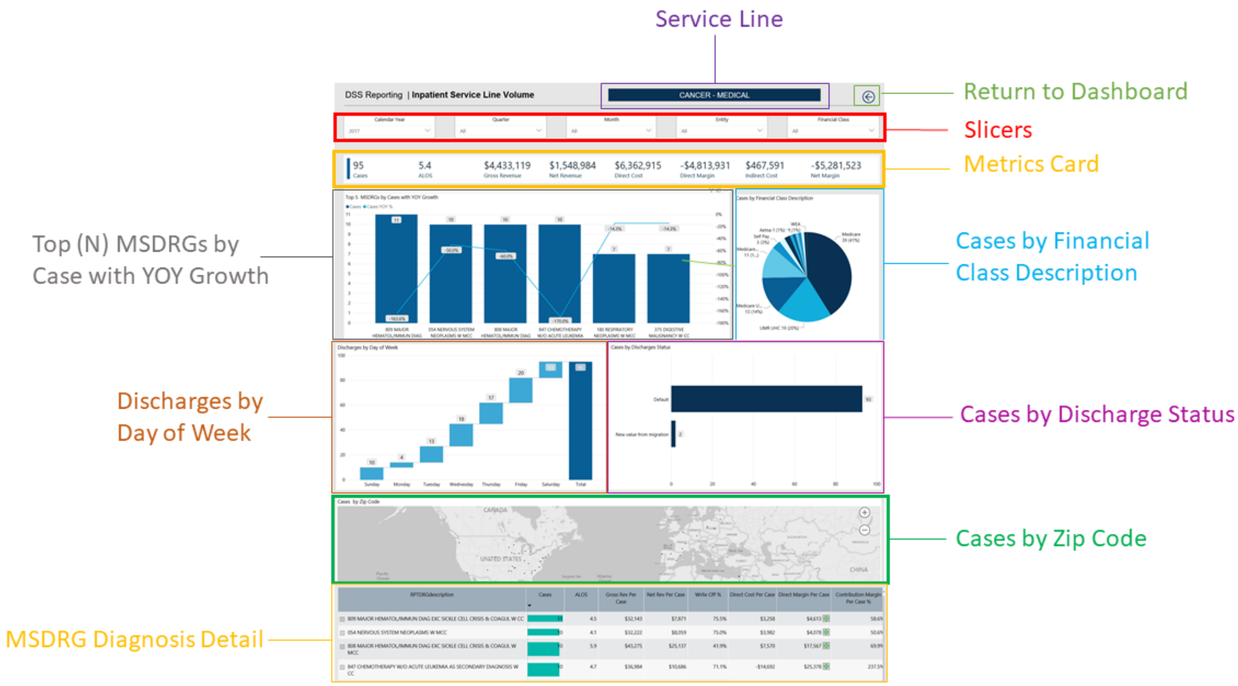
PayorDescription	Gross Revenue
MEDICARE	$4,119,102
UHC MEDICARE	$1,748,103
UHC	$1,424,385
ANTHEM	$1,222,760
MEDICARE ADVANTAGE	$904,729
AETNA	$651,308
MEDICAID	$600,740
MEDICAID MANAGED CARE	$520,777
CHILDRENS COMMUNITY HEALTH PLN	$250,034
UMR	$237,796
HUMANA MEDICARE	$233,423
COMMERCIAL	$216,272
DEAN	$183,118
MEDICAID MOLINA HEALTHCARE	$98,142
HUMANA	$92,520
SELF-PAY	$88,179
UHC COMMUNITY	$78,059
UNITY	$75,107
ANTHEM MEDICARE	$41,260
HPS	$36,828
WORKERS COMPENSATION	$26.332

Inpatient Service Line Volume report

Overview

This page provides the volume details for a specific service line selected in the Inpatient Service Line Dashboard.

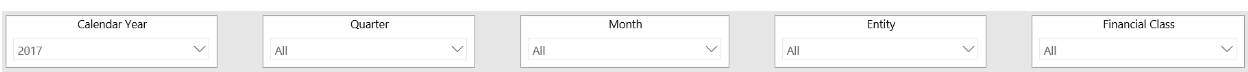
The top of the page displays the service line the page applies to. To return to the Inpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

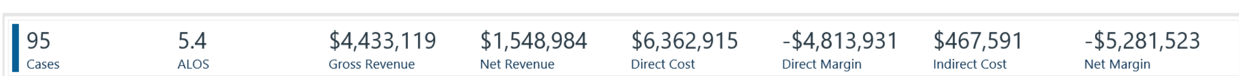
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



▶ Metrics Card

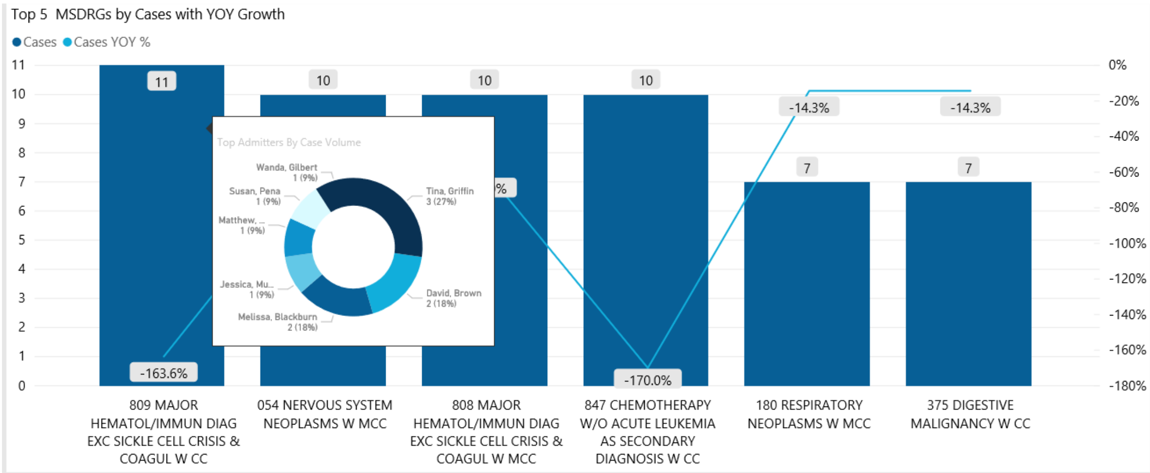
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select the different options from the different areas on the page, the totals in the Metrics Card adjust accordingly.



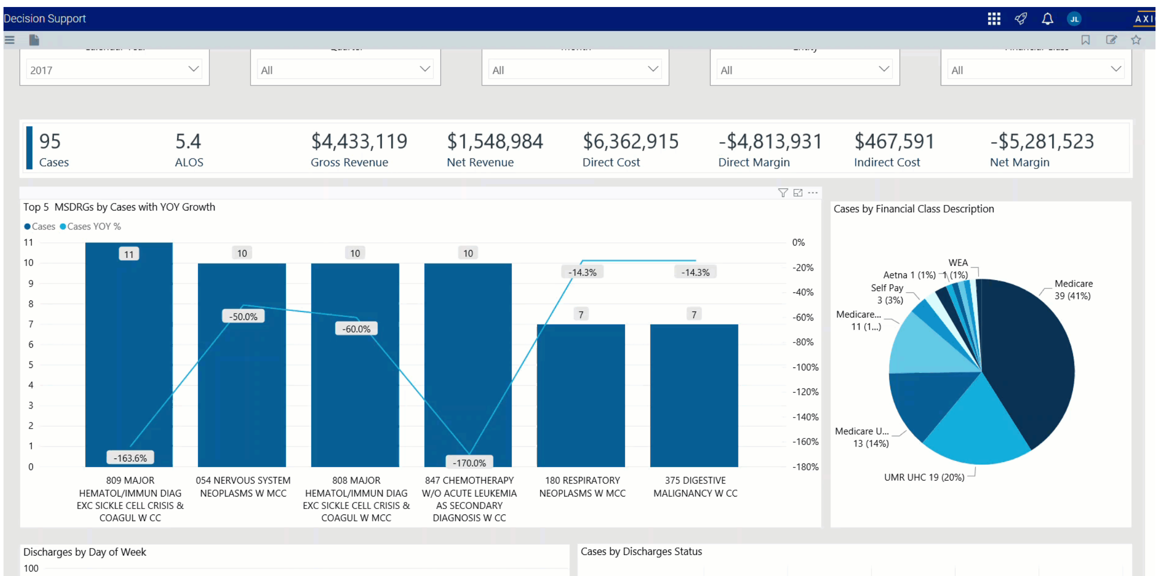
▶ Top (N) MSDRGs by Cases with YOY Growth

This section displays a bar graph of the top cases with a graph line that shows the YOY growth percentage. From here, you can do the following:

- View a breakdown of the top admitters by case volume by hovering your cursor over any bar.



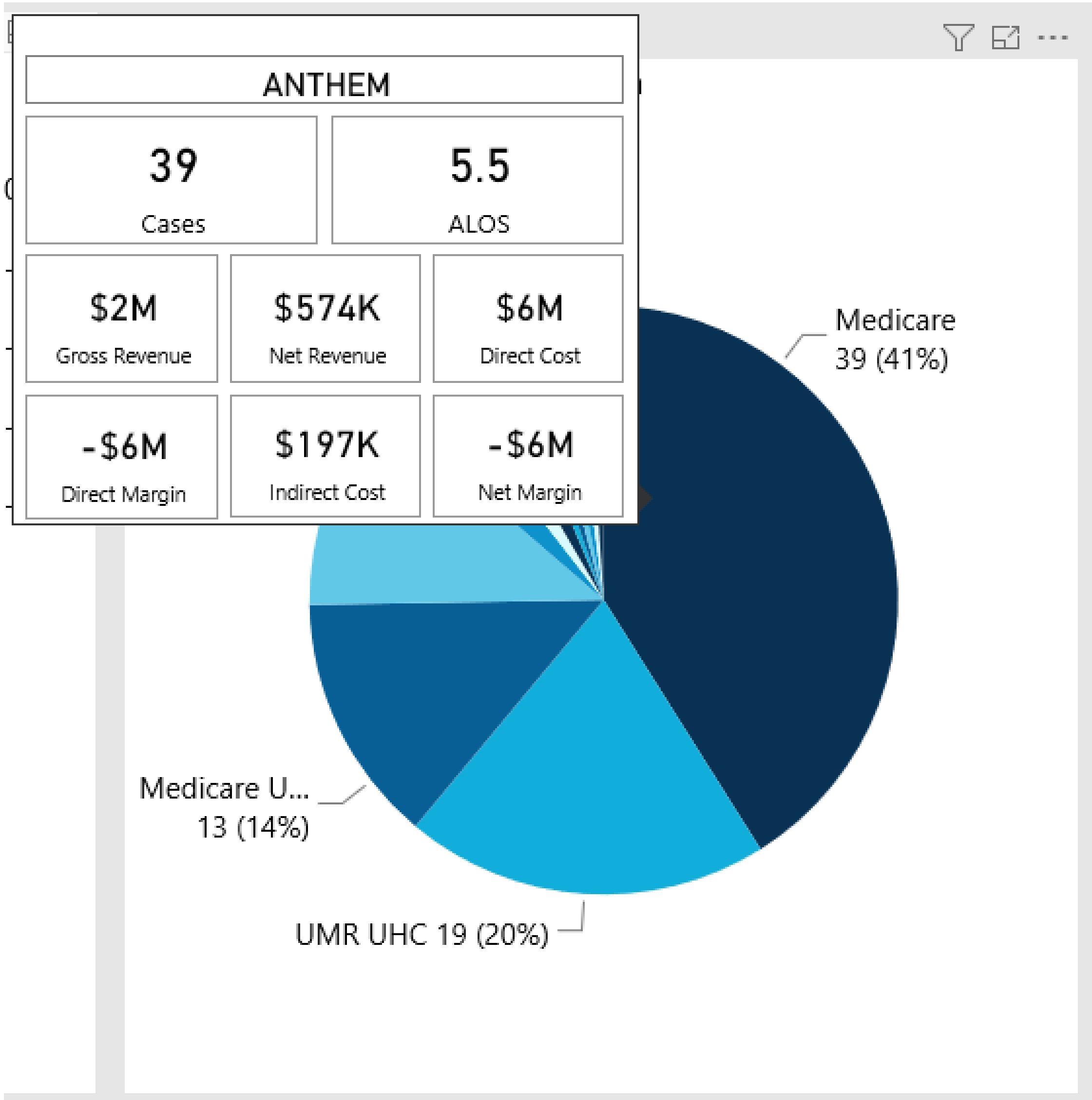
- View the KPIs specific to a case type by clicking a bar. The sections of the page will adjust to show data specific to that diagnosis.



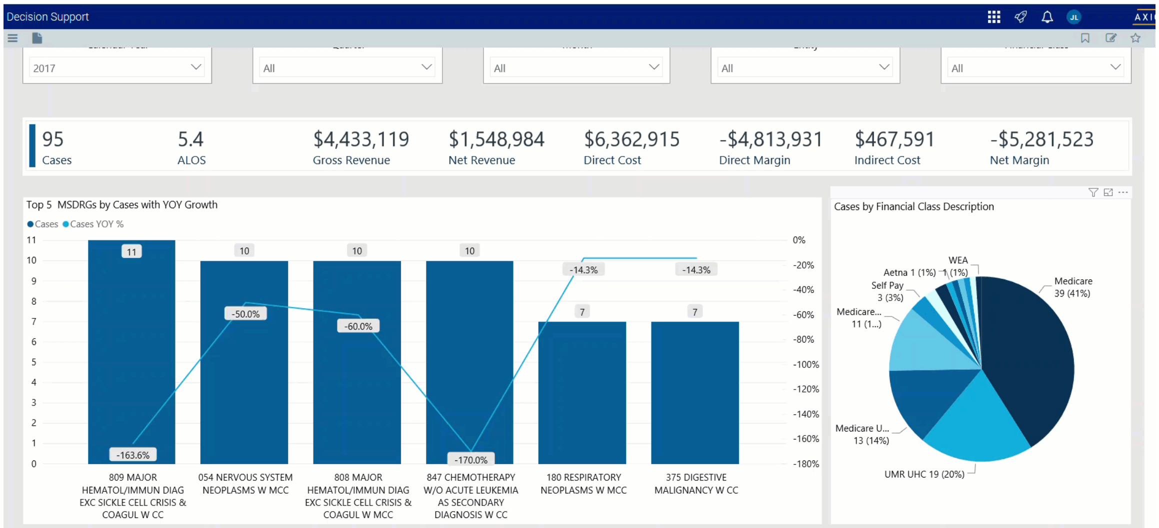
Cases by Financial Class Description

This sections displays a pie chart that breaks down cases by financial class. From here, you can do the following:

- View details regarding cases, gross and net revenue, direct and indirect cost, direct and net margin for a financial class by hovering your cursor over a slice.


ANTHEM
39
Cases
5.5
ALOS
$2M
Gross Revenue
$574K
Net Revenue
$6M
Direct Cost
-$6M
Direct Margin
$197K
Indirect Cost
-$6M
Net Margin
Medicare
39 (41%)
Medicare U...
13 (14%)
UMR UHC 19 (20%)

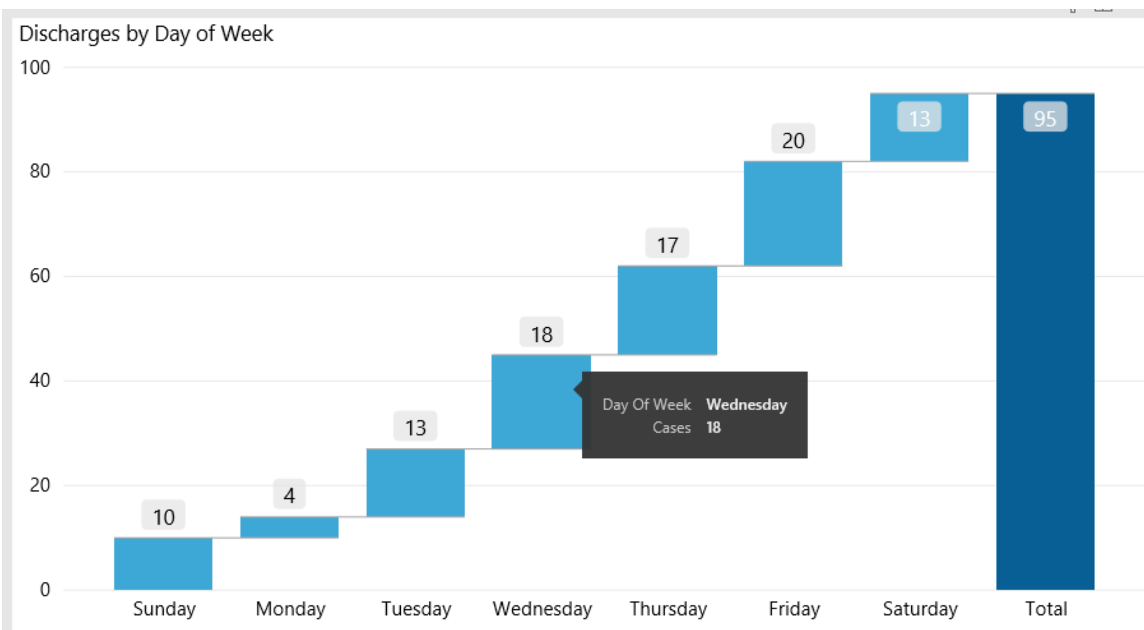
- View the KPIs specific to a financial class by clicking a slice. The sections on the page will adjust to show the data specific to that financial class.



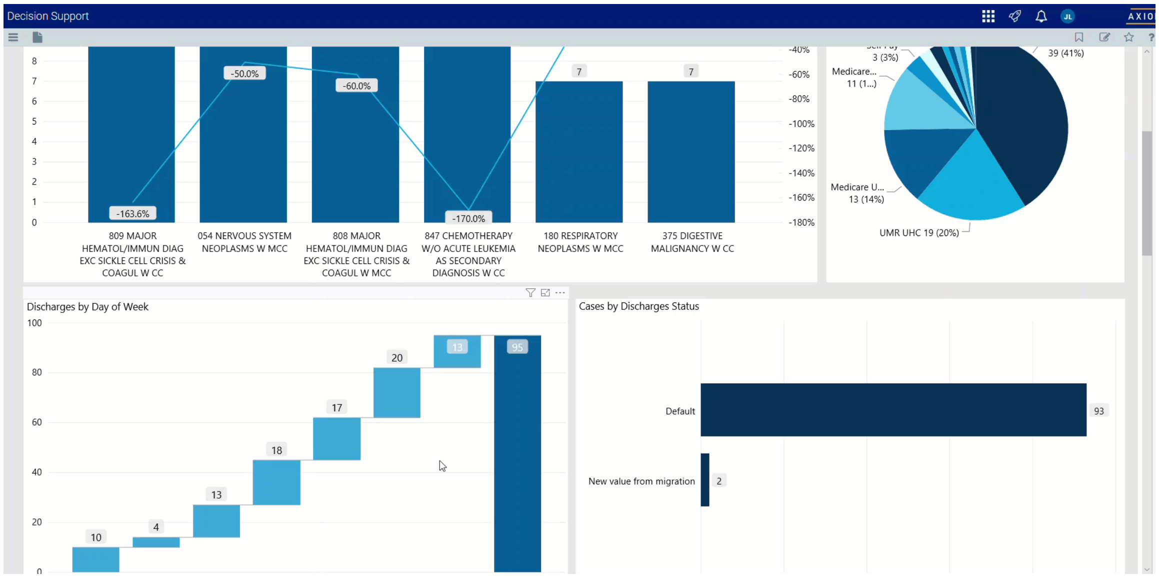
▶ Discharges by Day of Week

This section displays a bar chart of the number of discharges broken down by days of the week. From here, you can do the following:

- View the number of discharges for each day by hovering your cursor over a bar.



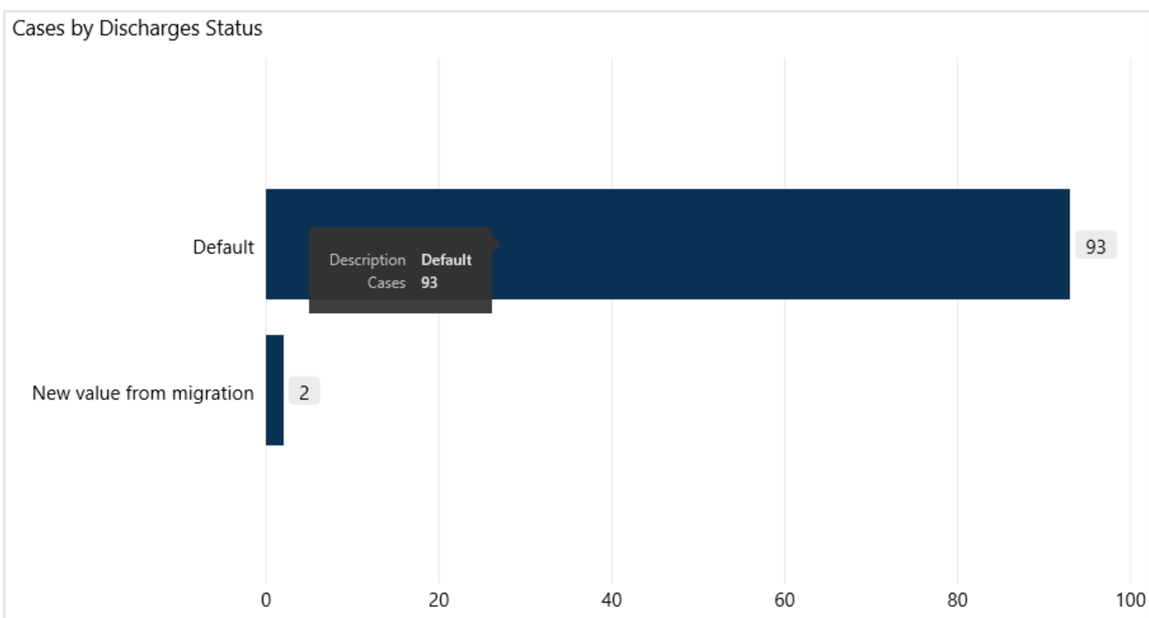
- View the KPIs specific to a discharge by clicking a bar. The sections on the page will adjust to show the data specific to that discharge.



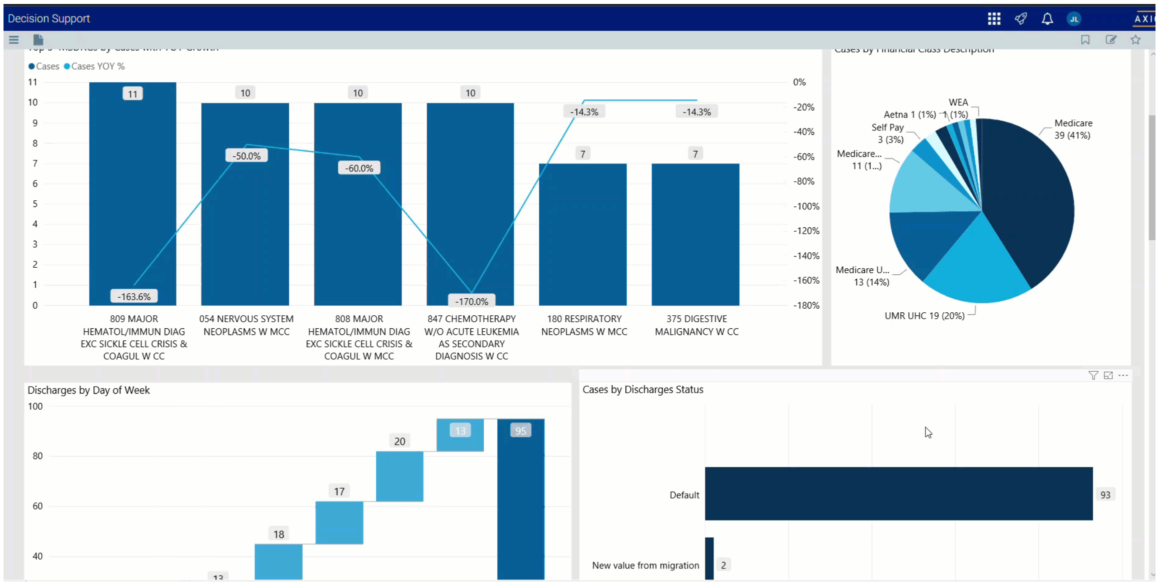
▶ Cases by Discharge Status

This section displays the cases by discharge status. From here, you can do the following:

- View the number of cases for a type of discharge status by hovering your cursor over a bar.



- View the KPIs specific to a discharge status by clicking a bar. The sections on the page will adjust to show the data specific to that discharge.



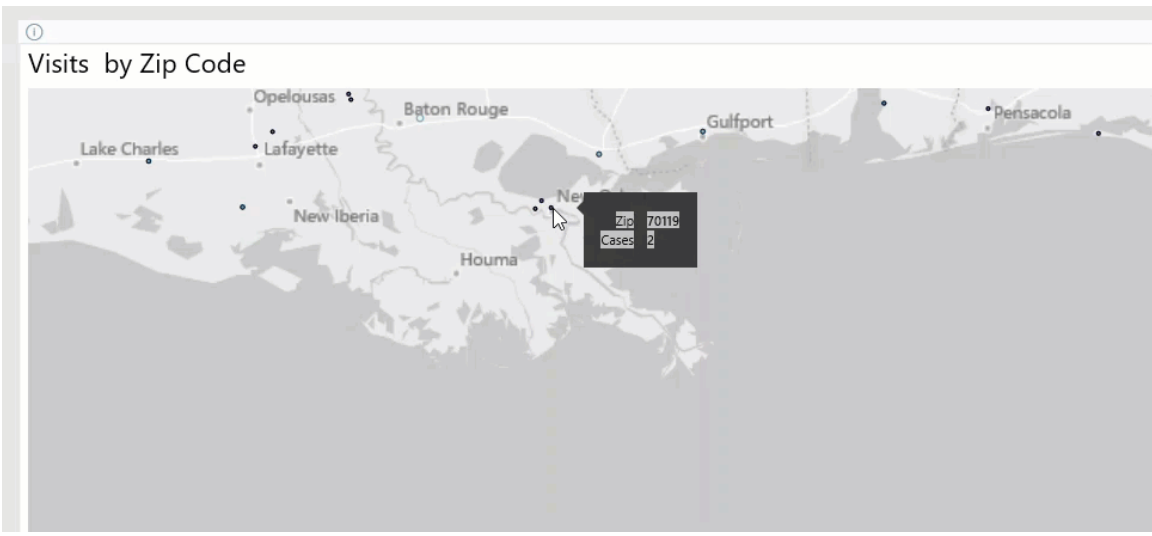
Visits by Zip Code

This section displays the cases by location using a map. From here, you can do the following:

- Zoom in and out of the map by clicking + or - on the right side of the page. You can move the map by holding down the left mouse button and moving the mouse to the area to view.

- View the zip code and number of visits for a location by hovering your cursor over a dot on the map.

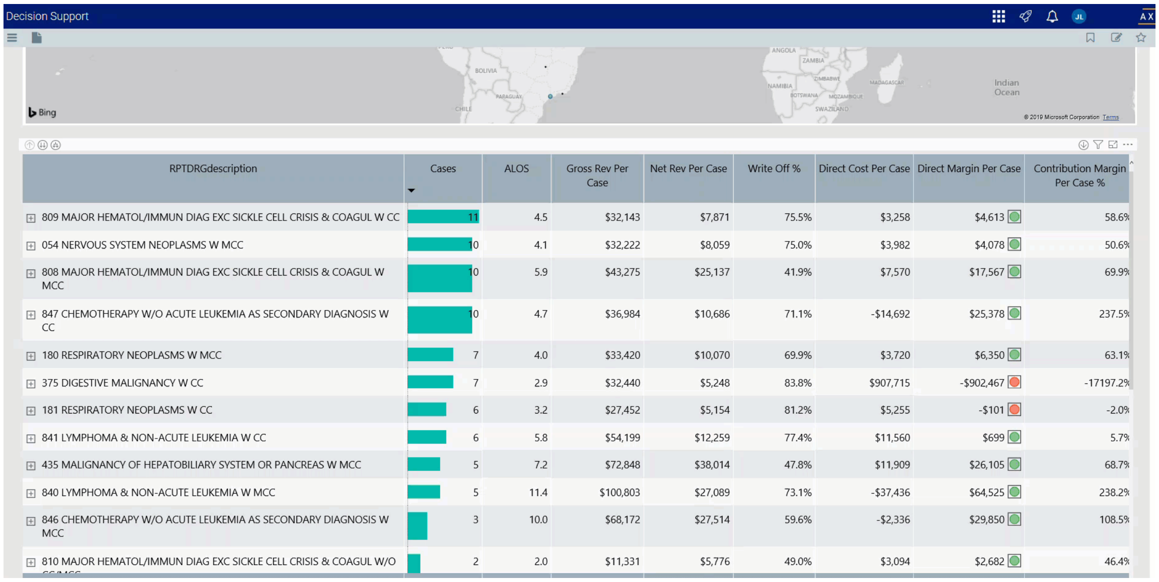
- View information about visits specific to that location by clicking a dot on the map, and the sections on the page will adjust accordingly.



DRG Diagnosis Detail

This sections displays the revenue values related to profitability for each DRG. From this table, you can do the following:

- View the details for a DRG by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.



RPTDRGdescription	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
809 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W CC	11	4.5	$32,143	$7,871	75.5%	$3,258	$4,613	58.6%
054 NERVOUS SYSTEM NEOPLASMS W MCC	10	4.1	$32,222	$8,059	75.0%	$3,982	$4,078	50.6%
808 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W MCC	10	5.9	$43,275	$25,137	41.9%	$7,570	$17,567	69.9%
847 CHEMOTHERAPY W/O ACUTE LEUKEMIA AS SECONDARY DIAGNOSIS W CC	10	4.7	$36,984	$10,686	71.1%	-$14,692	$25,378	237.5%
180 RESPIRATORY NEOPLASMS W MCC	7	4.0	$33,420	$10,070	69.9%	$3,720	$6,350	63.1%
375 DIGESTIVE MALIGNANCY W CC	7	2.9	$32,440	$5,248	83.8%	$907,715	-$902,467	-17197.2%
181 RESPIRATORY NEOPLASMS W CC	6	3.2	$27,452	$5,154	81.2%	$5,255	-$101	-2.0%
841 LYMPHOMA & NON-ACUTE LEUKEMIA W CC	6	5.8	$54,199	$12,259	77.4%	$11,560	$699	5.7%
435 MALIGNANCY OF HEPATOBILIARY SYSTEM OR PANCREAS W MCC	5	7.2	$72,848	$38,014	47.8%	$11,909	$26,105	68.7%
840 LYMPHOMA & NON-ACUTE LEUKEMIA W MCC	5	11.4	$100,803	$27,089	73.1%	-$37,436	$64,525	238.2%
846 CHEMOTHERAPY W/O ACUTE LEUKEMIA AS SECONDARY DIAGNOSIS W MCC	3	10.0	$68,172	$27,514	59.6%	-$2,336	$29,850	108.5%
810 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W/O	2	2.0	$11,331	$5,776	49.0%	$3,094	$2,682	46.4%

- Sort the table by columns in ascending or descending order by clicking the column header.

RPTDRGdescription	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
809 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W CC	11	4.5	$32,143	$7,871	75.5%	$3,258	$4,613	58.6%
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Total	**95**	**5.4**	**$46,664**	**$16,305**	**65.1%**	**$66,978**	**-$50,673**	**-310.8%**

- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

RPTDRGdescription	Cases	ALOS	Gross Rev Per Case	Net Rev Per Case	Write Off %	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin Per Case %
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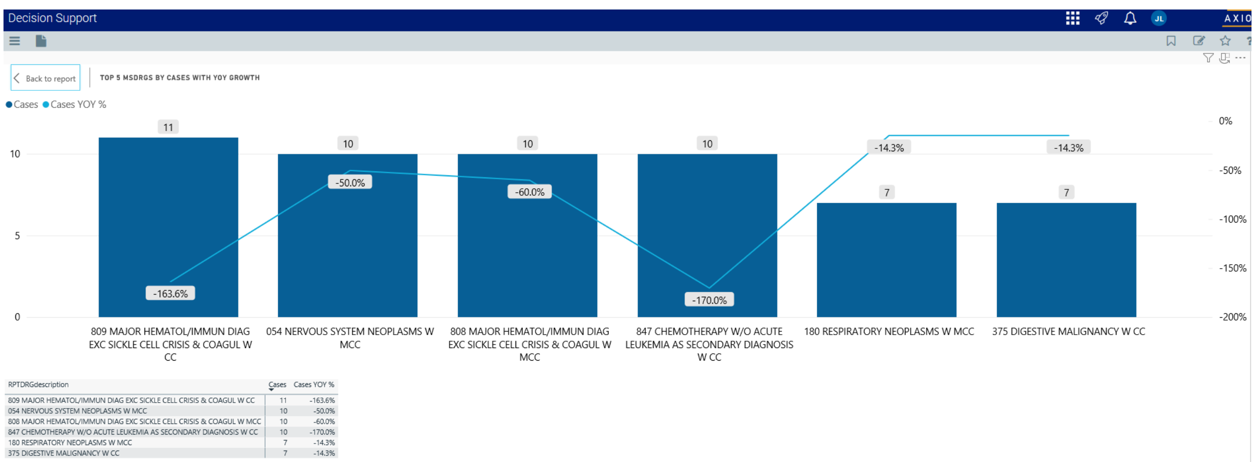
Total	**95**	**5.4**	**$46,664**	**$16,305**	**65.1%**	**$66,978**	**-$50,673**	**-310.8%**

▶ Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



RPTDRGdescription	Cases	Cases YOY %
809 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W CC	11	-163.6%
054 NERVOUS SYSTEM NEOPLASMS W MCC	10	-50.0%
808 MAJOR HEMATOL/IMMUN DIAG EXC SICKLE CELL CRISIS & COAGUL W MCC	10	-60.0%
847 CHEMOTHERAPY W/O ACUTE LEUKEMIA AS SECONDARY DIAGNOSIS W CC	10	-170.0%
180 RESPIRATORY NEOPLASMS W MCC	7	-14.3%
375 DIGESTIVE MALIGNANCY W CC	7	-14.3%

Using the Outpatient Service Line Dashboard

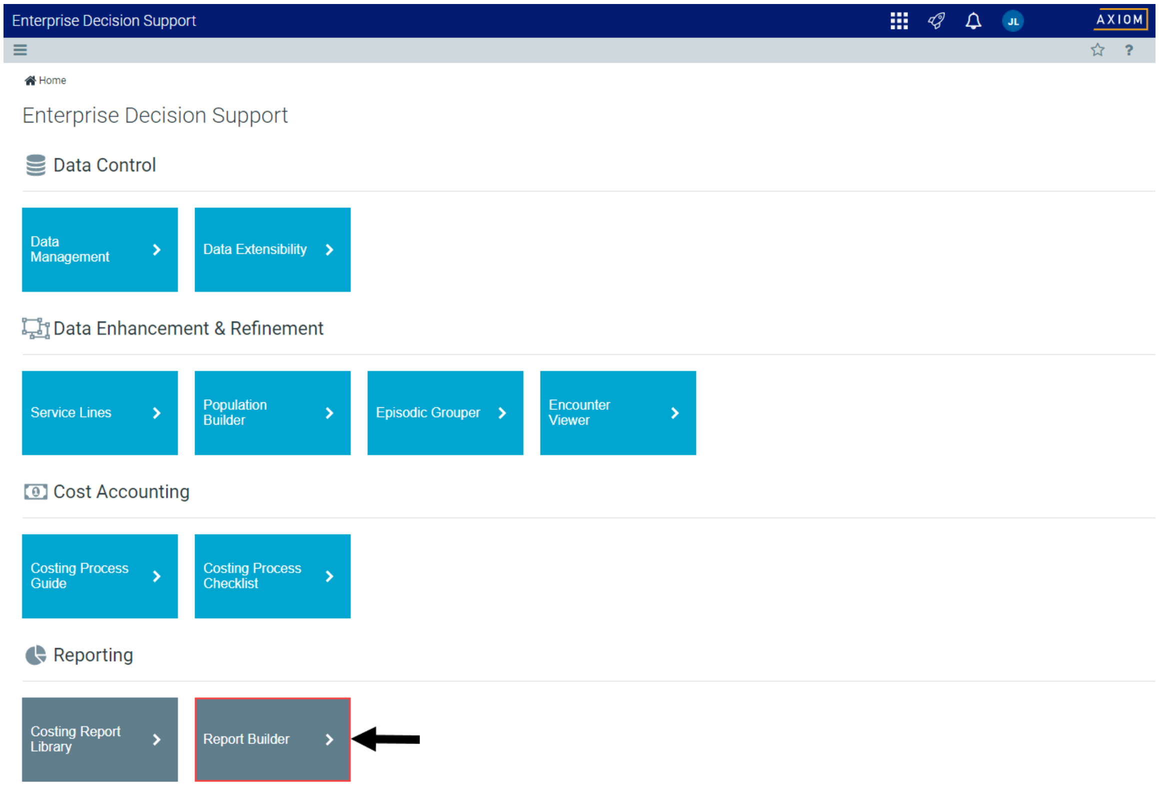
▶ Overview

This dashboard displays a view of all the outpatient service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

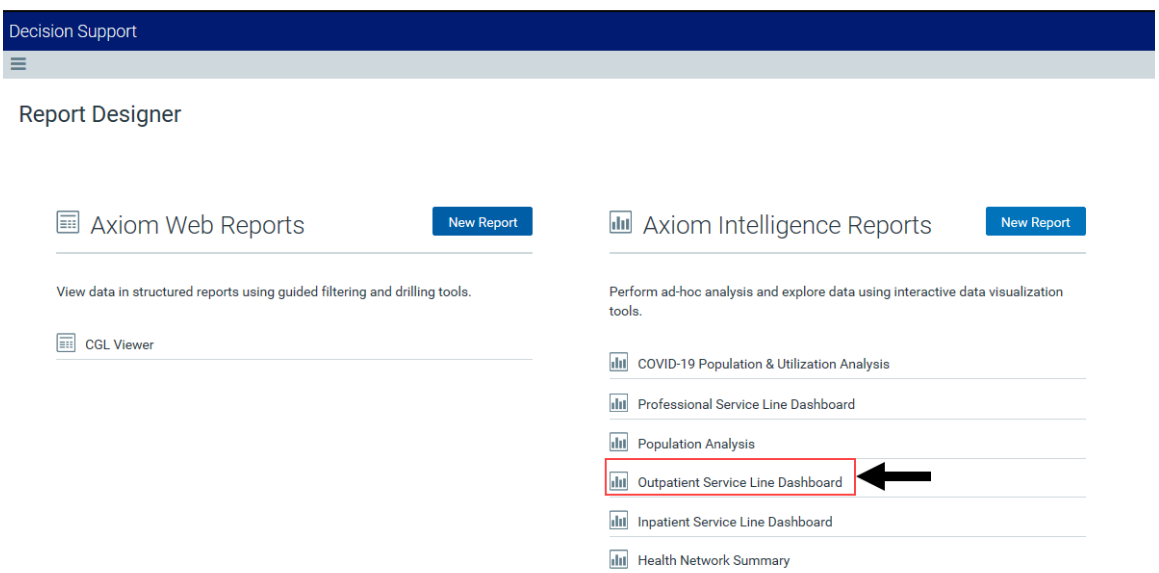
Opening the dashboard

To open the dashboard:

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

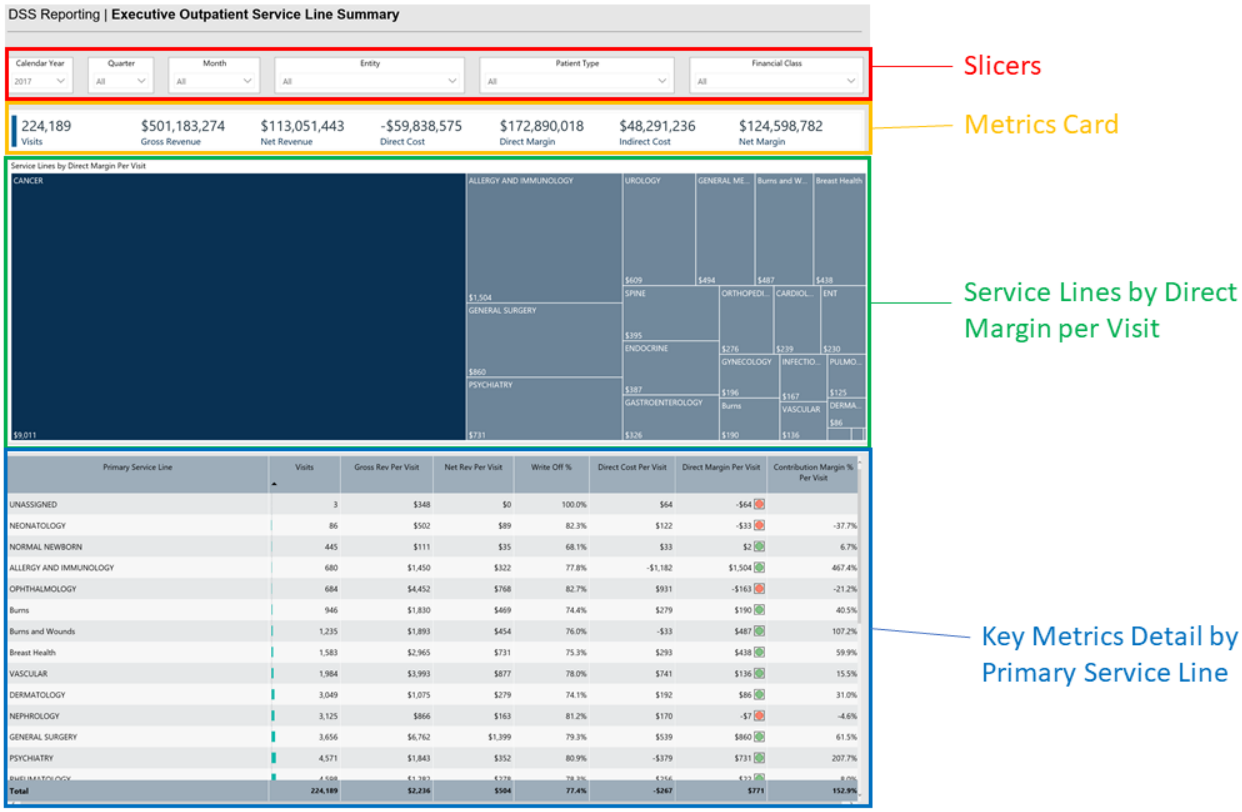


2. In the Axiom Intelligence Reports section, click **Outpatient Service Line Dashboard**.



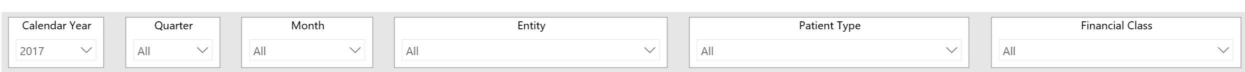
Navigating the dashboard

The Executive Outpatient Service Line Summary page serves as the main home page for the dashboard and includes the following sections:



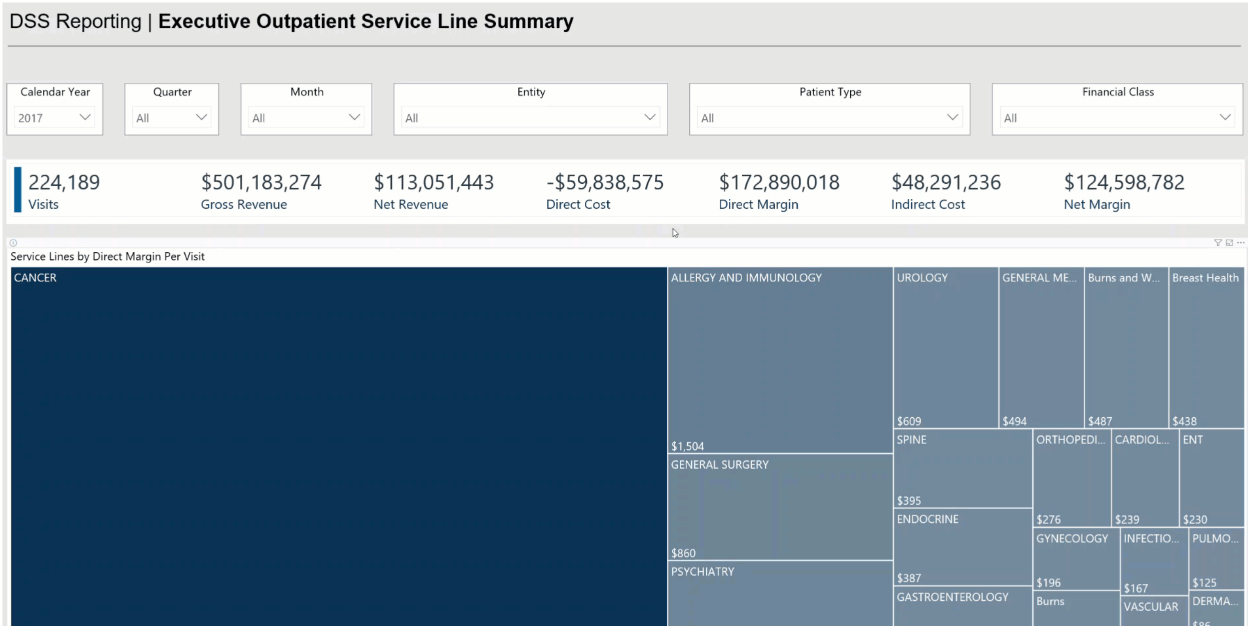
Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the slicer drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



Metrics Card

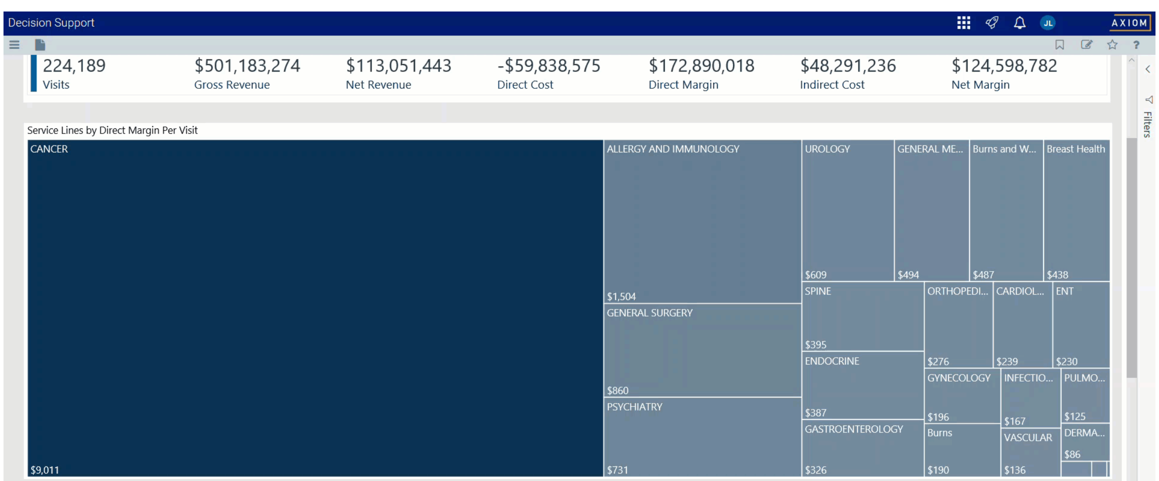
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select service lines from the different areas of the page, the totals in the Metrics Card adjust to show the metrics specific to that service line.



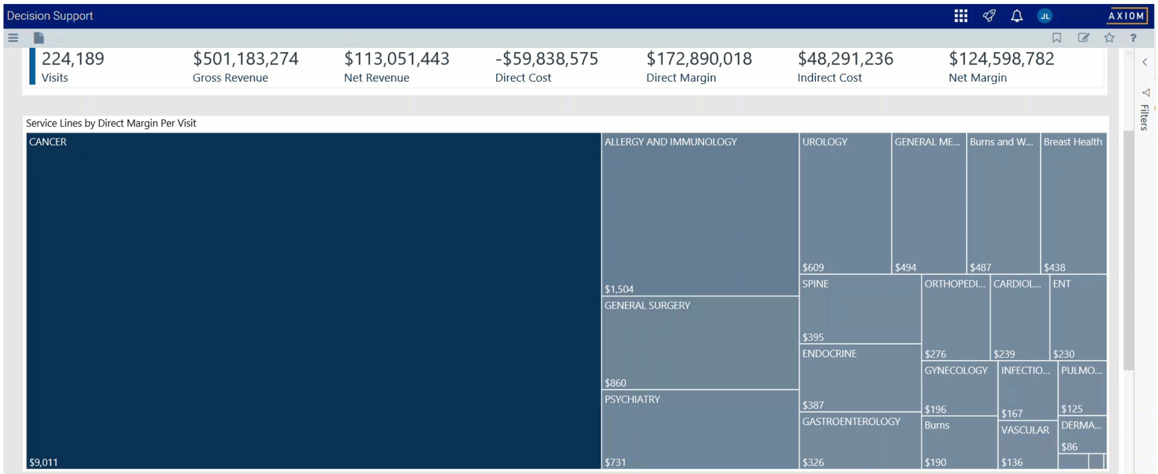
Service Lines by Direct Margin Per Visit

This section provides a visualization of your direct margin for each visit across service lines. From this section, you can do the following:

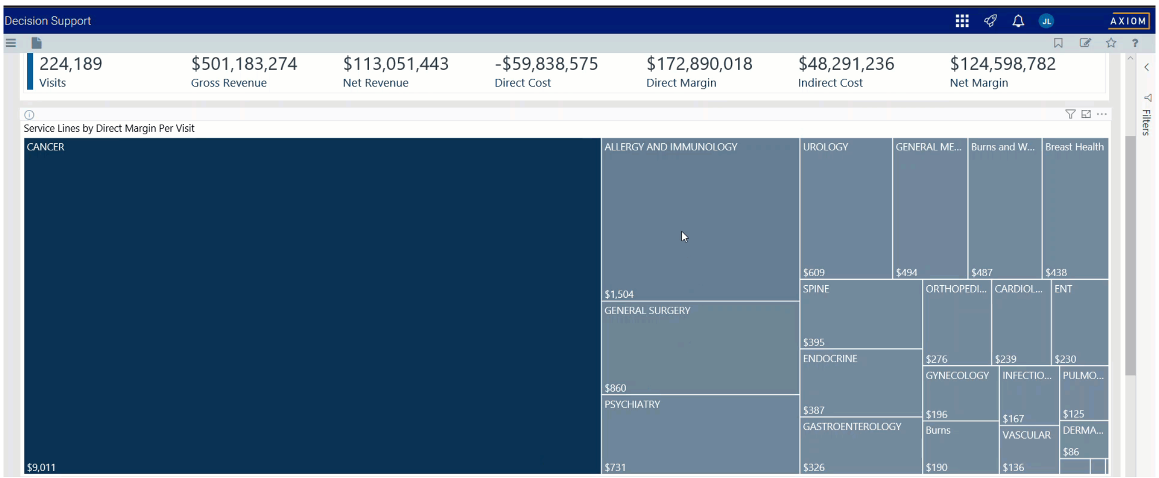
- View details about a specific service line by placing your cursor on a square. The system displays a tool tip that provides information on the number of visits compared to last year, the gross revenue by financial class, and a cost breakdown.



- View metrics specific to a service line by clicking a square. The system greys out the other service line squares and only shows metrics and details for that service line. To enable all of the service lines, click the square again.



- Open drillthrough pages for outpatient service line data by right-clicking any square, and selecting a report. For more information, see Using drillthrough pages in the section below.



Key Metrics Detail by Primary Service Line

This section displays the values related to profitability for each service line. From this section, you can do the following:

- View the underlying data for service lines by right-clicking the row, and clicking **Show Data**.
- Exclude a service line from the table by right-clicking the service line row, and clicking **Exclude**. To show only one service line in the table, right click the service line, and click **Include**.

- Sort the information in the table by clicking the column to toggle between sorting the table data by the column in ascending or descending order.

> **TIP:** An arrow displays in the column in which the data is sorted. An up arrow indicates ascending order. A down arrow indicated descending order.

- Drill down further by right-clicking anywhere in the table, and from the menu, selecting the drillthrough reports to display. For more information, see Using drillthrough pages in the section below.

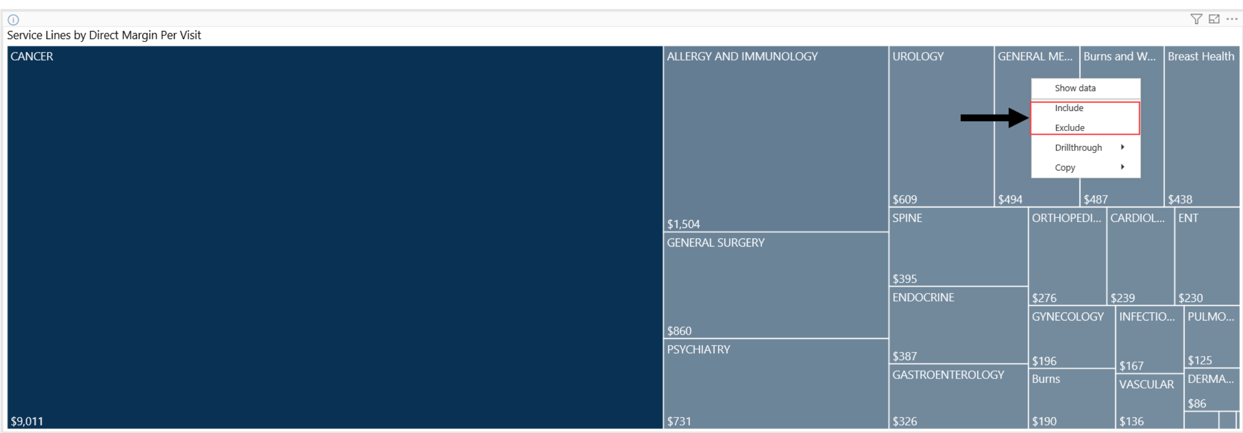
Using drillthrough pages

The following is a list of the drillthrough pages available from the Service Lines by Direct Margin Per Visit and Key Metrics Detail sections of the dashboard:

- Executive Outpatient Service Line Trend report
- Outpatient Service Line Cost report
- Outpatient Service Line Revenue report
- Outpatient Service Line Volume report

Including or excluding data

You can exclude data from a visualization chart or a table by right-clicking the image or table row, and clicking **Exclude**. To show only one service line in the visualization or table, right click the image or a table row, and click **Include**. You can also perform this action in the Executive Summary page of the dashboard and the drillthrough pages.



Viewing data in table format

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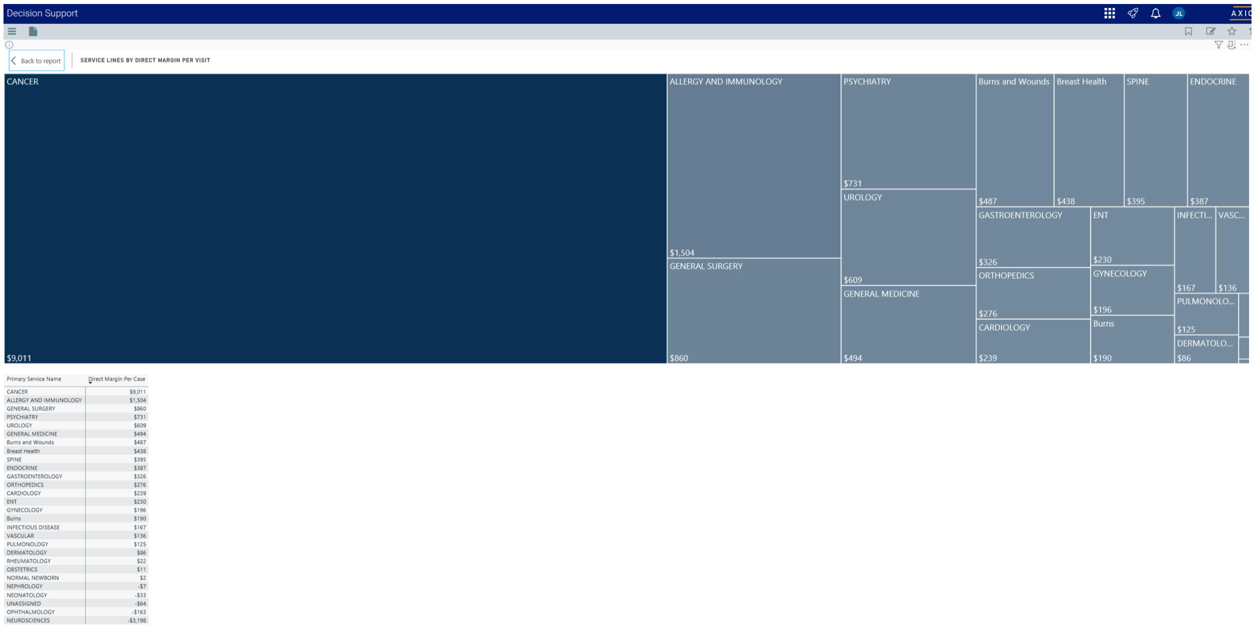


Copying data for other reports

If you have permissions to edit or create Axiom Intelligence reports, you can copy visuals to create a new report. For tables, you can also copy values and selections.

To copy, right-click in the section, and select **Copy Visual**, **Copy Selection** (tables only), or **Copy Value** (tables only).

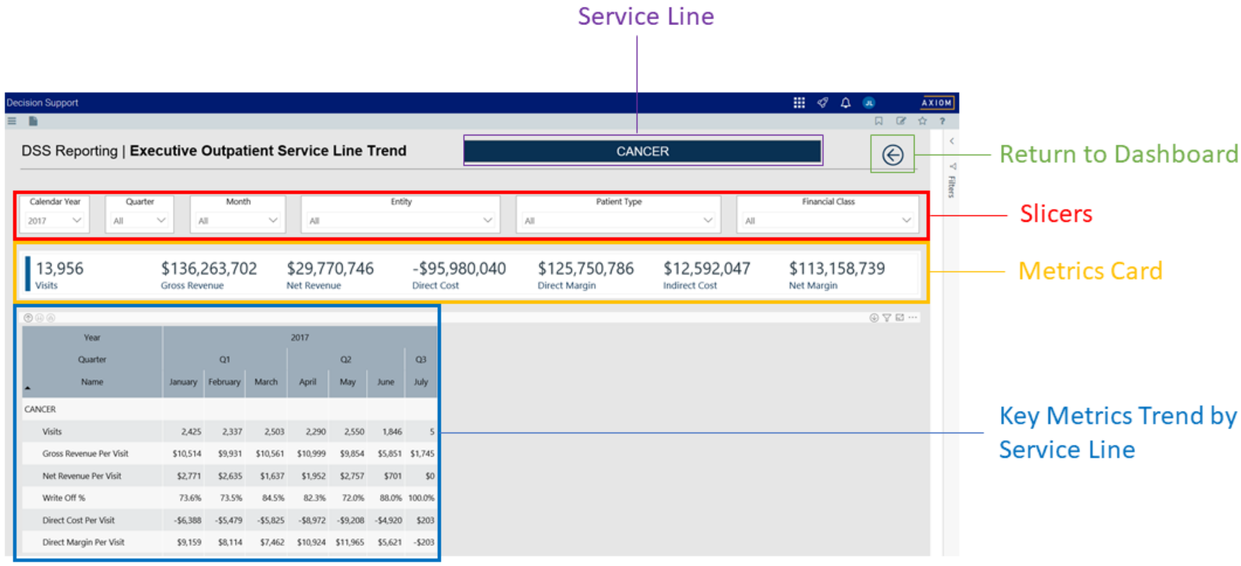
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Executive Outpatient Service Line Trend report

Overview

This page provides trend details for a specific service line selected in the Outpatient Service Line Dashboard.

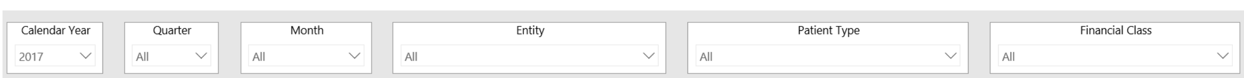
The top of the page displays the service line the page applies to. To return to the Outpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

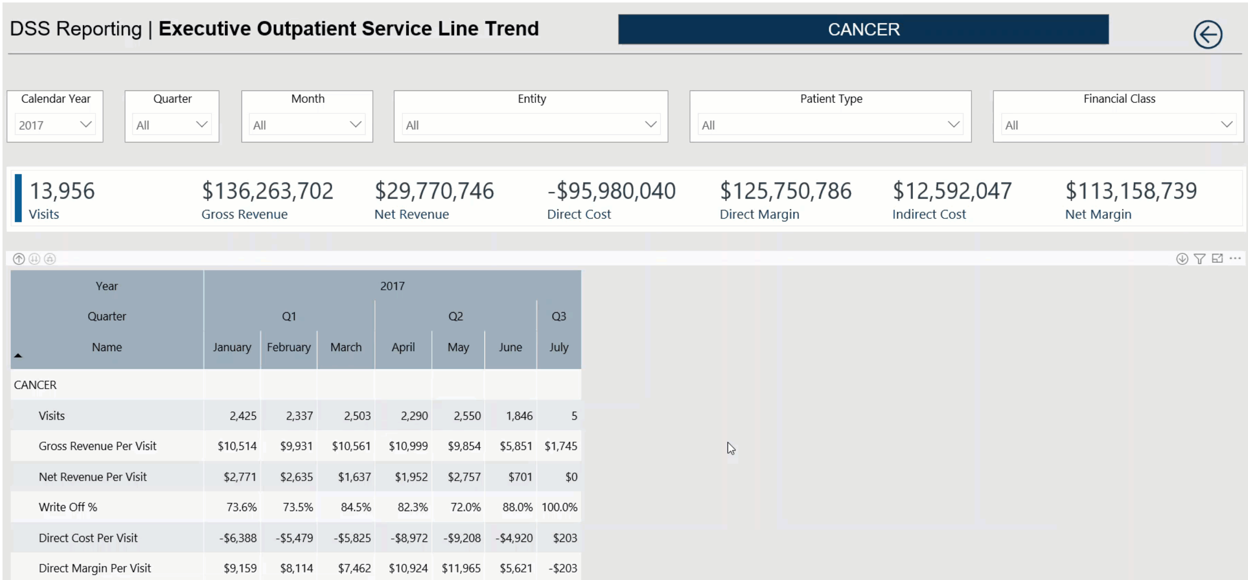
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



▶ Metrics Card

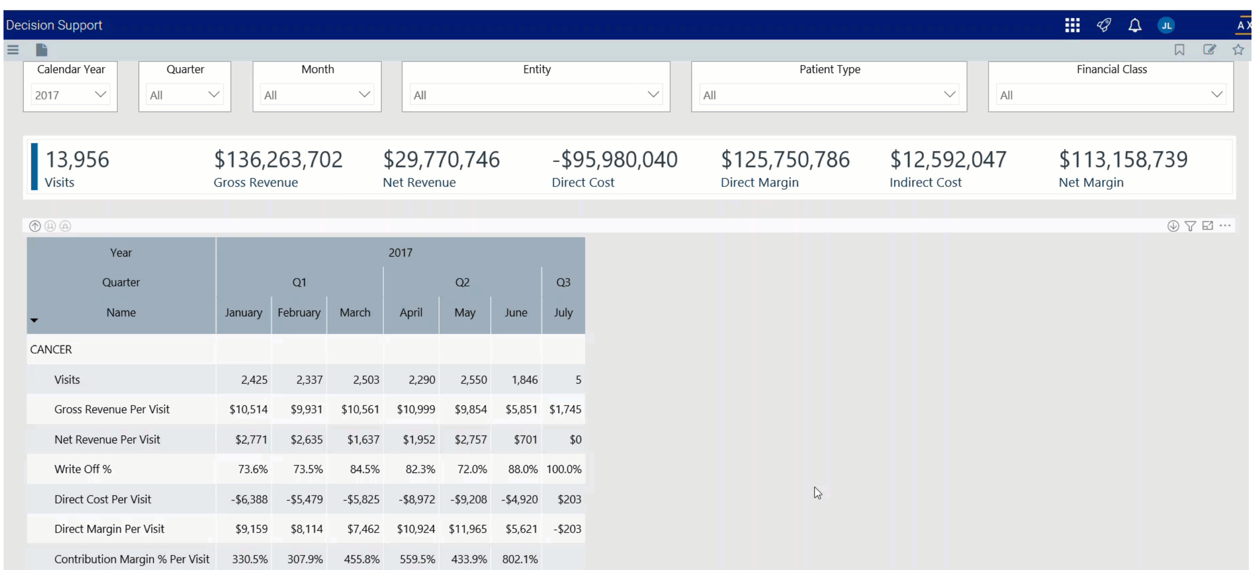
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select different columns or rows in the Key Metrics Trend table, the totals in the Metrics Card adjust accordingly.



Year	2017						
Quarter	Q1			Q2			Q3
Name	January	February	March	April	May	June	July
CANCER							
Visits	2,425	2,337	2,503	2,290	2,550	1,846	5
Gross Revenue Per Visit	$10,514	$9,931	$10,561	$10,999	$9,854	$5,851	$1,745
Net Revenue Per Visit	$2,771	$2,635	$1,637	$1,952	$2,757	$701	$0
Write Off %	73.6%	73.5%	84.5%	82.3%	72.0%	88.0%	100.0%
Direct Cost Per Visit	-$6,388	-$5,479	-$5,825	-$8,972	-$9,208	-$4,920	$203
Direct Margin Per Visit	$9,159	$8,114	$7,462	$10,924	$11,965	$5,621	-$203

Key Metrics Trend by Service Line

This section displays the values related to profitability for the corresponding service line indicated at the top of the page. From this section, you can click a column or row to view the metric values for that specific row or column. As you click a column, the other columns will gray out to indicate that the information in the Metrics Card is specific to that column.



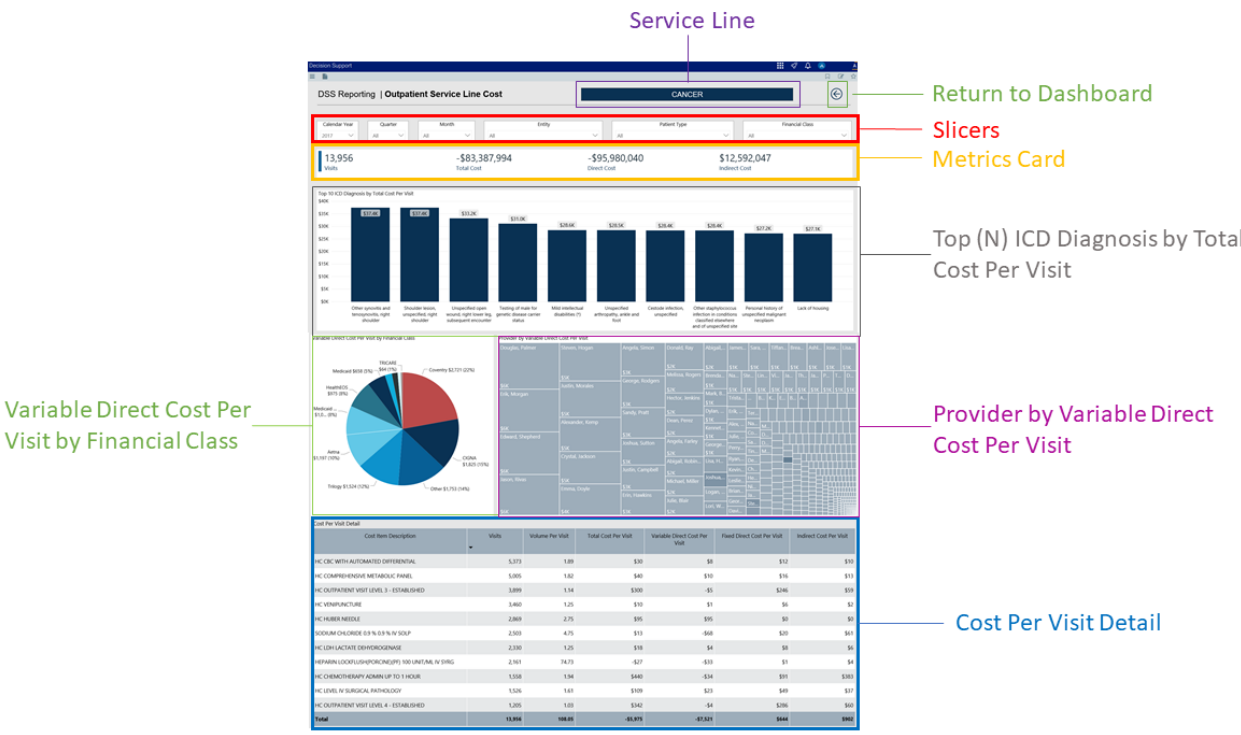
Year	2017						
Quarter	Q1			Q2			Q3
Name	January	February	March	April	May	June	July
CANCER							
Visits	2,425	2,337	2,503	2,290	2,550	1,846	5
Gross Revenue Per Visit	$10,514	$9,931	$10,561	$10,999	$9,854	$5,851	$1,745
Net Revenue Per Visit	$2,771	$2,635	$1,637	$1,952	$2,757	$701	$0
Write Off %	73.6%	73.5%	84.5%	82.3%	72.0%	88.0%	100.0%
Direct Cost Per Visit	-$6,388	-$5,479	-$5,825	-$8,972	-$9,208	-$4,920	$203
Direct Margin Per Visit	$9,159	$8,114	$7,462	$10,924	$11,965	$5,621	-$203
Contribution Margin % Per Visit	330.5%	307.9%	455.8%	559.5%	433.9%	802.1%	

Outpatient Service Line Cost report

▶ Overview

This page provides cost details for a specific service line selected in the Outpatient Service Line Dashboard.

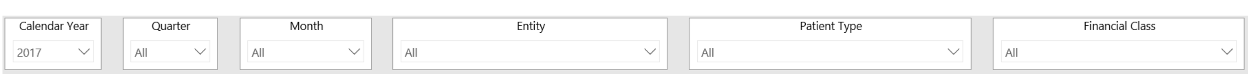
The top of the page displays the service line the page applies to. To return to the Outpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

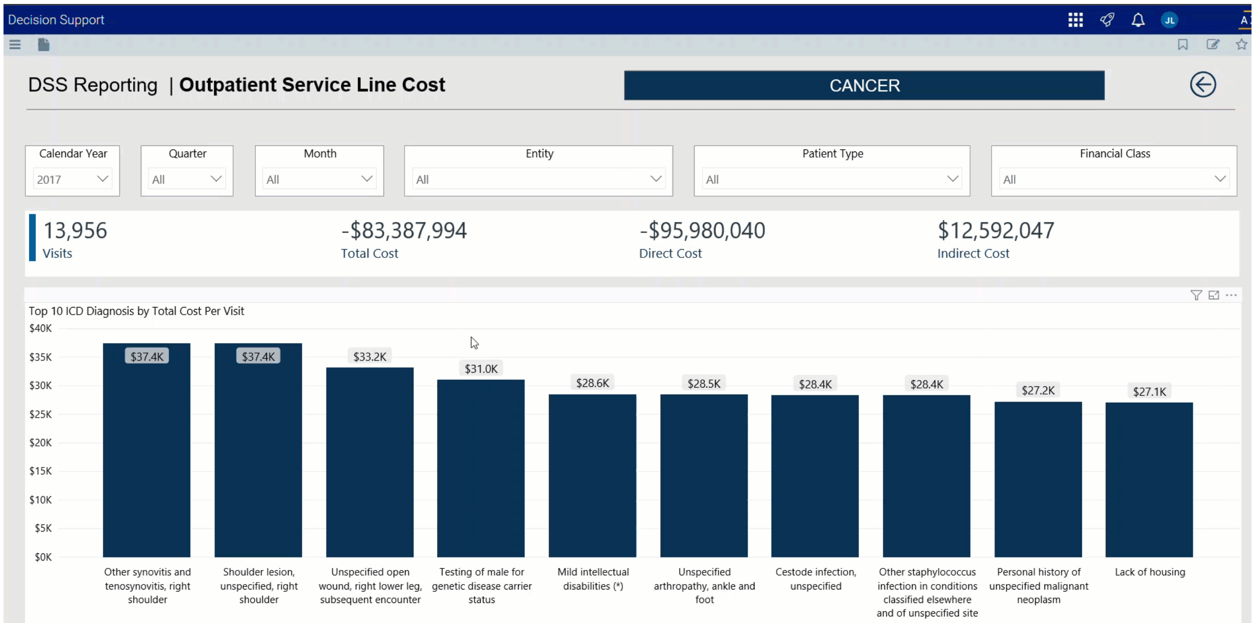
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



▶ Metrics Card

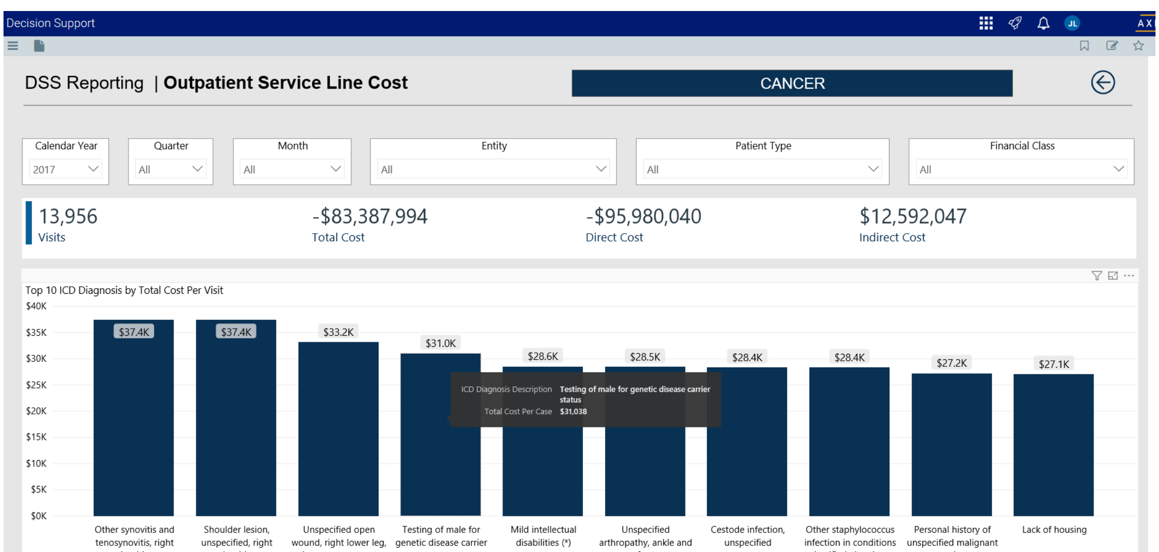
This section displays KPI data for visits, total cost, direct and indirect cost. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.



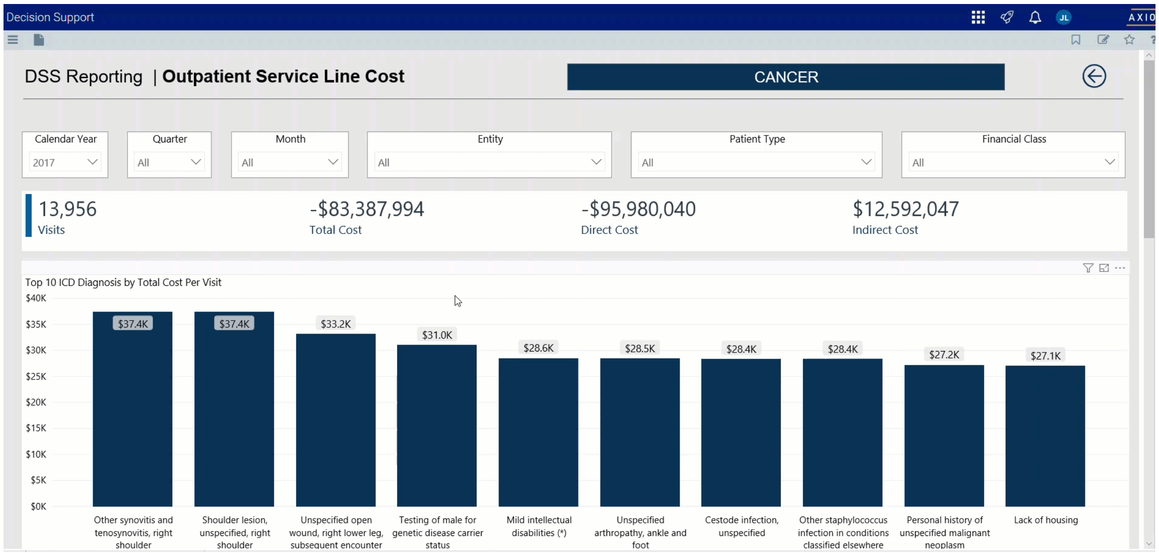
▶ Top (N) ICD Diagnosis by Total Cost Per Visit

This bar chart displays the total cost per visit for each ICD Diagnosis. From this section, you can do the following:

- View cost details about a specific ICD Diagnosis by hovering your cursor over a bar. The system displays a tool tip that provides information on the diagnosis description and the total cost per case.



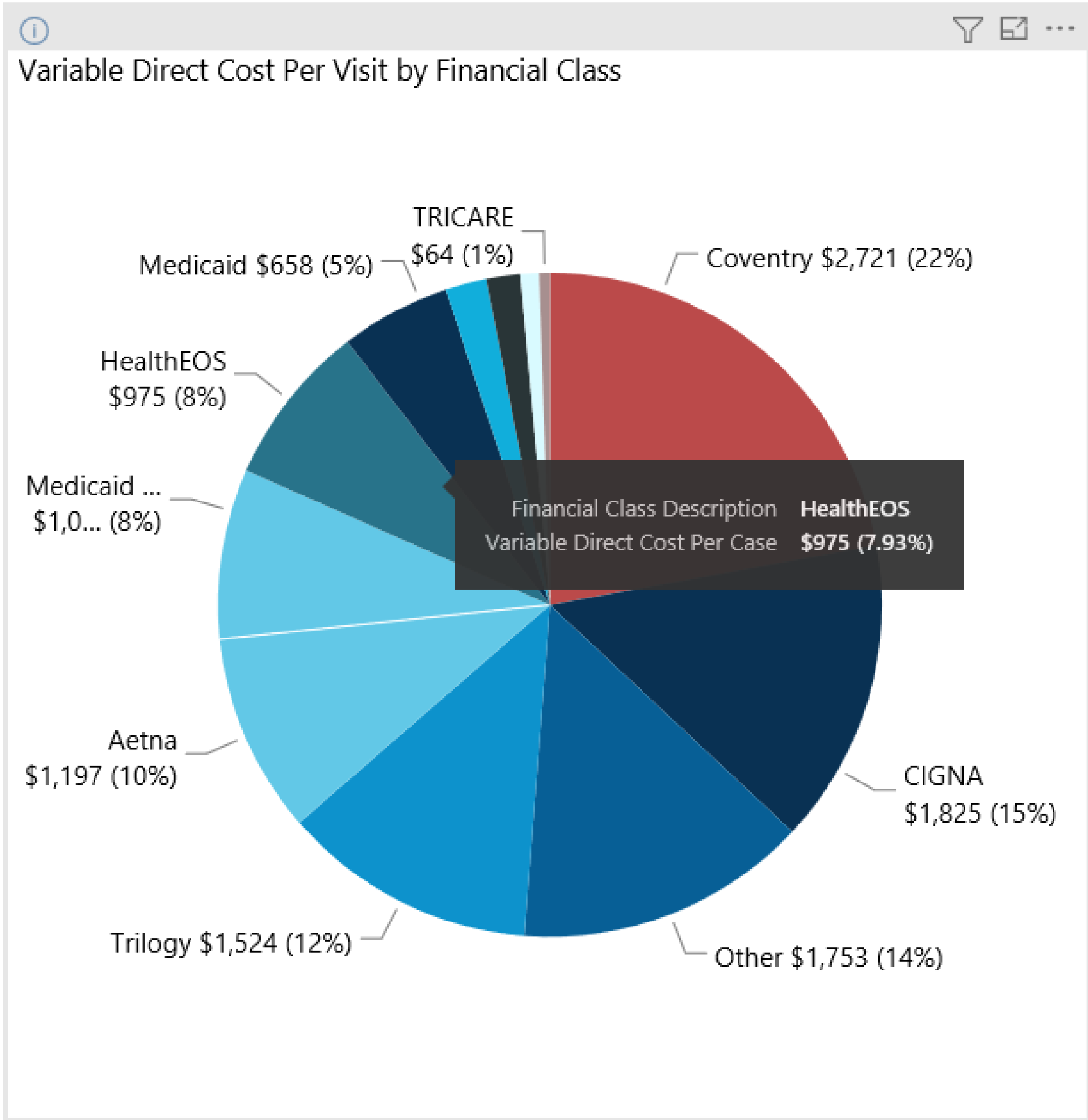
- View cost details for a specific diagnosis by clicking a bar. The system greys out the other diagnosis bars in the chart and only shows metrics and details for that diagnosis. To enable all of the diagnosis data in the page again, click the bar again.



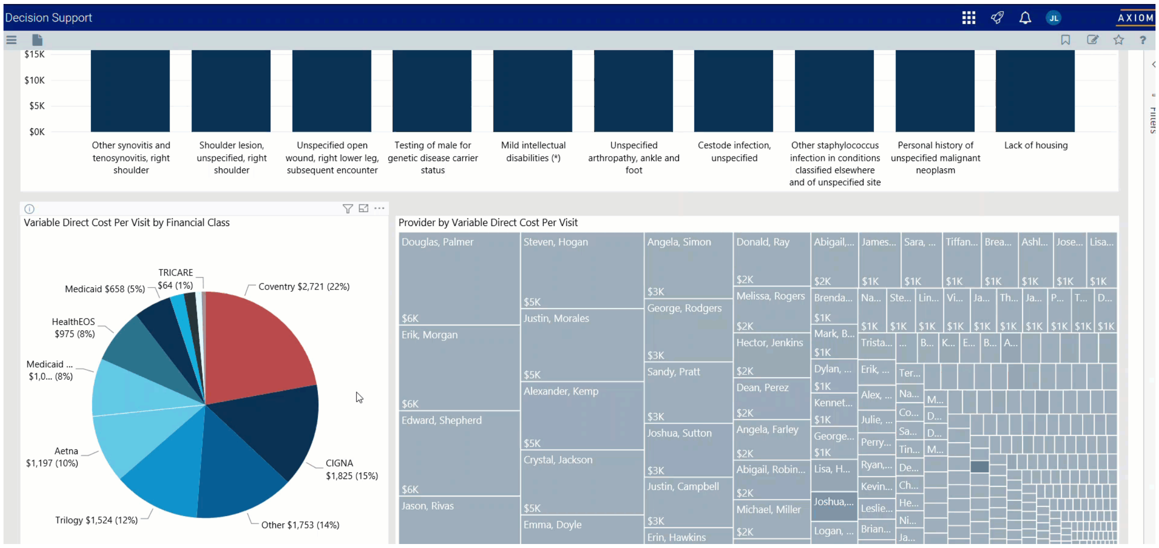
Variable Direct Cost Per Visit by Financial Class

This pie chart breaks down the variable direct cost per visit across financial classes. From this section, you can do the following:

- View financial class details by hovering your cursor over a slice. The system displays a tool tip that provides a description of the financial class and the variable direct cost per case.


Variable Direct Cost Per Visit by Financial Class
TRICARE
$64 (1%)
Medicaid $658 (5%)
Coventry $2,721 (22%)
HealthEOS
$975 (8%)
Medicaid ...
$1,0... (8%)
Financial Class Description HealthEOS
Variable Direct Cost Per Case $975 (7.93%)
Aetna
$1,197 (10%)
CIGNA
$1,825 (15%)
Trilogy $1,524 (12%)
Other $1,753 (14%)

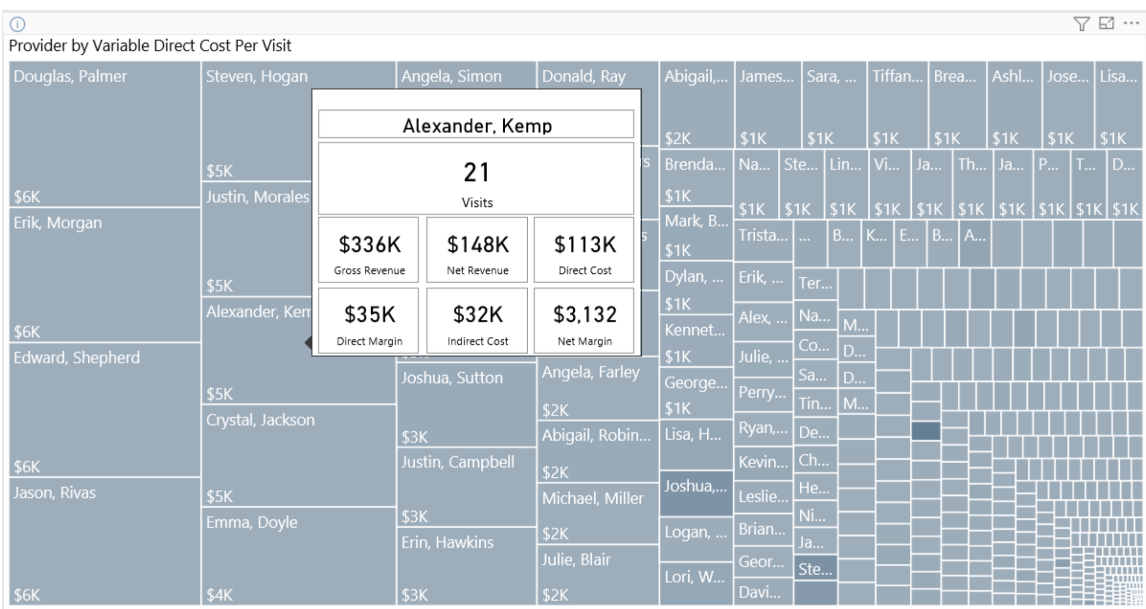
- View details for a specific financial class by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To enable all of the financial class data in the page again, click the slice again.



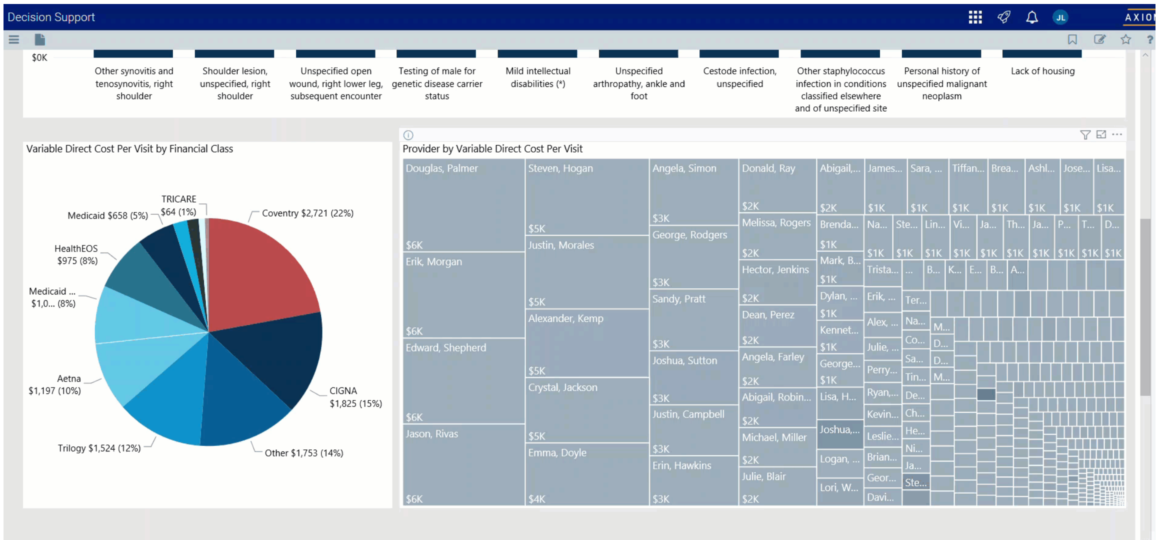
▶ Provider by Variable Direct Cost Per Visit

This visual shows the variable direct cost per visit for each provider. The larger the square, the higher the cost per visit. From this section, you can do the following:

- View variable direct cost details by hovering your cursor over a provider square. The system displays a tool tip with the provider's name, the number of visits, gross and net revenue, direct and indirect cost, and direct and net margin.



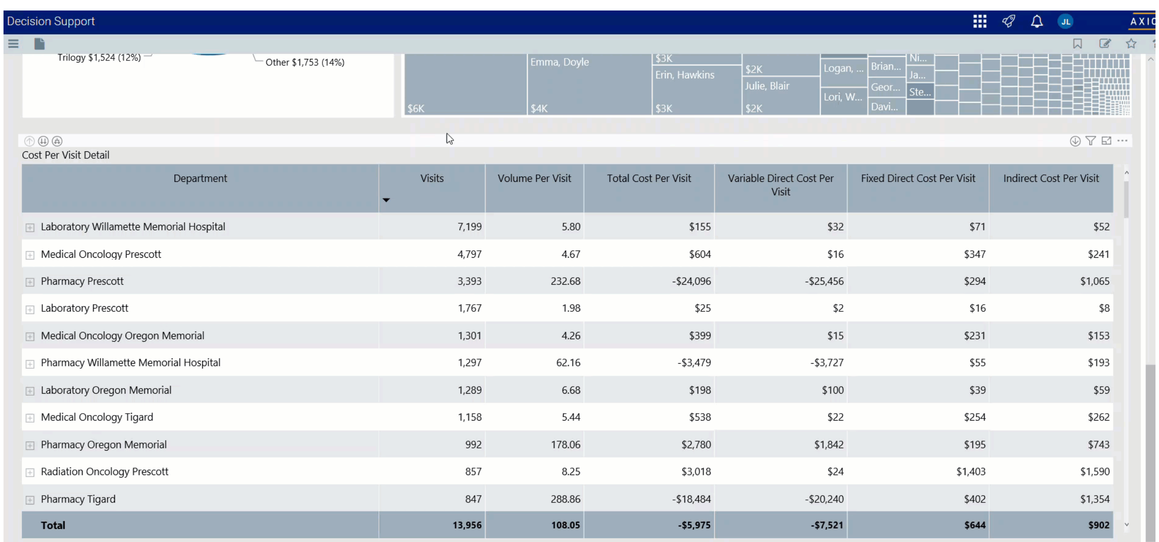
- View details for a specific provider by clicking a square. The system greys out the details across the page except for data specific to the provider you selected. To enable all of the provider data in the page again, click the square again.



▶ Cost Per Visit Detail

This section displays the revenue details related to the cost per visit. From this section, you can do the following:

- View the details for a specific department by clicking a row. The system greys out the details for the other departments across the page except for data specific to the department you selected.


Cost Per Visit Detail

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Laboratory Willamette Memorial Hospital	7,199	5.80	$155	$32	$71	$52
Medical Oncology Prescott	4,797	4.67	$604	$16	$347	$241
Pharmacy Prescott	3,393	232.68	-$24,096	-$25,456	$294	$1,065
Laboratory Prescott	1,767	1.98	$25	$2	$16	$8
Medical Oncology Oregon Memorial	1,301	4.26	$399	$15	$231	$153
Pharmacy Willamette Memorial Hospital	1,297	62.16	-$3,479	-$3,727	$55	$193
Laboratory Oregon Memorial	1,289	6.68	$198	$100	$39	$59
Medical Oncology Tigard	1,158	5.44	$538	$22	$254	$262
Pharmacy Oregon Memorial	992	178.06	$2,780	$1,842	$195	$743
Radiation Oncology Prescott	857	8.25	$3,018	$24	$1,403	$1,590
Pharmacy Tigard	847	288.86	-$18,484	-$20,240	$402	$1,354
Total	**13,956**	**108.05**	**-$5,975**	**-$7,521**	**$644**	**$902**

- Sort the table by columns in ascending or descending order by clicking the column header.

Cost Per Visit Detail

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Pharmacy Oregon Memorial	992	178.06	$2,780	$1,842	$195	$743
Surgery Willamette Memorial Hospital	431	69.25	$3,528	$1,198	$1,023	$1,308
Interventional Radiology Willamette Memorial Hospital	105	3.04	$1,202	$487	$280	$434
Interventional Radiology Prescott	100	2.14	$1,614	$359	$603	$652
GoodeGrace Hospice	133	89.23	$4,751	$333	$2,155	$2,263
Surgery Oregon Memorial	52	29.31	$1,804	$248	$673	$883
Portland Home Health Care Outpatient Hospice	164	19.01	$2,252	$240	$1,361	$651
Interventional Radiology Oregon Memorial	48	2.10	$832	$239	$289	$304
PET CT Prescott	687	2.89	$743	$224	$130	$390

- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Cost Per Visit Detail

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Wound Center	8	1.38	$158	$9	$118	$31
Women's Health Services Willamette Memorial Hospital	236	1.00	$185	$0	$144	$41
Women's Health Services Oregon Memorial	125	1.04	$126	$5	$82	$39
Willamette Memorial Hospital Telemonitoring	9	2.44	$31	$0	$31	$0
Ultrasound Willamette Memorial Hospital	25	1.08	$191	$1	$134	$56
Ultrasound Tigard	30	1.03	$209	$1	$126	$82
Ultrasound Prescott	96	1.04	$174	$1	$107	$65
Ultrasound Oregon Memorial	30	1.03	$175	$1	$116	$58
Surgery Willamette Memorial Hospital	431	69.25	$3,528	$1,198	$1,023	$1,308

▶ Viewing data in table format

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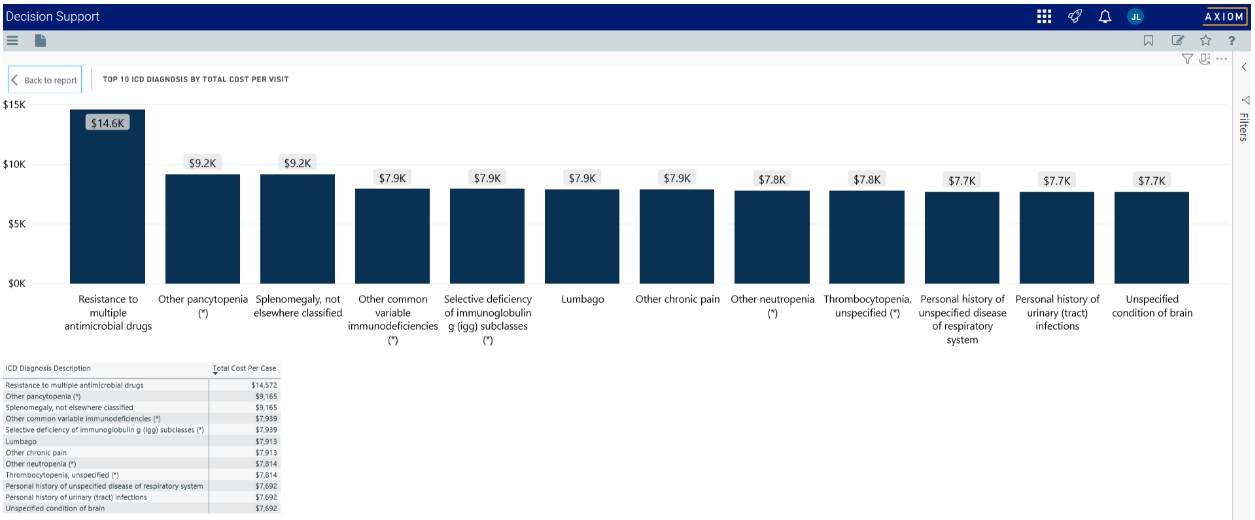


ICD Diagnosis Description	Total Cost Per Case
Resistance to multiple antimicrobial drugs	$14,572
Other pancytopenia (*)	$9,165
Splenomegaly, not elsewhere classified	$9,165
Other common variable immunodeficiencies (*)	$7,939
Selective deficiency of immunoglobulin g (igg) subclasses (*)	$7,939
Lumbago	$7,913
Other chronic pain	$7,913
Other neutropenia (*)	$7,814
Thrombocytopenia, unspecified (*)	$7,814
Personal history of unspecified disease of respiratory system	$7,692
Personal history of urinary (tract) infections	$7,692
Unspecified condition of brain	$7,692

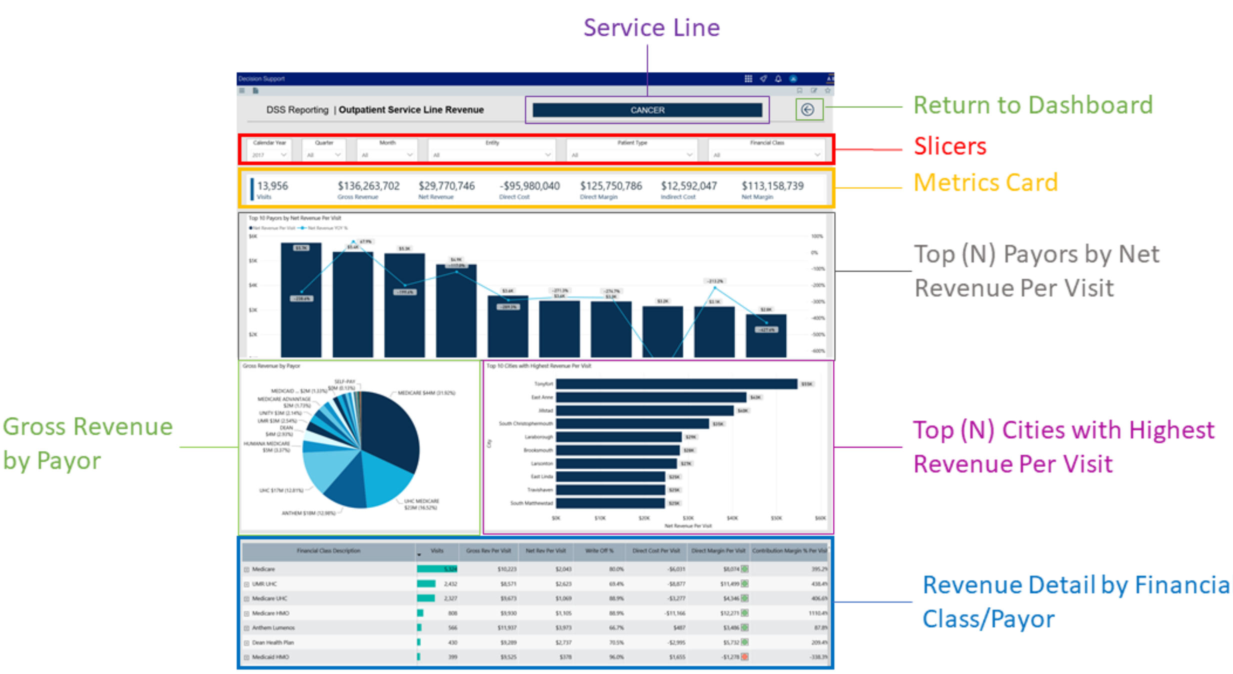
Click image to view full size

Outpatient Service Line Revenue report

Overview

This page provides revenue details for a specific service line selected in the Outpatient Service Line Dashboard.

The top of the page displays the service line the page applies to. To return to the Outpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

▶ Slicers

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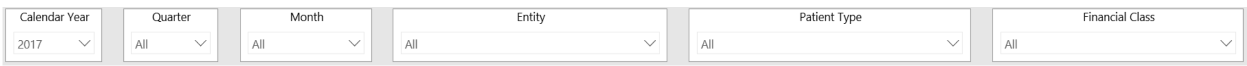
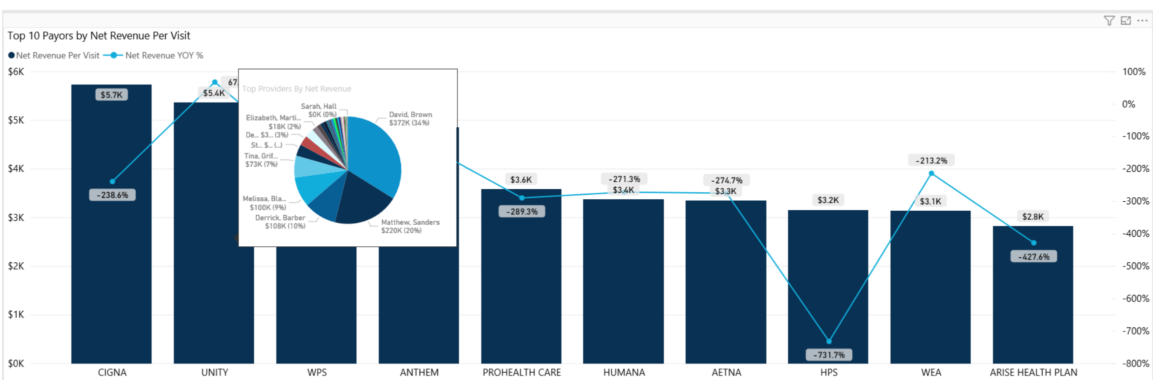


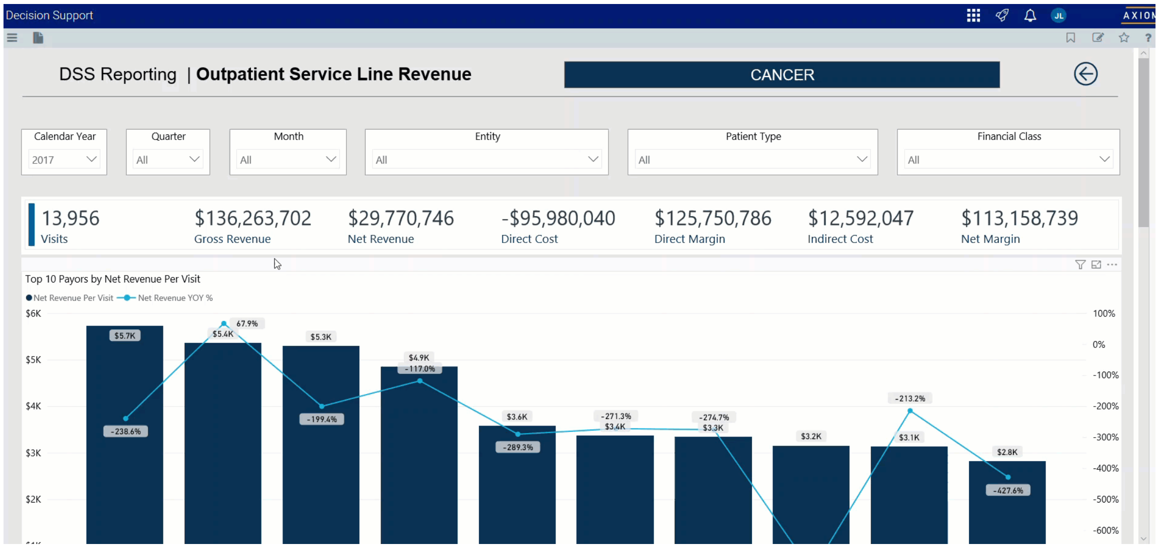
▶ Top (N) Payors by Net Revenue Per Visit

This bar chart displays the net revenue per visit for each payor. From this section, you can do the following:

- View the providers revenue details by hovering your cursor over a bar. The system displays a tool tip that shows a pie chart that segments data by provider percentage.



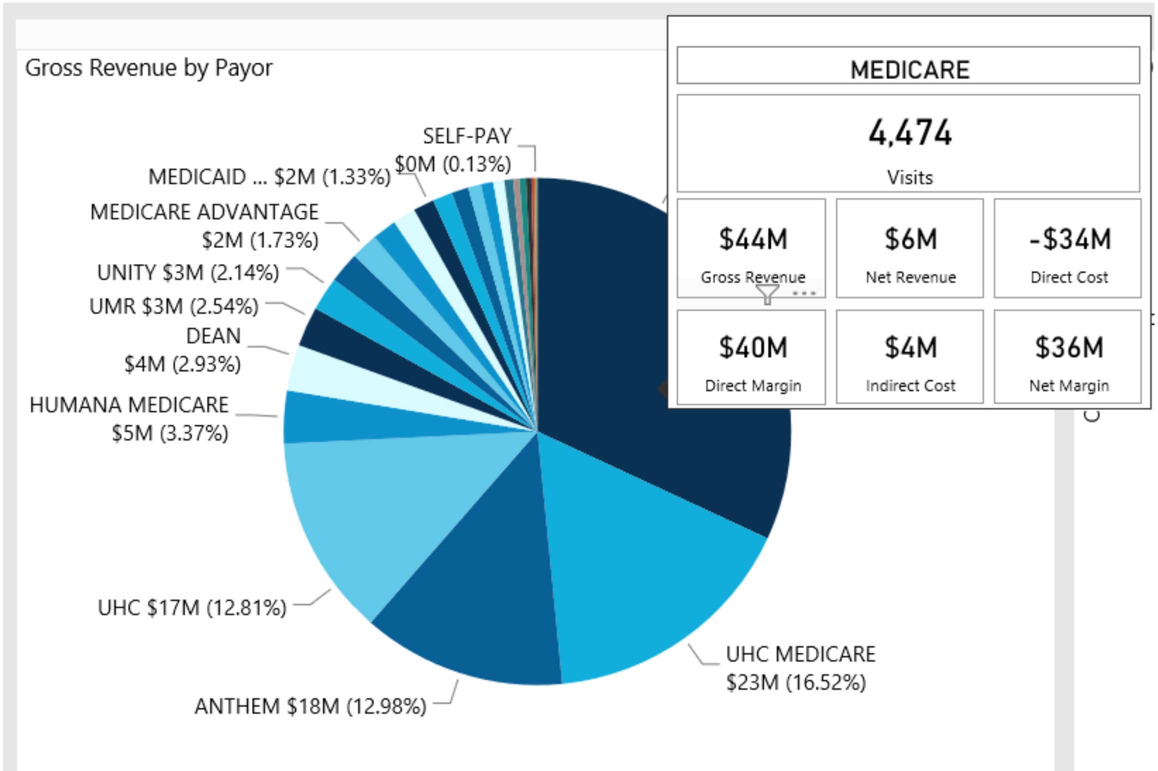
- View revenue details for a specific payor by clicking a bar. The system greys out the other payor bars in the chart and only shows metrics and details for that payor. To show all of the payor data in the page again, click the bar again.



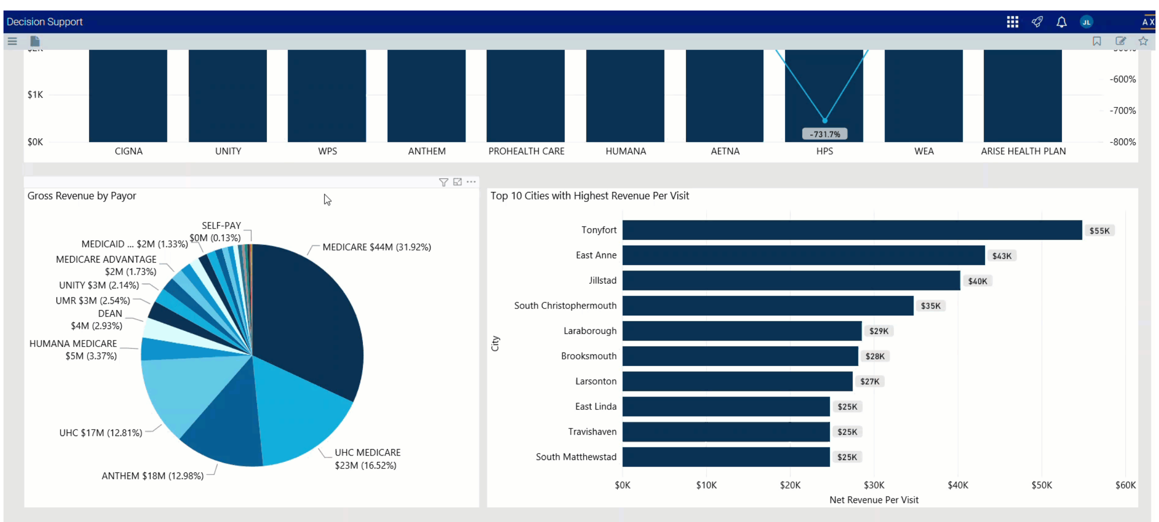
▶ Gross Revenue by Payor

This pie chart breaks down the gross revenue across payors. From this section, you can do the following:

- View payor gross revenue details by hovering your cursor over a slice. The system displays a tool tip that shows details regarding the number of visits, gross and net revenue, direct and indirect cost, and direct and net margin.



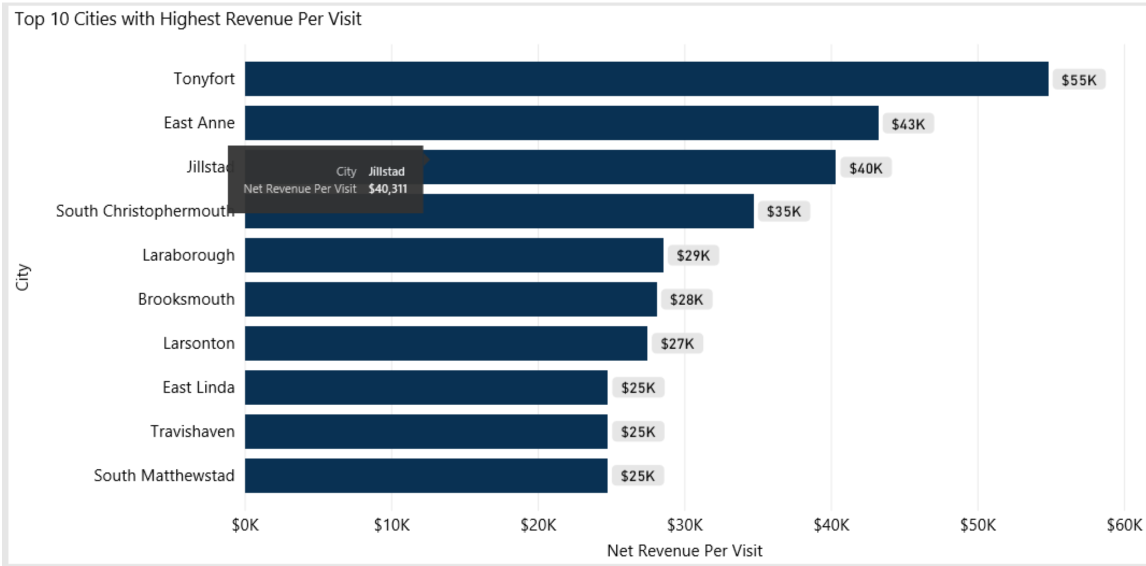
- View details for the gross revenue by payor by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To show all of the provider data in the page again, click the slice again.



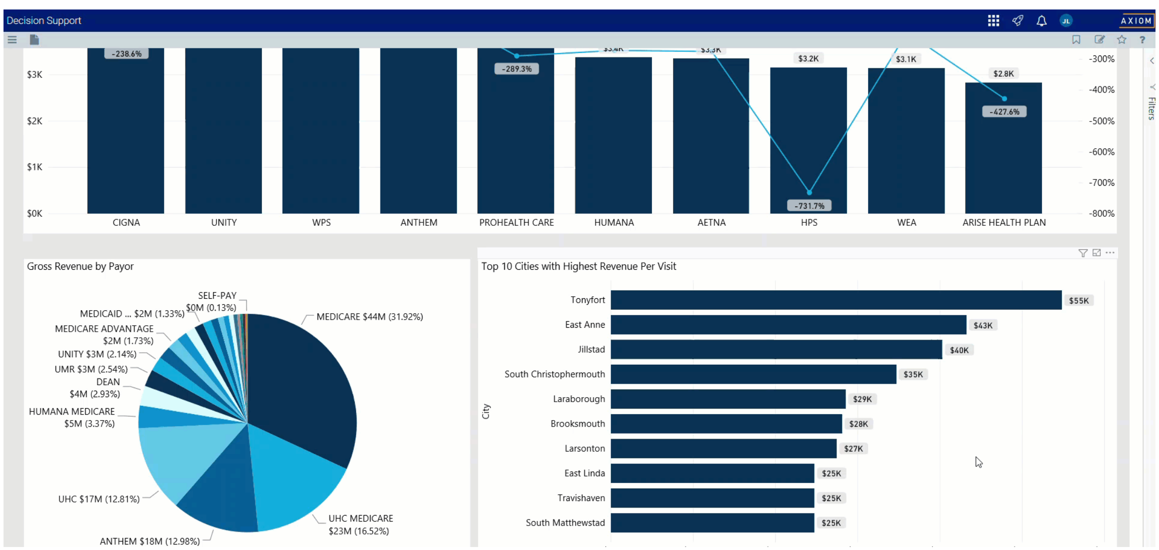
▶ Top (N) Cities with Highest Revenue Per Visit

This bar chart shows the top number of cities that have the highest revenue per visit. From this chart, you can do the following:

- View details regarding visit net revenue for the city by hovering the cursor over a bar to display a tool tip.



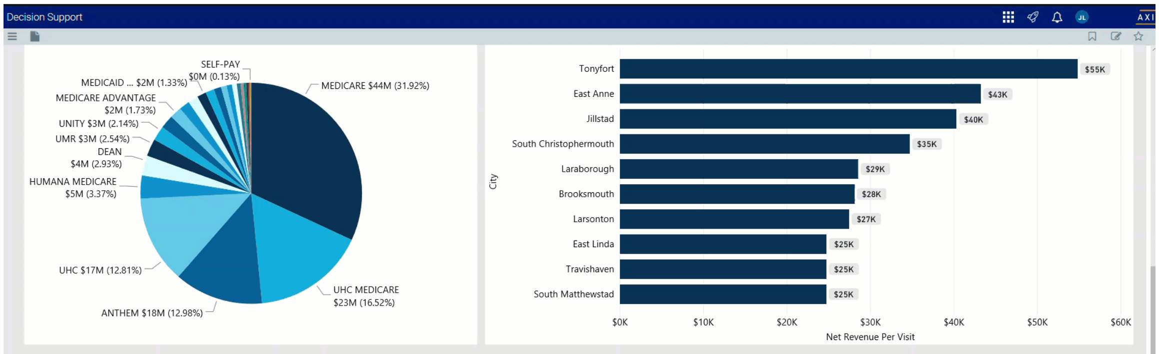
- View details for a specific city by clicking a bar. The system greys out the details across the page except for data specific to the city bar you selected. To enable all of the city data in the page, click the bar again.



Revenue Detail by Financial Class / Payor

This section displays the revenue values by financial class or payor. From this section, you can do the following:

- View the details for a specific financial class by clicking a row. The system greys out the details for the other financial classes across the page except for data specific to the financial class you selected. To enable all of the table data in the page, click the row again.



Financial Class Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
Medicare	5,324	$10,223	$2,043	80.0%	-$6,031	$8,074	395.2%
UMR UHC	2,432	$8,571	$2,623	69.4%	-$8,877	$11,499	438.4%
Medicare UHC	2,327	$9,673	$1,069	88.9%	-$3,277	$4,346	406.6%
Medicare HMO	808	$9,930	$1,105	88.9%	-$11,166	$12,271	1110.4%
Anthem Lumenos	566	$11,937	$3,973	66.7%	$487	$3,486	87.8%

- Sort the table by columns in ascending or descending order by clicking the column header.

Financial Class Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
Medicare	5,324	$10,223	$2,043	80.0%	-$6,031	$8,074	395.2%
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Anthem Lumenos	566	$11,937	$3,973	66.7%	$487	$3,486	87.8%
Dean Health Plan	430	$9,289	$2,737	70.5%	-$2,995	$5,732	209.4%
Medicaid HMO	399	$9,525	$378	96.0%	$1,655	-$1,278	-338.3%
Aetna ProHealth	280	$7,204	$3,589	50.2%	-$6,024	$9,613	267.8%
Other Commercial	264	$14,102	$4,877	65.4%	-$48,715	$53,592	1098.8%
Medicaid	238	$10,476	$1,791	82.9%	$1,389	$401	22.4%
Humana Preferred	236	$8,475	$2,998	64.6%	-$24,234	$27,232	908.3%
CIGNA	152	$13,852	$5,737	58.6%	$2,609	$3,127	54.5%
Aetna	111	$8,653	$3,407	60.6%	$1,737	$1,671	49.0%
Self Pay	89	$4,516	$1,812	59.9%	$637	$1,175	64.9%
Total	**13,956**	**$9,764**	**$2,133**	**78.2%**	**-$6,877**	**$9,011**	**422.4%**

- Drill up or down through the data by right-clicking the row, and selecting **Drill Up** or **Drill Down**.

> **TIP:** You can also view drill down information by clicking + next to the financial class description.

Financial Class Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
Medicare	5,324	$10,223	$2,043	80.0%	-$6,031	$8,074	395.2%
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Viewing data in table format

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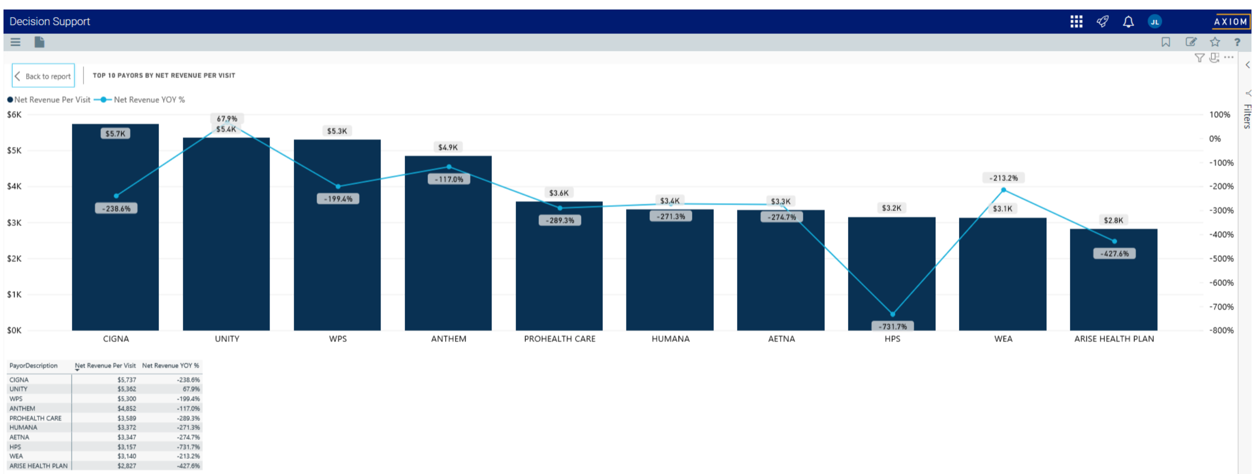


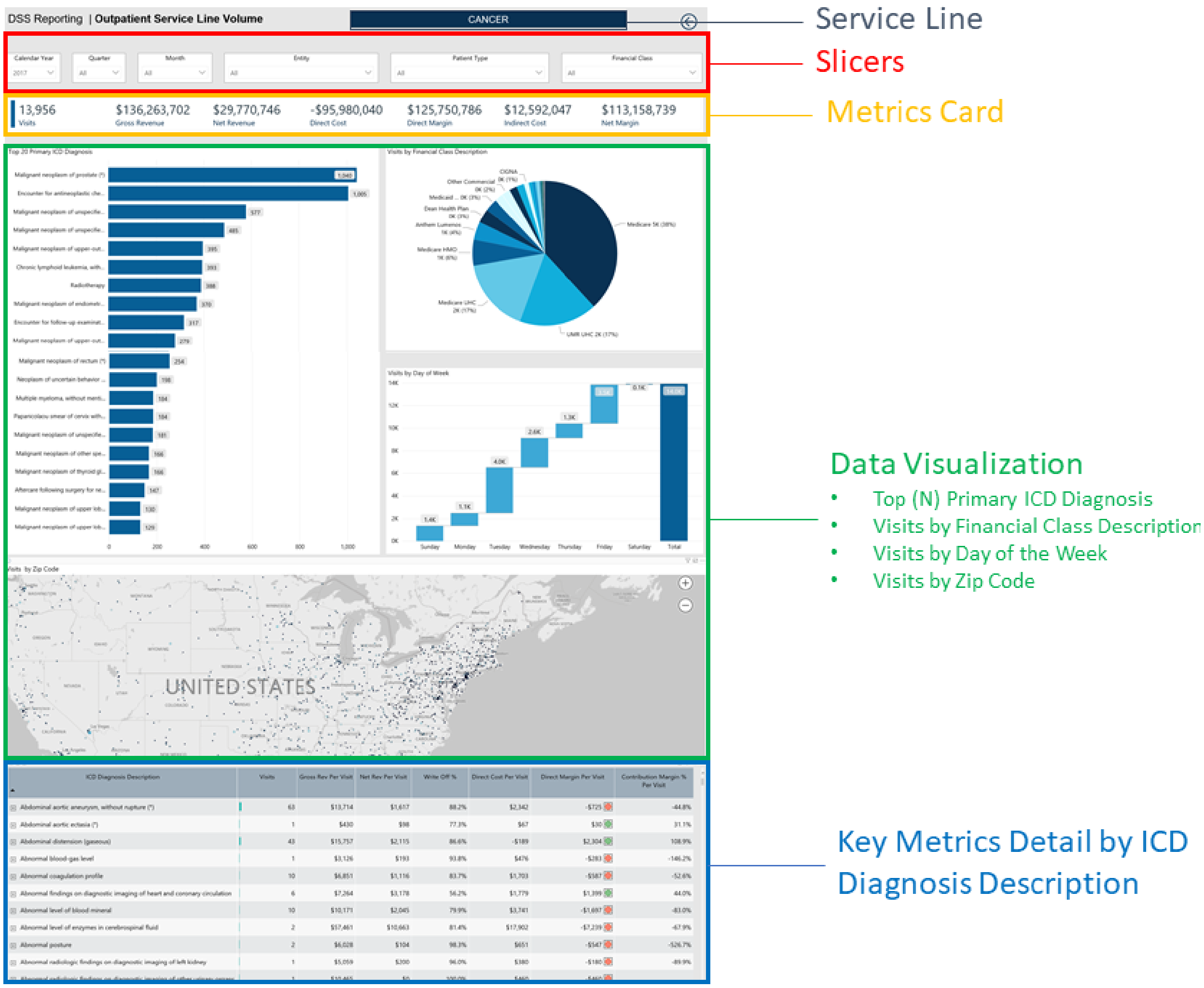
PayorDescription	Net Revenue Per Visit	Net Revenue YOY %
CIGNA	$5,737	-238.6%
UNITY	$5,362	67.9%
WPS	$5,300	-199.4%
ANTHEM	$4,852	-117.0%
PROHEALTH CARE	$3,589	-289.3%
HUMANA	$3,372	-271.3%
AETNA	$3,347	-274.7%
HPS	$3,157	-731.7%
WEA	$3,140	-213.2%
ARISE HEALTH PLAN	$2,827	-427.6%

Outpatient Service Line Volume report

Overview

This page provides the volume details for a specific service line selected in the Outpatient Service Line Dashboard.

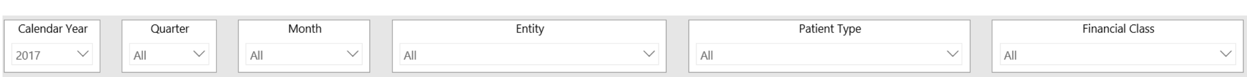
The top of the page displays the service line the page applies to. To return to the Outpatient Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

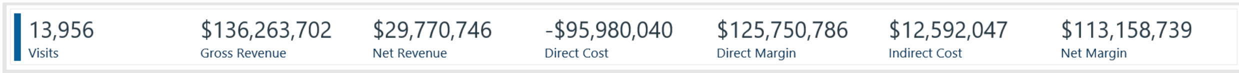
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



Metrics Card

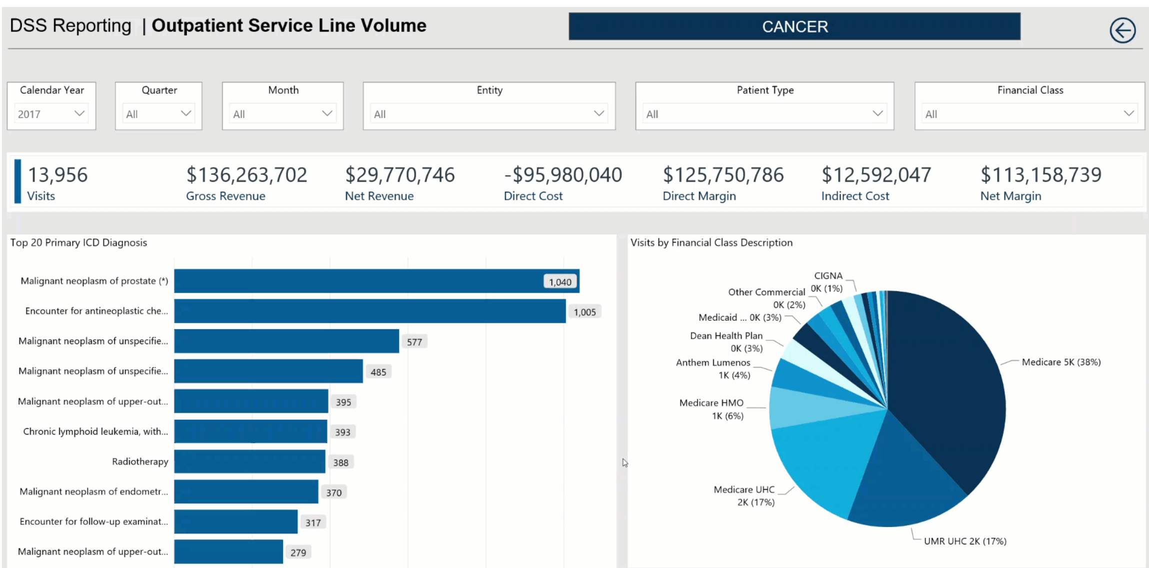
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select the different options from the different areas on the page, the totals in the Metrics Card adjust accordingly.



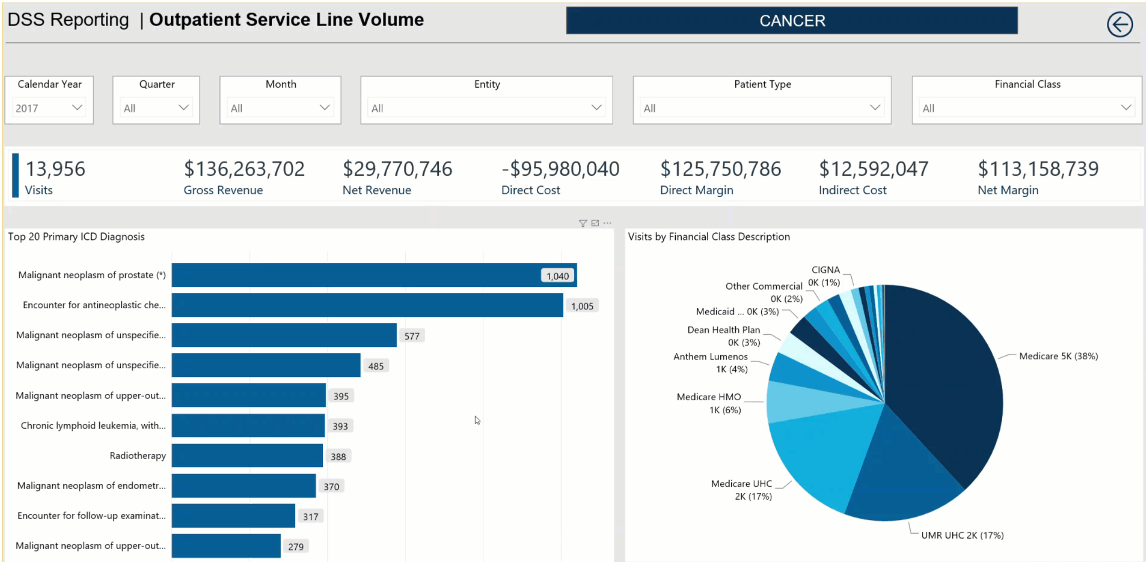
Top (N) Primary ICD Diagnosis

This section displays a bar graph of the top visits by ICD Diagnosis. From here, you can do the following:

- View a breakdown of providers by visit by hovering your cursor over any bar.



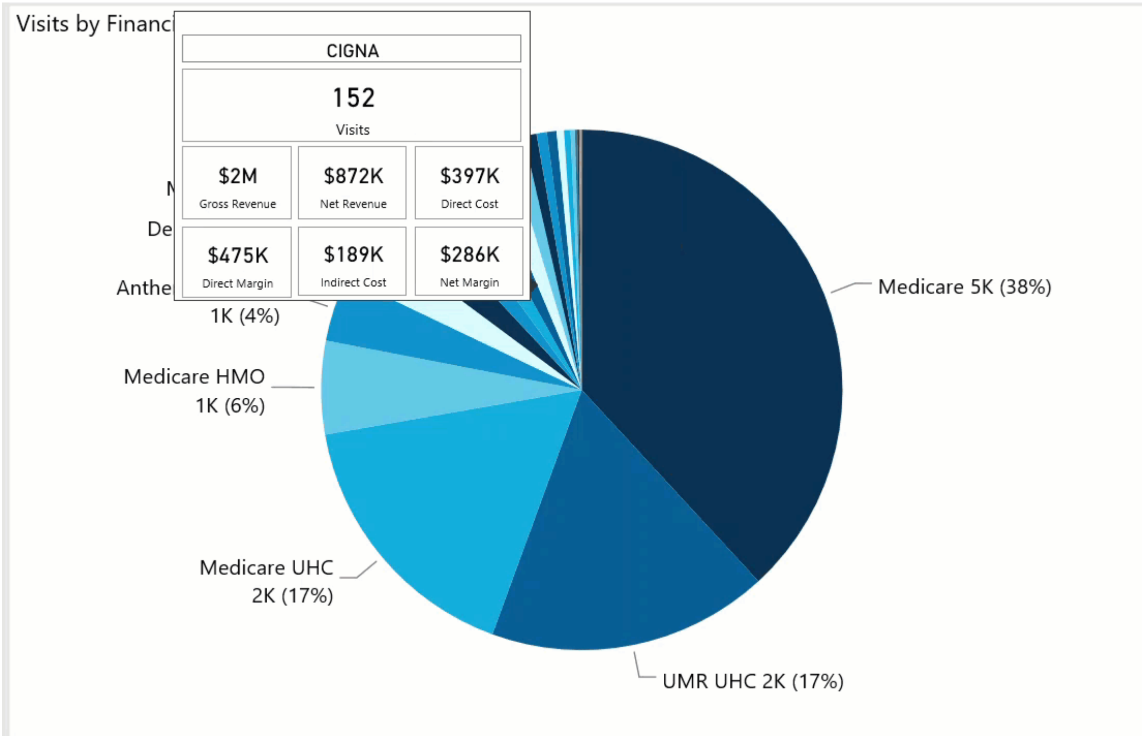
- View the KPIs specific to a diagnosis by clicking a bar. The sections of the page will adjust to show data specific to that diagnosis.



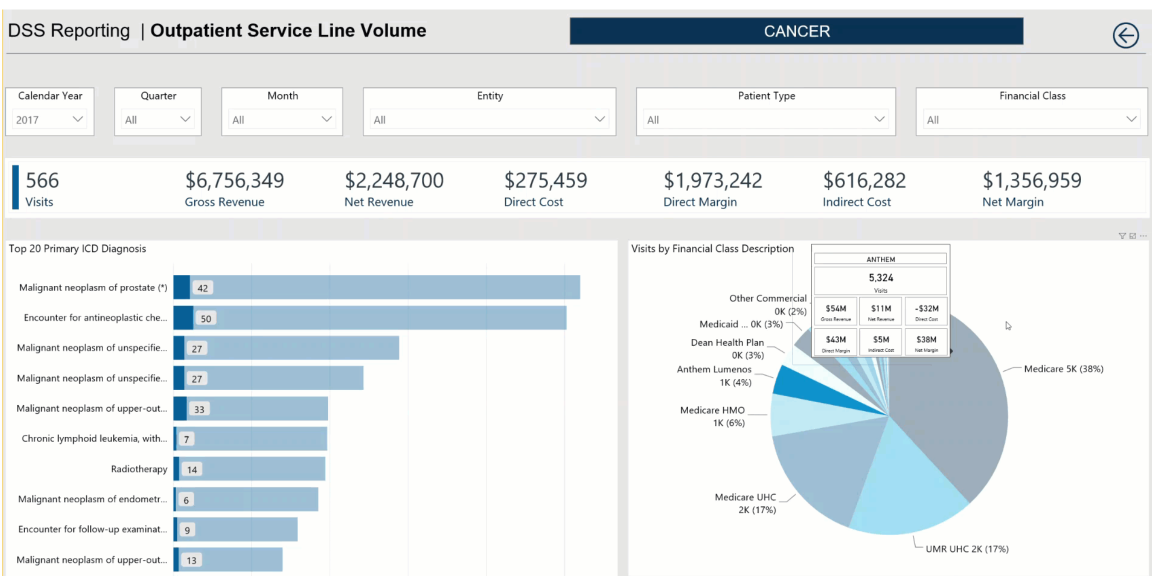
Visits by Financial Class Description

This section displays a pie chart that breaks down visits by financial class. From here, you can do the following:

- View details regarding visits, gross and net revenue, direct and indirect cost, direct and net margin for a financial class by hovering your cursor over a slice.



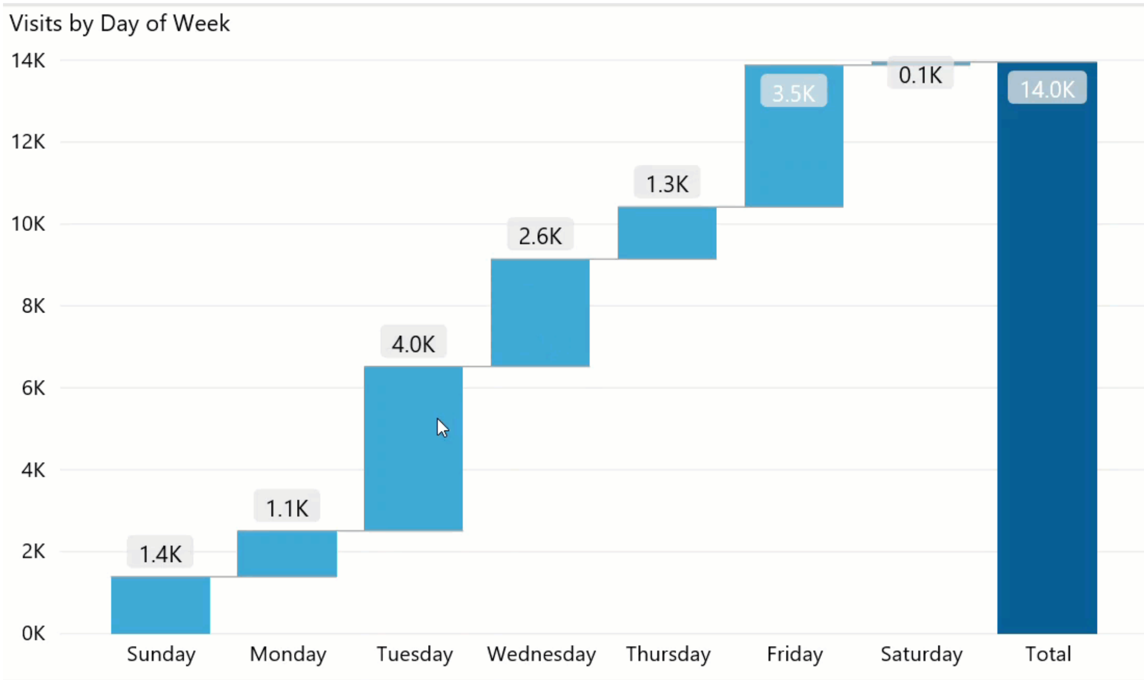
- View the KPIs specific to a diagnosis by clicking a slice. The sections on the page will adjust to show the data specific to that diagnosis.



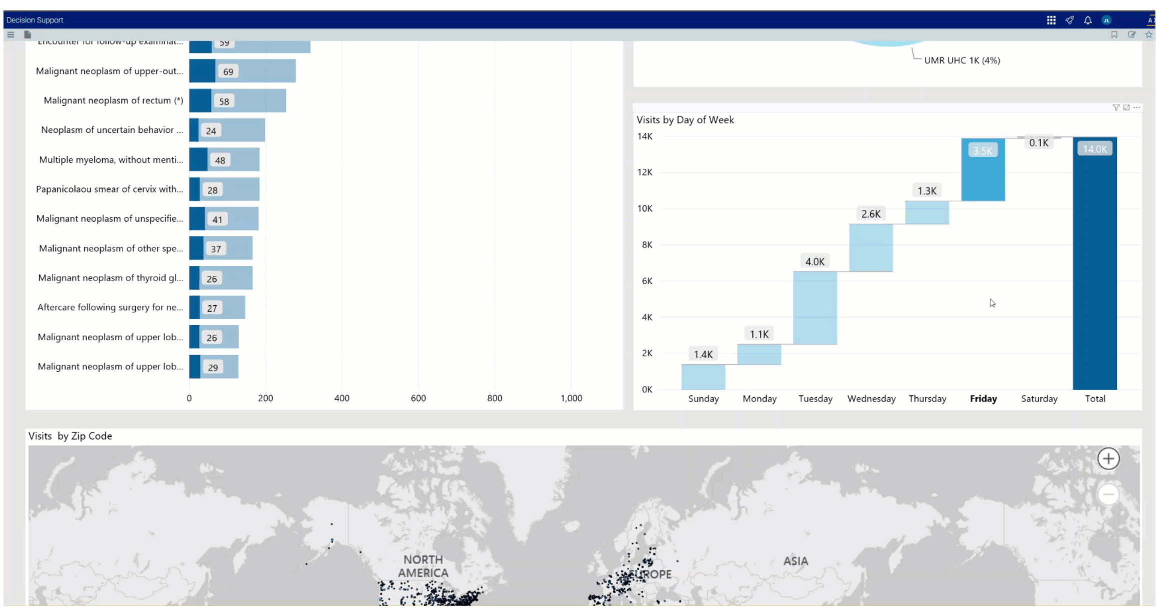
▶ Visits by Day of Week

This section displays a bar chart of the number of visits broken down by days of the week. From here, you can do the following:

- View the number of visits for each day by hovering your cursor over a bar.



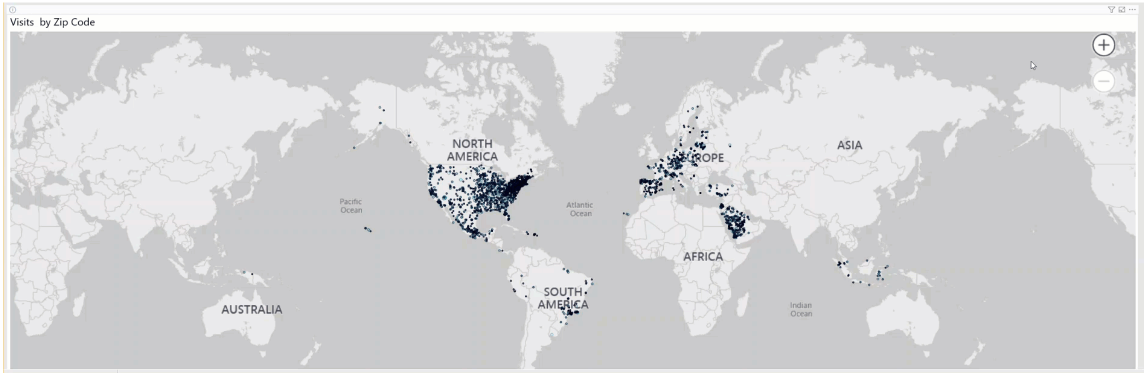
- View the KPIs specific to a diagnosis by clicking a bar. The sections on the page will adjust to show the data specific to that diagnosis.



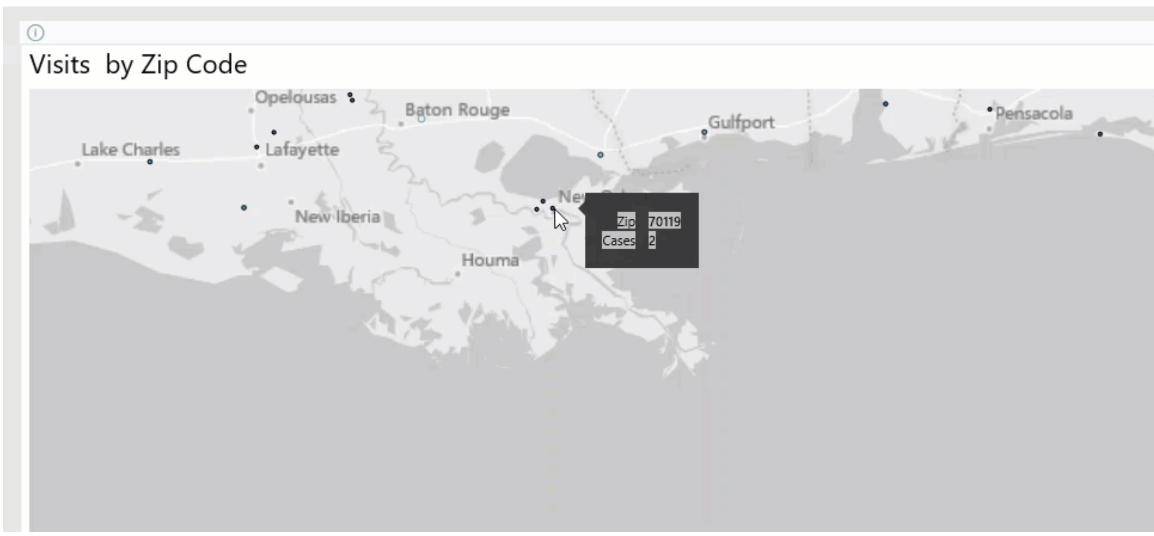
▶ Visits by Zip Code

This section displays the visits by location using a map. From here, you can do the following:

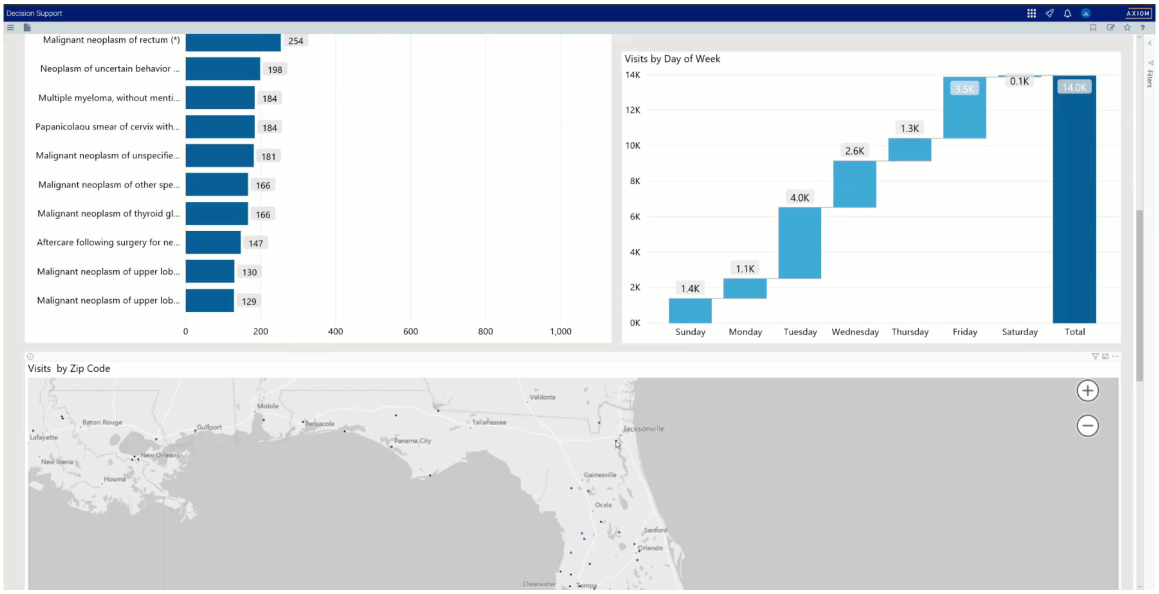
- Zoom in and out of the map by clicking + or - on the right side of the page. You can move the map by holding down the left mouse button and moving the mouse to the area to view.



- View the zip code and number of visits for a location by hovering your cursor over a dot on the map.



- View information about visits specific to that location by clicking a dot on the map, and the sections on the page will adjust accordingly.



▶ ICD Diagnosis Detail

This section displays the revenue values related to profitability for each ICD Diagnosis. From this table, you can do the following:

- View the details for a specific ICD Diagnosis by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.

Decision Support

ICD Diagnosis Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
Unspecified essential hypertension	1,946	$15,367	$2,954	80.8%	-$9,740	$12,694	429.8%
Personal history of tobacco use, presenting hazards to health	1,390	$17,656	$3,792	78.5%	-$244	$4,036	106.4%
Estrogen receptor positive status (ER+)	1,331	$11,529	$2,686	76.7%	-$850	$3,536	131.6%
Encounter for antineoplastic chemotherapy	1,266	$37,618	$9,316	75.2%	-$31,468	$40,784	437.8%
Malignant neoplasm of prostate (*)	1,210	$10,238	$1,388	86.4%	$481	$907	65.3%
Anemia, unspecified	1,115	$16,643	$4,093	75.4%	-$12,232	$16,325	398.8%
Other and unspecified hyperlipidemia	988	$15,795	$2,677	83.1%	-$776	$3,453	129.0%
Secondary malignant neoplasm of bone and bone marrow (*)	873	$20,062	$4,664	76.8%	-$8,666	$13,330	285.8%
Gastro-esophageal reflux disease without esophagitis (*)	803	$17,072	$3,597	78.9%	-$6,061	$9,658	268.5%
Type II or unspecified type diabetes mellitus without mention of complication, not stated as uncontrolled	723	$14,697	$2,425	83.5%	-$12,649	$15,074	621.7%
Personal history of irradiation, presenting hazards to health	659	$10,392	$2,609	74.9%	$1,104	$1,505	57.7%
Malignant neoplasm of unspecified site of right female breast (*)	655	$7,350	$1,723	76.6%	-$2,573	$4,295	249.3%
Personal history of surgery to other organs	609	$12,070	$2,742	77.3%	-$741	$3,483	127.0%
Long term (current) use of anticoagulants	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total	**13,956**	**$9,764**	**$2,133**	**78.2%**	**-$6,877**	**$9,011**	**422.4%**

- Sort the table by columns in ascending or descending order by clicking the column header.

ICD Diagnosis Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
Unspecified essential hypertension	1,946	$15,367	$2,954	80.8%	-$9,740	$12,694	429.8%
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Total	**13,956**	**$9,764**	**$2,133**	**78.2%**	**-$6,877**	**$9,011**	**422.4%**

- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

ICD Diagnosis Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
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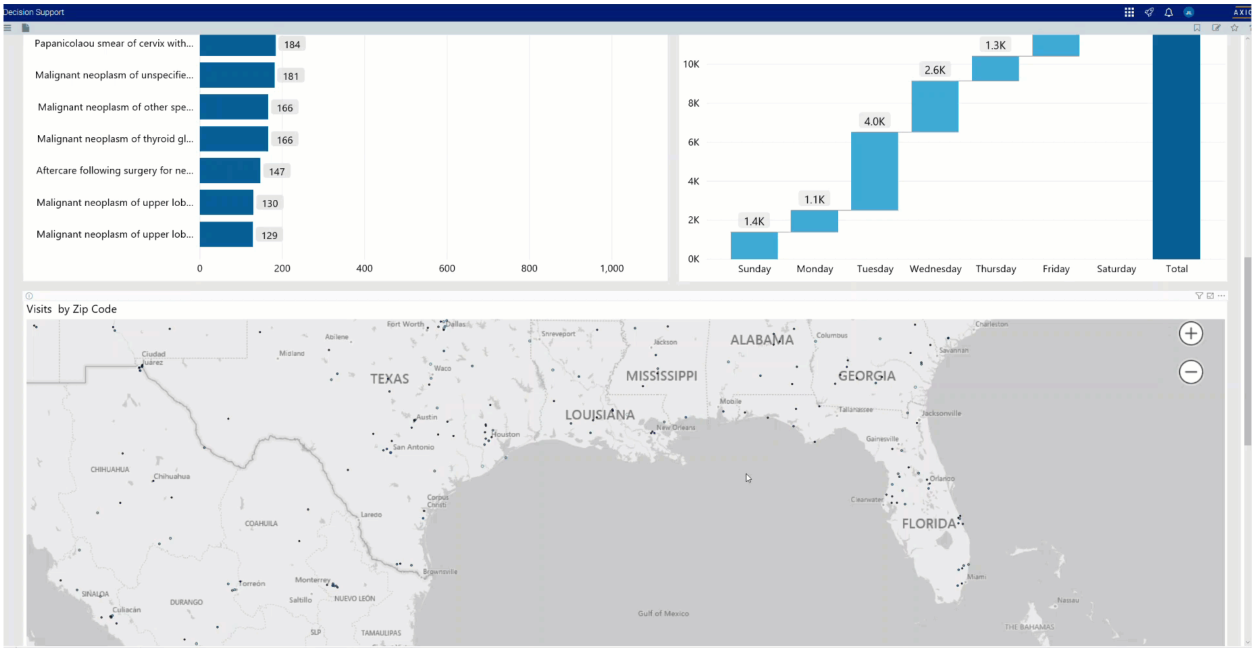
Total	**13,956**	**$9,764**	**$2,133**	**78.2%**	**-$6,877**	**$9,011**	**422.4%**

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



Using the Professional Service Line Dashboard

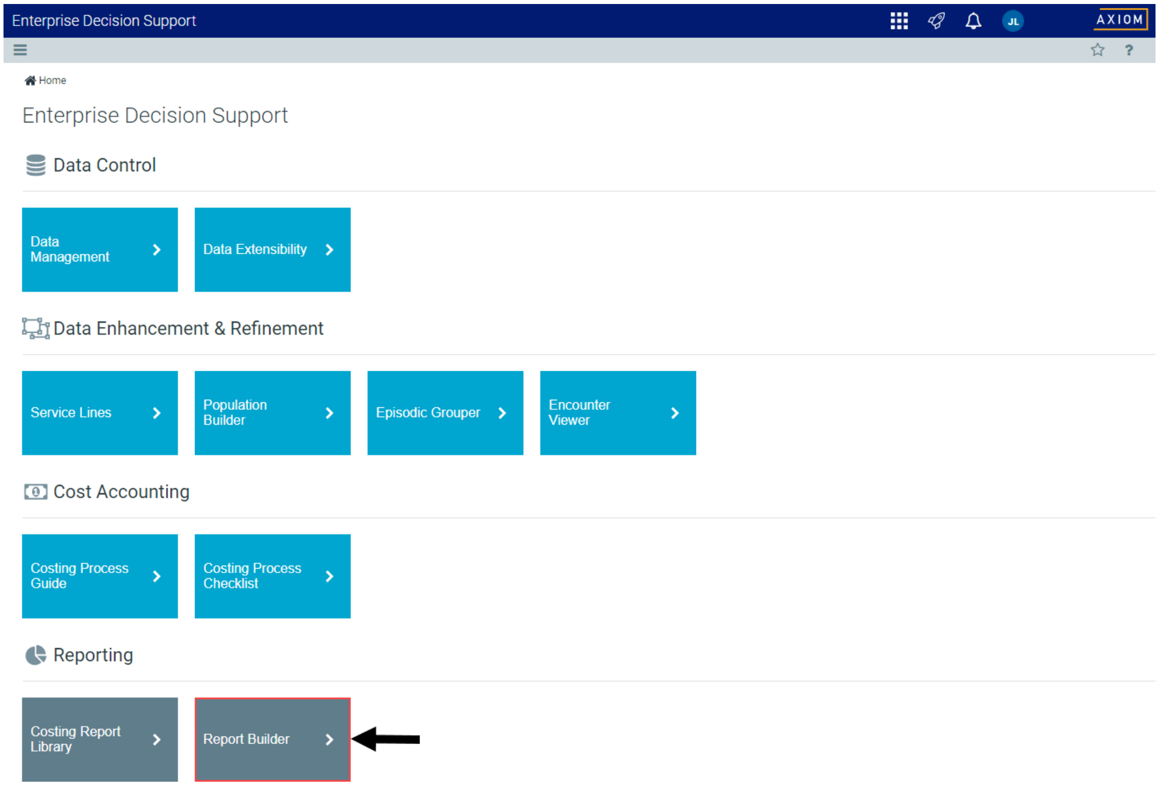
▶ Overview

This dashboard report displays a view of all the professional billing service lines, with the ability to drill through to any service line at a trend level, volume view, revenue view, and cost view.

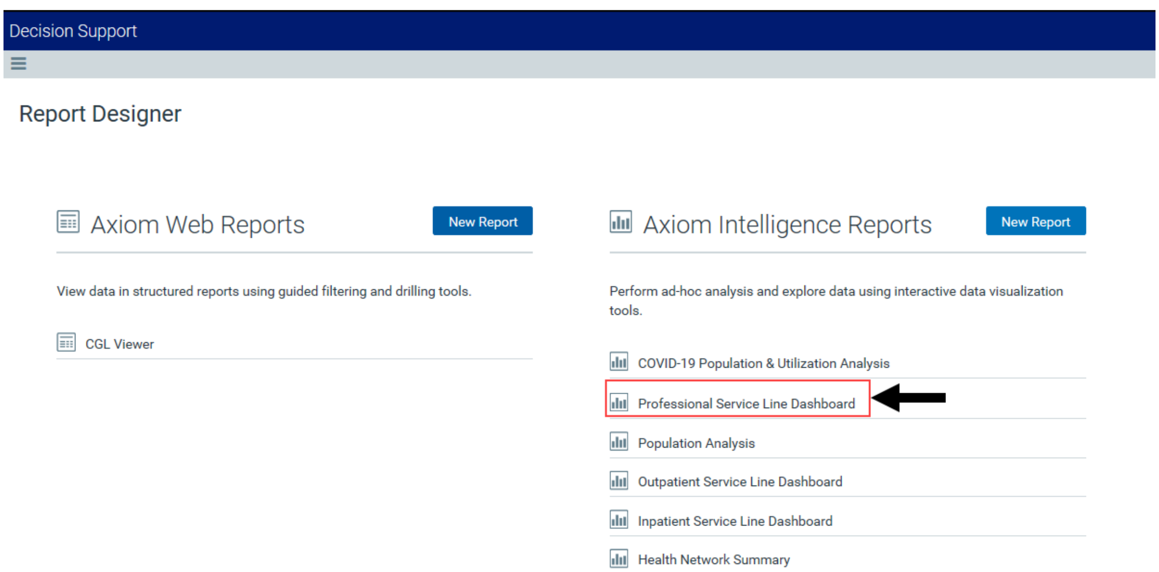
▶ Opening the dashboard

To open the dashboard:

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



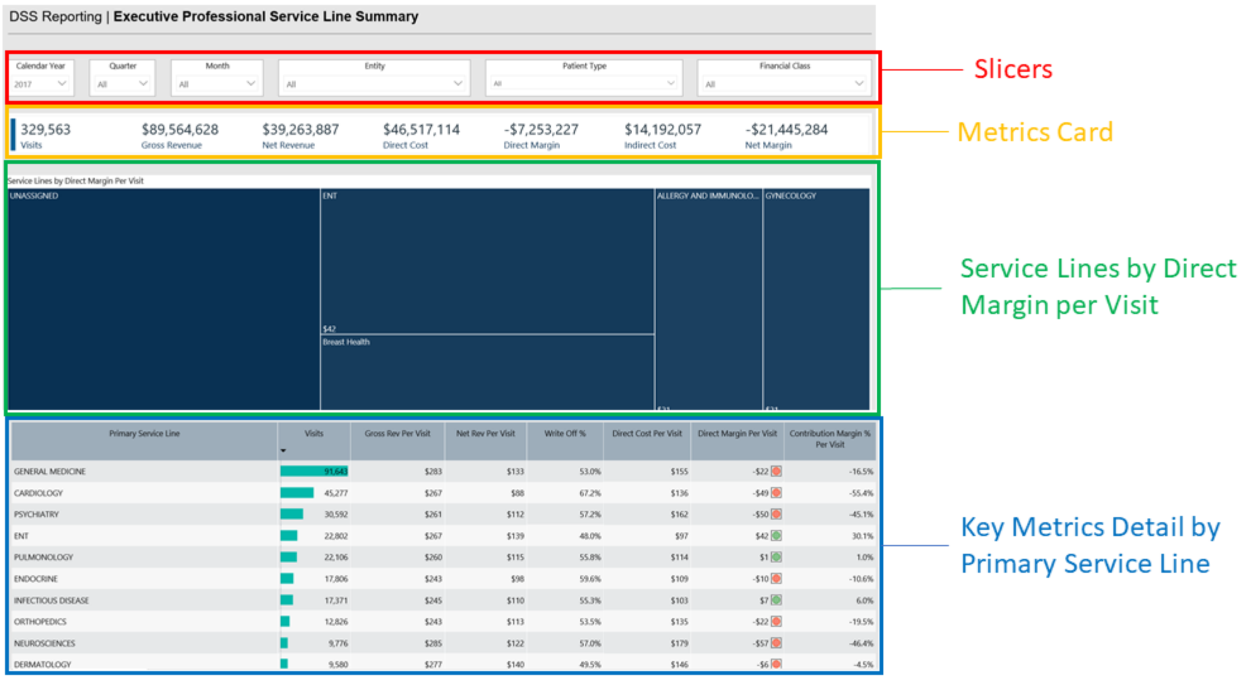
2. In the Axiom Intelligence Reports section, click **Professional Service Line Dashboard**.



Click image to view full size

Navigating the dashboard

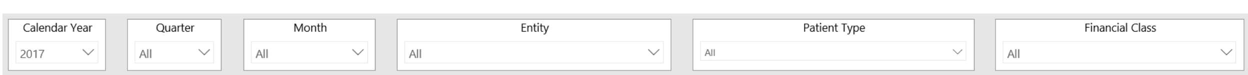
The Executive Professional Service Line Summary page serves as the main home page for the dashboard and includes the following sections:



Click image to view full size

Slicers

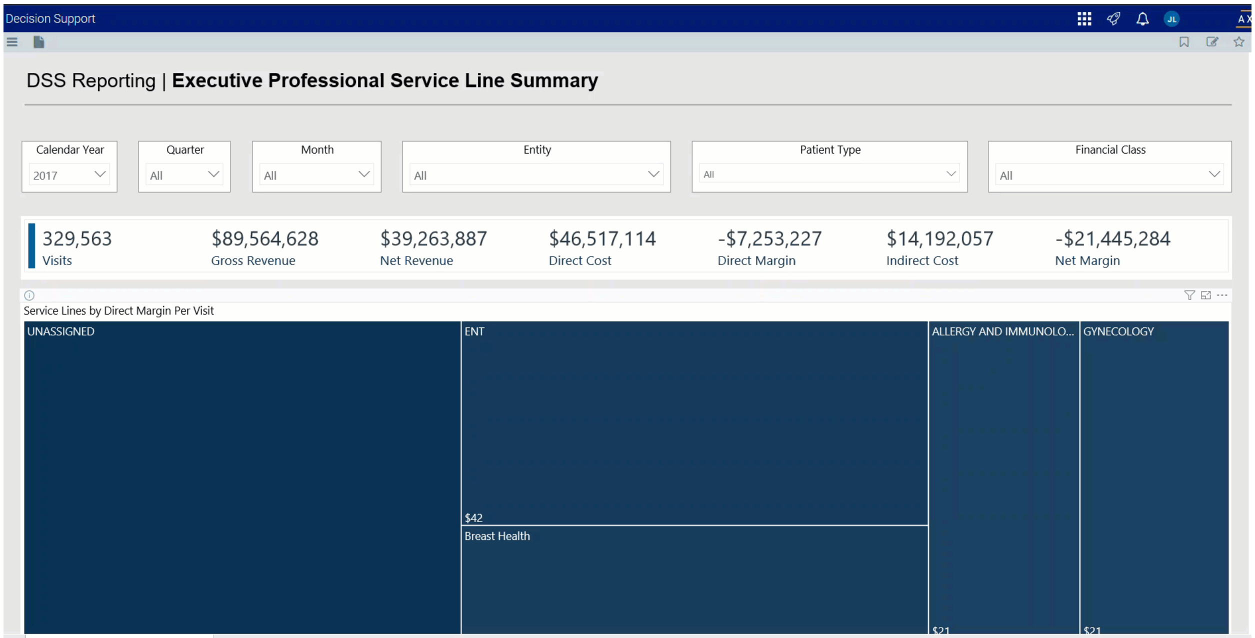
This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the slicer drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



Click image to view full size

Metrics Card

This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select service lines from the different areas of the page, the totals in the Metrics Card adjust to show the metrics specific to that service line.

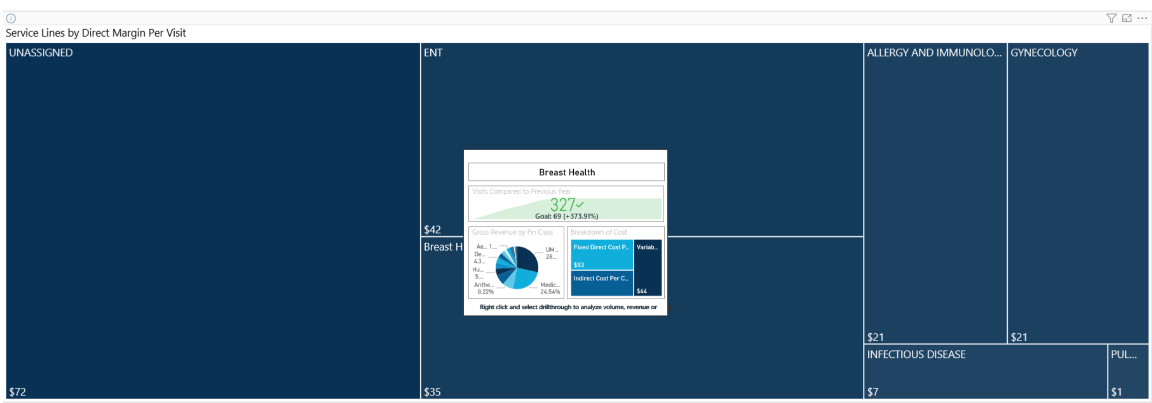


Click image to view animated GIF full size

Service Lines by Direct Margin Per Visit

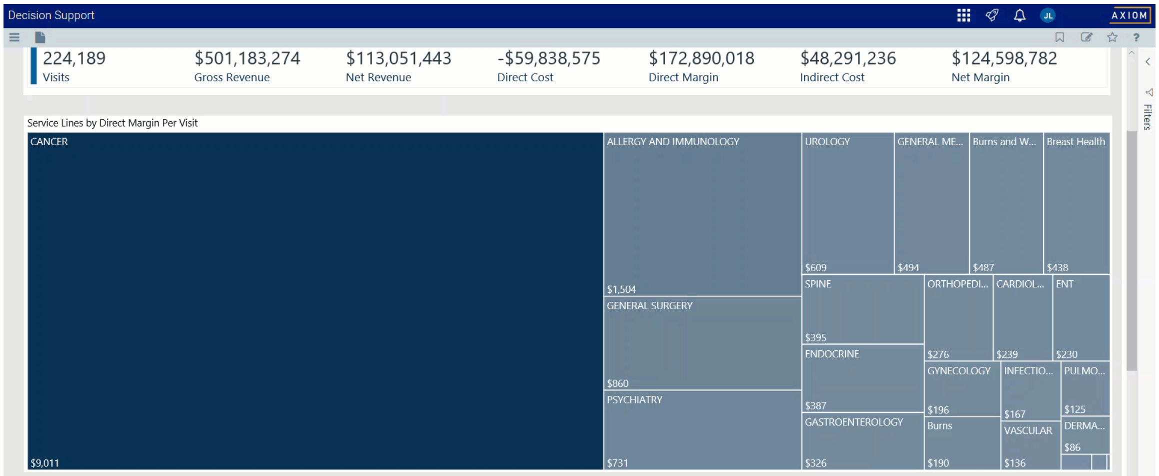
This section provides a visualization of your direct margin for each visit across service lines. From this section, you can do the following:

- View details about a specific service line by placing your cursor on a square. The system displays a tool tip that provides information on the number of visits compared to last year, the gross revenue by financial class, and a cost breakdown.



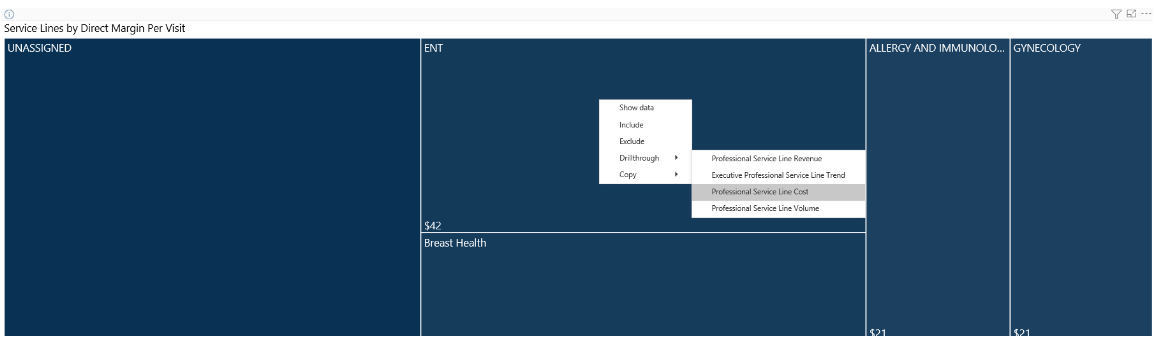
Click image to view full size

- View metrics specific to a service line by clicking a square. The system greys out the other service line squares and only shows metrics and details for that service line. To enable all of the service lines, click the square again.



Click image to view animated GIF full size

- Open drillthrough pages for professional billing service line data by right-clicking any square, and selecting a report. For more information, see Using drillthrough pages in the section below.



Click image to view full size

Key Metrics Detail by Primary Service Line

This section displays the values related to profitability for each service line. From this section, you can do the following:

- View the underlying data for service lines by right-clicking the row, and clicking **Show Data**.
- Exclude a service line from the table by right-clicking the service line row, and clicking **Exclude**. To show only one service line in the table, right click the service line, and click **Include**.

- Sort the information in the table by clicking the column to toggle between sorting the table data by the column in ascending or descending order.

> **TIP:** An arrow displays in the column in which the data is sorted. An up arrow indicates ascending order. A down arrow indicated descending order.

- Drill down further by right-clicking anywhere in the table, and from the menu, selecting the drillthrough reports to display. For more information, see Using drillthrough reports in the section below.

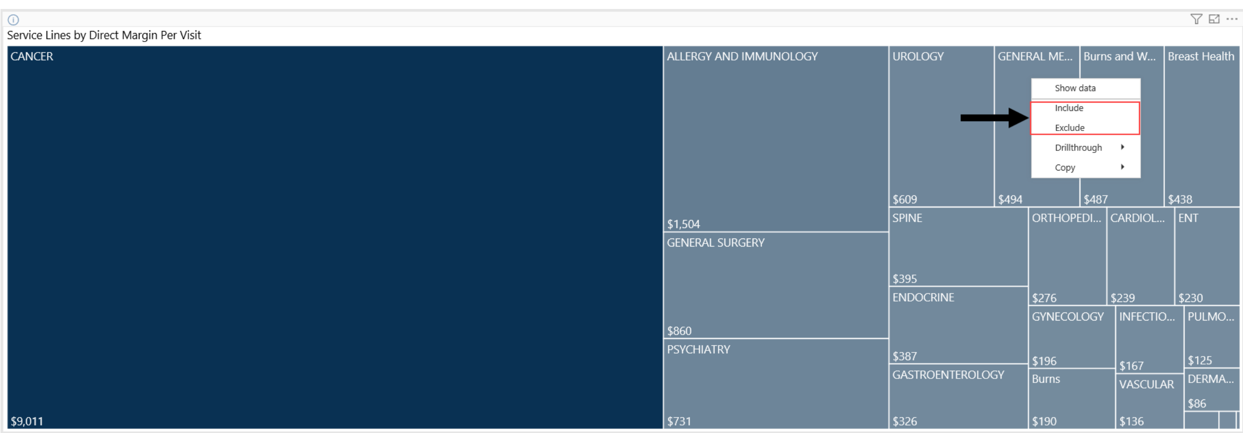
Using drillthrough pages

The following is a list of the drillthrough pages available from the Service Lines by Direct Margin Per Visit and Key Metrics Detail sections of the dashboard:

- Executive Professional Service Line Trend report
- Professional Service Line Cost report
- Professional Service Line Revenue report
- Professional Service Line Volume report

Including or excluding data

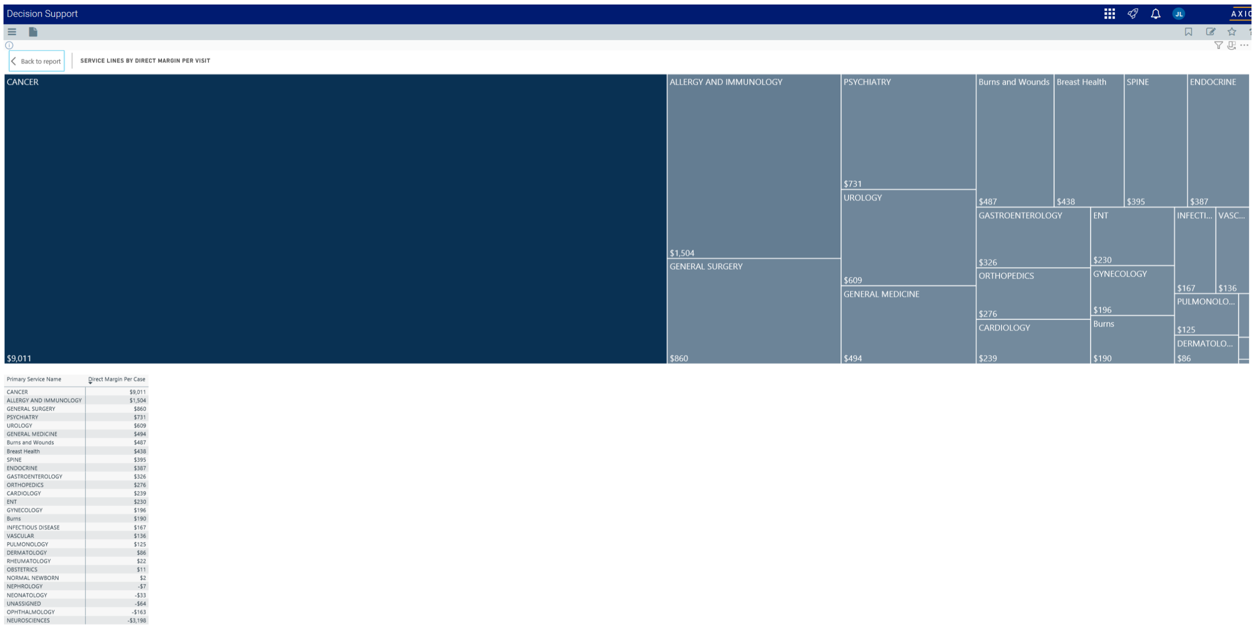
You can exclude data from a visualization chart or a table by right-clicking the image or table row, and clicking **Exclude**. To show only one service line in the visualization or table, right click the image or a table row, and click **Include**. You can also perform this action in the Executive Summary page of the dashboard and the drillthrough pages.



Click image to view full size

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show Data**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



Click image to view full size

Copying data for other reports

If you have permissions to edit or create Axiom Intelligence reports, you can copy visuals to create a new report. For tables, you can also copy values and selections.

To copy, right-click in the section, and select **Copy Visual**, **Copy Selection** (tables only), or **Copy Value** (tables only).

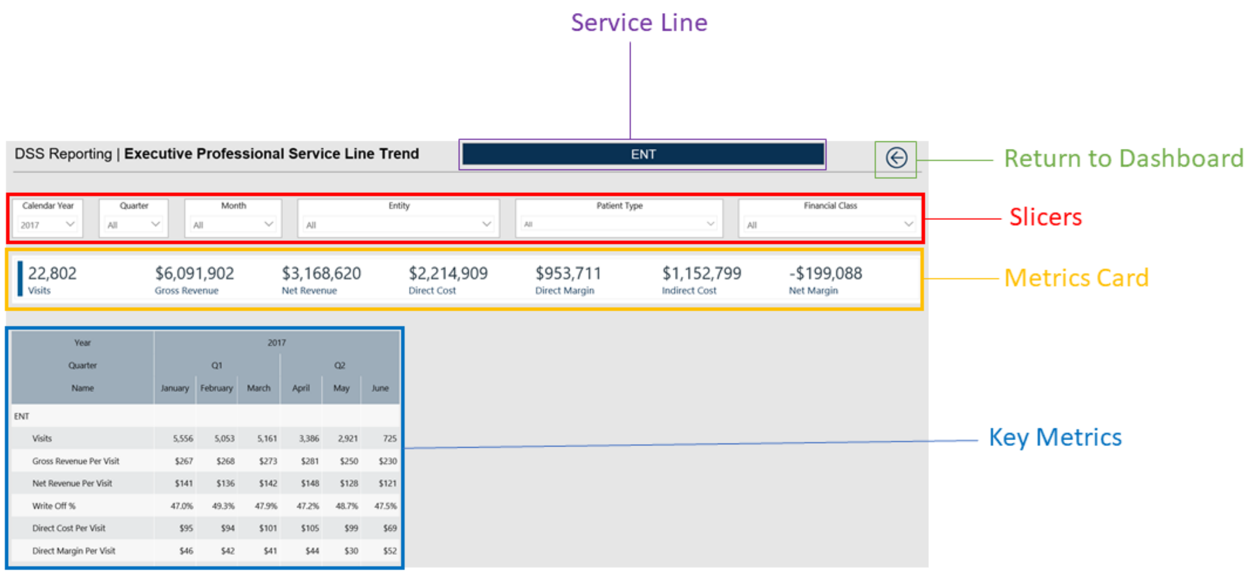
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Executive Professional Service Line Trend report

Overview

This page provides trend details for a specific service line selected in the Professional Service Line Dashboard.

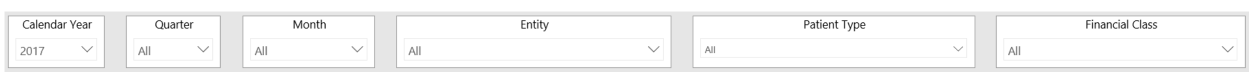
The top of the page displays the service line the report applies to. To return to the Professional Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

▶ Slicers

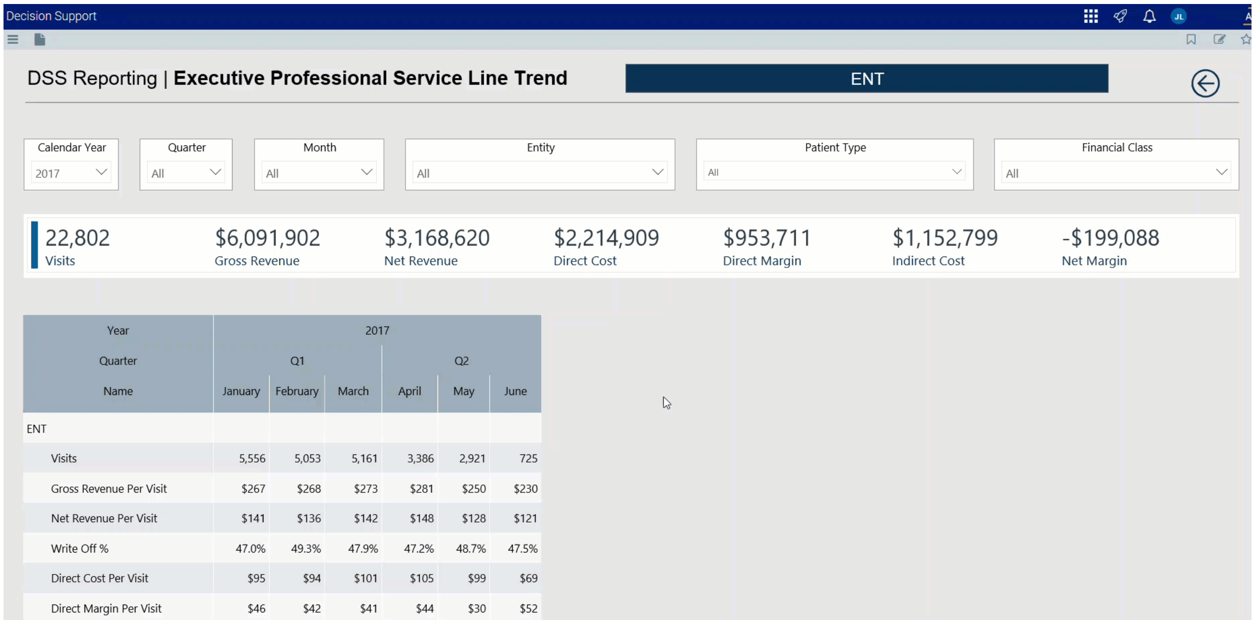
This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



Click image to view full size

▶ Metrics Card

This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select different columns or rows in the Key Metrics Trend table, the totals in the Metrics Card adjust accordingly.



Click image to view full size

▶ Key Metrics Trend by Service Line

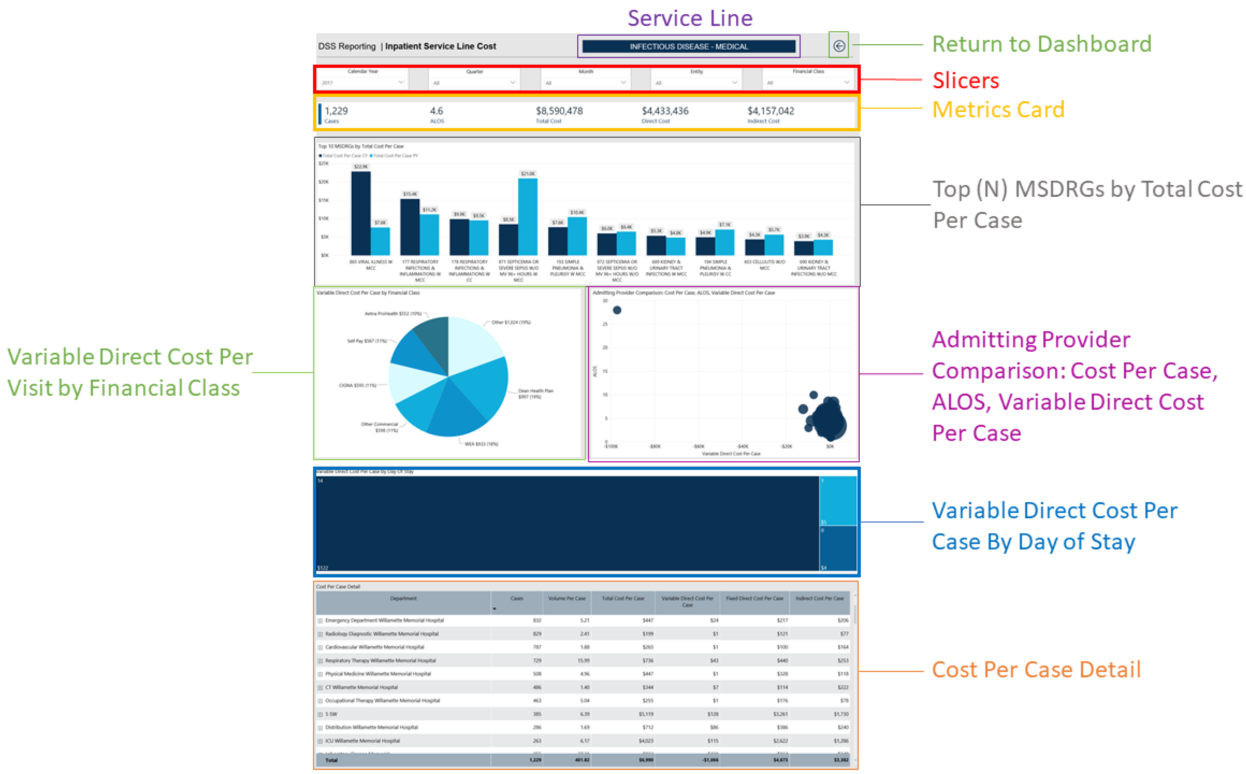
This section displays the values related to profitability for the corresponding service line indicated at the top of the page. From this section, you can click a column or row to view the metric values for that specific row or column. As you click a column, the other columns will gray out to indicate that the information in the Metrics Card is specific to that column.

Professional Service Line Cost report

▶ Overview

This page provides cost details for a specific service line selected in the Professional Service Line Dashboard.

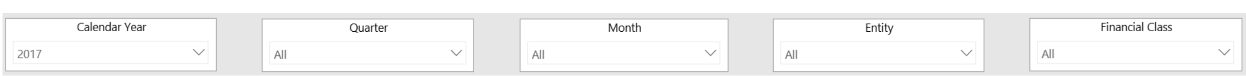
The top of the page displays the service line the page applies to. To return to the Professional Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

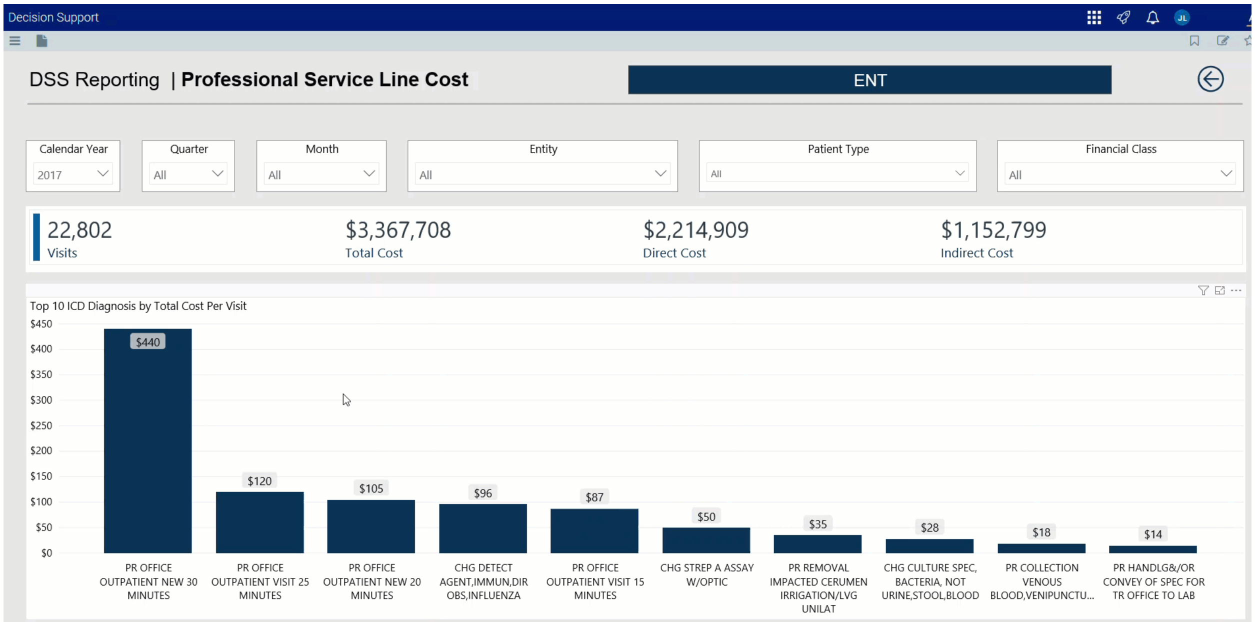
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



▶ Metrics Card

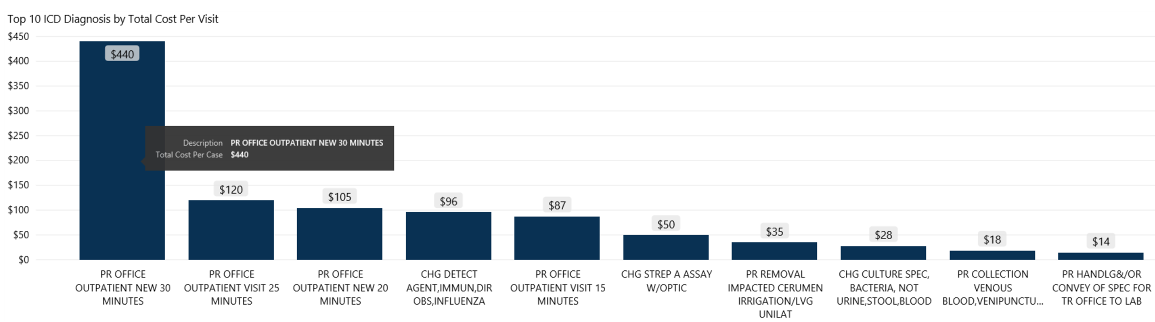
This section displays KPI data for visits, total cost, direct and indirect cost. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.



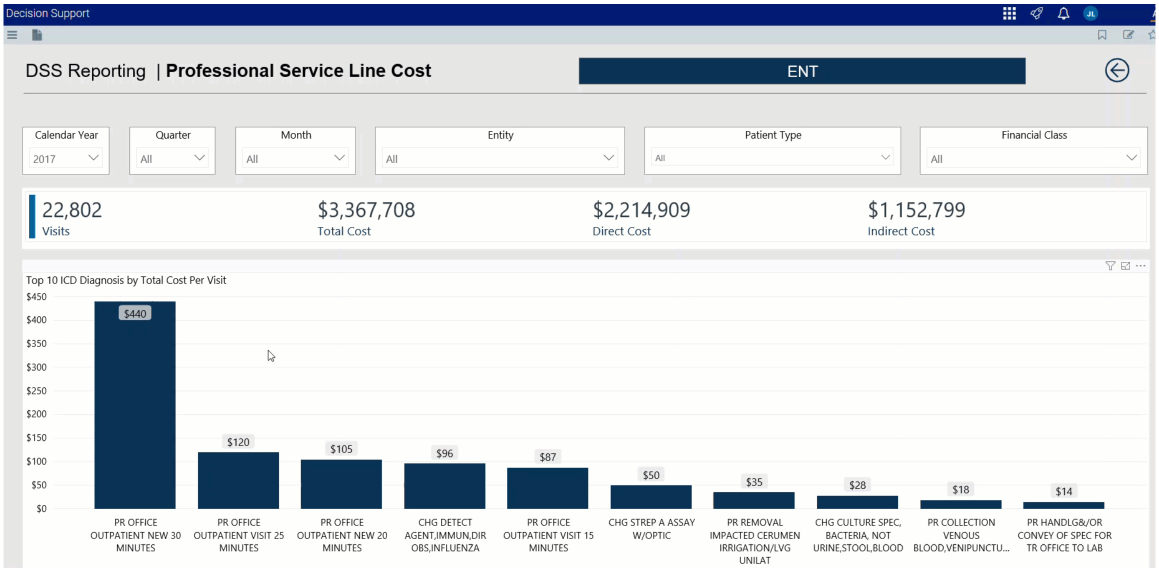
Top (N) ICD Diagnosis by Total Cost Per Visit

This bar chart displays the total cost per visit for each ICD Diagnosis. From this section, you can do the following:

- View cost details about a specific ICD Diagnosis by hovering your cursor over a bar. The system displays a tool tip that provides information on the diagnosis description and the total cost per case.



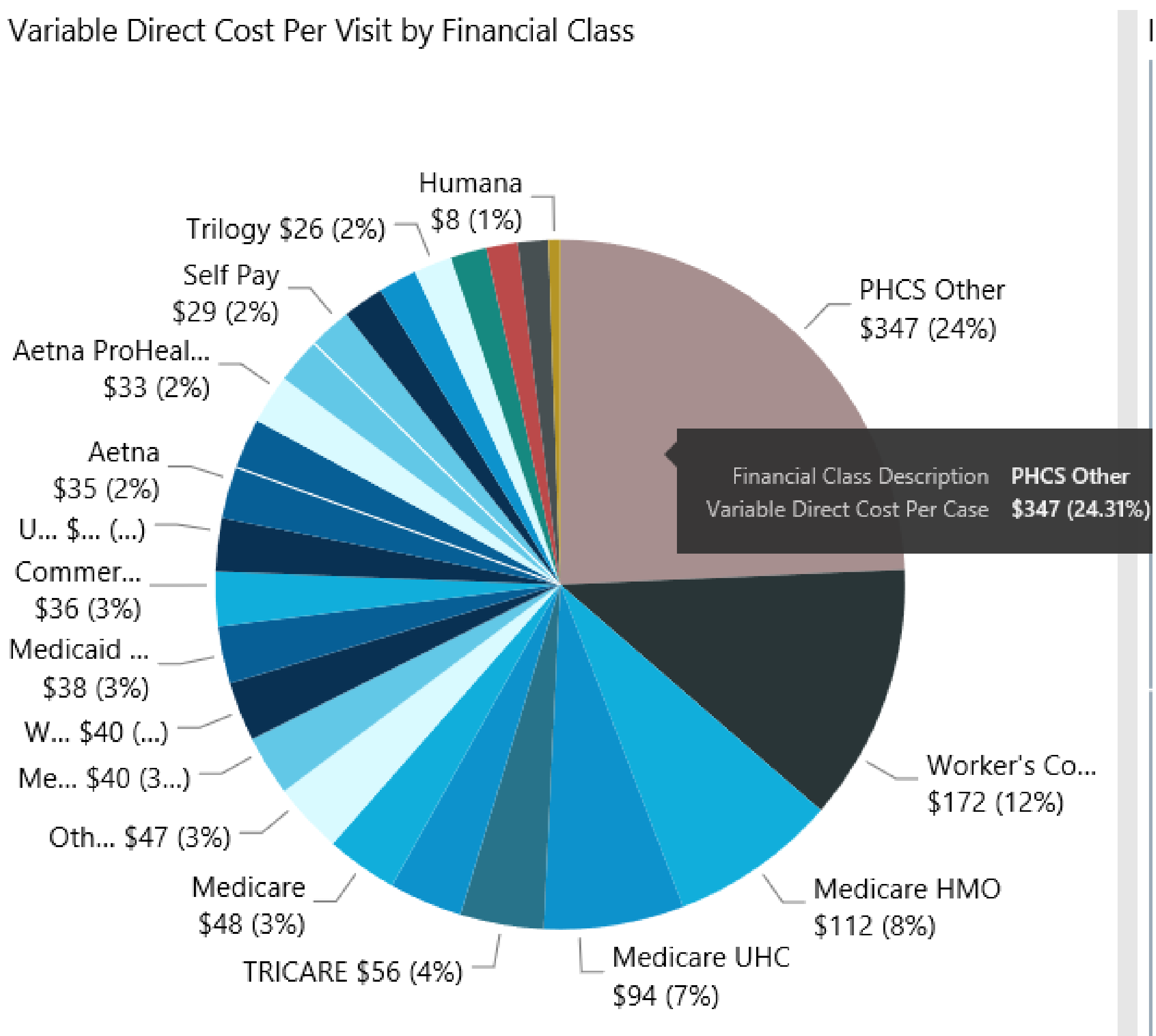
- View cost details for a specific diagnosis by clicking a bar. The system greys out the other diagnosis bars in the chart and only shows metrics and details for that diagnosis. To enable all of the diagnosis data in the page again, click the bar again.



Variable Direct Cost Per Visit by Financial Class

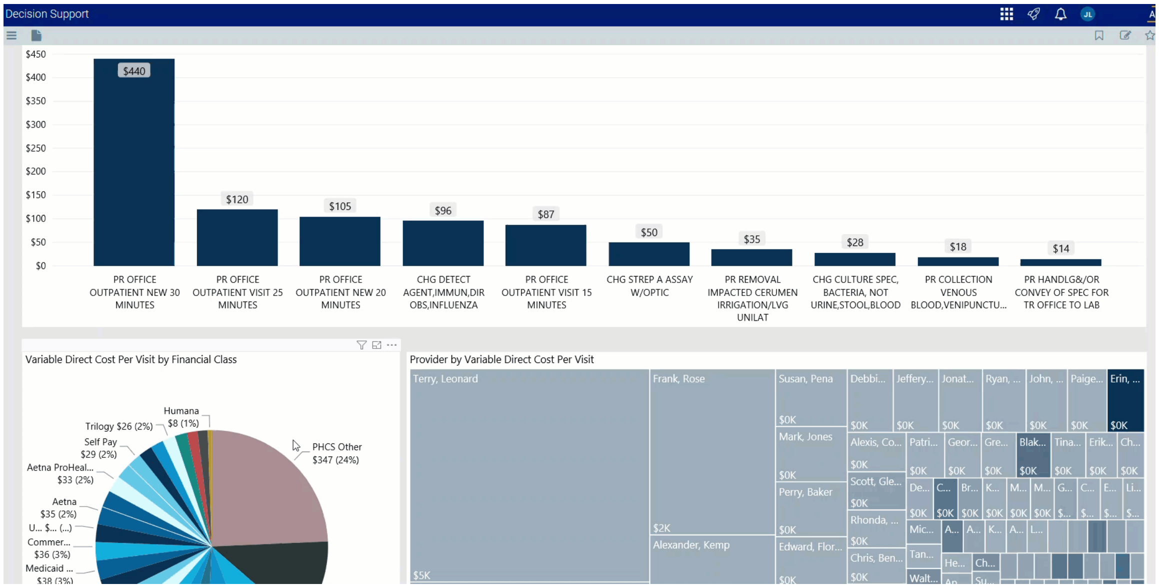
This pie chart breaks down the variable direct cost per visit across financial classes. From this section, you can do the following:

- View financial class details by hovering your cursor over a slice. The system displays a tool tip that provides a description of the financial class and the variable direct cost per case.



Variable Direct Cost Per Visit by Financial Class
Humana $8 (1%)
Trilogy $26 (2%)
Self Pay $29 (2%)
Aetna ProHeal... $33 (2%)
Aetna $35 (2%)
U... $... (...)
Commer... $36 (3%)
Medicaid ... $38 (3%)
W... $40 (...)
Me... $40 (3...)
Oth... $47 (3%)
Medicare $48 (3%)
TRICARE $56 (4%)
Medicare UHC $94 (7%)
Medicare HMO $112 (8%)
Worker's Co... $172 (12%)
PHCS Other $347 (24%)
Financial Class Description PHCS Other
Variable Direct Cost Per Case $347 (24.31%)

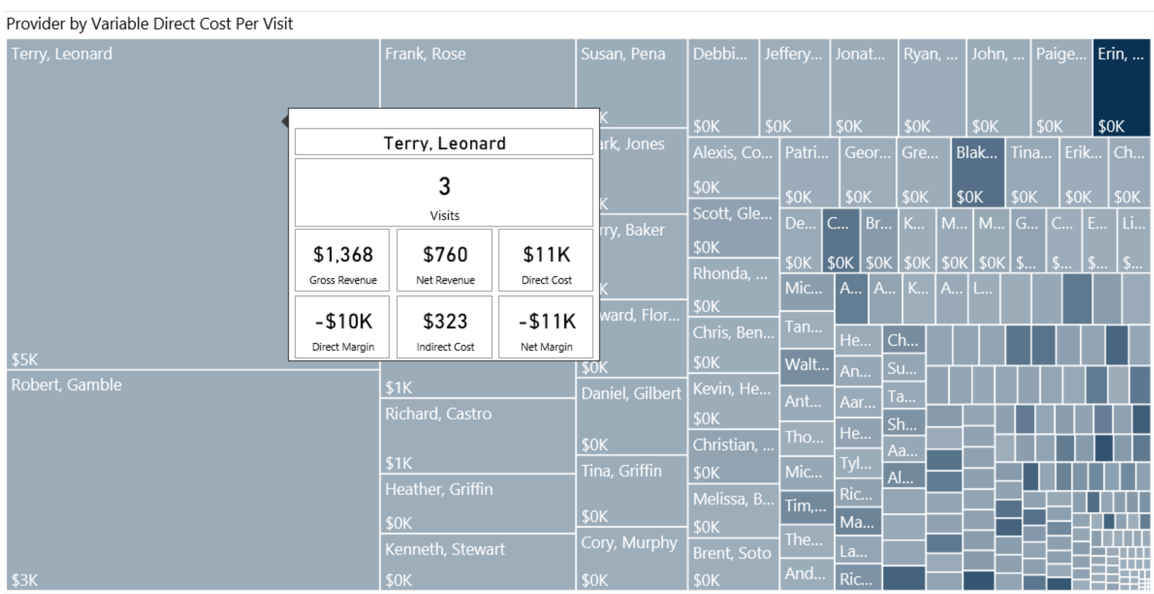
- View details for a specific financial class by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To enable all of the financial class data in the page again, click the bar again.



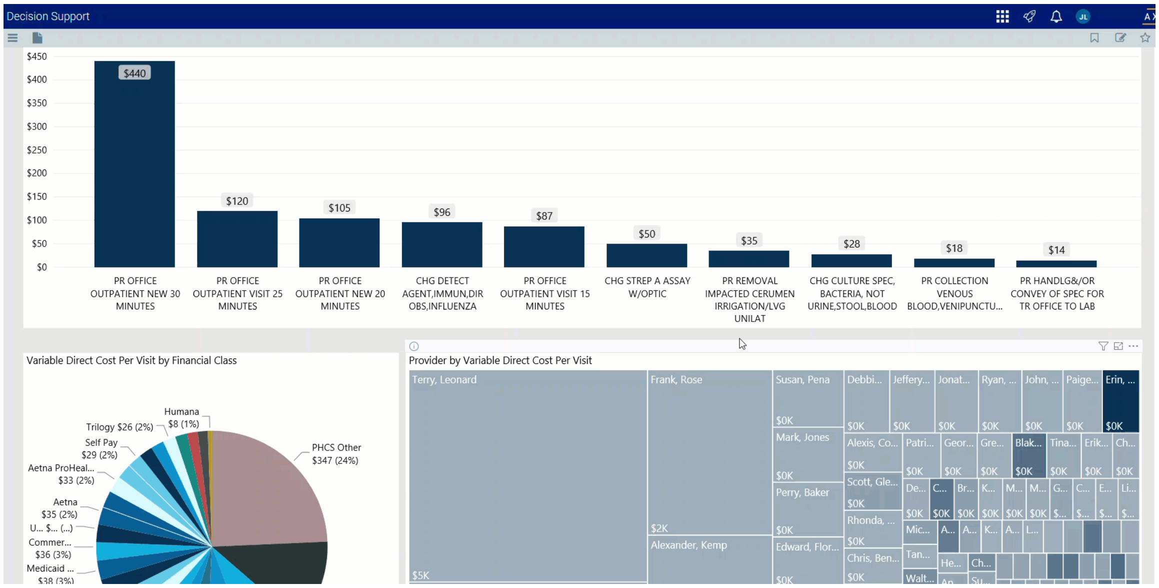
Provider by Variable Direct Cost Per Visit

This visual shows the variable direct cost per visit for each provider. The larger the square, the higher the cost per visit. From this section, you can do the following:

- View variable direct cost details by hovering your cursor over a provider square. The system displays a tool tip with the provider's name, the number of visits, gross and net revenue, direct and indirect cost, and direct and net margin.



- View details for a specific provider by clicking a square. The system greys out the details across the page except for data specific to the provider you selected. To enable all of the provider data in the page again, click the square again.



Cost Per Visit Detail

This section displays the value details related to the cost per visit. From this section, you can do the following:

- View the details for a specific department by clicking a row. The system greys out the details for the other departments across the page except for data specific to the department you selected.

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Portland Health Medical Group-Prescott	4,842	1.60	$209	$67	$70	$72
Portland Health Medical Group-Tigard	3,520	1.65	$176	$30	$68	$78
Portland Health Medical Group-Banks Road	3,411	1.65	$107	$32	$39	$36
Portland Health Medical Group-Corp Ctr Dr Oregon	2,003	1.57	$114	$30	$53	$32
Portland Health Medical Group-Newberg	1,594	1.66	$110	$25	$44	$41
Portland Health Medical Group-Dundee	1,437	1.46	$149	$57	$53	$40
Portland Health Medical Group-Dayton	1,294	1.47	$112	$46	$32	$34
Portland Health Medical Group-Washougal	1,053	1.57	$153	$41	$65	$46
Portland Health Medical Group-King City	1,008	1.60	$103	$24	$40	$38
McMinnville Family Medicine	961	1.40	$99	$28	$38	$34
Portland Health Medical Group-Tualatin	898	1.40	$123	$29	$54	$41
Total	**22,802**	**1.57**	**$148**	**$42**	**$55**	**$51**

- Sort the table by columns in ascending or descending order by clicking the column header.

Cost Per Visit Detail

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Portland Health Medical Group-Prescott	4,842	1.60	$209	$67	$70	$72
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Portland Health Medical Group-Dayton	1,294	1.47	$112	$46	$32	$34
Portland Health Medical Group-Washougal	1,053	1.57	$153	$41	$65	$46
Portland Health Medical Group-King City	1,008	1.60	$103	$24	$40	$38

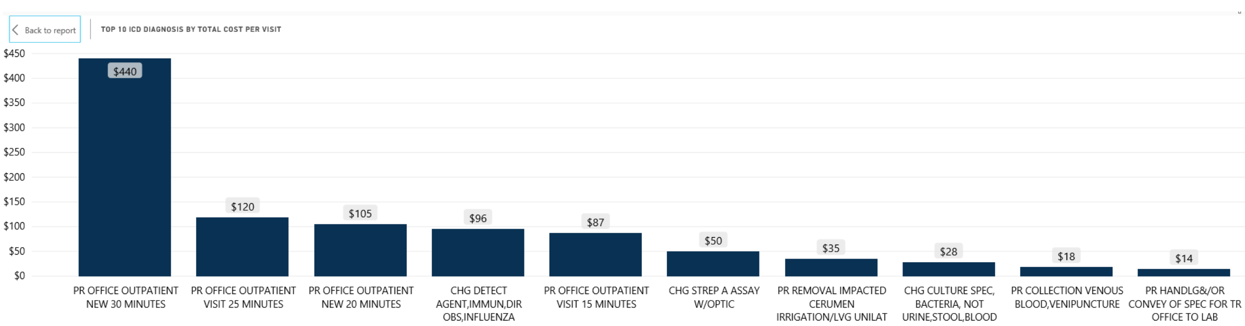
- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Cost Per Visit Detail

Department	Visits	Volume Per Visit	Total Cost Per Visit	Variable Direct Cost Per Visit	Fixed Direct Cost Per Visit	Indirect Cost Per Visit
Behavioral Health Services	4	1.00	$116	$32	$56	$28
Cardiology	58	1.17	$143	$69	$37	$37
Cardiology-New	78	1.09	$117	$56	$34	$27
Cardiothoracic Surgery	1	1.00	$787	$1	$708	$78
Family Practice Residency Program	29	1.07	$621	$145	$327	$149
First Care	159	1.20	$71	$2	$49	$20
Hospitalists-Oregon Memorial	12	1.17	$523	$408	$56	$59
Hospitalists-Willamette Memorial Hospital	82	1.01	$311	$181	$82	$48
McMinnville Family Medicine	961	1.40	$99	$28	$38	$34
Medical Oncology	51	1.00	$245	$174	$29	$43
Neurology	10	1.00	$307	$516	$771	-$979
Total	**22,802**	**1.57**	**$148**	**$42**	**$55**	**$51**

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



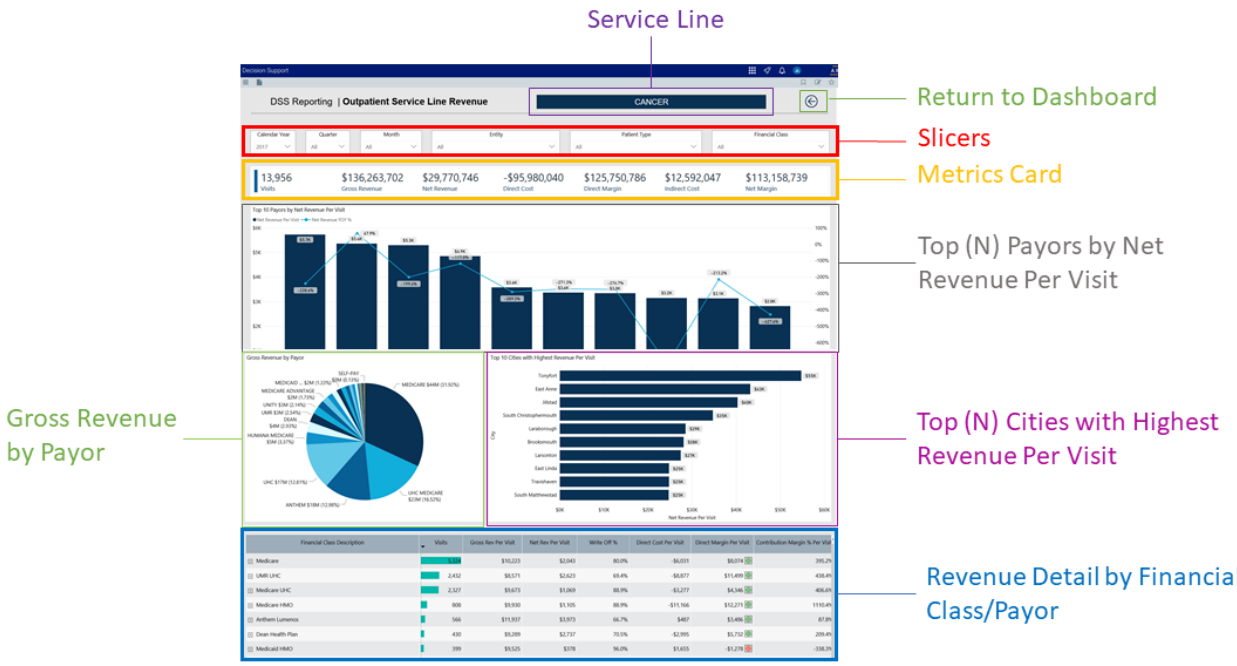
Description	Total Cost Per Case
PR OFFICE OUTPATIENT NEW 30 MINUTES	$440
PR OFFICE OUTPATIENT VISIT 25 MINUTES	$120
PR OFFICE OUTPATIENT NEW 20 MINUTES	$105
CHG DETECT AGENT,IMMUN,DIR OBS,INFLUENZA	$96
PR OFFICE OUTPATIENT VISIT 15 MINUTES	$87
CHG STREP A ASSAY W/OPTIC	$50
PR REMOVAL IMPACTED CERUMEN IRRIGATION/LVG UNILAT	$35
CHG CULTURE SPEC, BACTERIA, NOT URINE,STOOL,BLOOD	$28
PR COLLECTION VENOUS BLOOD,VENIPUNCTURE	$18
PR HANDLG&/OR CONVEY OF SPEC FOR TR OFFICE TO LAB	$14

Professional Service Line Revenue report

Overview

This page provides revenue details for a specific service line selected in the Professional Service Line Dashboard.

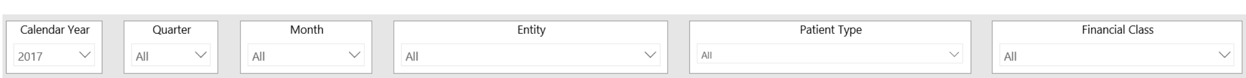
The top of the page displays the service line the page applies to. To return to the Professional Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

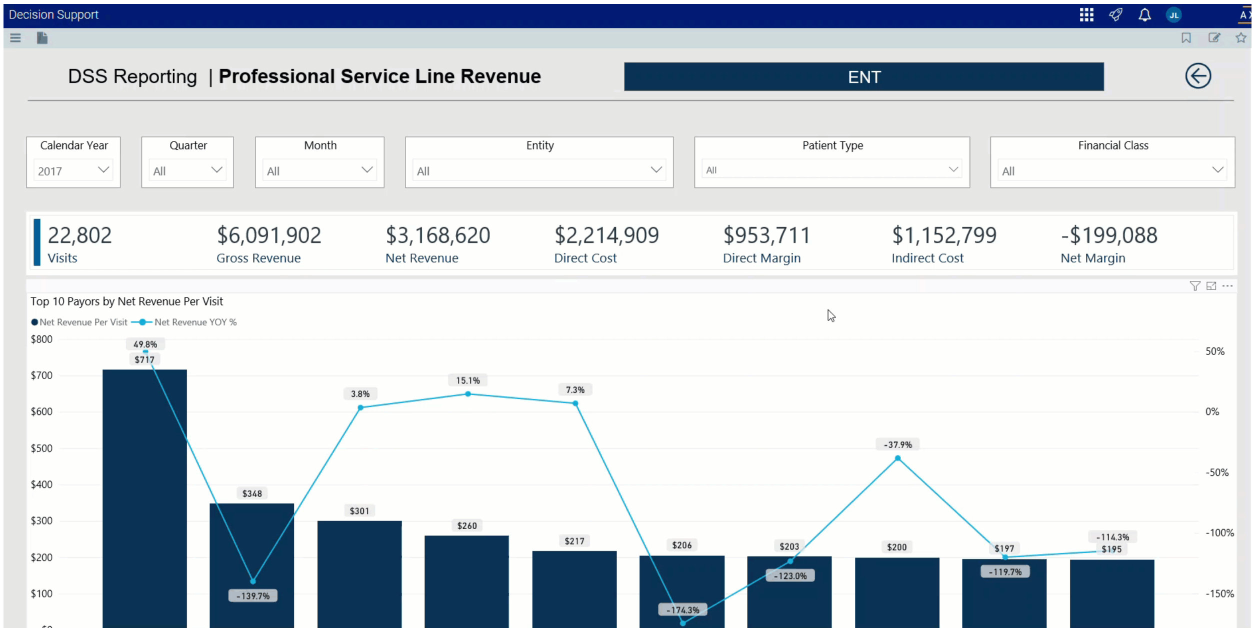
Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the parameters to include in the views.



Metrics Card

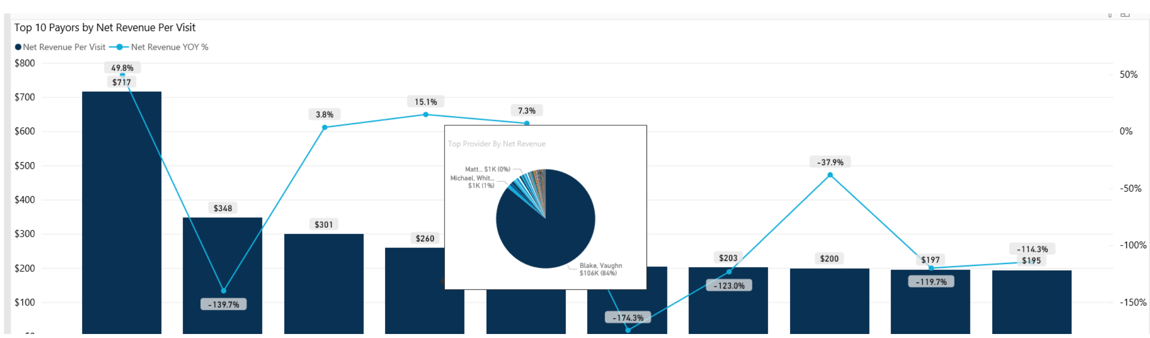
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.



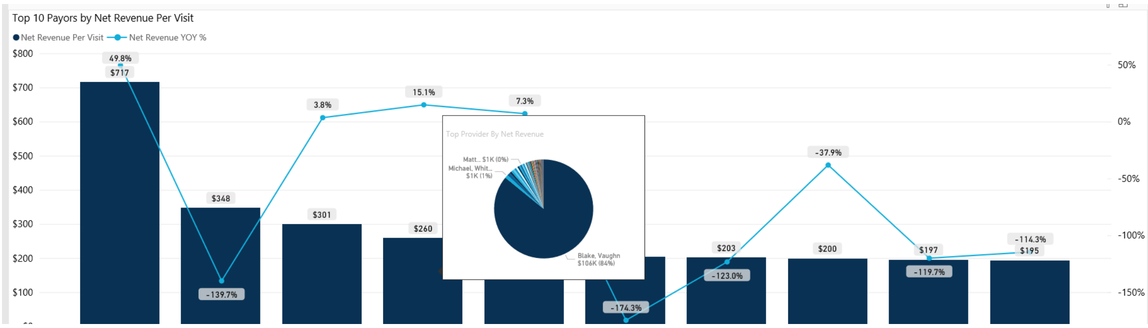
▶ Top (N) Payors by Net Revenue Per Visit

This bar chart displays the net revenue per visit for each payor. From this section, you can do the following:

- View the top providers for by net revenue by hovering your cursor over a bar. The system displays a tool tip that provides a pie chart that segments data by provider percentage.



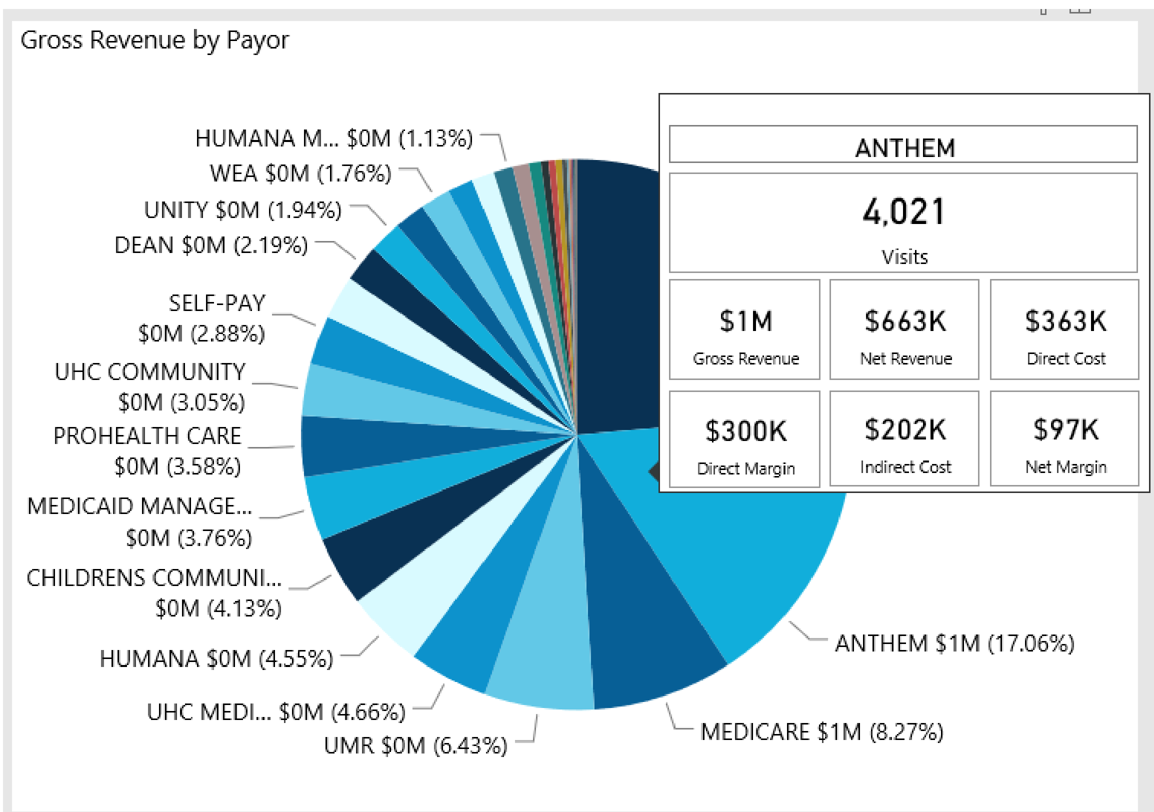
- View revenue details for a specific payor by clicking a bar. The system greys out the other payor bars in the chart and only shows metrics and details for that payor. To show all of the payor data in the page again, click the bar again.



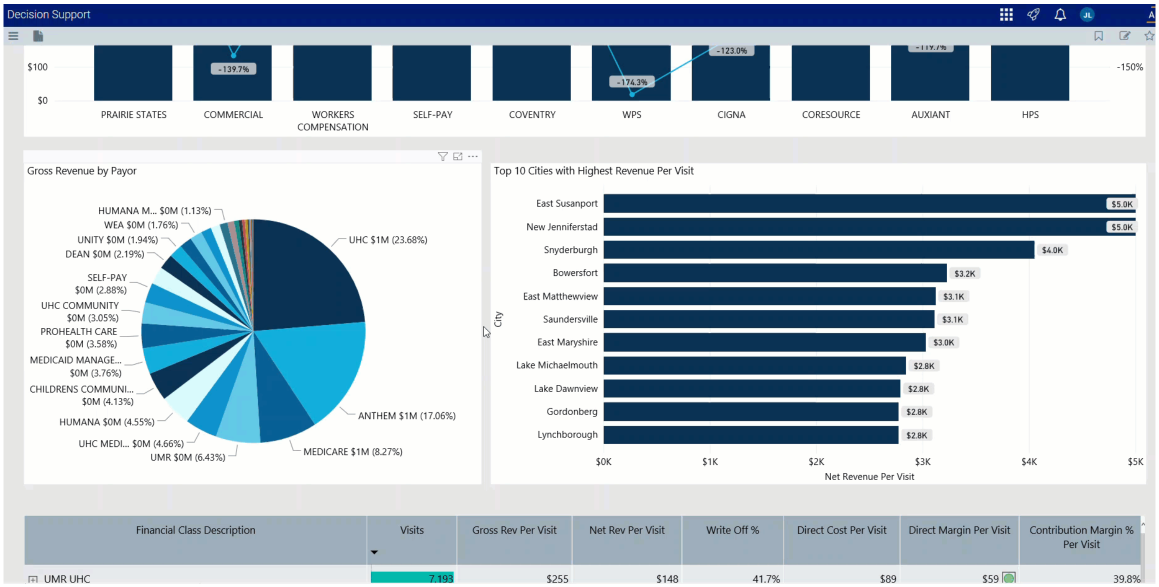
▶ Gross Revenue by Payor

This pie chart breaks down the gross revenue across payors. From this section, you can do the following:

- View payor gross revenue details by hovering your cursor over a slice. The system displays a tool tip displays details regarding the number of visits, gross and net revenue, direct and indirect cost, and direct and net margin.



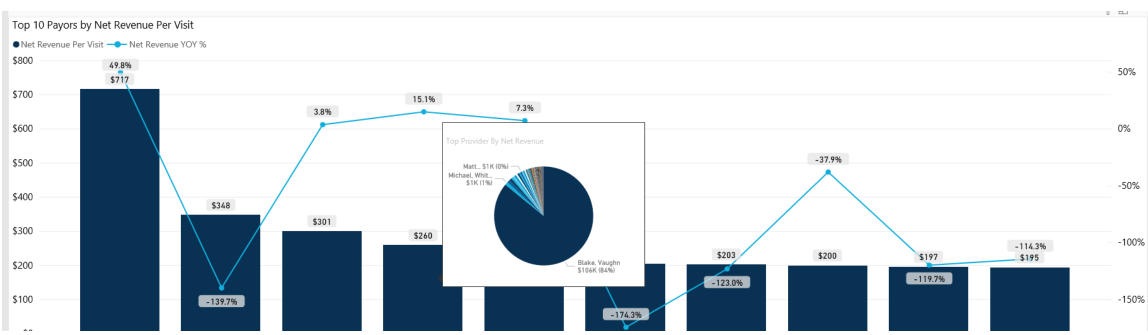
- View details for the gross revenue by payor by clicking a slice. The system greys out the details across the page except for data specific to the slice you selected. To show all of the provider data in the page again, click the slice again.



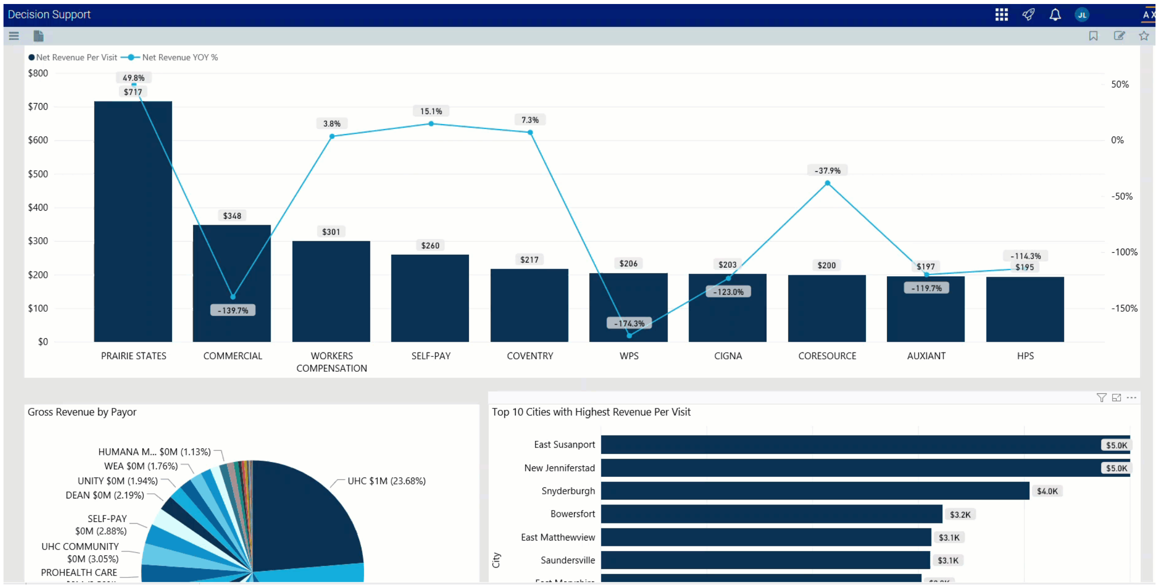
Top (N) Cities with Highest Revenue Per Visit

This bar chart shows the top number of cities that have the highest revenue per visit. From this chart, you can do the following:

- View details regarding visit net revenue for the city by hovering the cursor over a bar to display a tool tip.



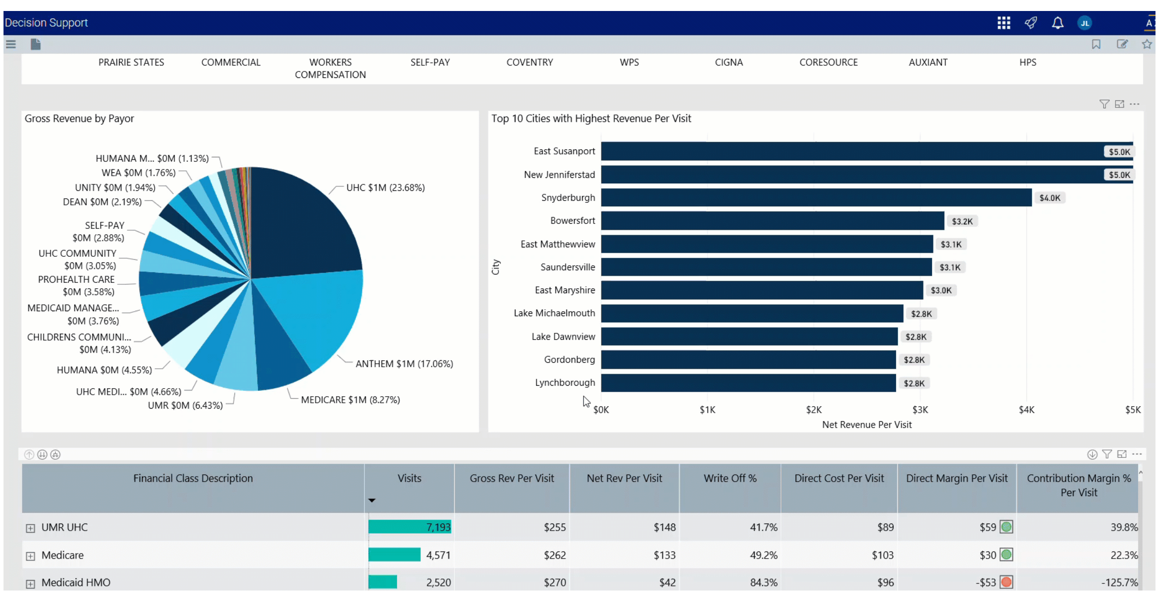
- View details for a specific city by clicking a bar. The system greys out the details across the page except for data specific to the city bar you selected. To enable all of the city data in the page, click the bar again.



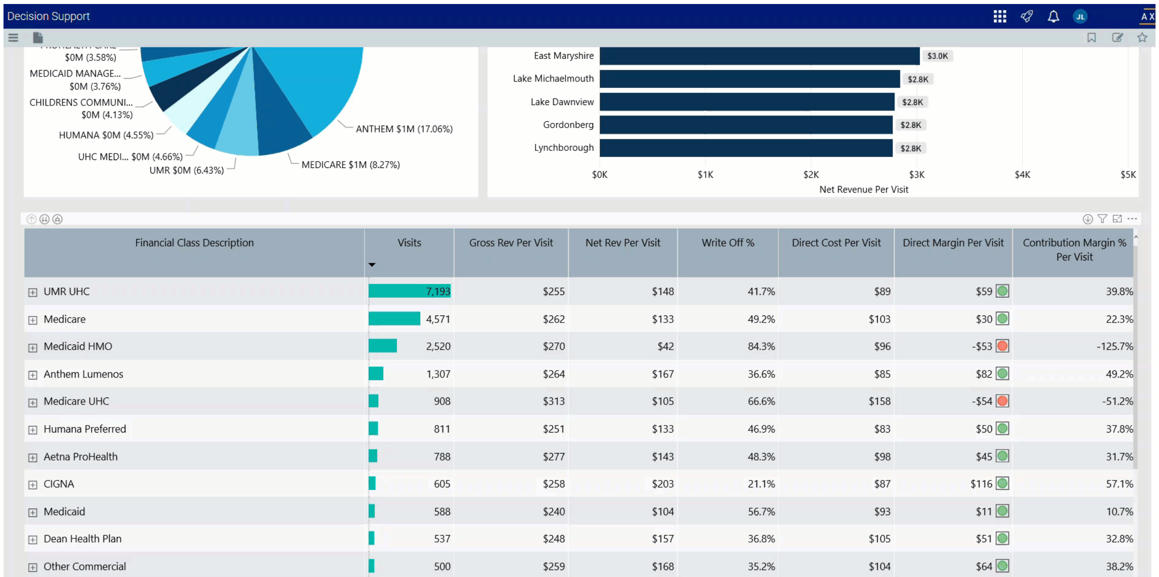
▶ Revenue Detail by Financial Class / Payor

This section displays the values related to the revenue by financial class or payor. From this section, you can do the following:

- View the details for a specific financial class by clicking a row. The system greys out the details for the other financial classes across the page except for data specific to the financial class you selected. To enable all of the table data in the page, click the row again.

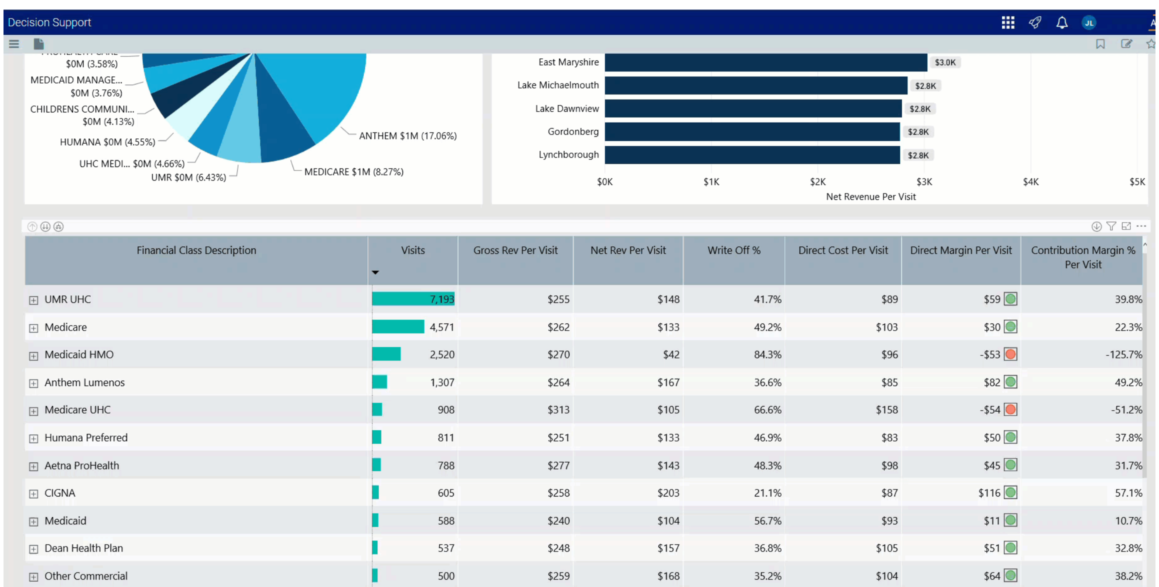


- Sort the table by columns in ascending or descending order by clicking the column header.



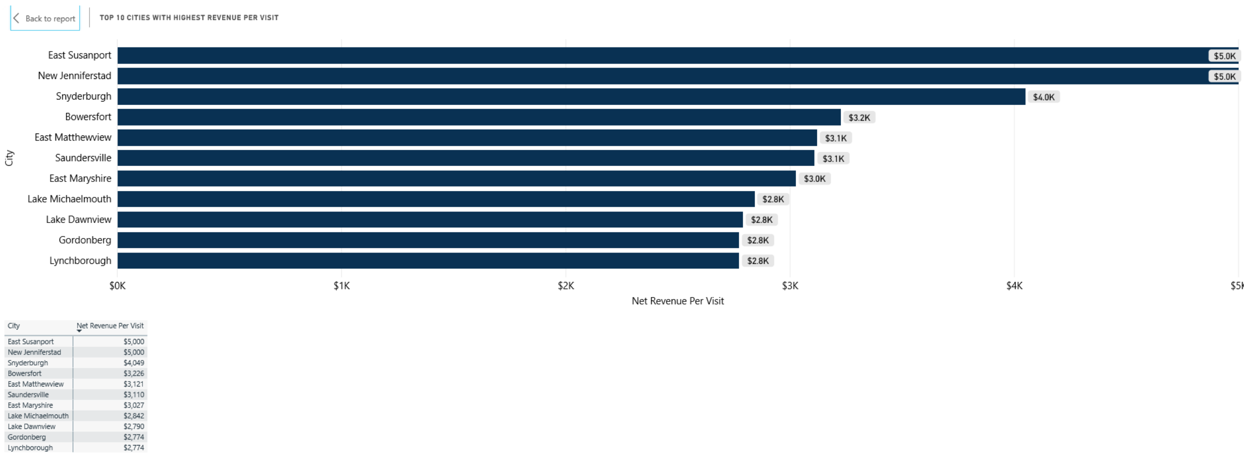
- Drill up or down through the data by right-clicking the row, and selecting **Drill Up** or **Drill Down**.

> **TIP:** You can also view drill down information by clicking + next to the financial class description.



Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.

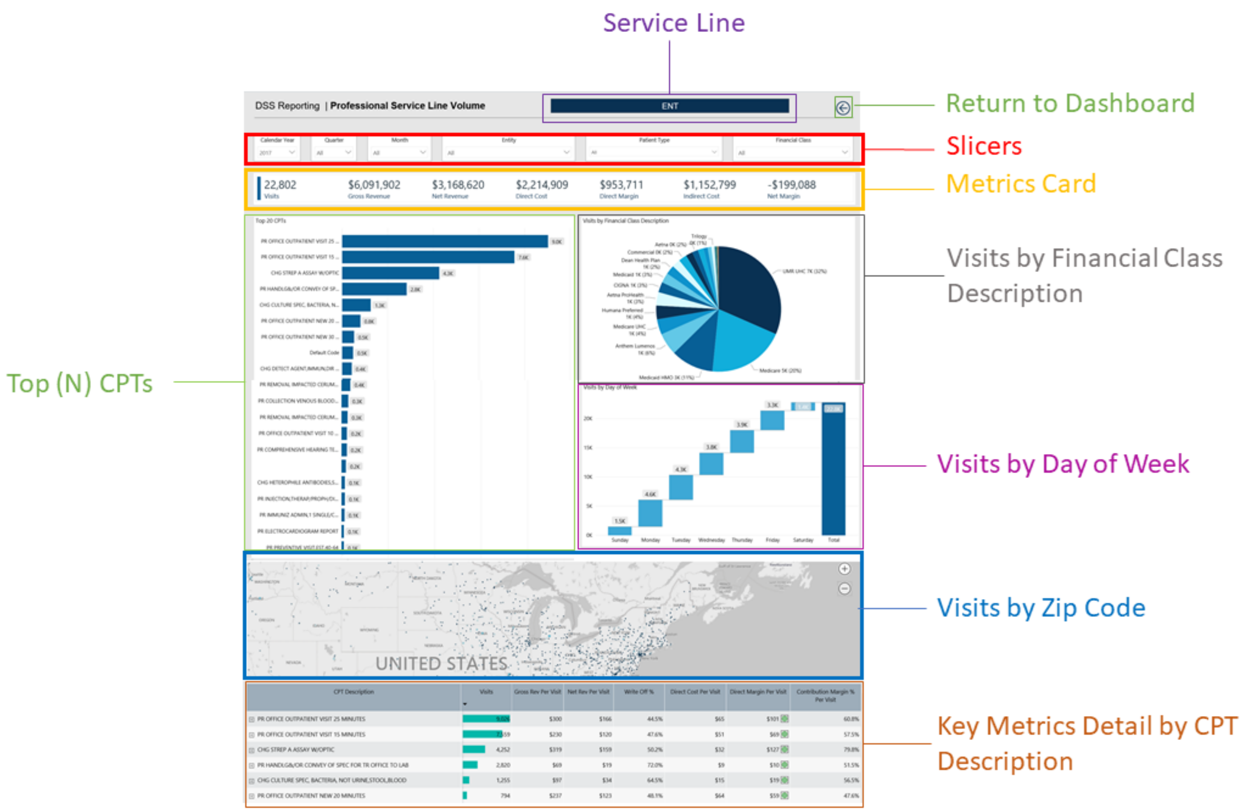


Professional Service Line Volume report

▶ Overview

This page provides the volume details for a specific service line selected in the Professional Service Line Dashboard.

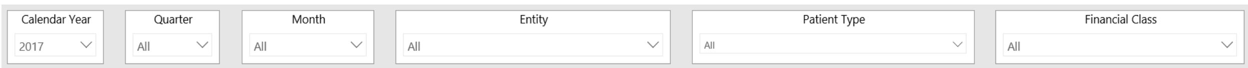
The top of the page displays the service line the page applies to. To return to the Professional Service Line Dashboard, click the arrow in the upper right corner.



The following sections describe the different areas of this page.

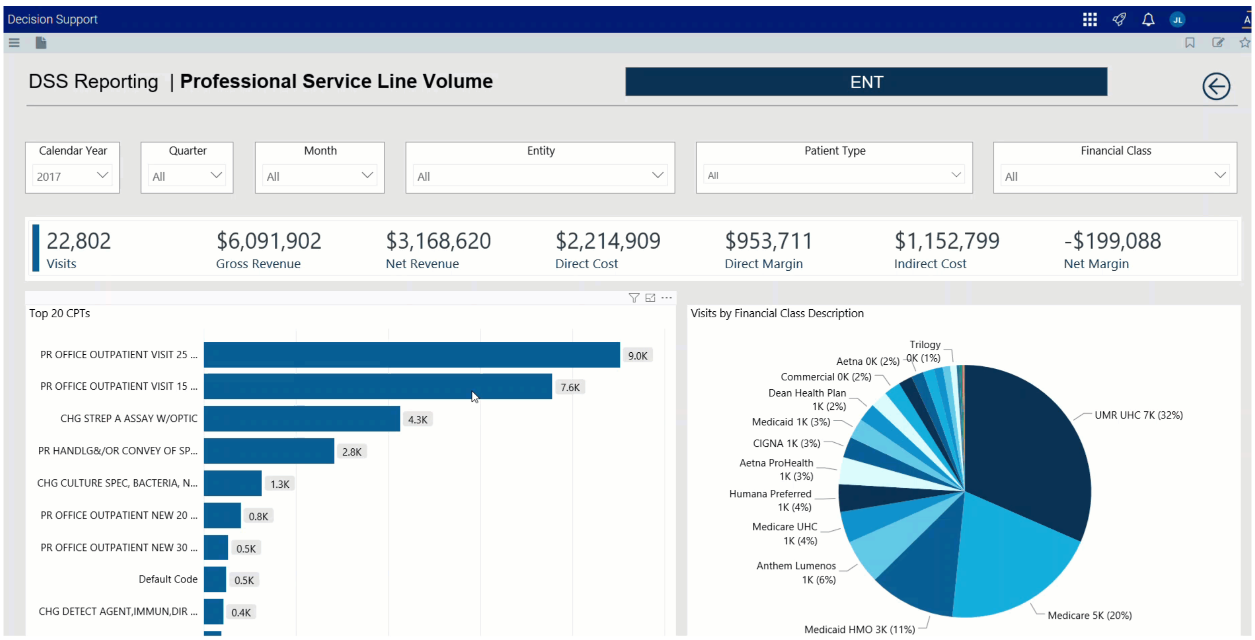
▶ Slicers

This section allows you to filter data by time (calendar year, quarter, month), entity, patient type, and financial class. From the drop-downs, you can select a combination of the available options to configure the data parameters for this page.



▶ Metrics Card

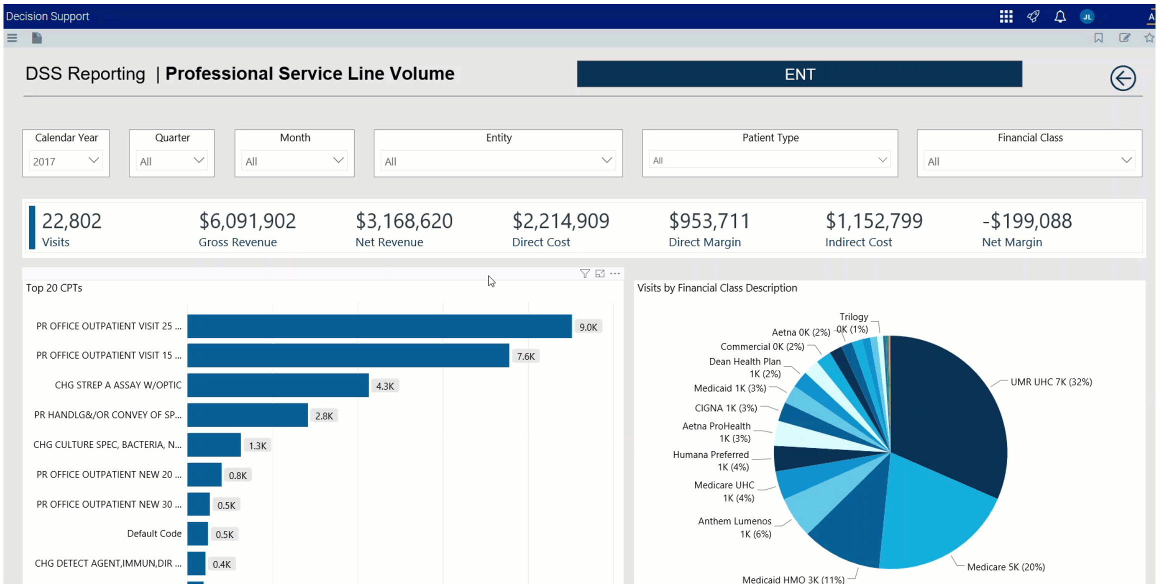
This section displays KPI data for visits, gross and net revenue, direct and indirect cost, and direct and net margin. As you select the different options from the different areas on the page, the totals in the Metrics Card adjust accordingly.



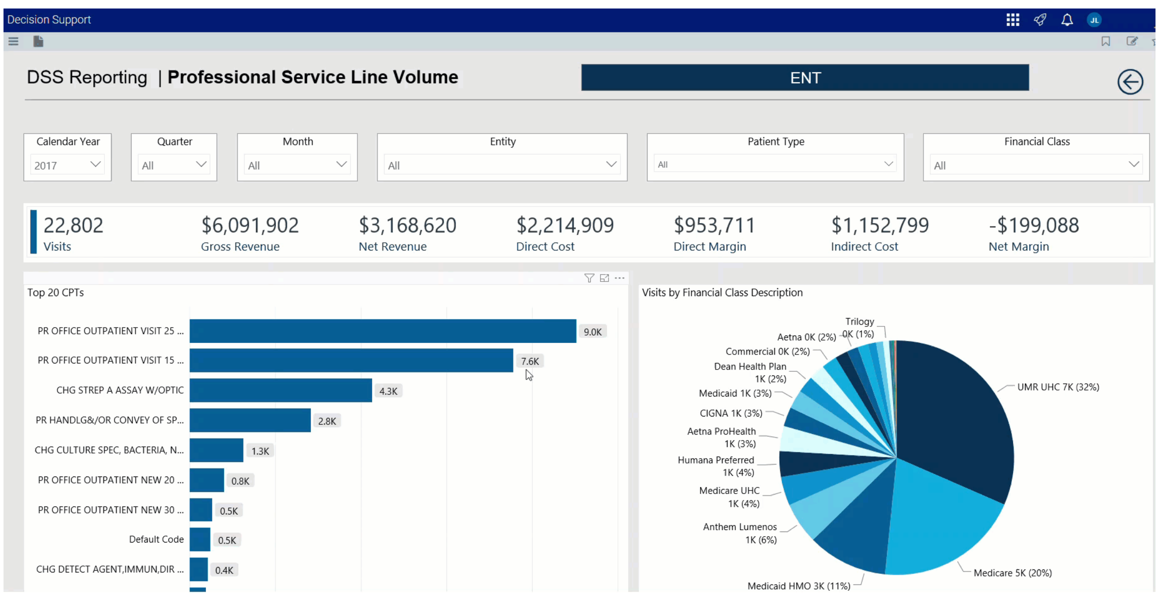
▶ Top (N) CPTs

This sections displays a bar graph of the top visits by CPT. From here, you can do the following:

- View a breakdown of the top providers by visit by hovering your cursor over any bar.



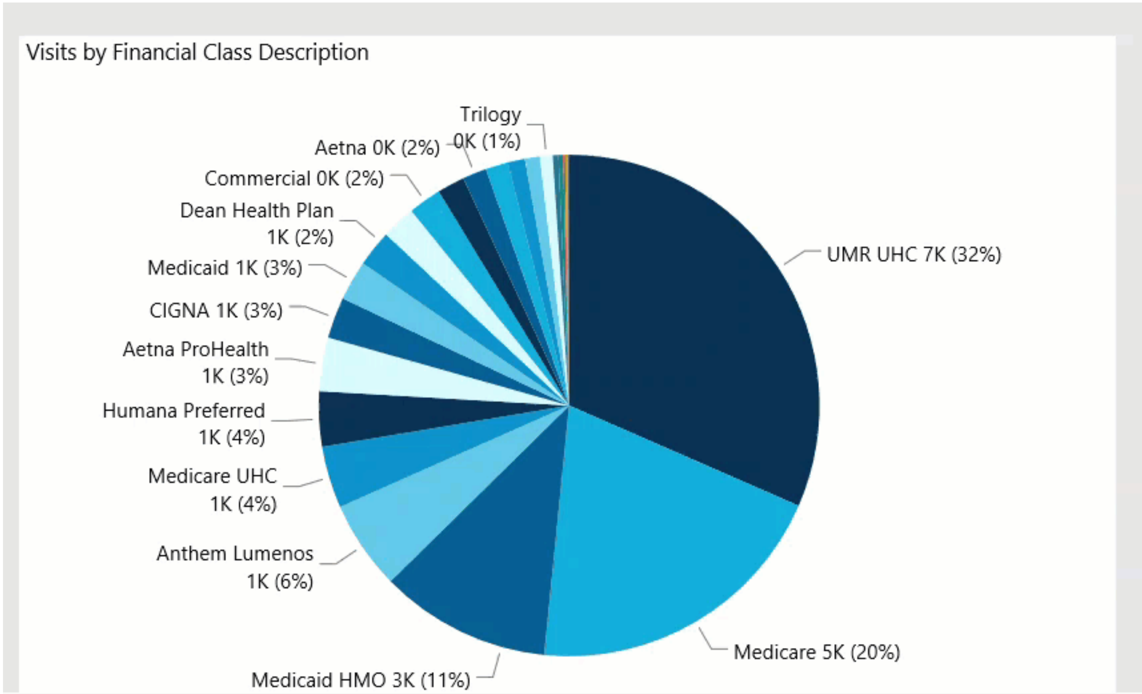
- View the KPIs specific to a diagnosis by clicking a bar. The sections of the page will adjust to show data specific to that diagnosis.



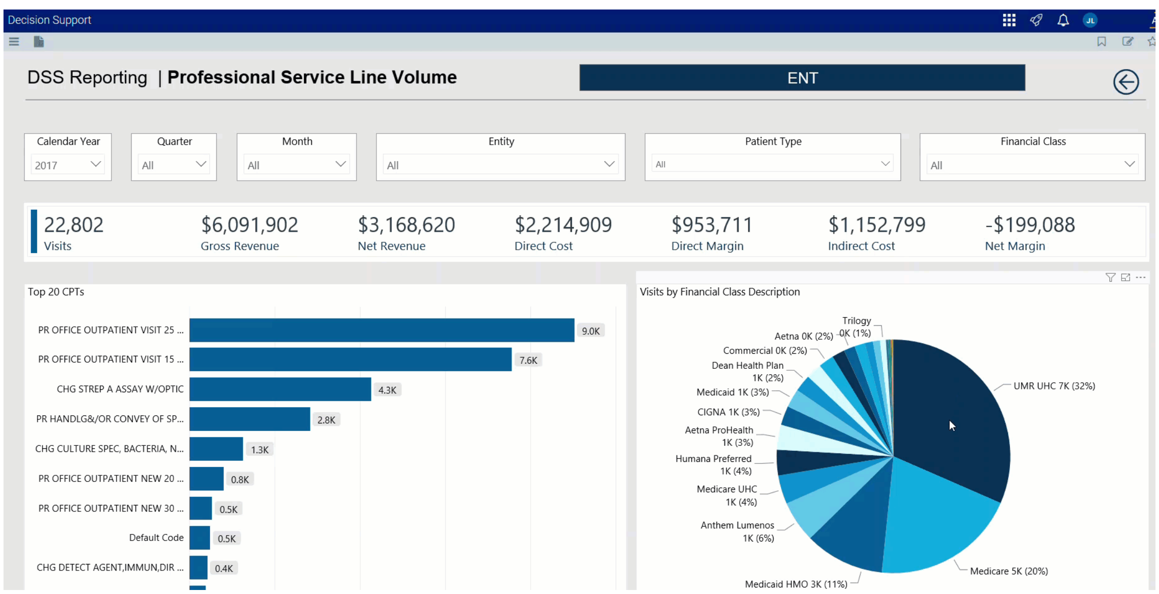
Visits by Financial Class Description

This sections displays a pie chart that breaks down visits by financial class. From here, you can do the following:

- View details regarding visits, gross and net revenue, direct and indirect cost, direct and net margin for a financial class by hovering your cursor over a slice.



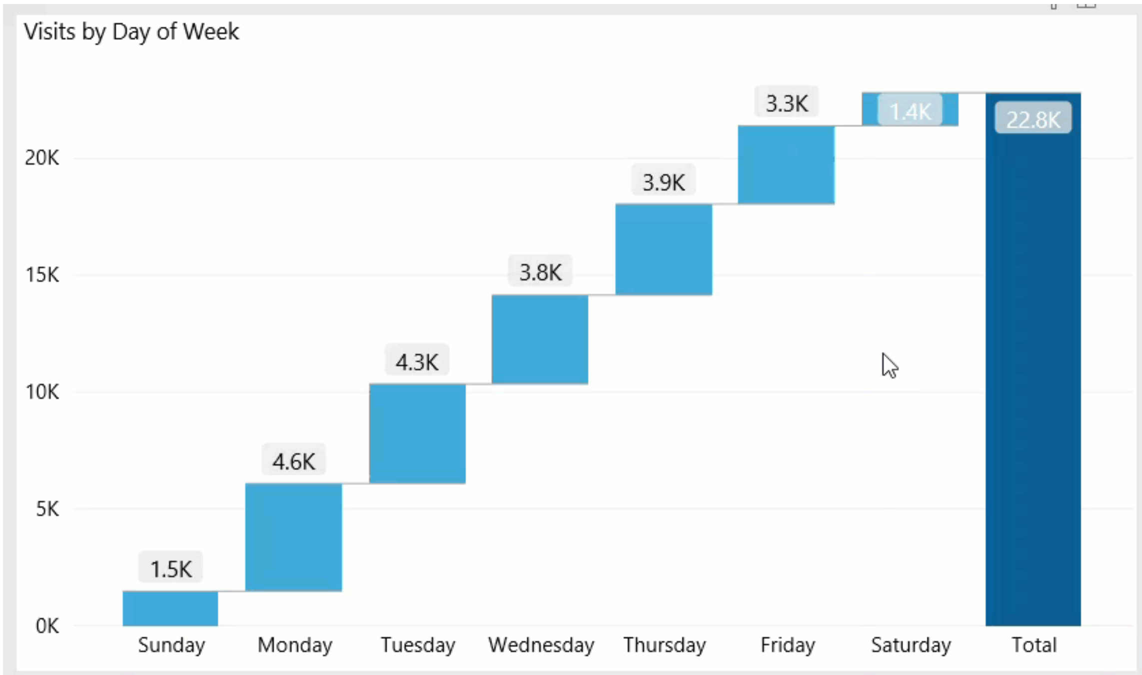
- View the KPIs specific to a diagnosis by clicking a slice. The sections on the page will adjust to show the data specific to that diagnosis.



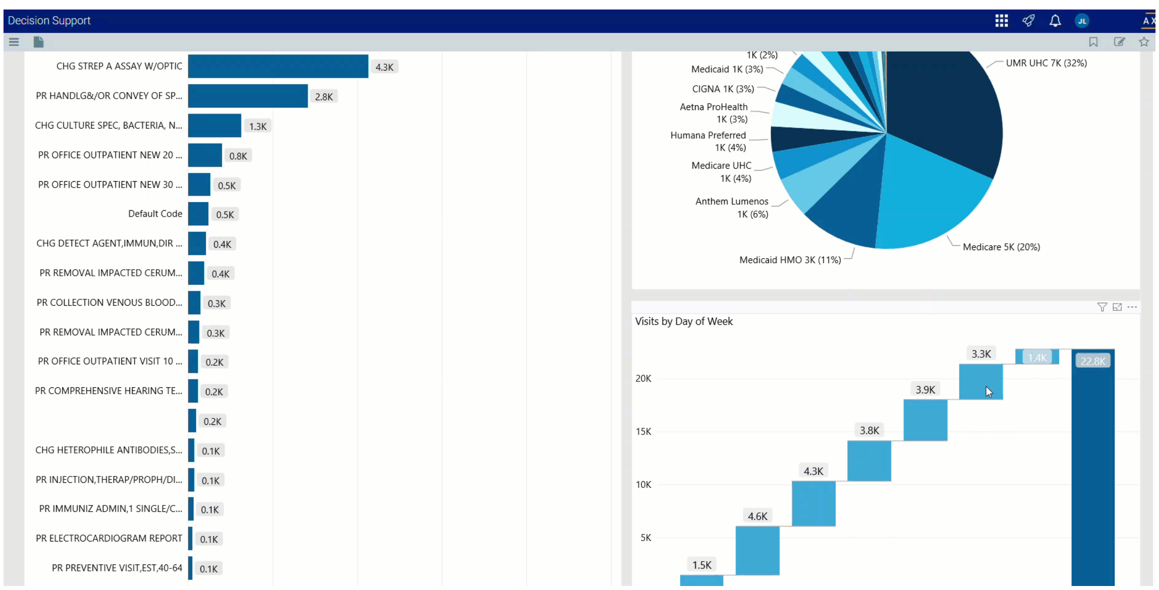
Visits by Day of Week

This section displays a bar chart of the number of visits broken down by days of the week. From here, you can do the following:

- View the number of visits for each day by hovering your cursor over a bar.



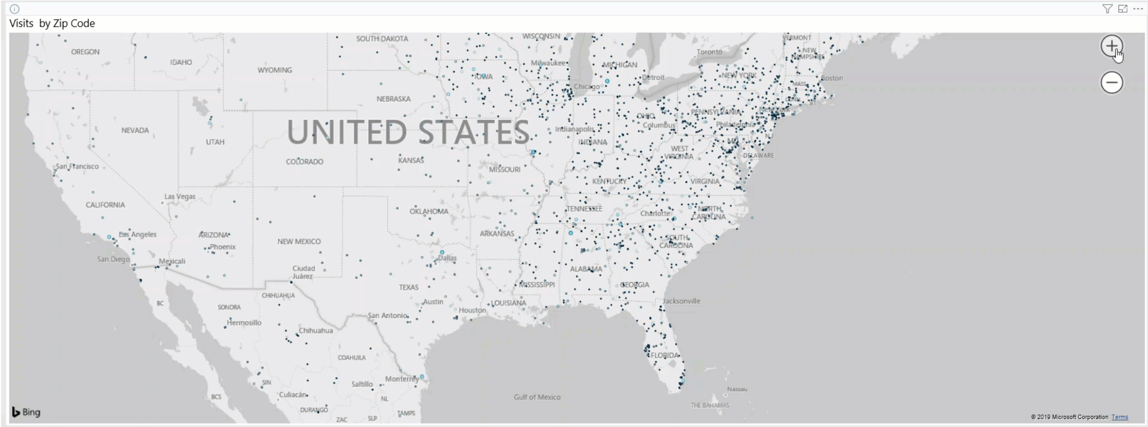
- View the KPIs specific to a diagnosis by clicking a bar. The sections on the page will adjust to show the data specific to that diagnosis.



▶ Visits by Zip Code

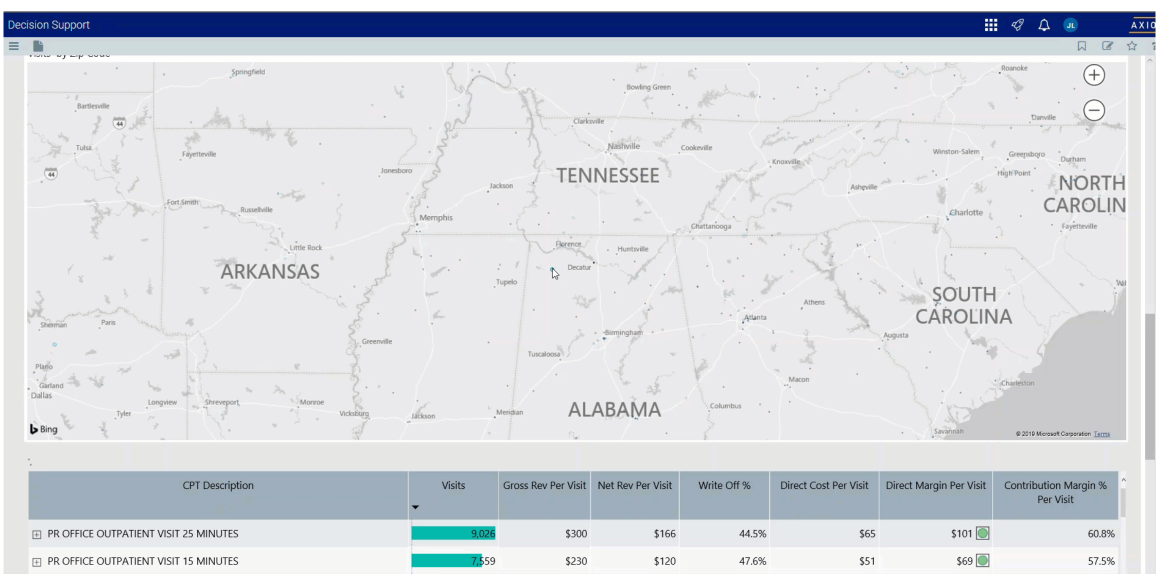
This section displays the visits by location using a map. From here, you can do the following:

- Zoom in and out of the map by clicking + or - on the right side of the page. You can move the map by holding down the left mouse button and moving the mouse to the area to view.



- View the zip code and number of visits for a location by hovering your cursor over a dot on the map.

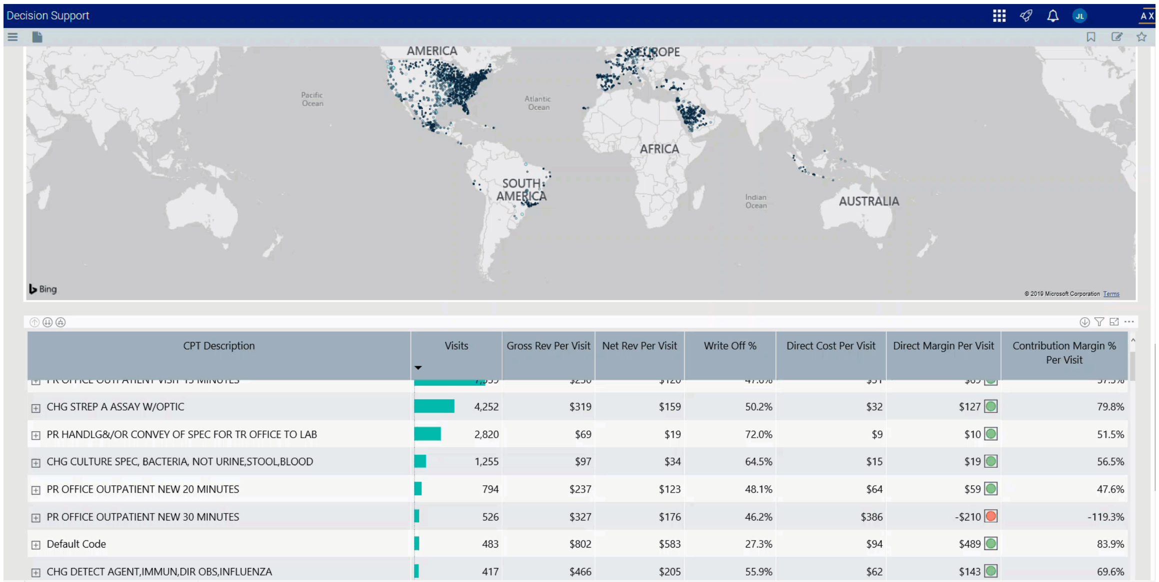
- View information about visits specific to that location by clicking a dot on the map, and the sections on the page will adjust accordingly.



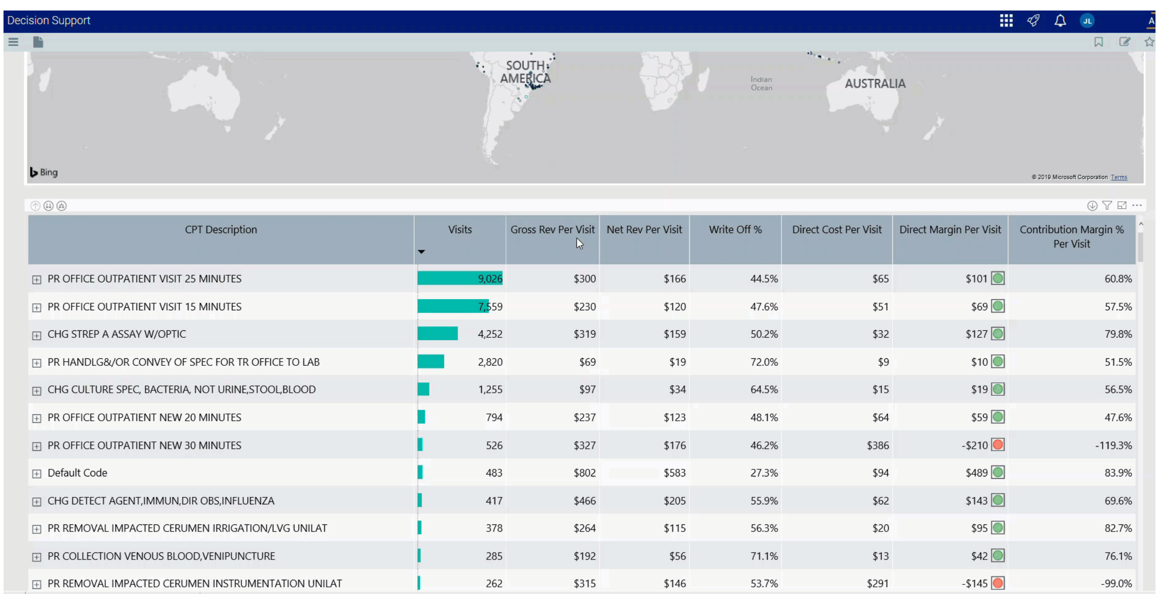
CPT Detail

This sections displays the values related to profitability for each CPT. From this table, you can do the following:

- View the details for a specific CPT description by clicking a row. The system greys out the details for the other descriptions across the page except for data specific to the description you selected.



- Sort the table by columns in ascending or descending order by clicking the column header.

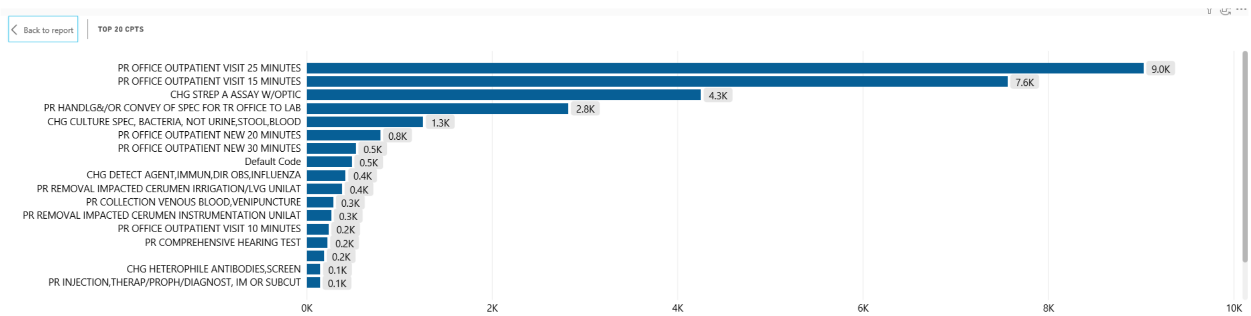


- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

CPT Description	Visits	Gross Rev Per Visit	Net Rev Per Visit	Write Off %	Direct Cost Per Visit	Direct Margin Per Visit	Contribution Margin % Per Visit
PR OFFICE OUTPATIENT VISIT 25 MINUTES	9,026	$300	$166	44.5%	$65	$101	60.8%
PR OFFICE OUTPATIENT VISIT 15 MINUTES	7,559	$230	$120	47.6%	$51	$69	57.5%
CHG STREP A ASSAY W/OPTIC	4,252	$319	$159	50.2%	$32	$127	79.8%
PR HANDLG&/OR CONVEY OF SPEC FOR TR OFFICE TO LAB	2,820	$69	$19	72.0%	$9	$10	51.5%
CHG CULTURE SPEC, BACTERIA, NOT URINE,STOOL,BLOOD	1,255	$97	$34	64.5%	$15	$19	56.5%
PR OFFICE OUTPATIENT NEW 20 MINUTES	794	$237	$123	48.1%	$64	$59	47.6%
PR OFFICE OUTPATIENT NEW 30 MINUTES	526	$327	$176	46.2%	$386	-$210	-119.3%
Default Code	483	$802	$583	27.3%	$94	$489	83.9%
CHG DETECT AGENT,IMMUN,DIR OBS,INFLUENZA	417	$466	$205	55.9%	$62	$143	69.6%
PR REMOVAL IMPACTED CERUMEN IRRIGATION/LVG UNILAT	378	$264	$115	56.3%	$20	$95	82.7%
PR COLLECTION VENOUS BLOOD,VENIPUNCTURE	285	$192	$56	71.1%	$13	$42	76.1%
PR REMOVAL IMPACTED CERUMEN INSTRUMENTATION UNILAT	262	$315	$146	53.7%	$291	-$145	-99.0%

Viewing data in table format

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show as a table**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



Description	Visits
PR OFFICE OUTPATIENT VISIT 25 MINUTES	9,026
PR OFFICE OUTPATIENT VISIT 15 MINUTES	7,559
CHG STREP A ASSAY W/OPTIC	4,252
PR HANDLG&/OR CONVEY OF SPEC FOR TR OFFICE TO LAB	2,820
CHG CULTURE SPEC, BACTERIA, NOT URINE,STOOL,BLOOD	1,255
PR OFFICE OUTPATIENT NEW 20 MINUTES	794
PR OFFICE OUTPATIENT NEW 30 MINUTES	526
Default Code	483
CHG DETECT AGENT,IMMUN,DIR OBS,INFLUENZA	417
PR REMOVAL IMPACTED CERUMEN IRRIGATION/LVG UNILAT	378
PR COLLECTION VENOUS BLOOD,VENIPUNCTURE	285
PR REMOVAL IMPACTED CERUMEN INSTRUMENTATION UNILAT	262
PR OFFICE OUTPATIENT VISIT 10 MINUTES	234
PR COMPREHENSIVE HEARING TEST	223
	186
CHG HETEROPHILE ANTIBODIES,SCREEN	146
PR INJECTION,THERAP/PROPH/DIAGNOST, IM OR SUBCUT	141
PR IMMUNIZ ADMIN,1 SINGLE/COMB VAC/TOXOID	123
PR ELECTROCARDIOGRAM REPORT	102
PR PREVENTIVE VISIT,EST,40-64	96

Axiom Clinical Performance Measures (CPM)

> **NOTE:** Axiom Clinical Performance Measures is only accessible if your organization has a license for Axiom CPM.

Axiom Enterprise Decision Support with Clinical Performance Measures (CPM) helps organizations establish a comprehensive view of service line performance across financial and clinical performance measures. Reports and analytics facilitate the conversation between finance and clinical process improvement teams, highlighting opportunities where quality and cost outcomes could be improved.

Inpatient Executive Summary dashboard

Overview

This dashboard displays KPI views of clinical and financial data to help inform and drive decision making for executives.

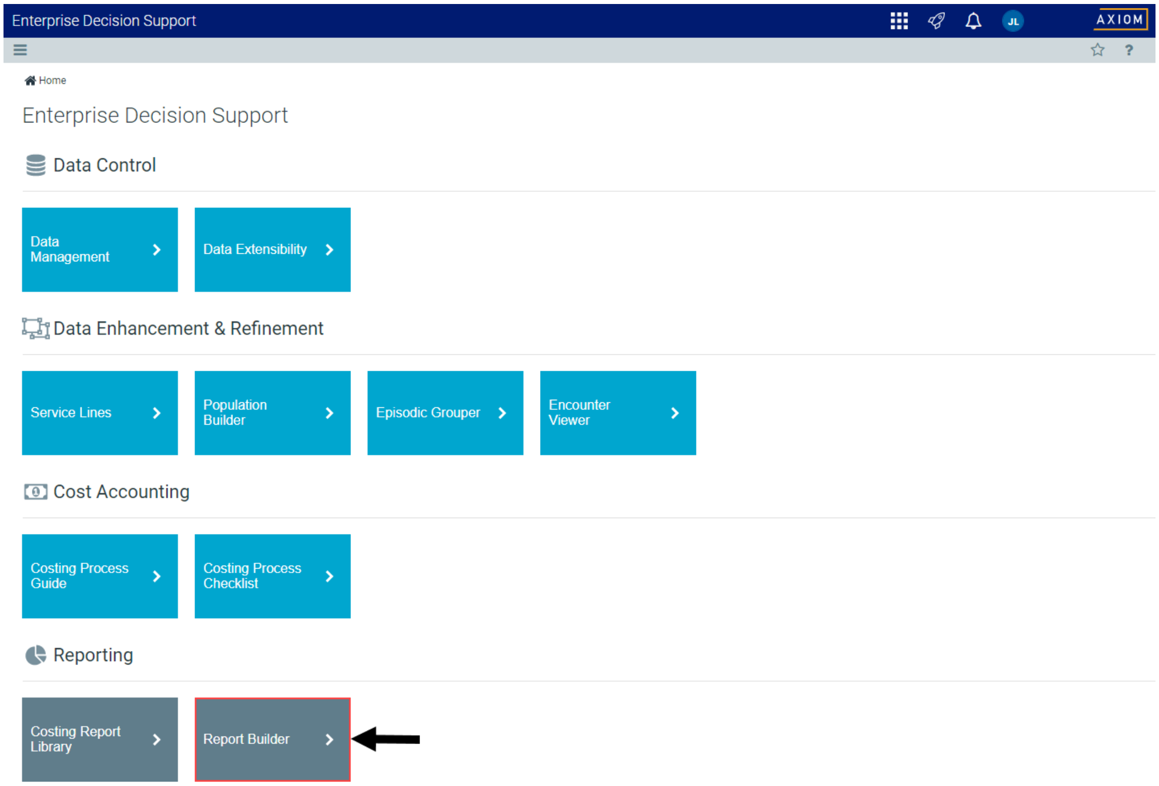
NOTE: This dashboard is only accessible if your organization has a license for Axiom CPM.

Opening the dashboard

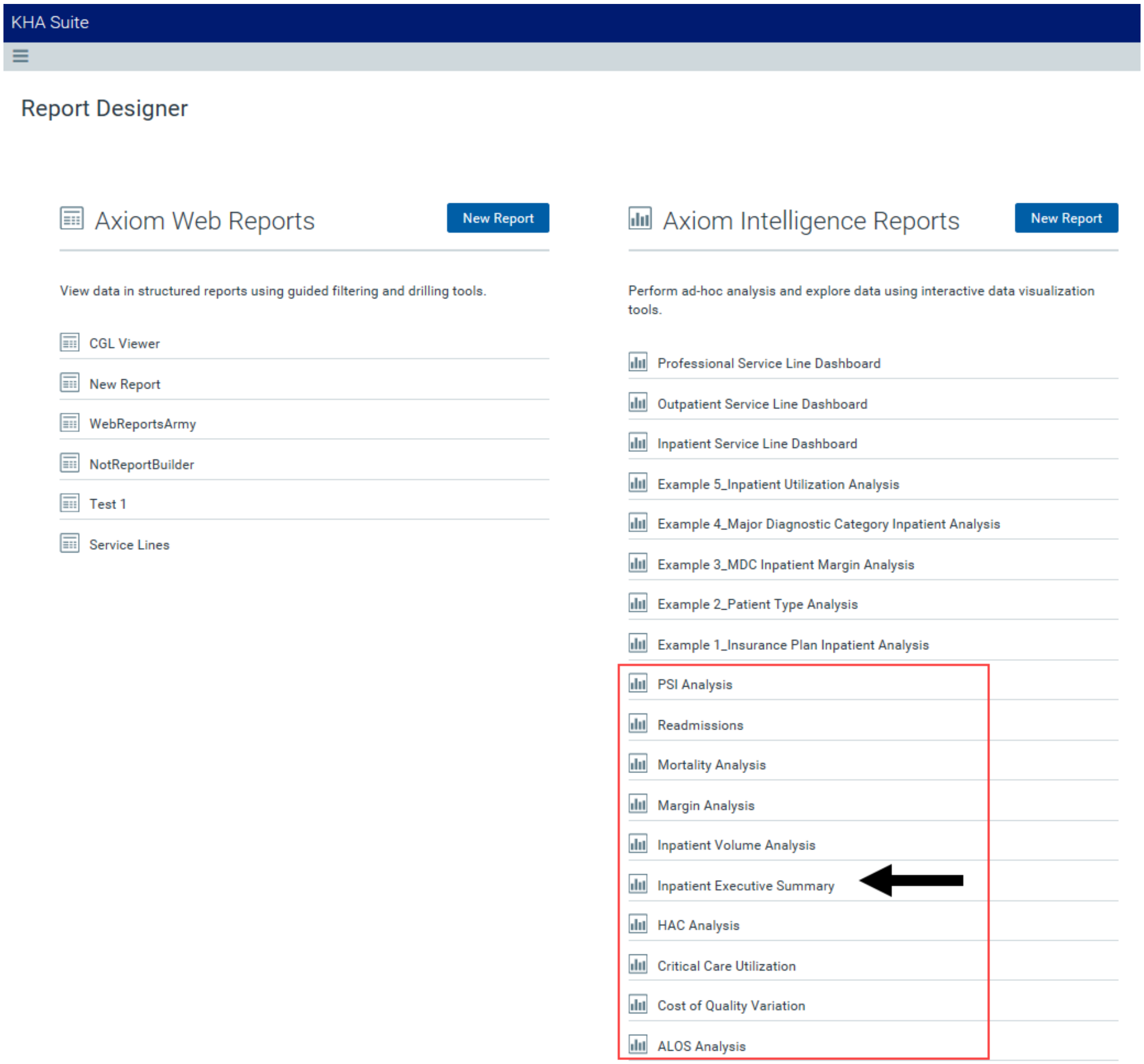
TIP: Along with the dashboard, you can also access the individual reports that make up the dashboard.

To open the dashboard:

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

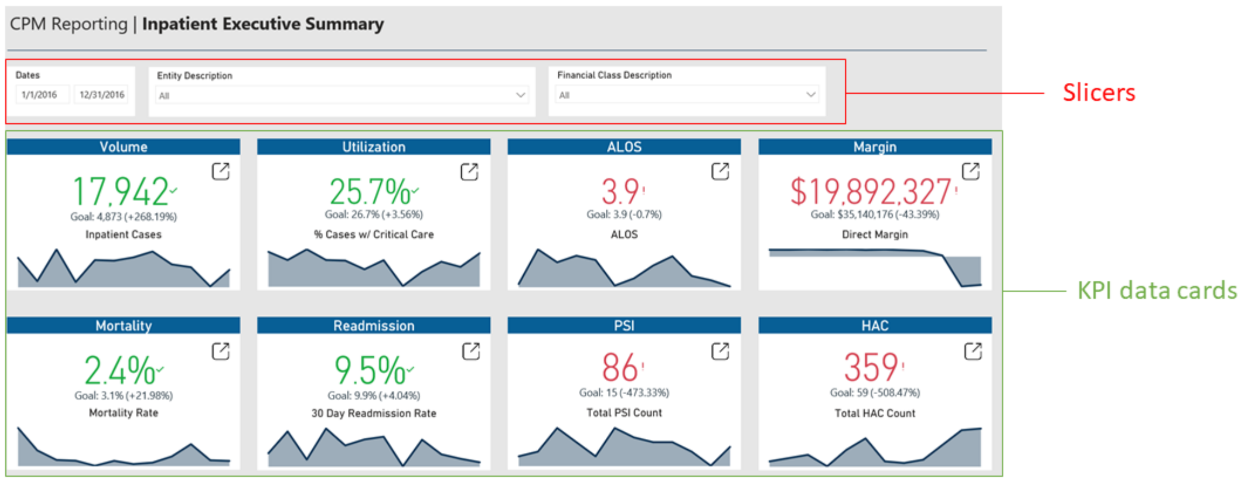


2. In the Axiom Intelligence Reports section, click **Inpatient Executive Dashboard**.



▶ Navigating the dashboard

The dashboard includes two main sections: Slicers and KPI data cards

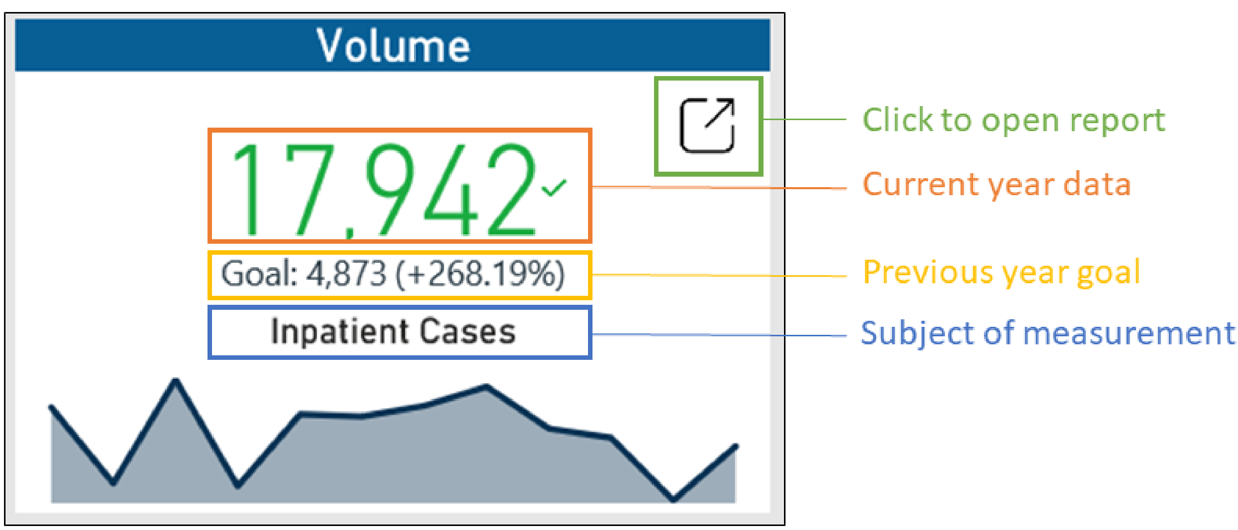


Slicers

This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the dashboard.

KPI data cards

Each KPI data card provides current year data, the goal set in the previous year, and what the data is measuring. The amount of data is based on the date range you selected in the Slicer section.



The card is interactive so that you can view KPI data throughout the date range. Hover your cursor over the graph at the bottom of the card to view a tool tip of the data specific to a month. When you click on the graph, the current year data and goal percentage in the parentheses will adjust to the selected time period.

The red and green font indicate where there are problems, which you can investigate further by drilling down into the specific reports that supply data for each card. Click the box in the top right corner to open the report used to generate the KPI data. Click the following links to view more information about the KPI report.

- Volume
- Utilization
- ALOS
- Margin
- Mortality
- Readmission
- PSI
- HAC

Inpatient Volume Analysis report

▶ Overview

This report provides volume trends and details for inpatient cases. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

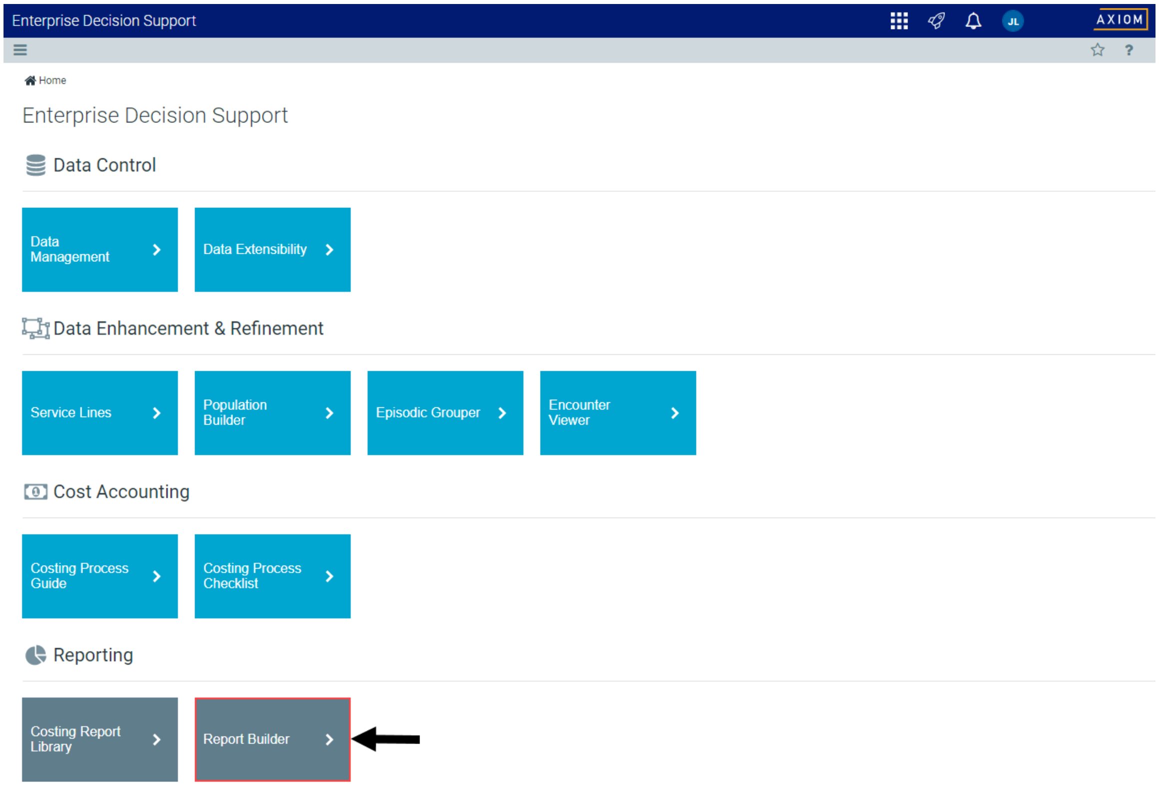
The following sections describe the different areas of this page.

Opening the report

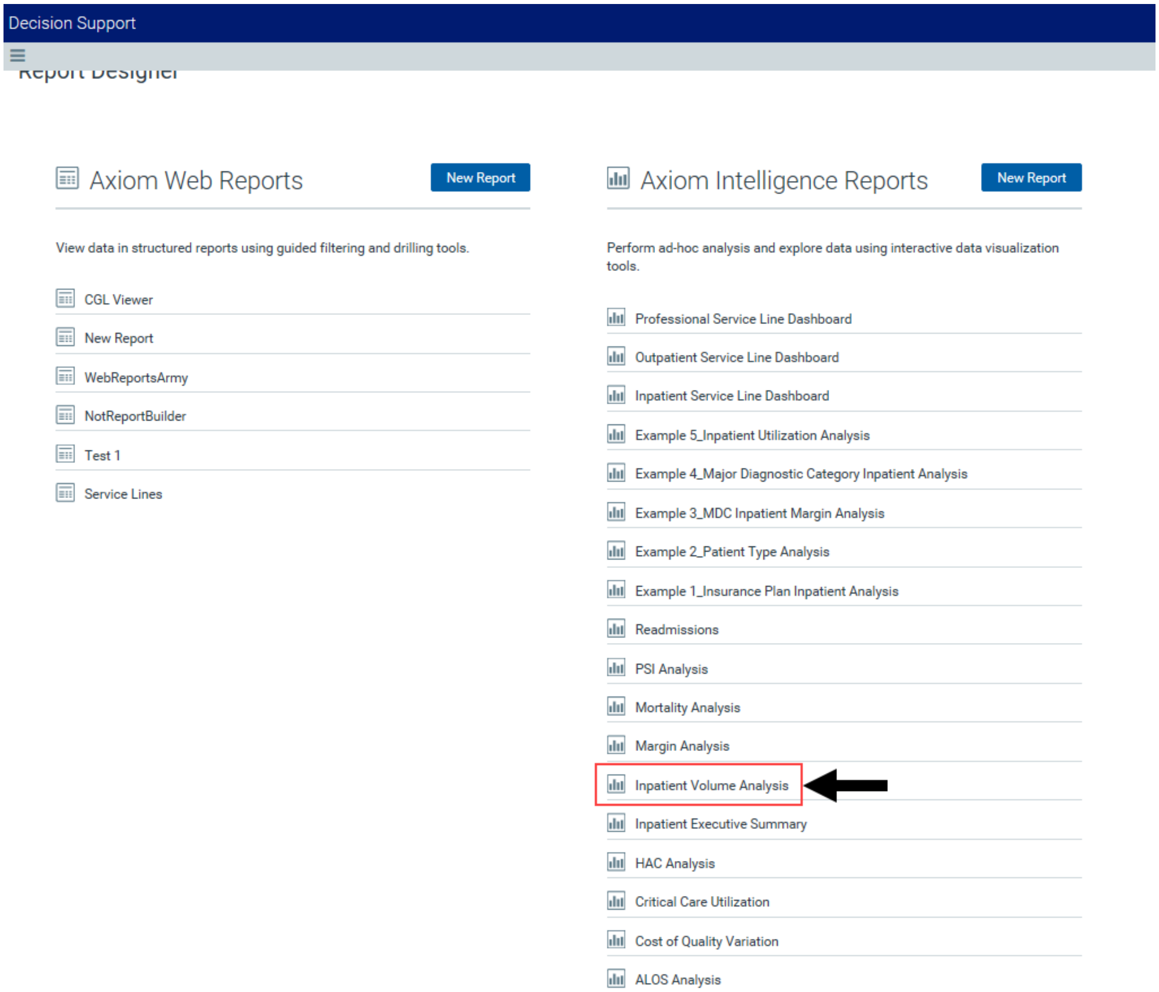
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Inpatient Volume Analysis**.

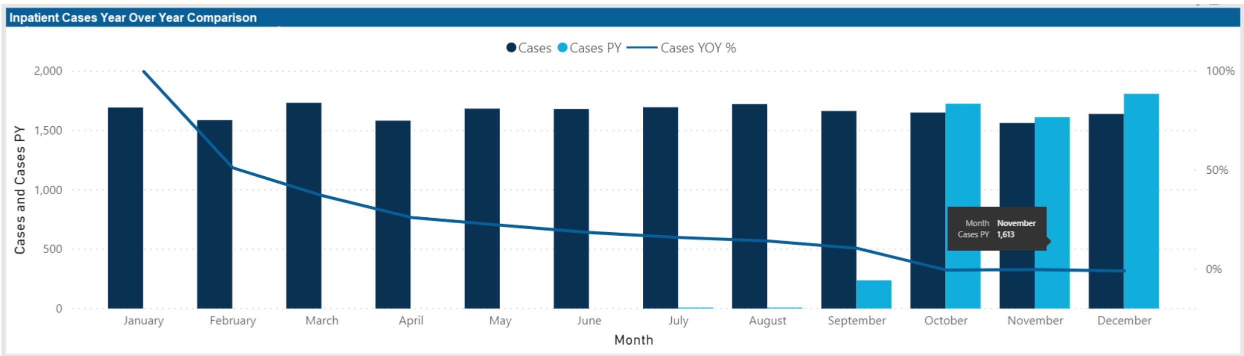


Slicers

This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Inpatient Cases Year Over Year Comparison

This bar chart displays the current and previous year's case volume, including a YOY growth line. To view the number of cases for a month, hover your cursor over a bar.



Inpatient Case Volume Detail

This section displays the value details related to case volume. From this section, you can do the following:

- View the details for a specific service line by clicking a row. The system greys out the details for the other service lines across the page except for data specific to the service line you selected.

- Sort the table by columns in ascending or descending order by clicking the column header.

- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Including or excluding data

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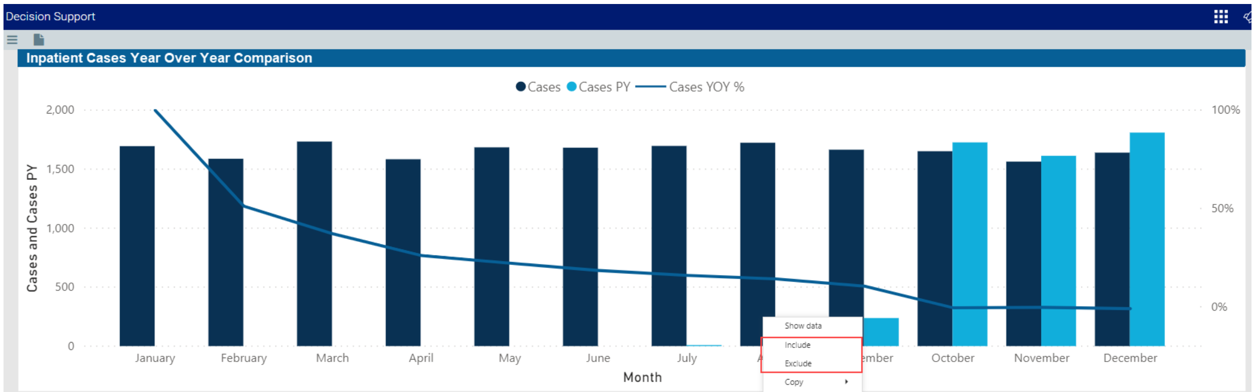
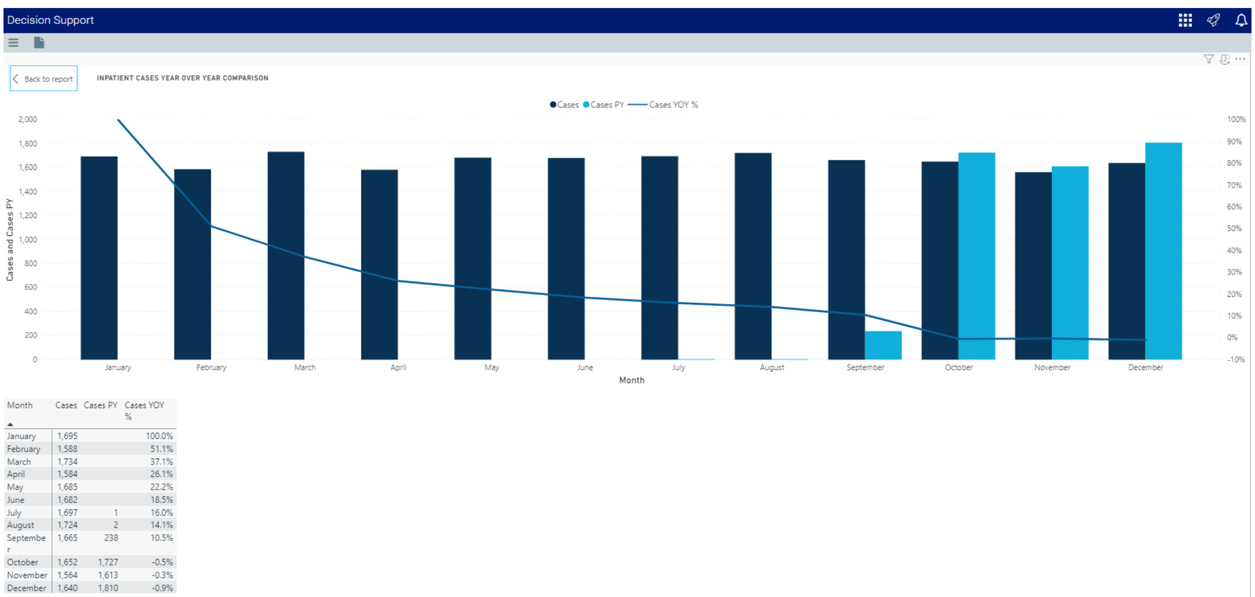


Viewing data

You can view the underlying data for visualization graphs and tables by right-clicking the image or table, and clicking **Show Data**. A data table displays underneath the visualization graphic or table. To return to the dashboard, click **Back to report** in the upper left corner of the page.



Copying data for other reports

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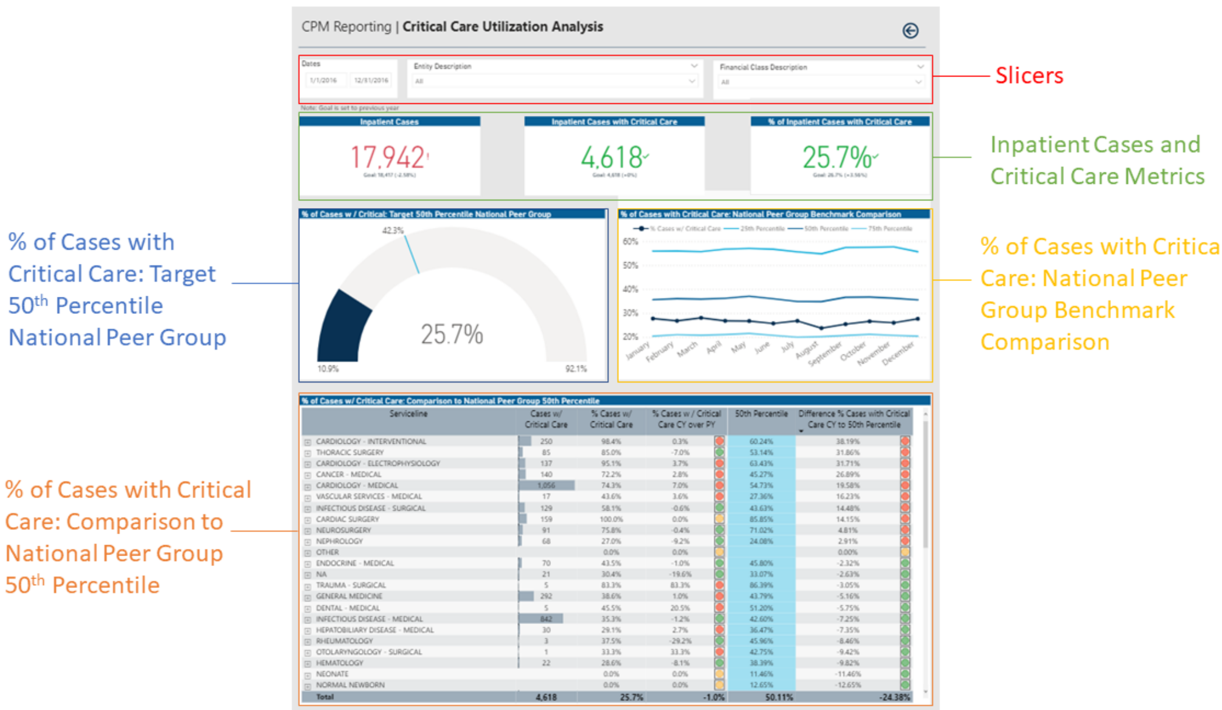
To copy, right-click in the section, and select **Copy Visual**, **Copy Selection** (tables only), or **Copy Value** (tables only).

> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Critical Care Utilization Analysis report

▶ Overview

This report provides benchmarking data regarding inpatient cases that required critical care. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

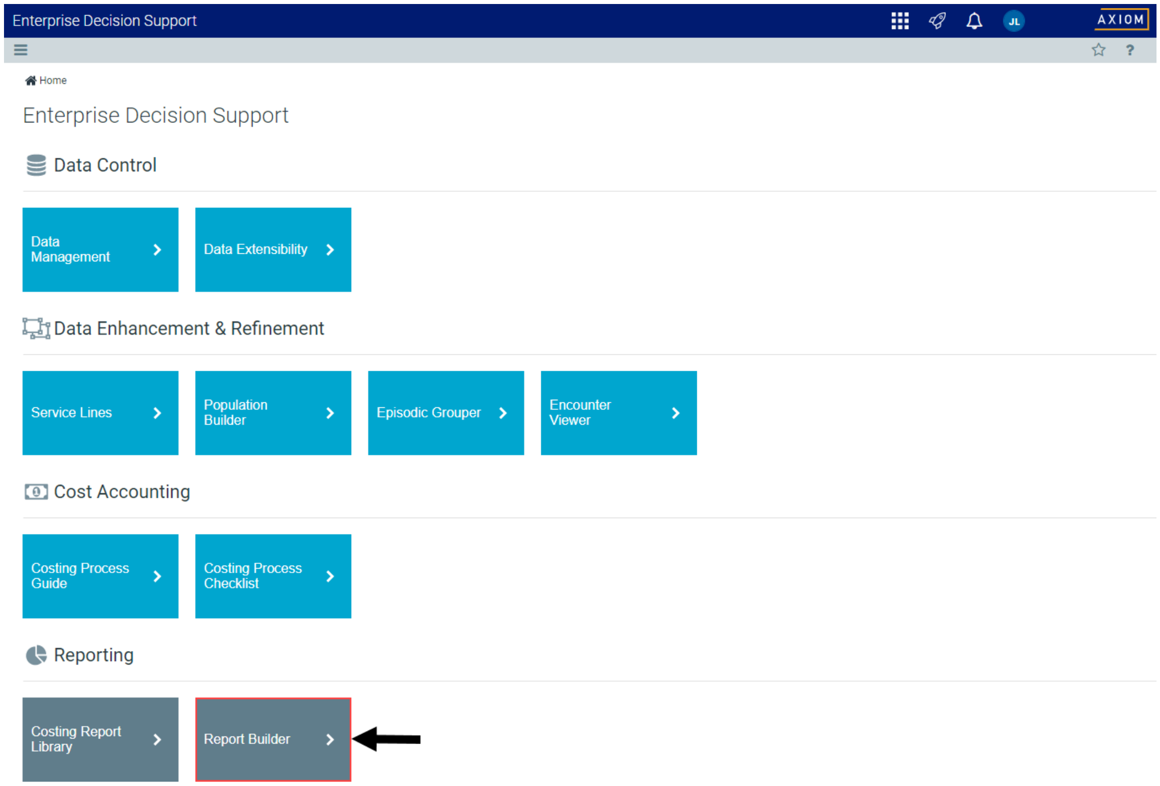


▶ Opening the report

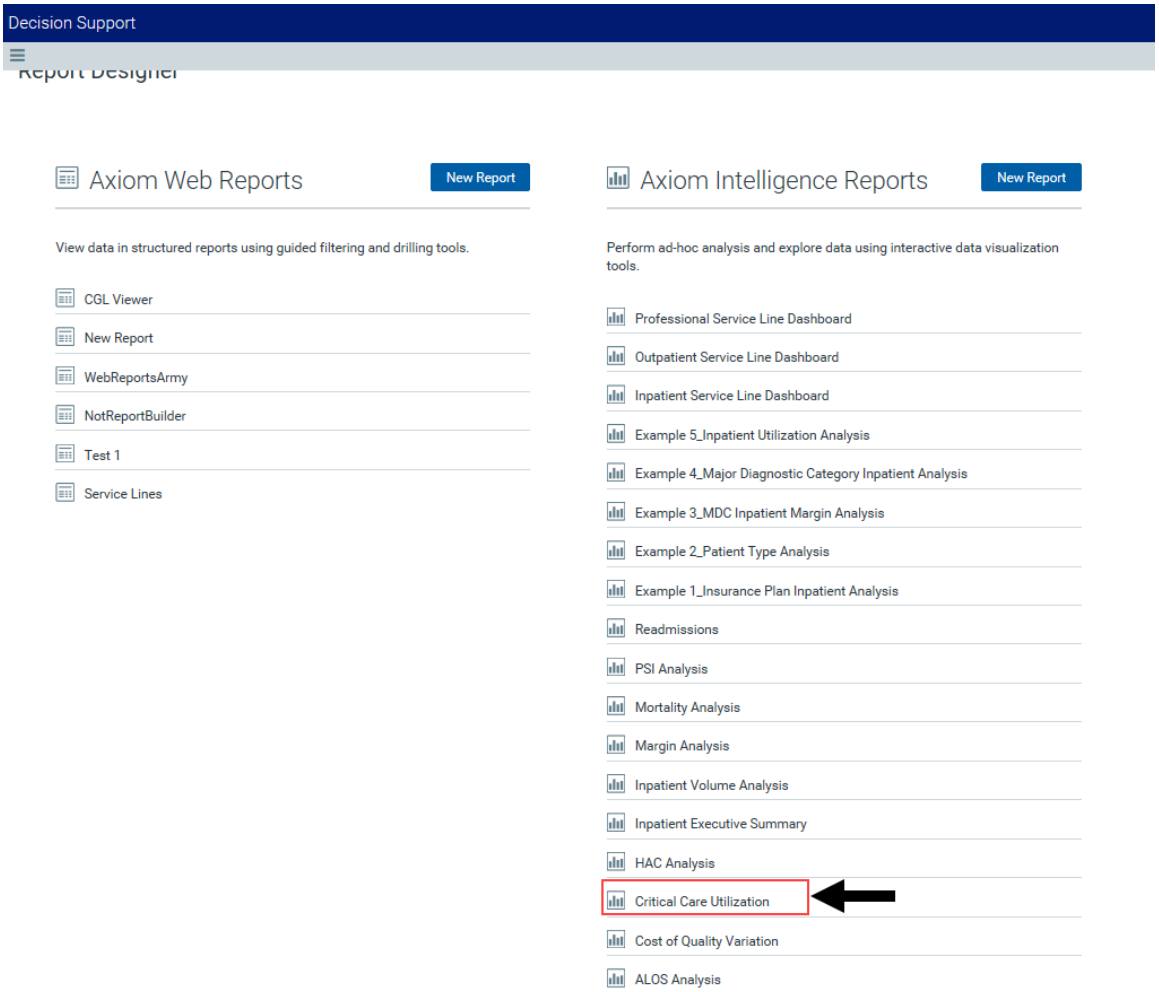
> **TIP:** You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Critical Care Utilization**.



Slicers

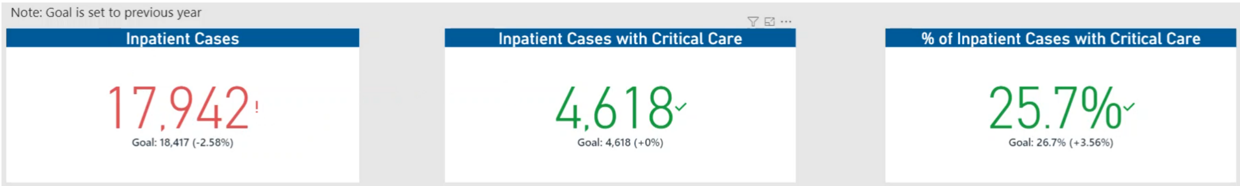
This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Inpatient Cases and Critical Care Metrics

This section shows the following metric information for the date range selected in the slicer section:

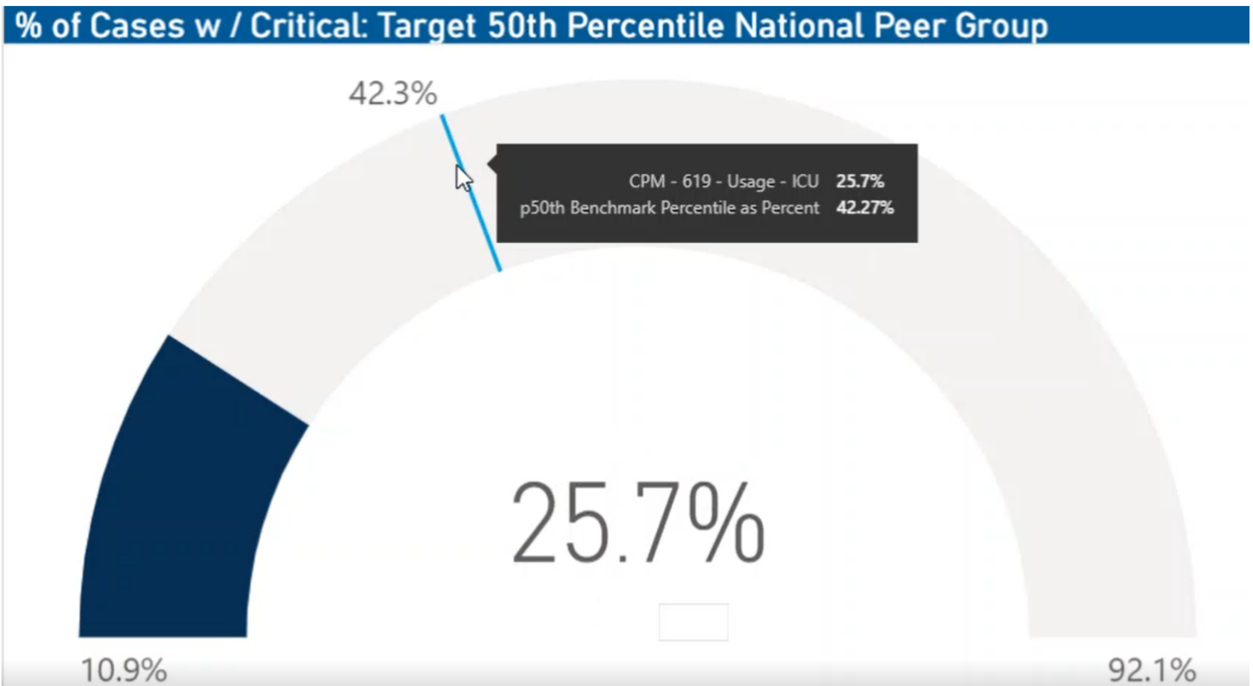
- **Inpatient Cases** - Total number of cases for the year, previous year goal, and percentage of goal
- **Inpatient Cases with Critical Care** - Total number of critical care inpatient cases, previous year goal, and percentage of goal

- **% of Inpatient Cases with Critical Care** - The percentage of total cases with critical care (usage rate), previous year goal, and percentage of goal



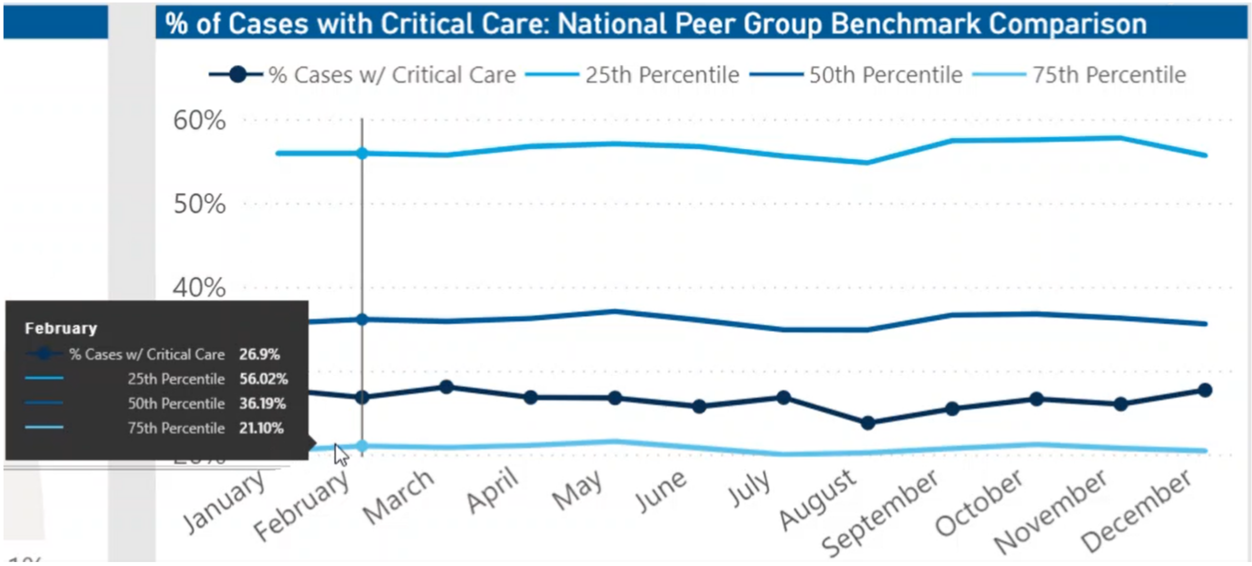
% of Cases w/ Critical Care: Target 50th Percentile National Peer Group

This section displays a gauge of the current overall utilization of critical care with a line that represents the benchmark. Hover your cursor over the line to view the benchmark details.



% of Cases with Critical Care: National Peer Group Benchmark Comparison

This section provides a way to view the critical care benchmark data across months, including values for the 25th, 50th, and 75th percentiles.



% of Cases w/ Critical Care: Comparison to National Peer Group 50th Percentile

This section displays the value details related to the your critical care cases segmented by service line. The table displays the total number of cases in need of critical care, the percentage of critical care cases, the number of critical care cases compared to the previous year, and the benchmark value.

% of Cases w/ Critical Care: Comparison to National Peer Group 50th Percentile

Serviceline	Cases w/ Critical Care	% Cases w/ Critical Care	% Cases w / Critical Care CY over PY	50th Percentile	Difference % Cases with Critical Care CY to 50th Percentile
CARDIOLOGY - INTERVENTIONAL	250	98.4%	0.3%	60.24%	38.19%
THORACIC SURGERY	85	85.0%	-7.0%	53.14%	31.86%
CARDIOLOGY - ELECTROPHYSIOLOGY	137	95.1%	3.7%	63.43%	31.71%
CANCER - MEDICAL	140	72.2%	2.8%	45.27%	26.89%
CARDIOLOGY - MEDICAL	1,056	74.3%	7.0%	54.73%	19.58%
VASCULAR SERVICES - MEDICAL	17	43.6%	3.6%	27.36%	16.23%
INFECTIOUS DISEASE - SURGICAL	129	58.1%	-0.6%	43.63%	14.48%
CARDIAC SURGERY	159	100.0%	0.0%	85.85%	14.15%
NEUROSURGERY	91	75.8%	-0.4%	71.02%	4.81%
NEPHROLOGY	68	27.0%	-9.2%	24.08%	2.91%

From this section, you can do the following:

- View the details for a specific service line by clicking a row. The system greys out the details for the other service lines across the page except for data specific to the service line you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Including or excluding data

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▶ Viewing data

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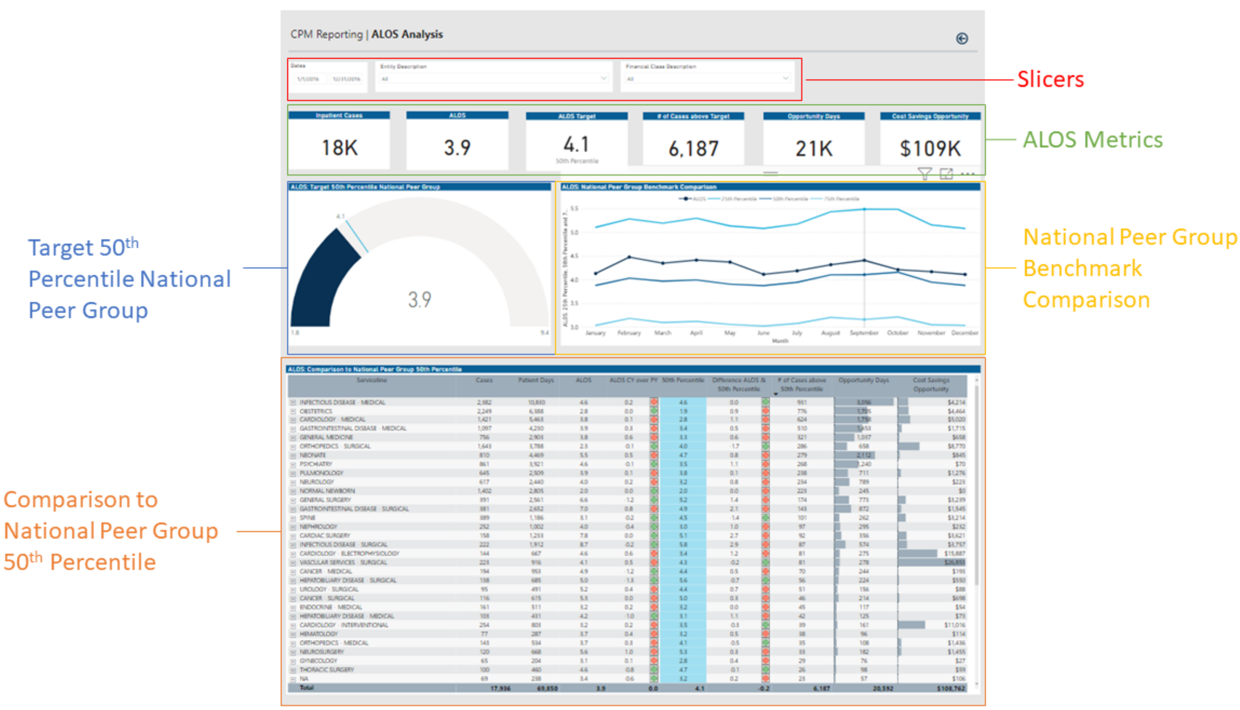
ALOS Analysis report

▶ Overview

This report provides benchmarking data regarding the Average Length of Stay for your organization. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

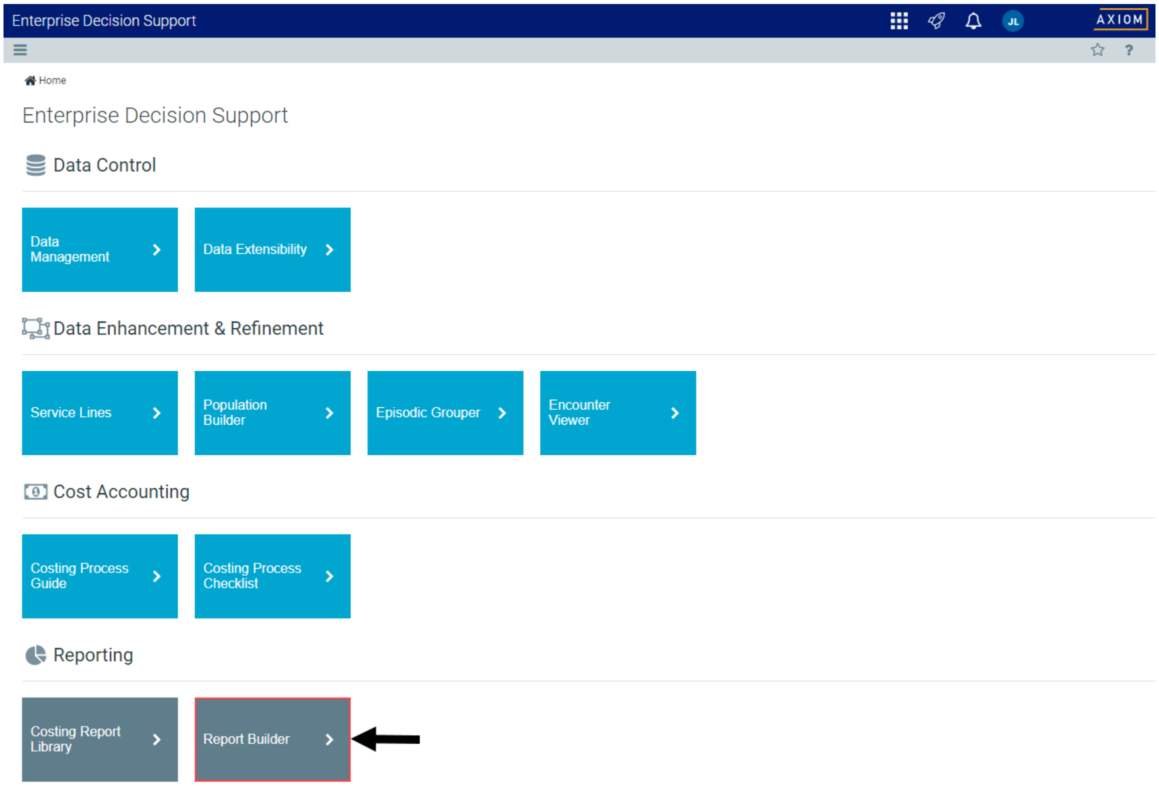


Opening the report

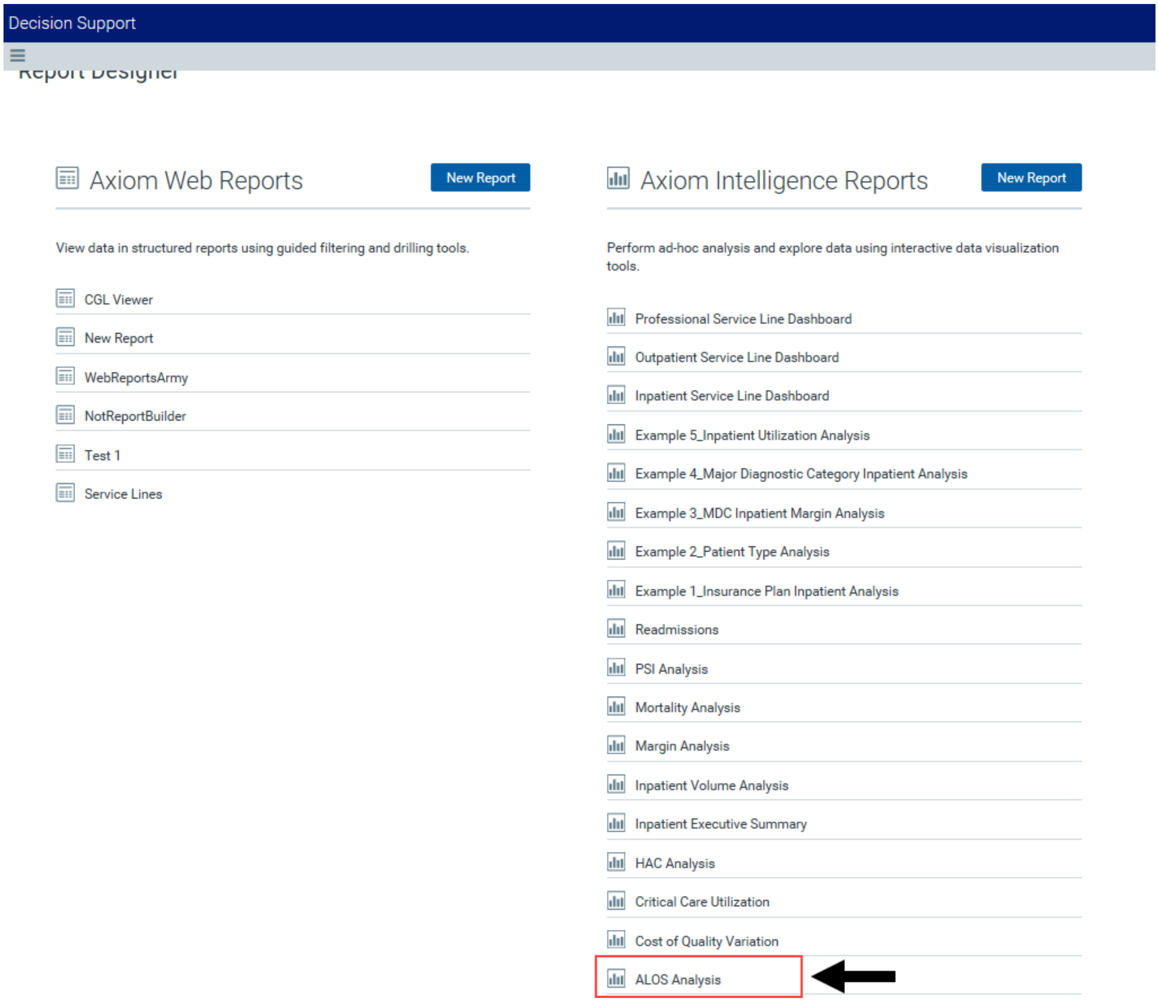
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **ALOS Analysis**.



Slicers

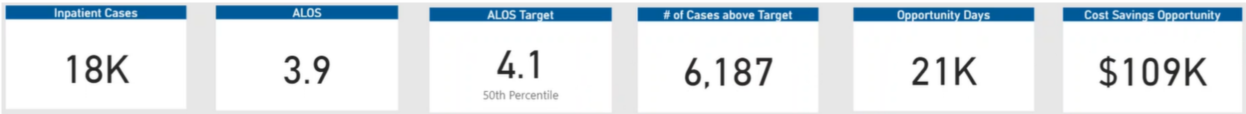
This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

ALOS Metrics

This section shows the following metric information for the date range selected in the slicer section:

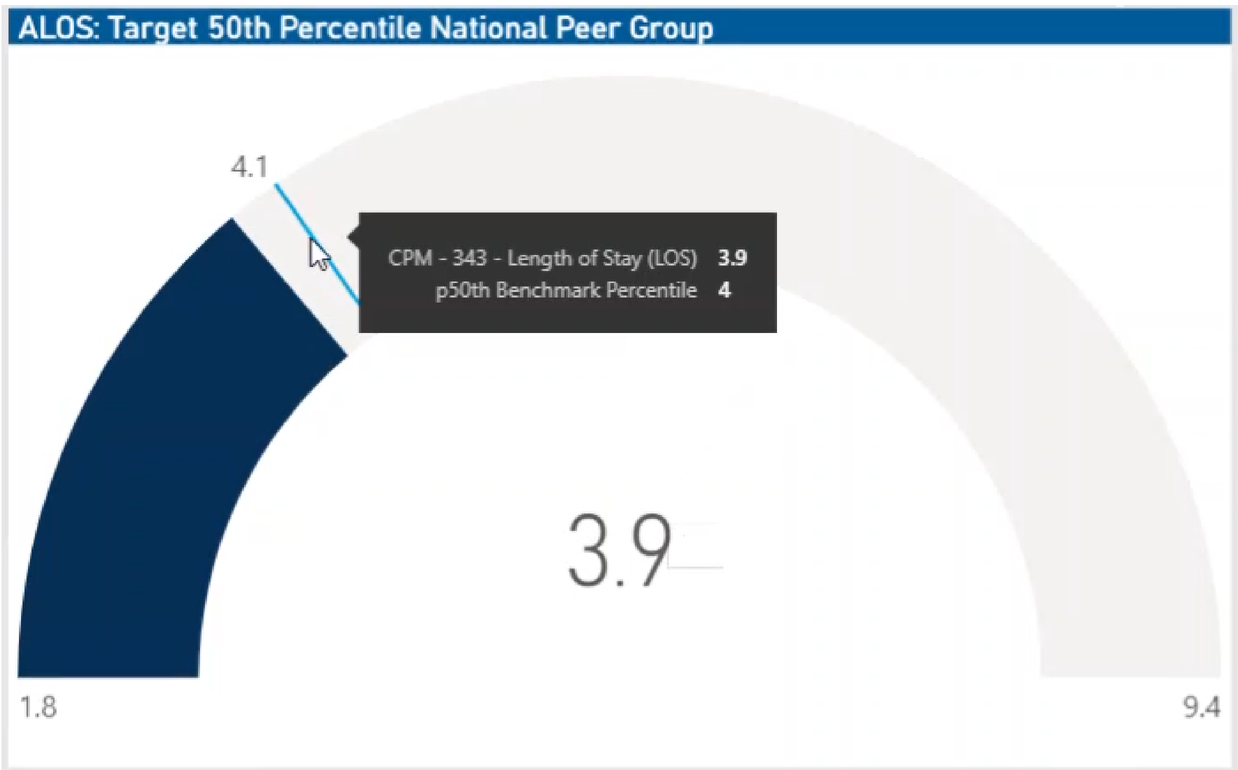
- **Inpatient Cases** - Total number of cases
- **ALOS** - Average Length of Stay (ALOS)
- **ALOS Target** - The target ALOS based on the percentile
- **# of Cases above Target** - The number of cases above the benchmark

- **Opportunity Days** - The number of days of opportunity
- **Cost Savings Opportunity** - The number of opportunity days multiplied by the average total cost per day to determine the potential cost savings



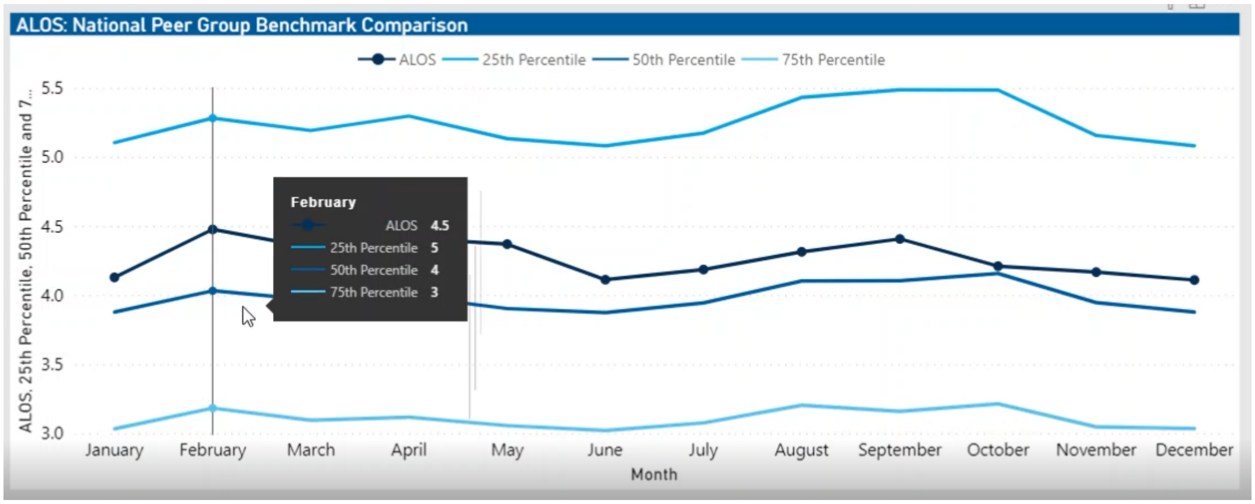
ALOS: Target 50th Percentile National Peer Group

This section displays a gauge of the current overall utilization with a line that represents the benchmark. Hover your cursor over the line to view the benchmark details.



ALOS: National Peer Group Benchmark Comparison

This section provides a way to view benchmark data across months, including values for the 25th, 50th, and 75th percentiles..



ALOS Comparison to National Peer Group 50th Percentile

This section displays the value details related to the ALOS for each service line. The table displays the current ALOS compared to the previous year, the specific benchmark and the difference to the benchmark, the total number of cases above the benchmark, and how many days/cost savings does it represent.

% of Cases w/ Critical Care: Comparison to National Peer Group 50th Percentile

Serviceline	Cases w/ Critical Care	% Cases w/ Critical Care	% Cases w / Critical Care CY over PY	50th Percentile	Difference % Cases with Critical Care CY to 50th Percentile
CARDIOLOGY - INTERVENTIONAL	250	98.4%	0.3%	60.24%	38.19%
THORACIC SURGERY	85	85.0%	-7.0%	53.14%	31.86%
CARDIOLOGY - ELECTROPHYSIOLOGY	137	95.1%	3.7%	63.43%	31.71%
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Including or excluding data

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Viewing data

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Copying data for other reports

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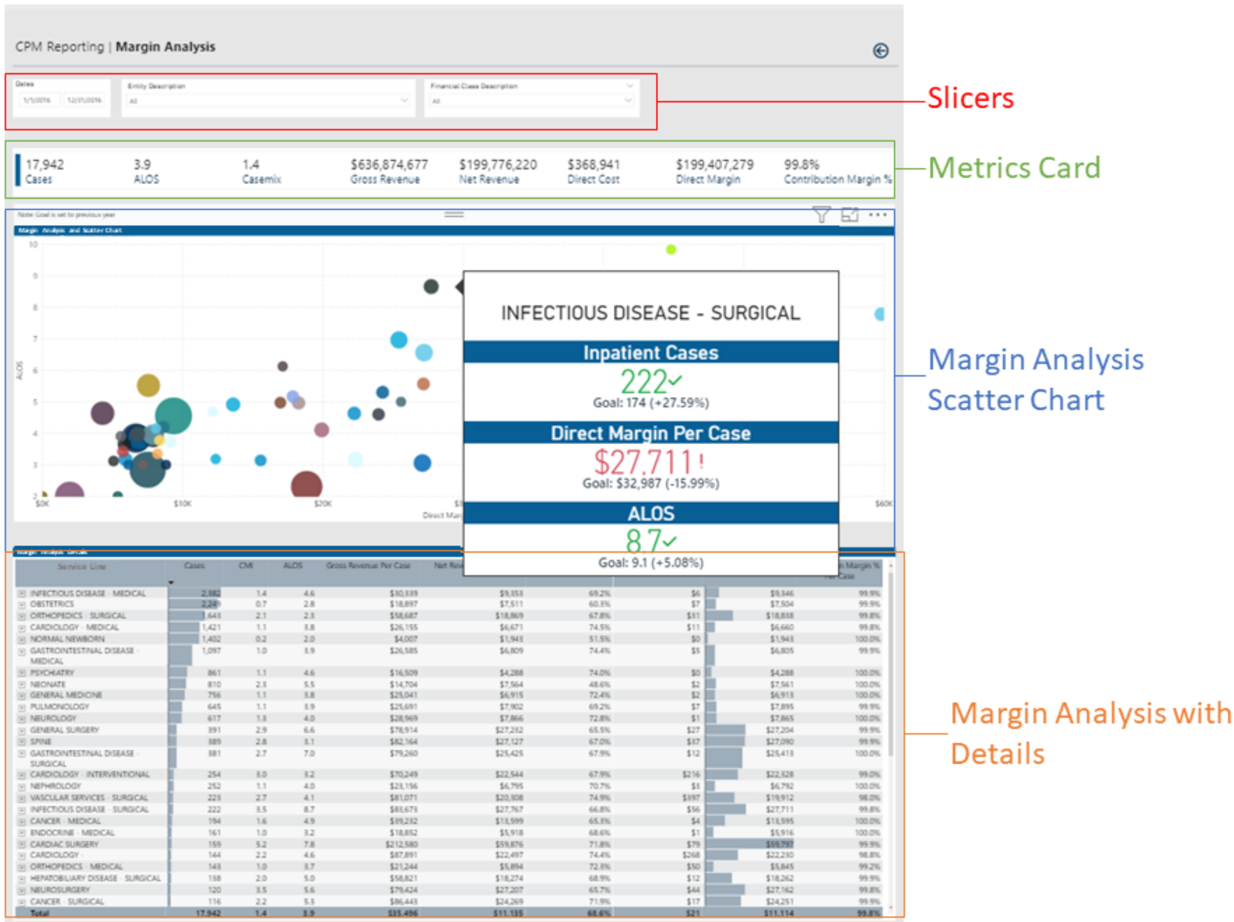
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Margin Analysis report

Overview

This report provides regarding details regarding margin analysis across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

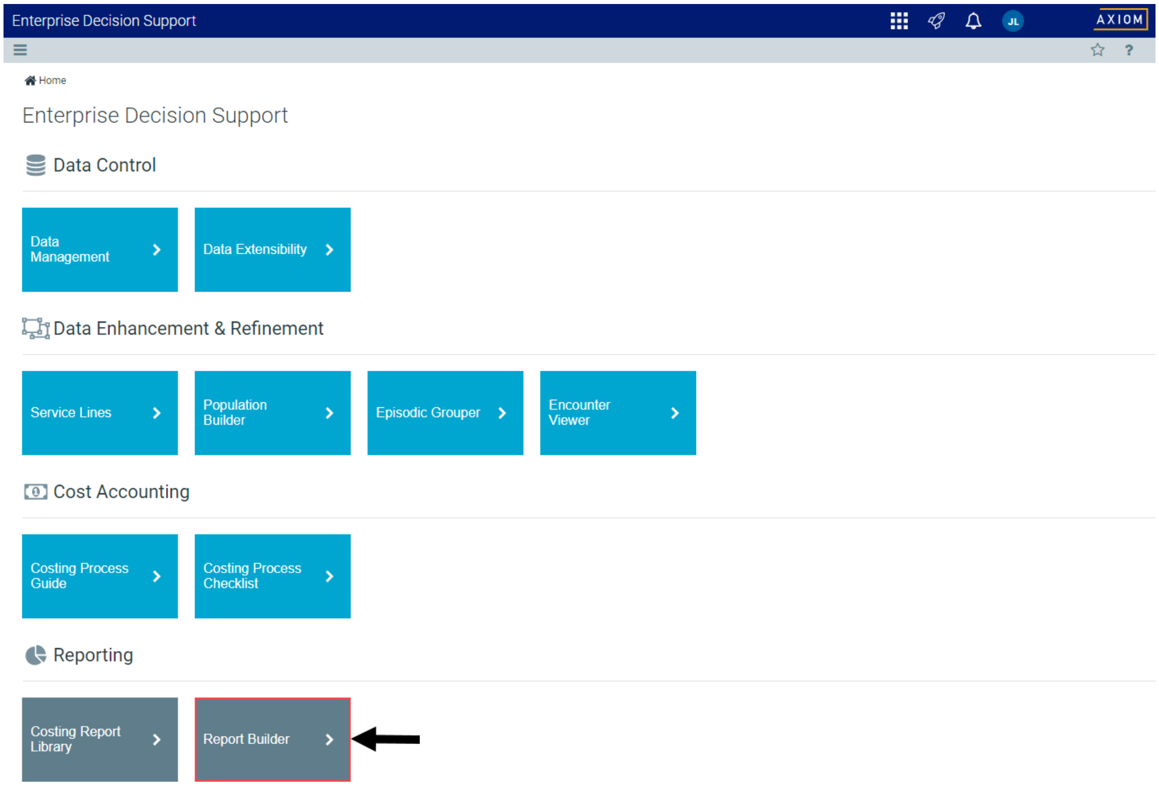


▶ Opening the report

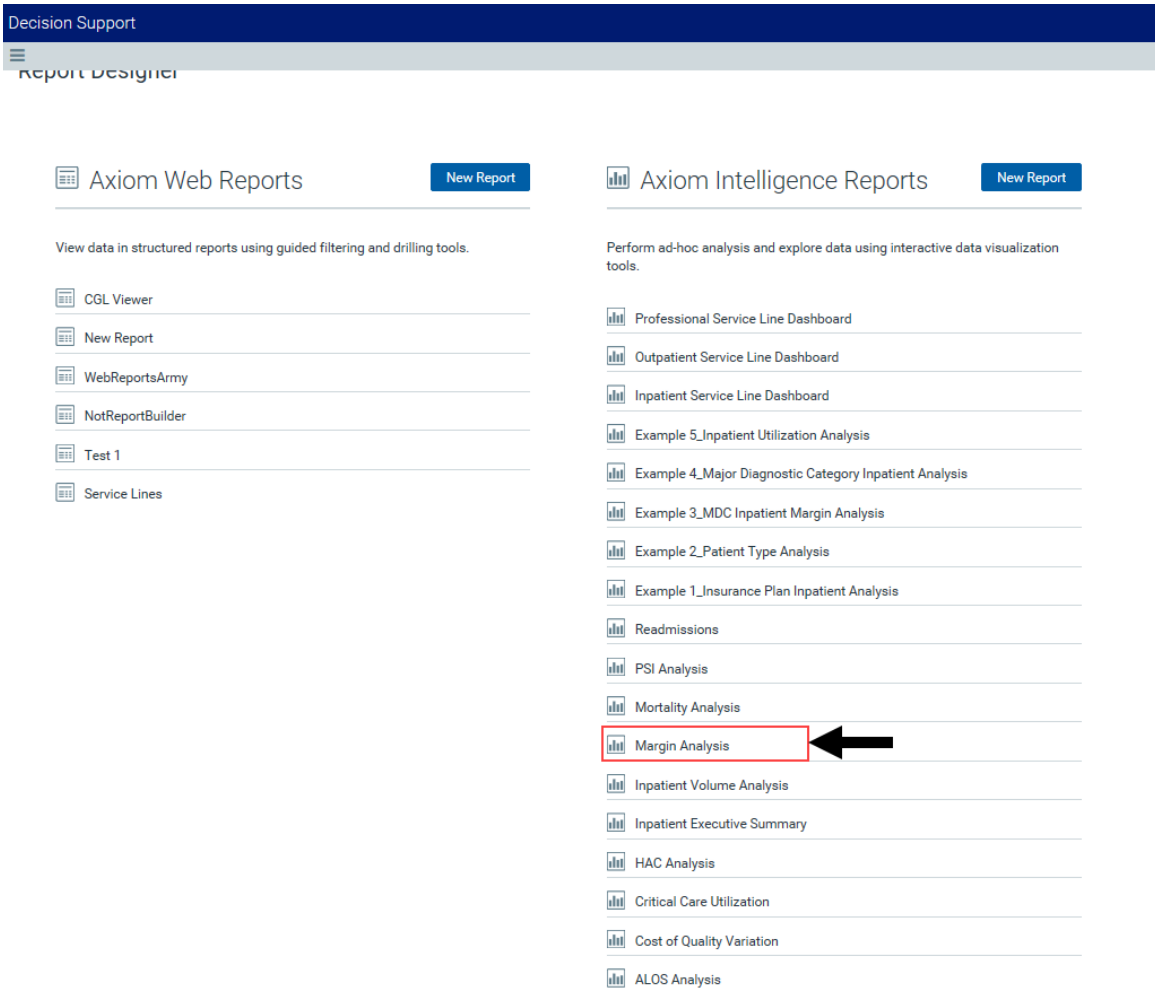
> **TIP:** You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Margin Analysis**.



Slicers

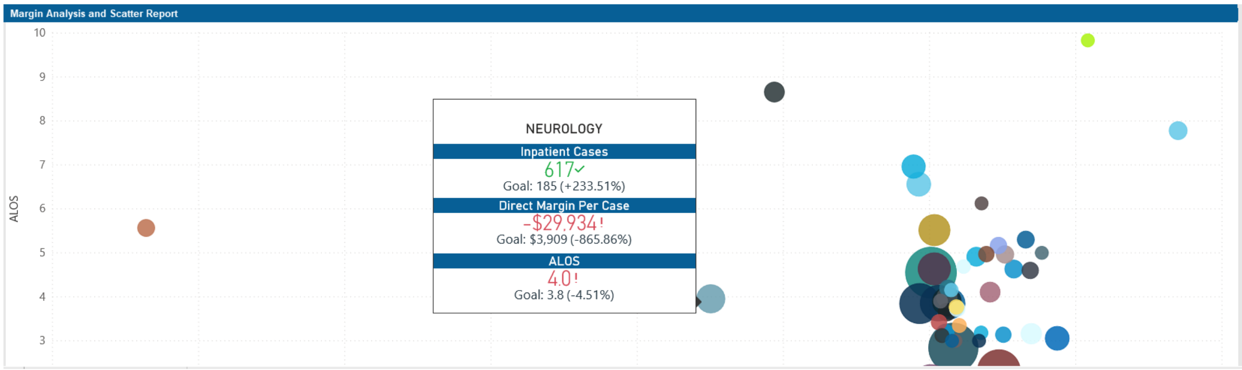
This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Metrics Card

This section displays KPI data for cases, ALOS, casemix, gross and net revenue, direct cost and margin, and contribution margin percentage. As you select different areas of this page, the totals in the Metrics Card adjust accordingly.

Margin Analysis Scatter Chart

This section shows a profitability visualization of the direct margin profitability analysis. You can view details for a specific service line by placing your cursor on a circle. The system displays a tool tip that provides information on the number of inpatient cases, the direct margin per case, and the ALOS.



Margin Analysis Details

This section displays the details related to margin for each service line, including the number of cases, gross revenue per case, net revenue per case, etc.

Margin Analysis Details

Service Line	Cases	CMI	ALOS	Gross Revenue Per Case	Net Revenue Per Case	Write Off % Per Case	Direct Cost Per Case	Direct Margin Per Case	Contribution Margin % Per Case
INFECTIOUS DISEASE - MEDICAL	2,382		4.6	$30,339	$9,353	69.2%	$9,158	$194	2.1%
OBSTETRICS	2,249		2.8	$18,897	$7,511	60.3%	$4,256	$3,255	43.3%
ORTHOPEDICS - SURGICAL	1,643		2.3	$58,687	$18,869	67.8%	$9,379	$9,490	50.3%
CARDIOLOGY - MEDICAL	1,421		3.8	$26,155	$6,671	74.5%	$8,015	-$1,344	-20.1%
NORMAL NEWBORN	1,402		2.0	$4,007	$1,943	51.5%	$1,761	$183	9.4%
GASTROINTESTINAL DISEASE - MEDICAL	1,097		3.9	$26,585	$6,809	74.4%	$5,634	$1,175	17.3%
PSYCHIATRY	861		4.6	$16,509	$4,288	74.0%	$3,643	$645	15.0%
NEONATE	810		5.5	$14,704	$7,564	48.6%	$6,897	$666	8.8%
GENERAL MEDICINE	756		3.8	$25,041	$6,915	72.4%	$4,159	$2,756	39.9%
PULMONOLOGY	645		3.9	$25,691	$7,902	69.2%	$5,525	$2,376	30.1%
NEUROLOGY	617		4.0	$28,969	$7,866	72.8%	$37,800	-$29,934	-380.6%
GENERAL SURGERY	391		6.6	$78,914	$27,232	65.5%	$28,708	-$1,476	-5.4%
SPINE	389		3.1	$82,164	$27,127	67.0%	$9,662	$17,465	64.4%
GASTROINTESTINAL DISEASE - SURGICAL	381		7.0	$79,260	$25,425	67.9%	$27,609	-$2,184	-8.6%

From this section, you can do the following:

- View the details for a specific service line by clicking a row. The system greys out the details for the other service lines across the page except for data specific to the service line you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
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▶ Viewing data

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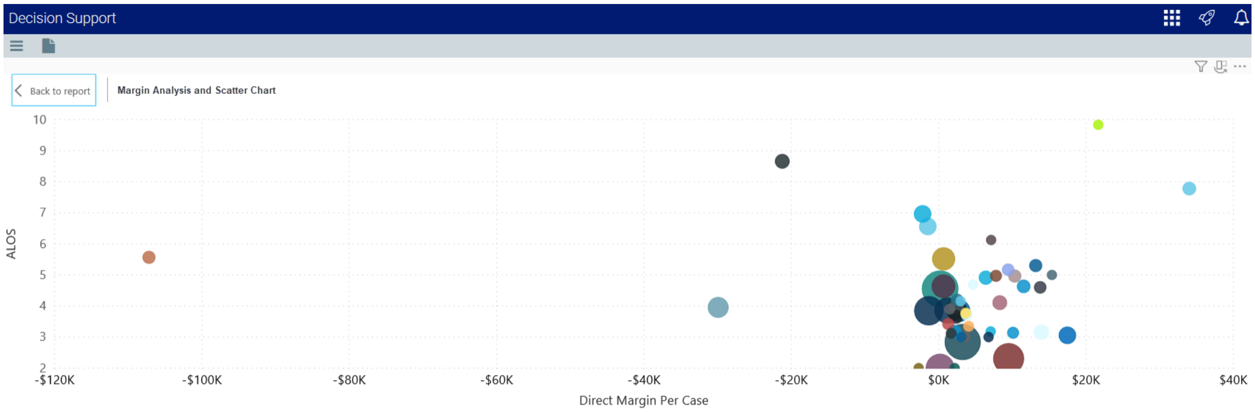

Name	Direct Margin Per Case	ALOS	Cases
BURNS - MEDICAL	$6,771	3.0	1
CANCER - MEDICAL	$6,397	4.9	194
CANCER - SURGICAL	$13,167	5.3	116
CARDIAC SURGERY	$34,009	7.8	159
CARDIOLOGY - ELECTROPHYSIOLOGY	$11,530	4.6	144
CARDIOLOGY - INTERVENTIONAL	$13,920	3.2	254
CARDIOLOGY - MEDICAL	-$1,344	3.8	1,421
DENTAL - MEDICAL	$7,054	3.2	11
DENTAL - SURGICAL	$3,076	3.0	2
DERMATOLOGY	$2,985	4.2	13
ENDOCRINE - MEDICAL	$2,148	3.2	161
ENDOCRINE - SURGICAL	$4,658	4.7	16
GASTROINTESTINAL DISEASE - MEDICAL	$1,175	3.9	1,097

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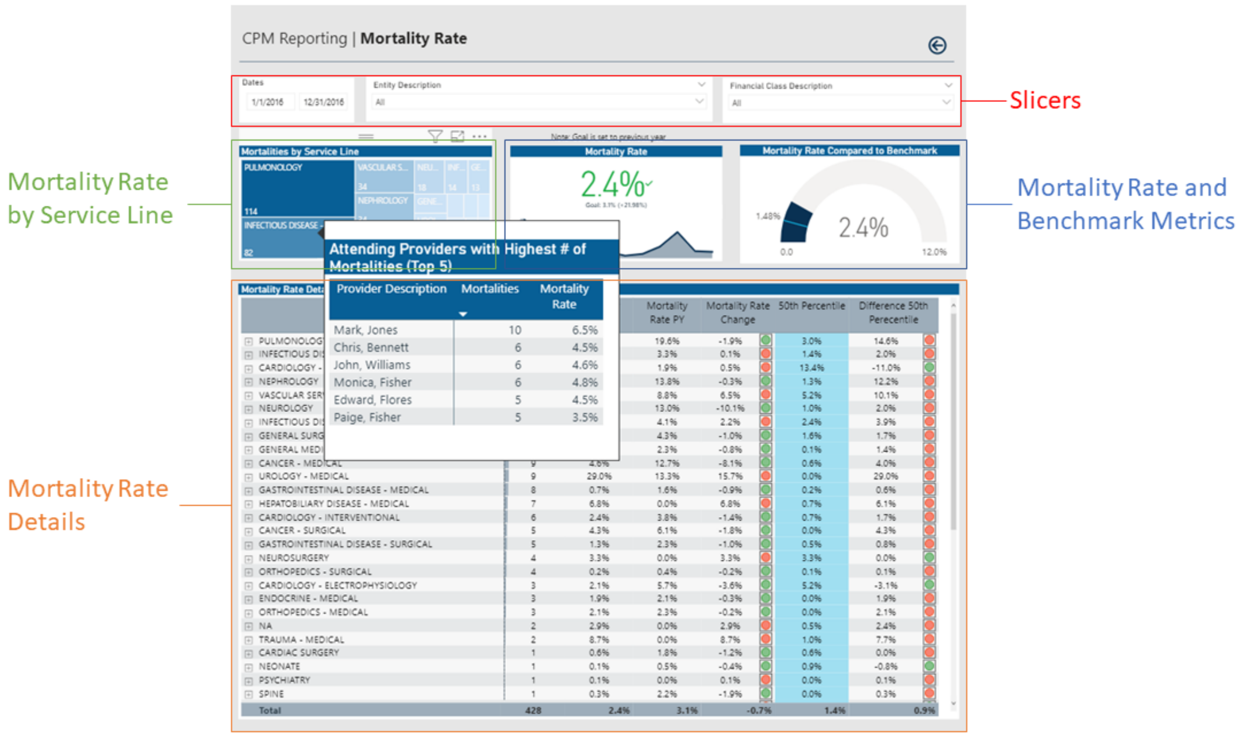
Mortality Analysis report

▶ Overview

This report provides KPI metrics and details regarding mortality rates at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

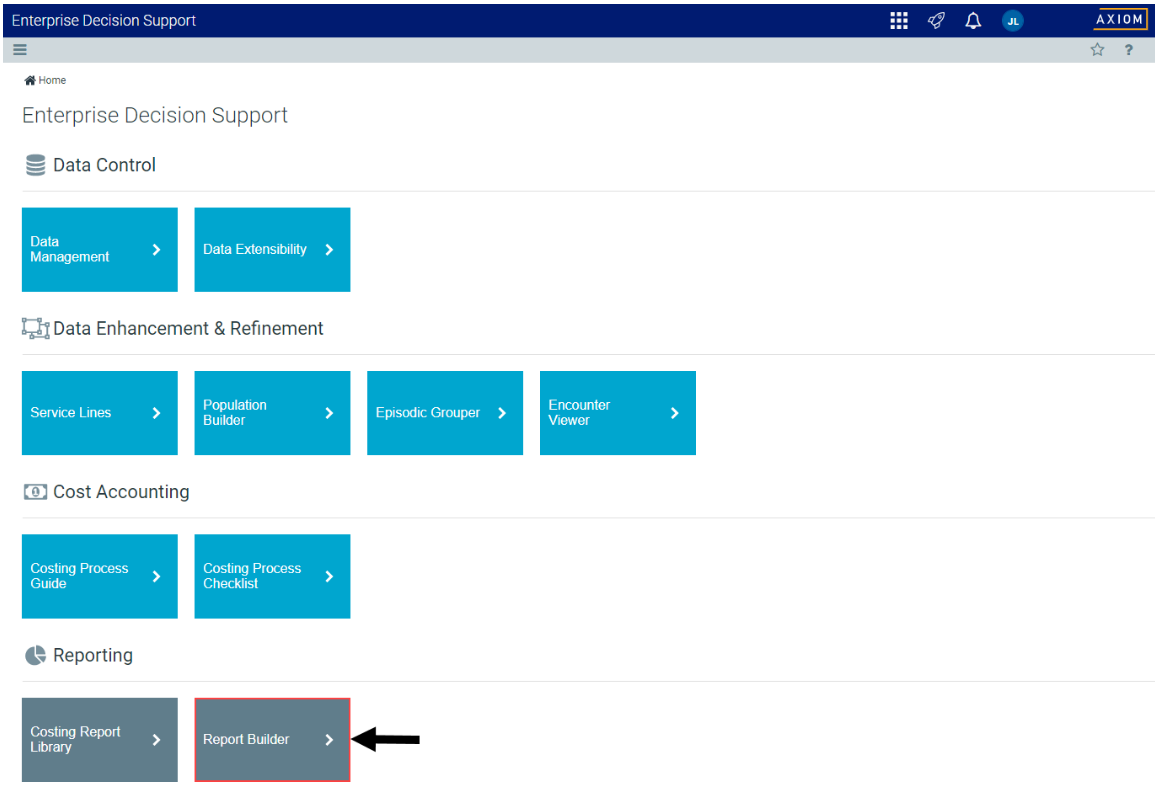


Opening the report

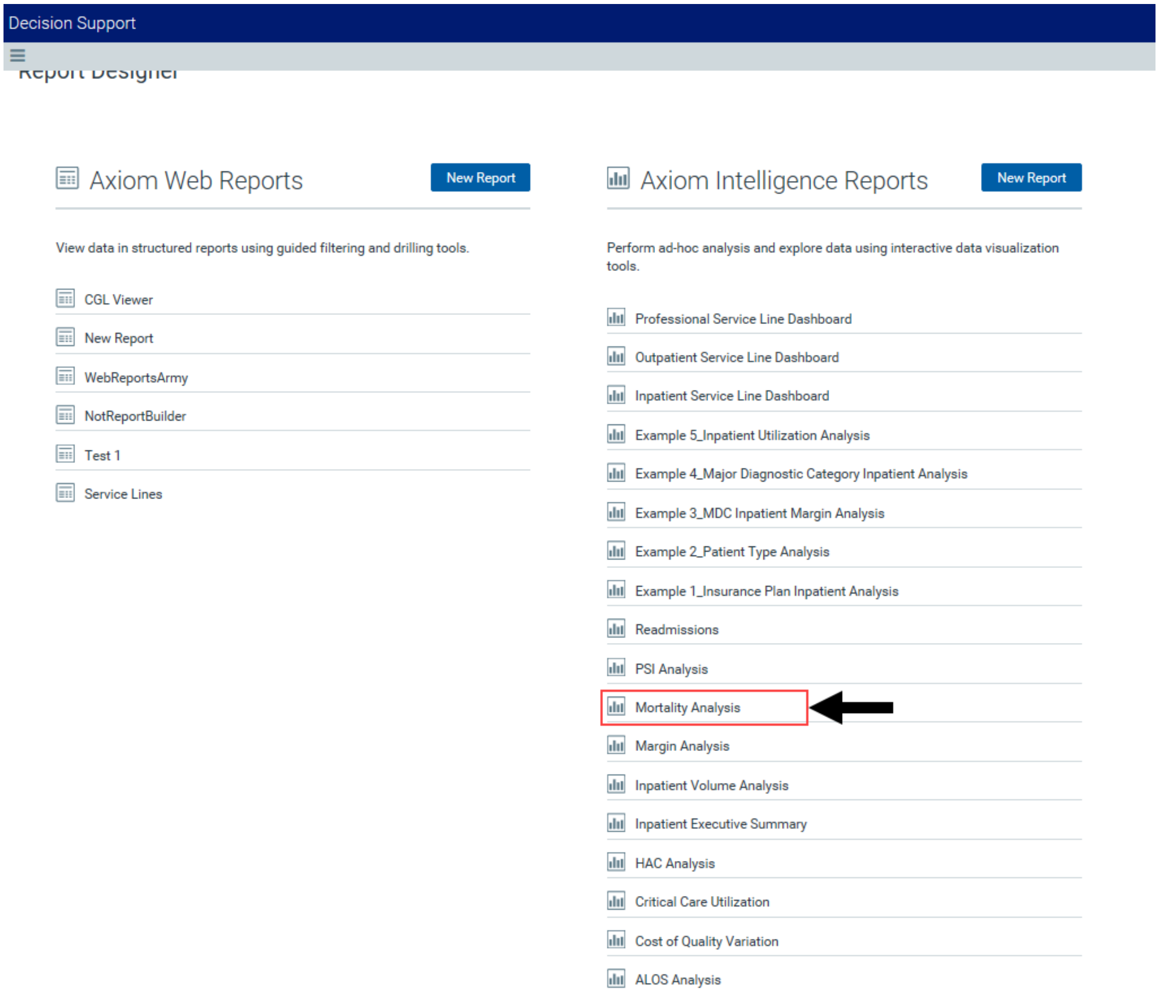
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Mortality Analysis**.

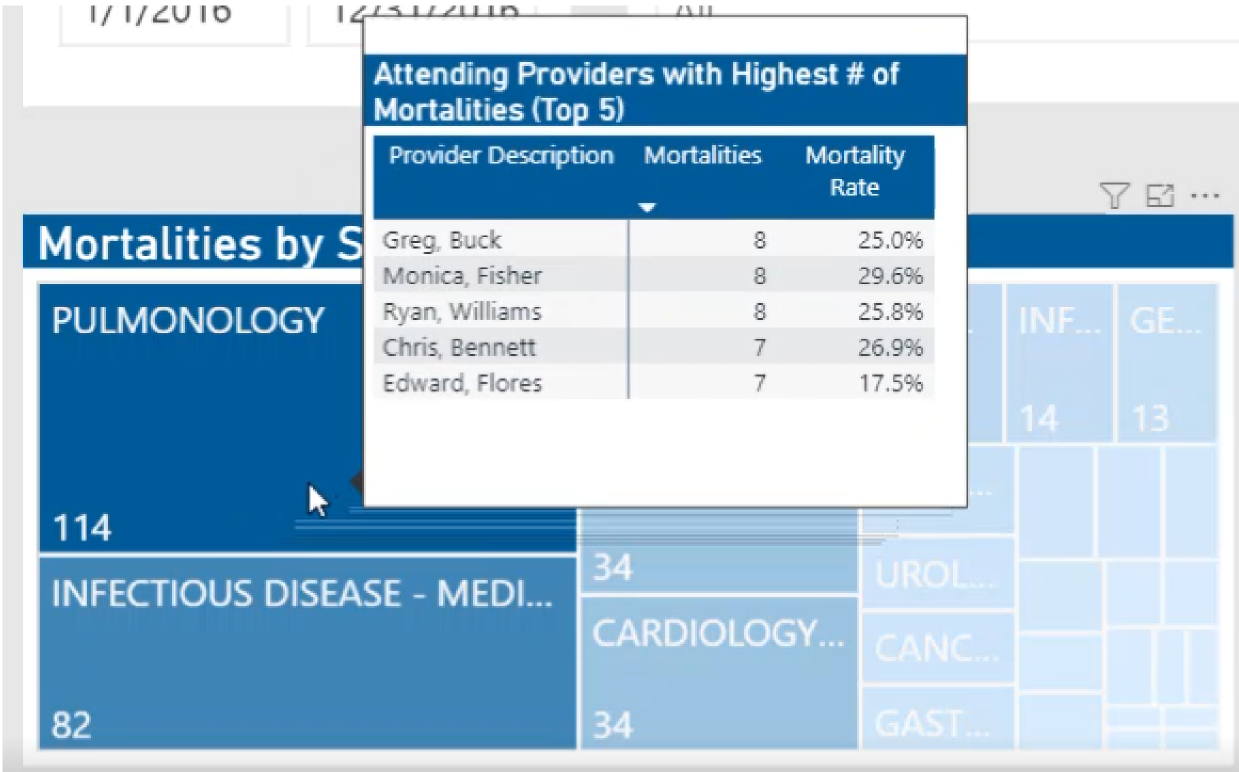


Slicers

This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Mortalities by Service Line

This section allows you to view the providers and their mortality rates by hovering your cursor over a service line square. When you click a square, the system greys out the details across the page except for data specific to the service line you selected. To enable all of the data across service lines on the page again, click the square again.

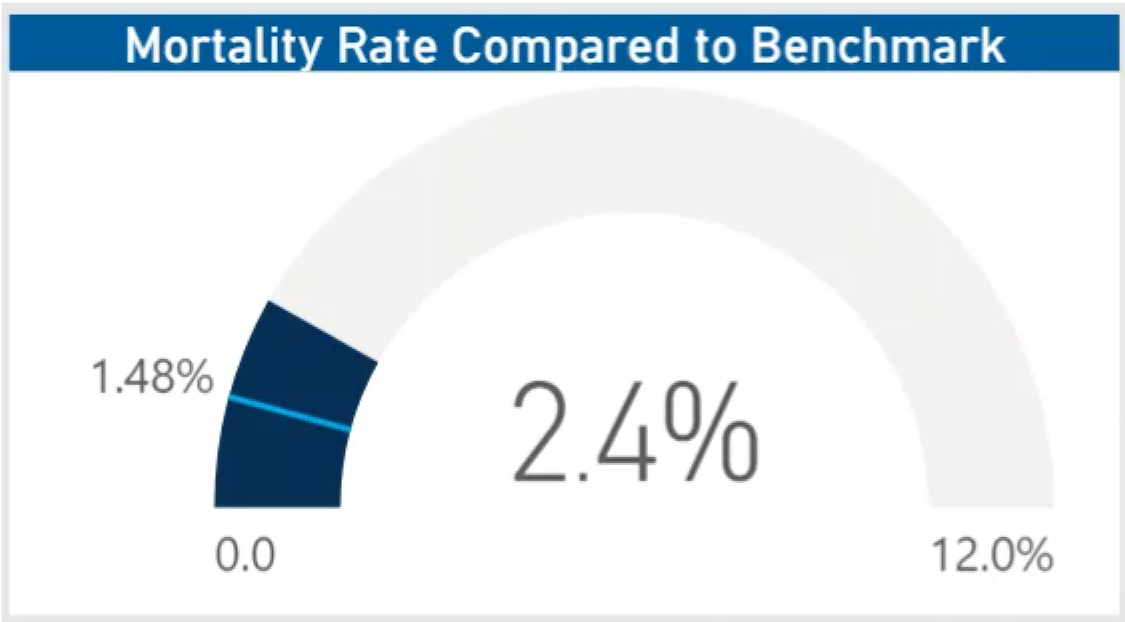


Mortality Rate Metric

This section shows the current year mortality rate and the goal set in the previous year. Hover your cursor over the graph at the bottom of the card to view a tool tip of the data specific to a month. When you click on the graph, the current year data and goal percentage in the parentheses will adjust to the selected time period.

Mortality Rate Compared to Benchmark

This section displays a gauge that compares your current mortality rate with the benchmark.



Mortality Rate Detail

This section displays the details related to morality rate for each service line, including the number of mortalities, the current year mortality rate compared to the previous year, and the benchmark details.

From this section, you can do the following:

- View the details for a specific service line by clicking a row. The system greys out the details for the other service lines across the page except for data specific to the service line you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

Including or excluding data

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Viewing data

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Copying data for other reports

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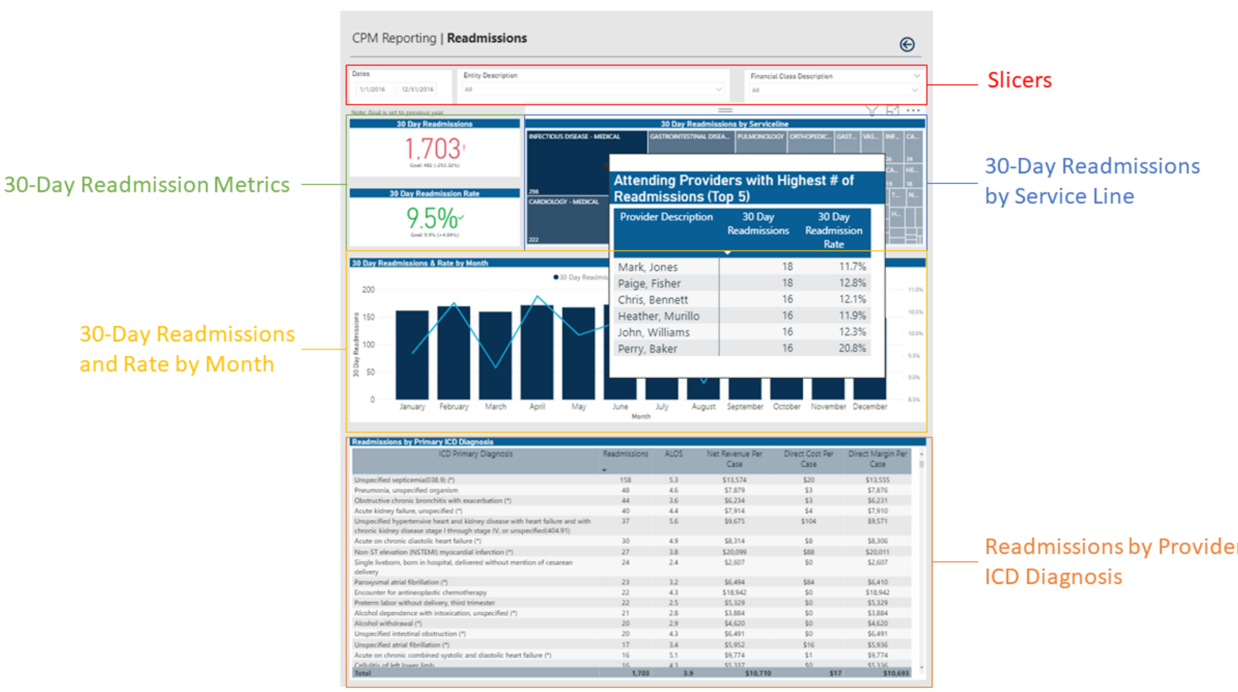
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Readmission Analysis report

Overview

This report provides KPI metrics and details regarding readmission rates at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

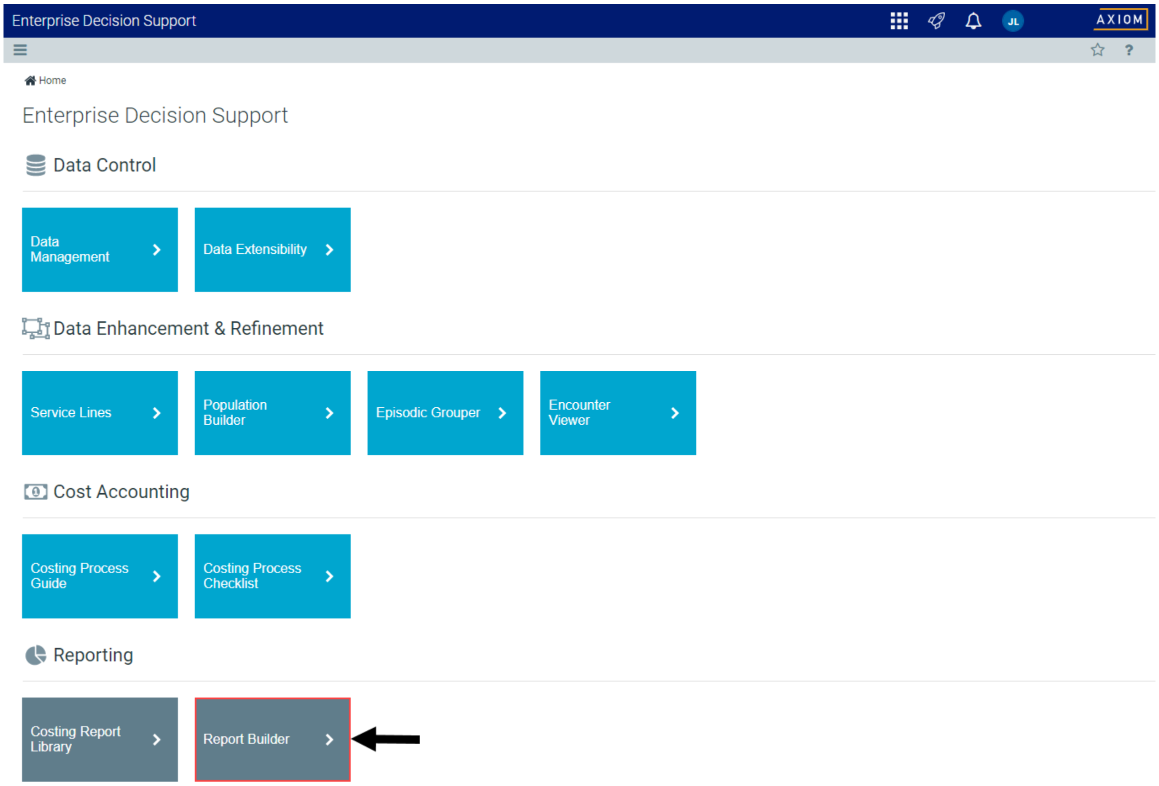


▶ Opening the report

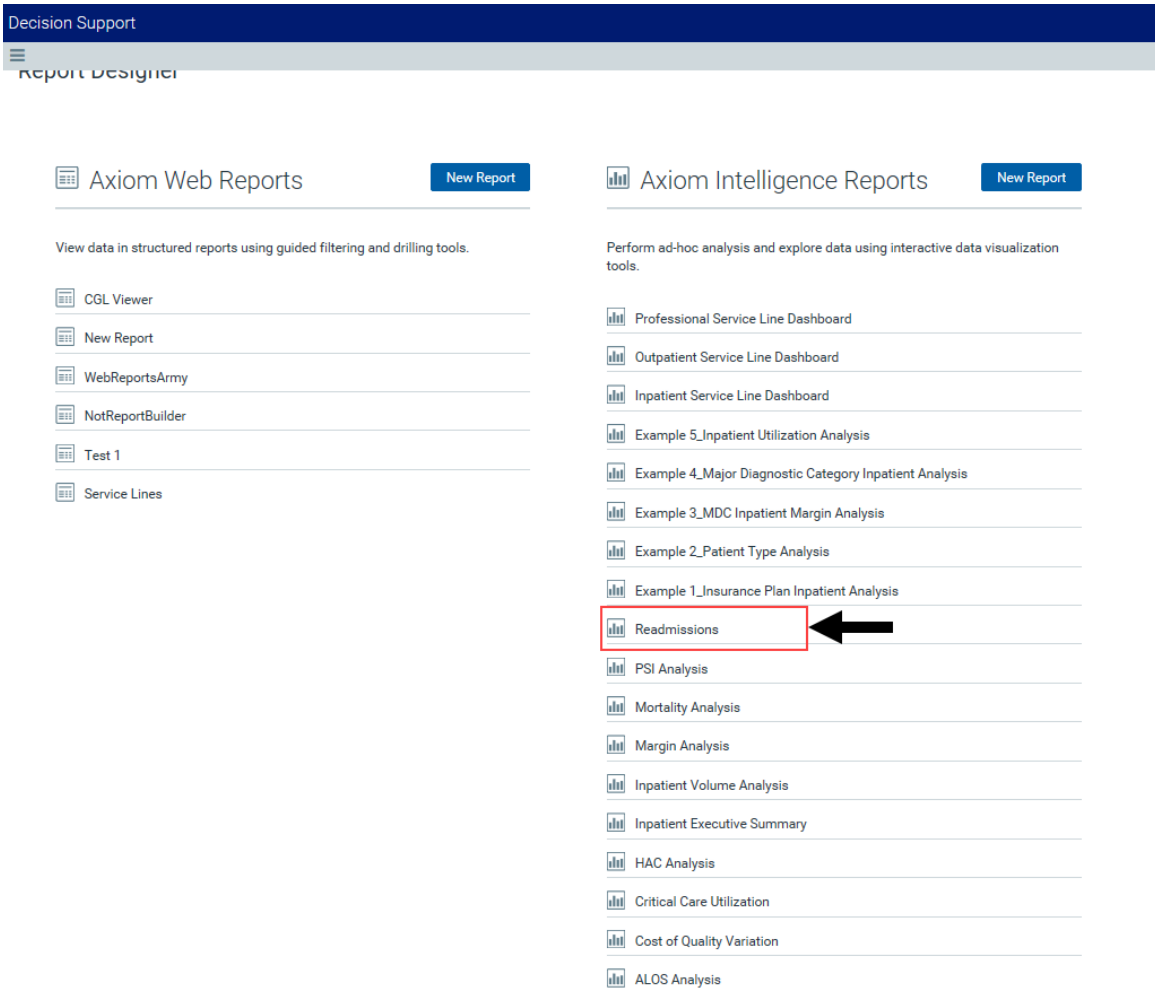
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Readmissions**.

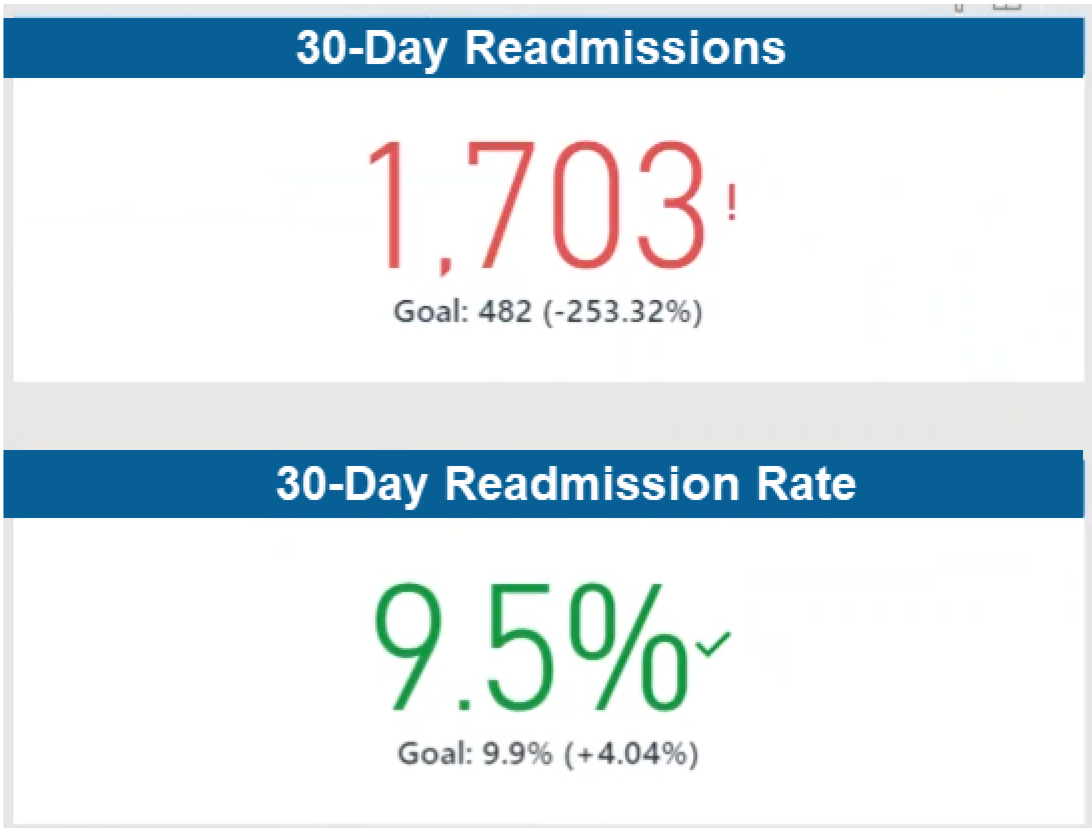


Slicers

This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

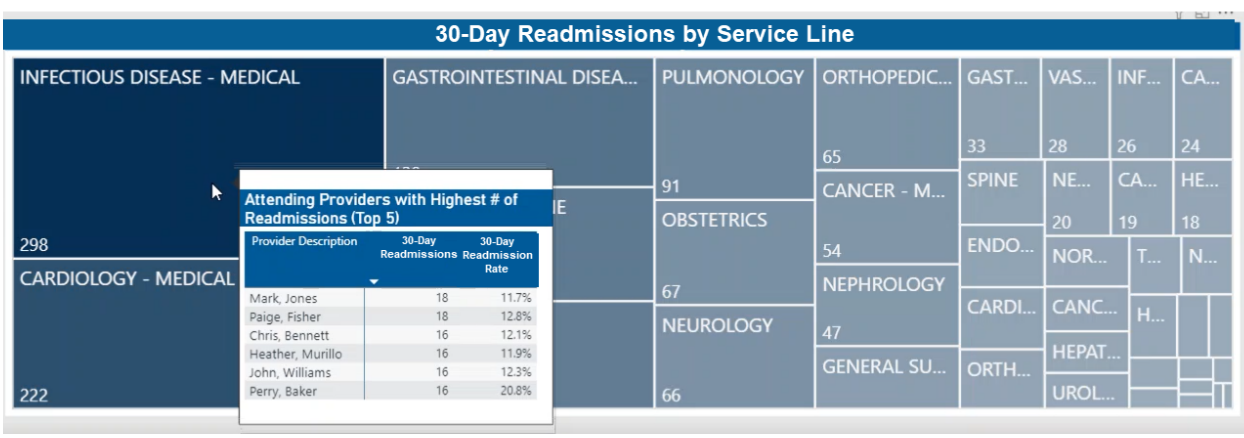
30-Day Readmissions and Rate

This section shows the number of readmissions and the readmission rate, including goals set up in the previous year.



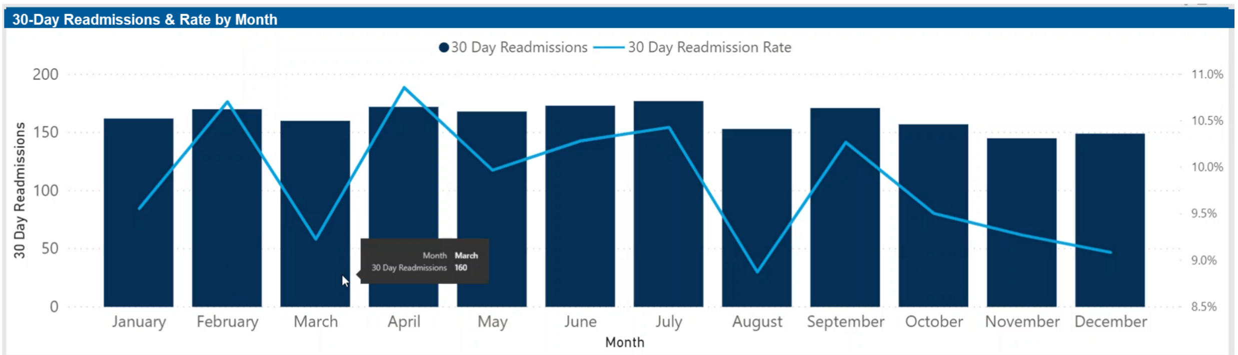
30-Day Readmissions by Service Line

This section allows you to view the providers and their readmission rates by hovering your cursor over a service line square. When you click a square, the system greys out the details across the page except for data specific to the service line you selected. To enable all of the data across service lines on the page again, click the square again.



30-Day Readmissions by Rate and Month

This section displays a bar chart that shows the number of readmissions for each month for the date range selected in the Slicer section above. The chart also shows the readmission rate trend across months.



Readmission by Primary ICD Diagnosis

This section shows the details regarding readmissions by primary ICD Diagnosis to help you understand under what circumstances patients are returning, including the number of readmissions, ALOS, net revenue per case, direct cost per case, and direct margin per case.

Readmissions by Primary ICD Diagnosis

ICD Primary Diagnosis	Readmissions	ALOS	Net Revenue Per Case	Direct Cost Per Case	Direct Margin Per Case
Unspecified septicemia(038.9) (*)	158	5.3	$13,574	$8,336	$5,238
Pneumonia, unspecified organism	48	4.6	$7,879	$5,645	$2,234
Obstructive chronic bronchitis with exacerbation (*)	44	3.6	$6,234	$4,276	$1,958
Acute kidney failure, unspecified (*)	40	4.4	$7,914	$5,016	$2,898
Unspecified hypertensive heart and kidney disease with heart failure and with chronic kidney disease stage I through stage IV, or unspecified(404.91)	37	5.6	$9,675	$6,923	$2,752
Acute on chronic diastolic heart failure (*)	30	4.9	$8,314	$6,196	$2,118
Non-ST elevation (NSTEMI) myocardial infarction (*)	27	3.8	$20,099	$9,051	$11,047
Single liveborn, born in hospital, delivered without mention of cesarean delivery	24	2.4	$2,607	$2,366	$241
Paroxysmal atrial fibrillation (*)	23	3.2	$6,494	$4,176	$2,318
Encounter for antineoplastic chemotherapy	22	4.3	$18,942	$8,252	$10,689
Preterm labor without delivery, third trimester	22	2.5	$5,329	$4,229	$1,100

From this section, you can do the following:

- View the details for a specific diagnosis by clicking a row. The system greys out the details for the other diagnoses across the page except for data specific to the diagnosis you selected.
- Sort the table by columns in ascending or descending order by clicking the column header.
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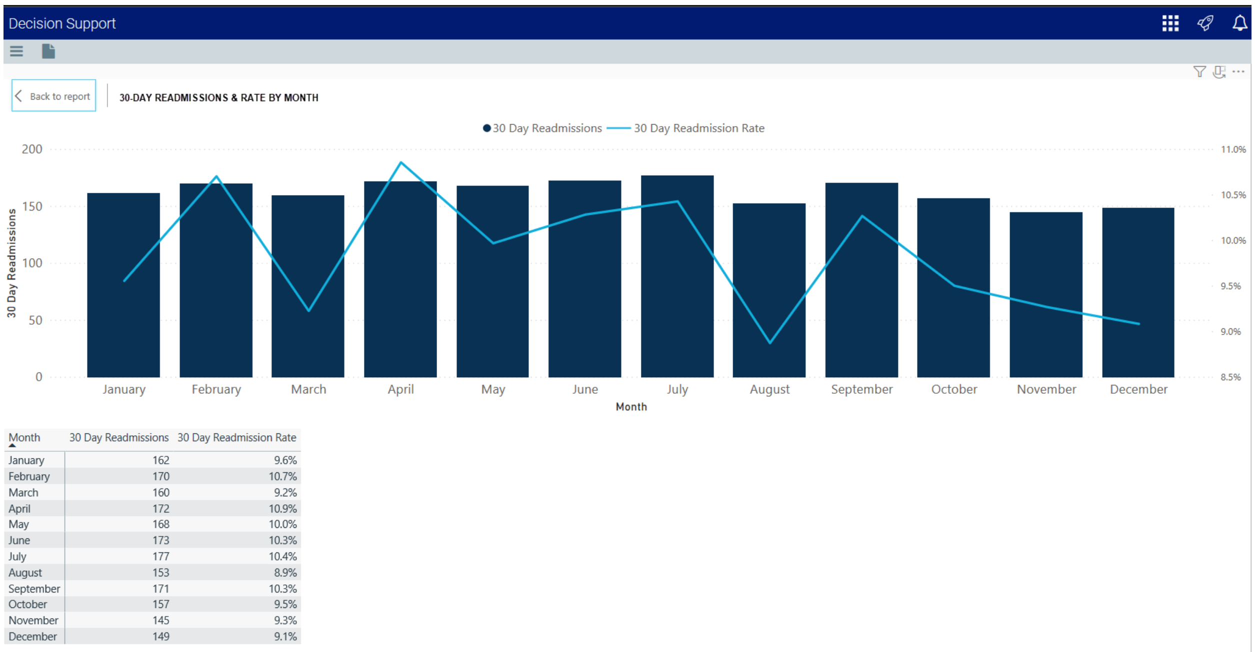

Month	30 Day Readmissions	30 Day Readmission Rate
January	162	9.6%
February	170	10.7%
March	160	9.2%
April	172	10.9%
May	168	10.0%
June	173	10.3%
July	177	10.4%
August	153	8.9%
September	171	10.3%
October	157	9.5%
November	145	9.3%
December	149	9.1%

Copying data for other reports

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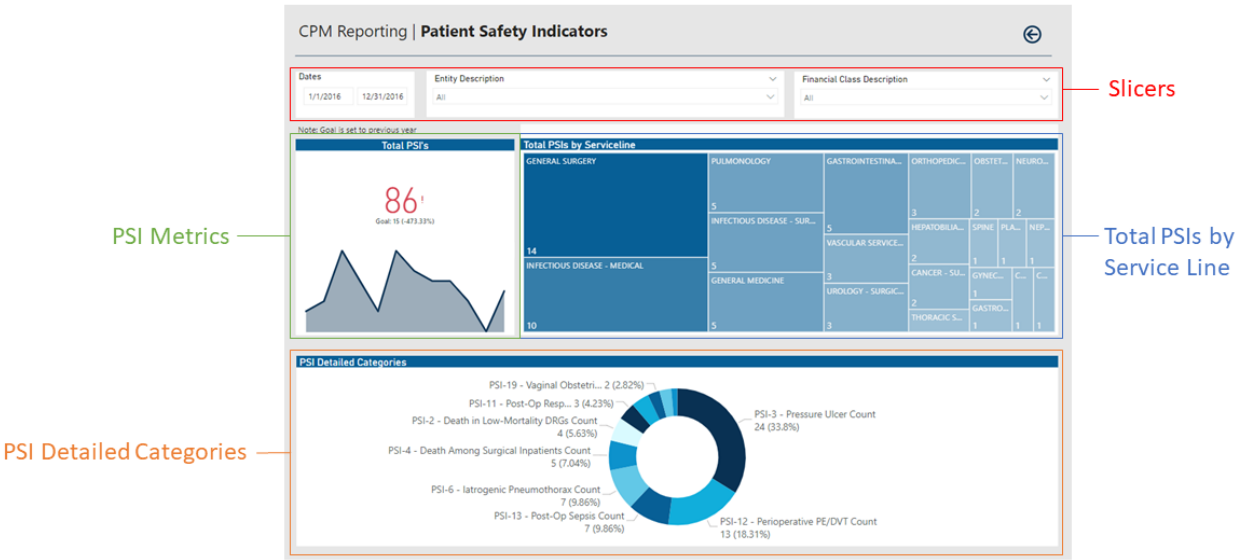
Patient Safety Indicator (PSI) Analysis report

▶ Overview

This report provides metrics and details regarding PSI at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

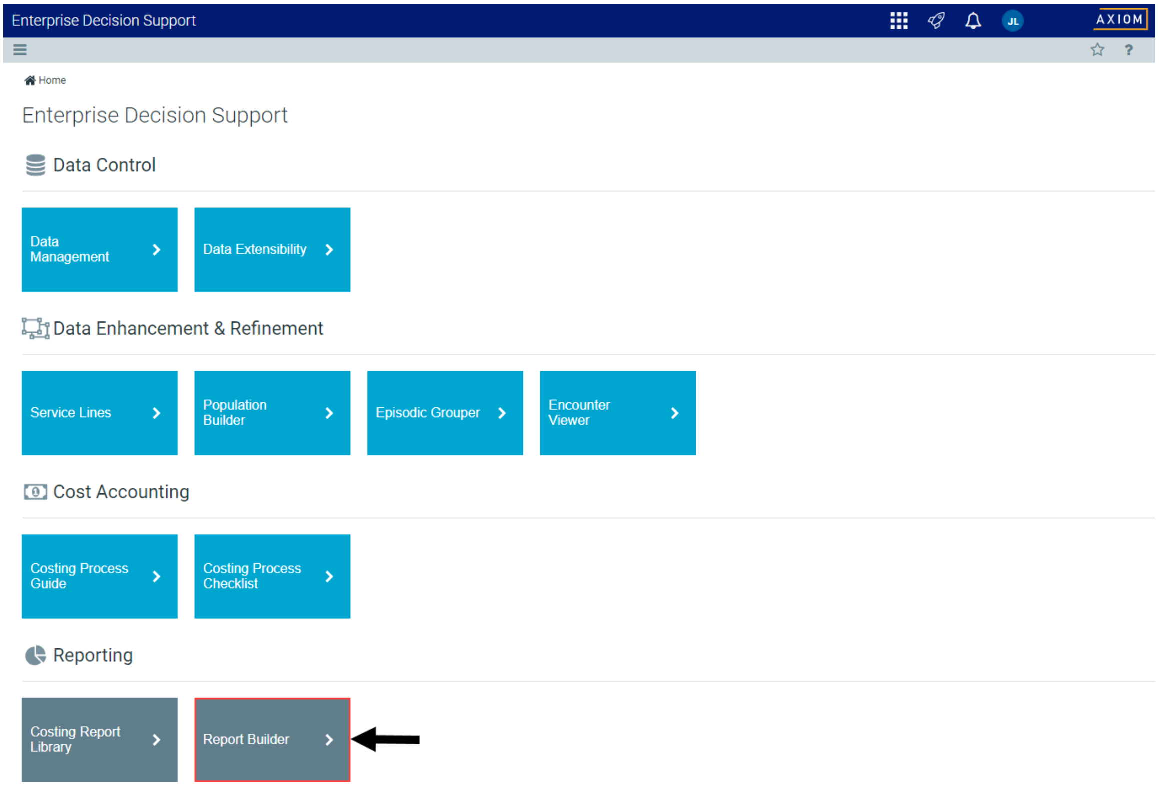


▶ Opening the report

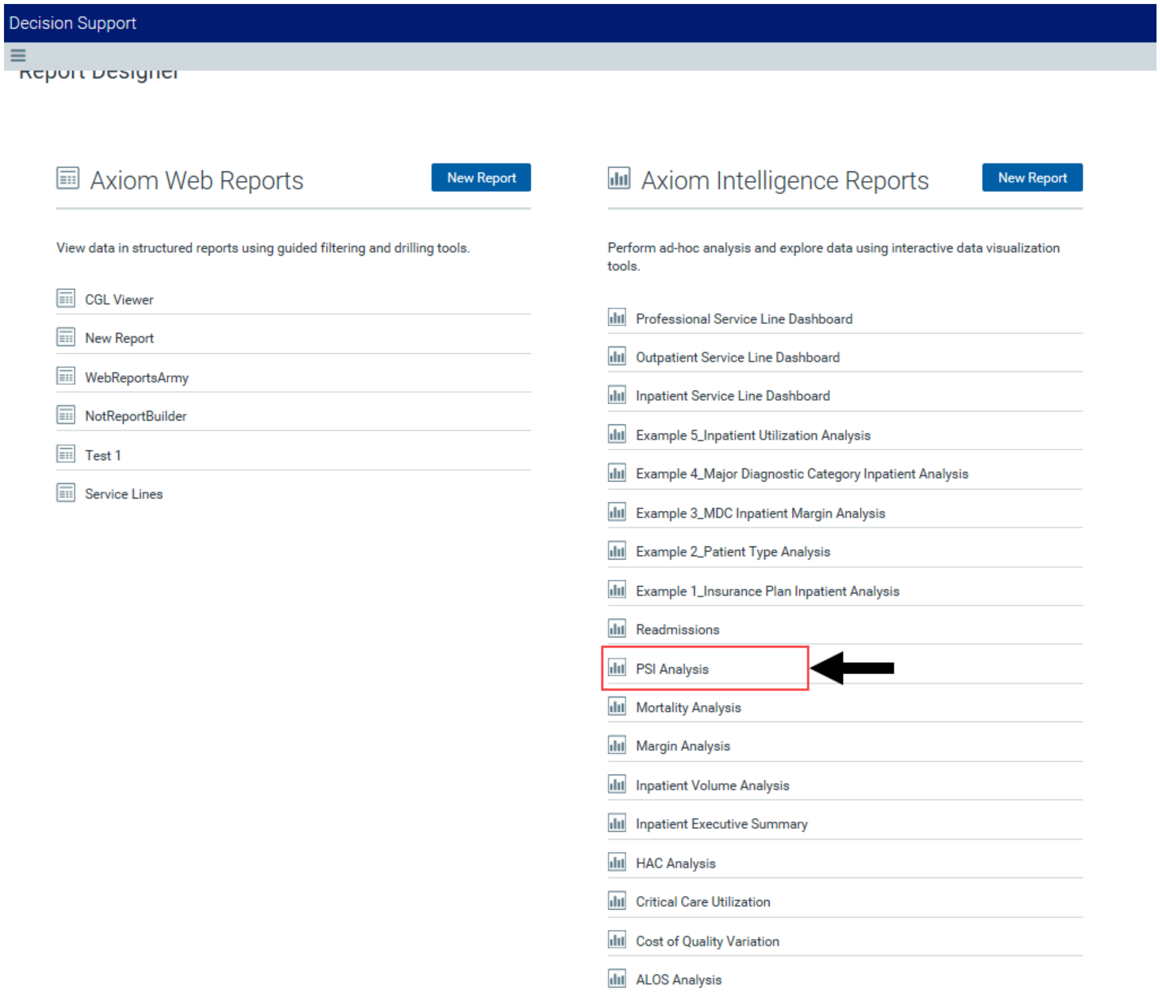
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **PSI Analysis**.

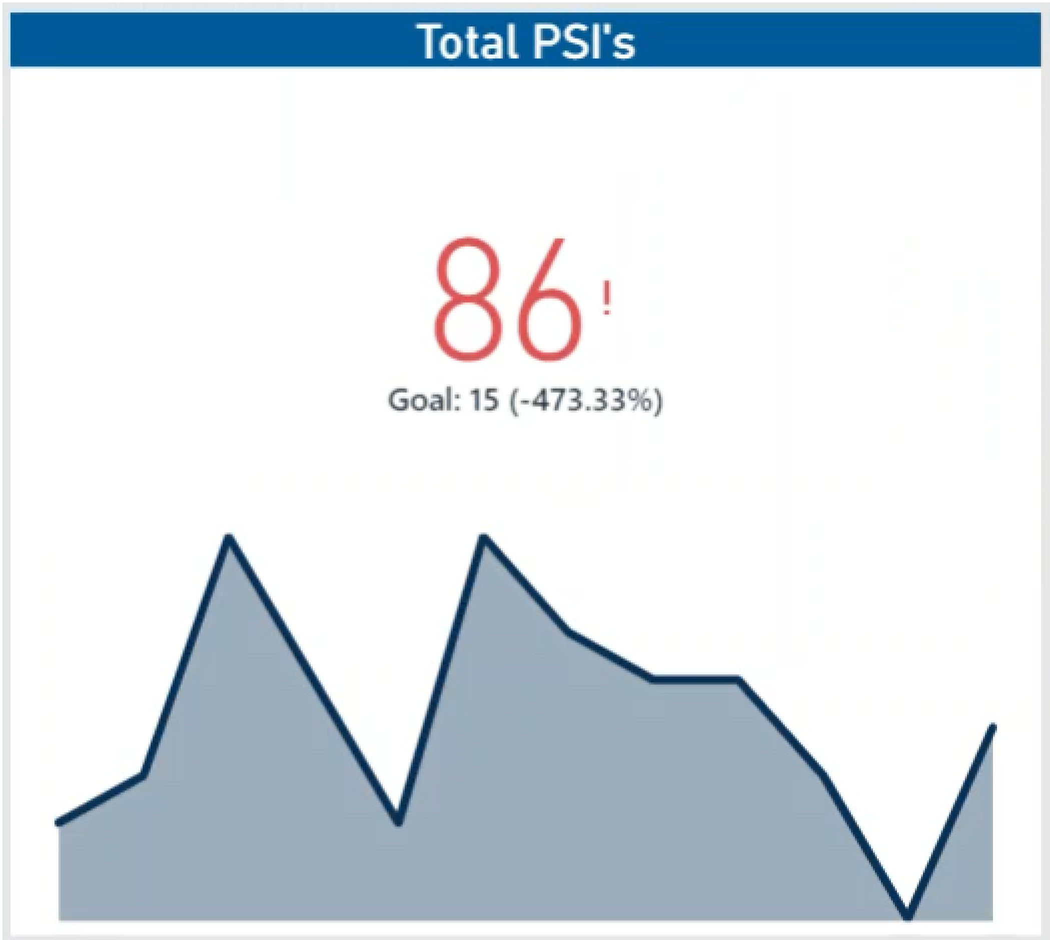


Slicers

This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

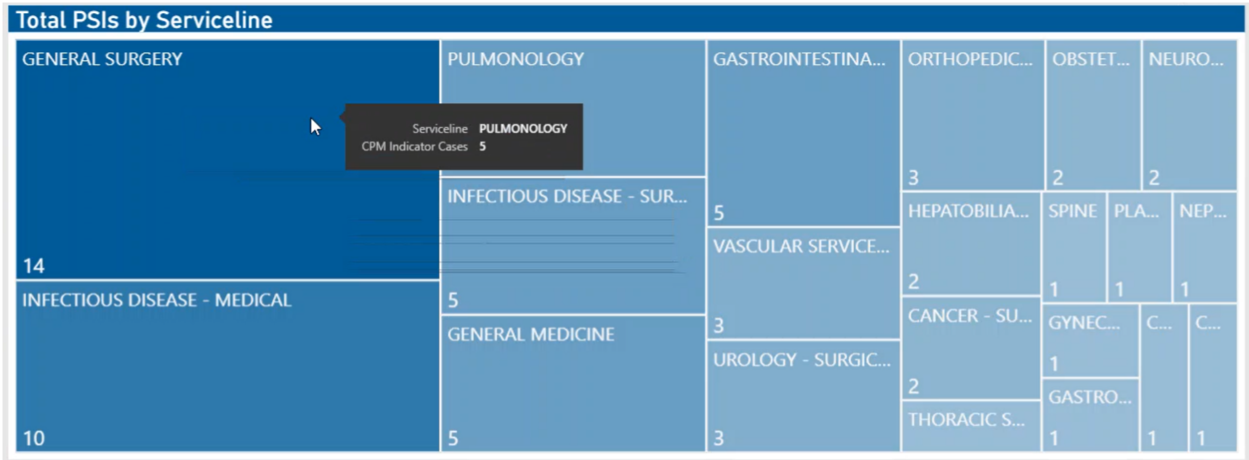
Total PSI

This section shows the current year PSIs and the goal set in the previous year. Hover your cursor over the graph at the bottom of the card to view a tool tip of the data specific to a month. When you click on the graph, the current year data and goal percentage in the parentheses will adjust to the selected time period.



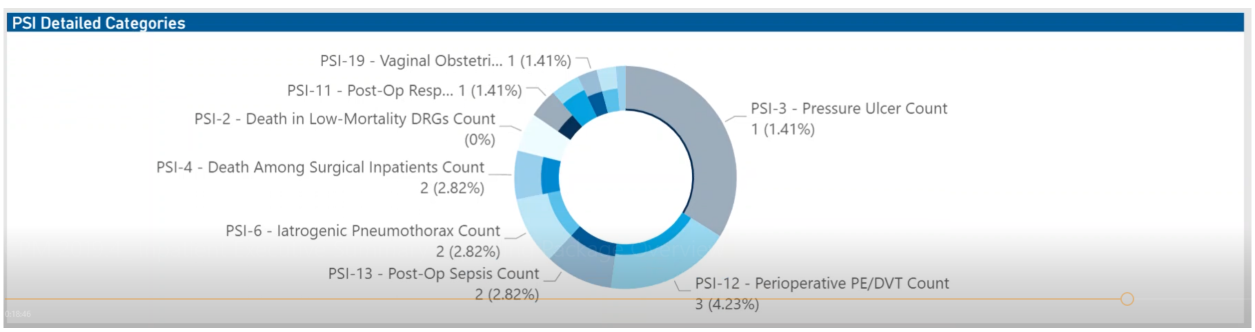
Total PSIs by Service Line

This section allows you to view the number of CPM indicator cases for each service line by hovering your cursor over a service line square. When you click a square, the system greys out the details across the page except for data specific to the service line you selected. To enable all of the data across service lines on the page again, click the square again.



PSI Detailed Categories

This section provides an overview of the breakdown of PSI by category and the percentage of each.



Including or excluding data

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Viewing data

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Copying data for other reports

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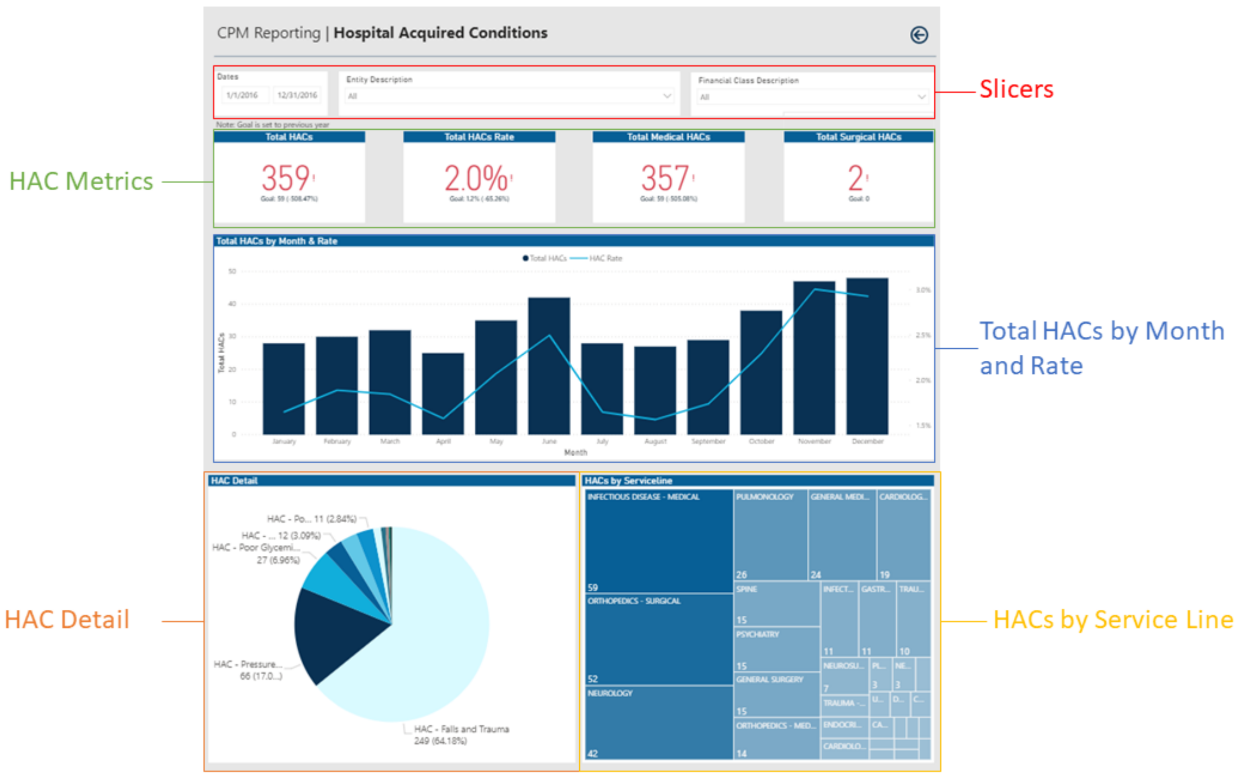
> **NOTE:** This function only applies to users that have permission to edit and manage Axiom Intelligence reports.

Hospital Acquired Condition (HAC) Analysis report

Overview

This report provides metrics and details regarding HAC at your organization and across service lines. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

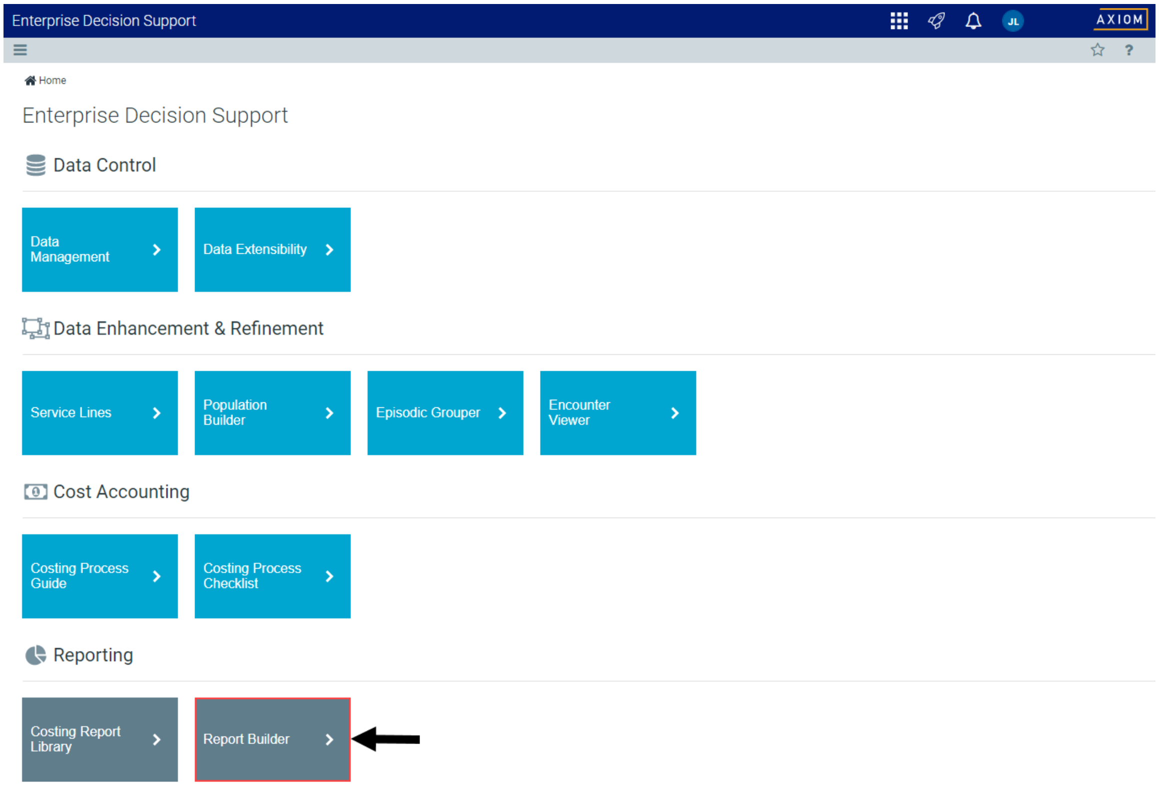


Opening the report

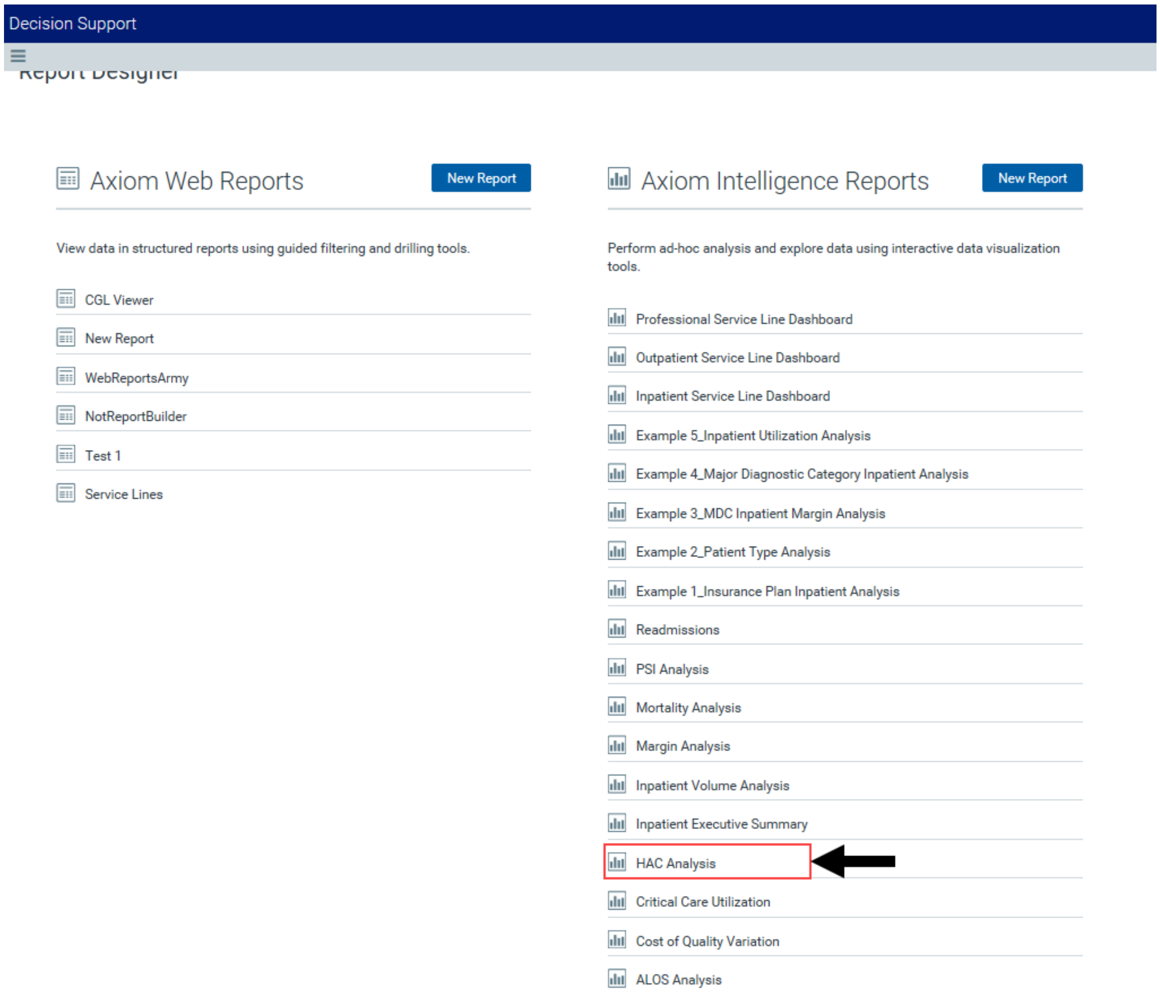
> **TIP:** You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **HAC Analysis**.



Slicers

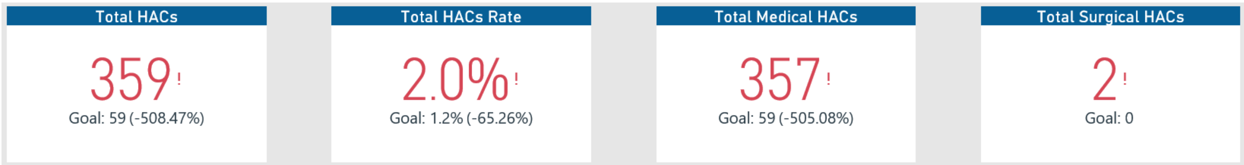
This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Inpatient Cases and Critical Care Metrics

This section shows the following metric information for the date range selected in the slicer section:

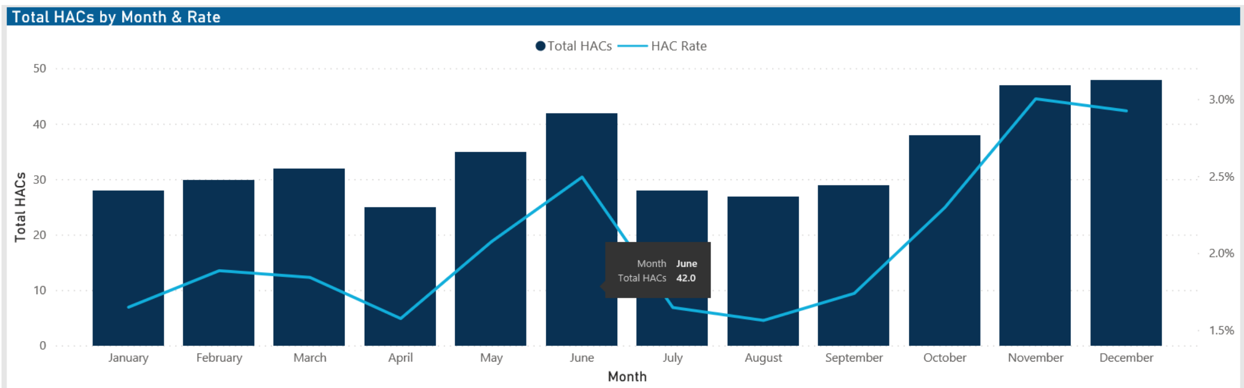
- **Total HACs** - Total number of HACs, previous year goal, and percentage of goal
- **Total HACs Rate** - Total rate of HACs, previous year goal, and percentage of goal
- **Total Medical HACs** - The number of medical HACs out of the total number of HACs, previous year goal, and percentage of goal

- **Total Surgical HACs** - The number of surgical HACs out of the total number of HACs, previous year goal, and percentage of goal



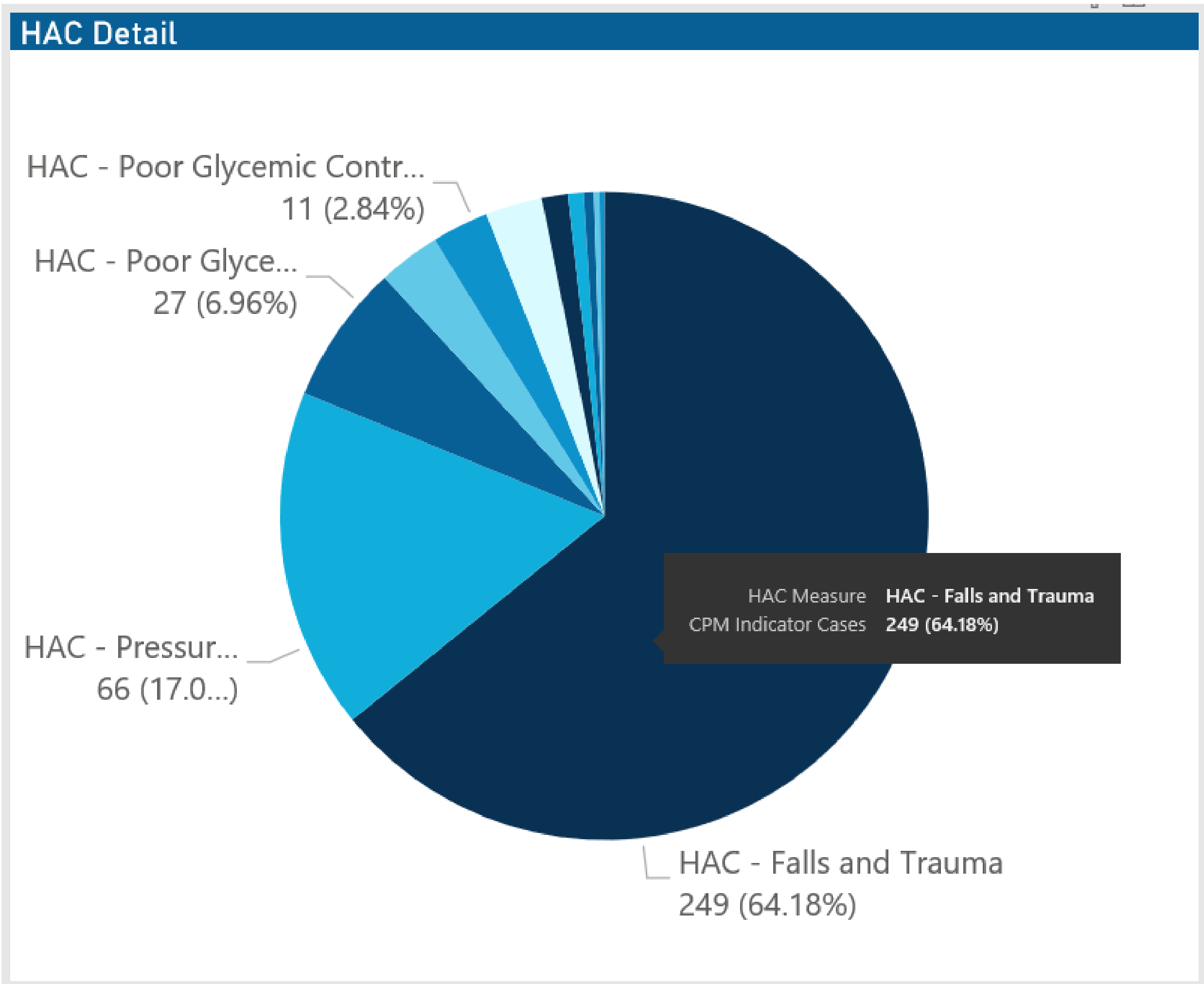
Total HACs by Month and Rate

This section displays a bar chart that shows the number of HACs for each month for the date range selected in the Slicer section above. The chart also shows the HAC rate trend across months.



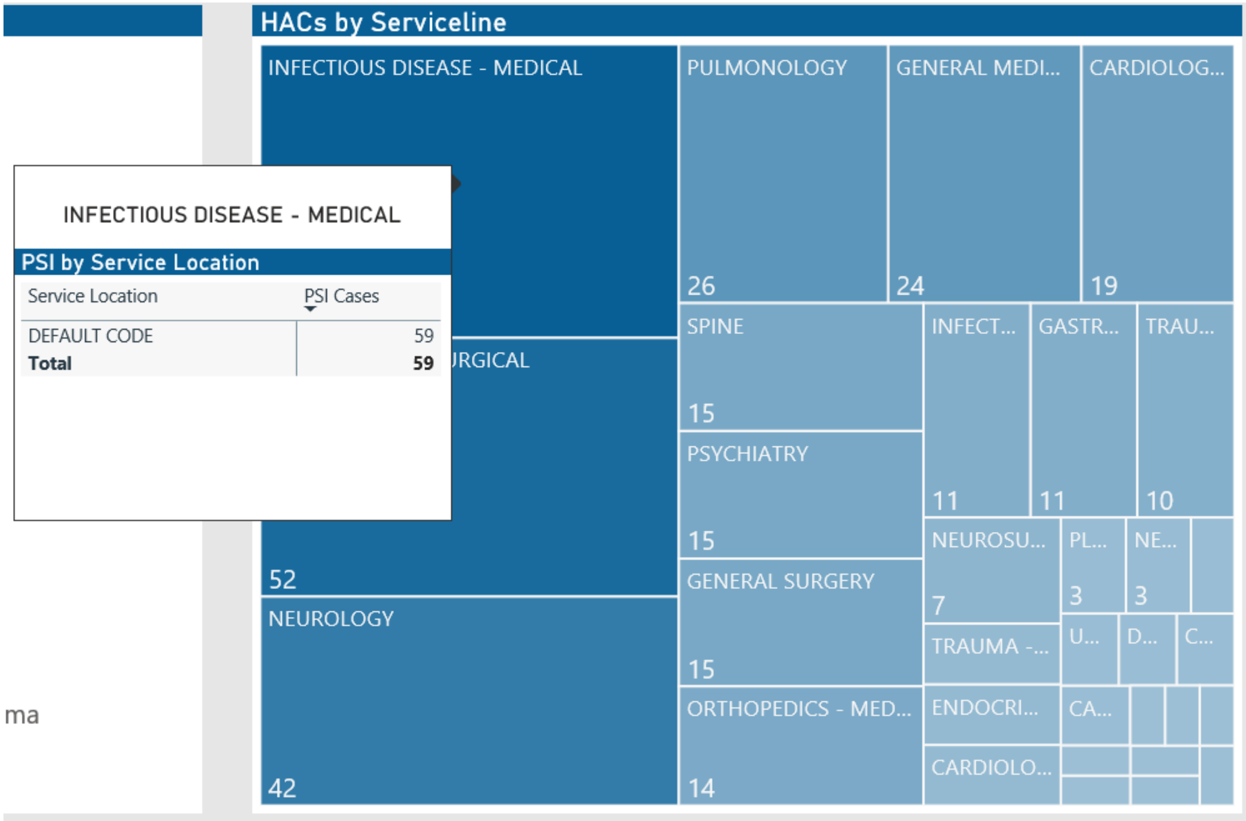
HAC Detail

This section displays a pie chart of the types of HACs and their percentages.



HACs by Service Line

This section allows you to view the number of HACs for each service line by hovering your cursor over a service line square. When you click a square, the system greys out the details across the page except for data specific to the service line you selected. To enable all of the data across service lines on the page again, click the square again.



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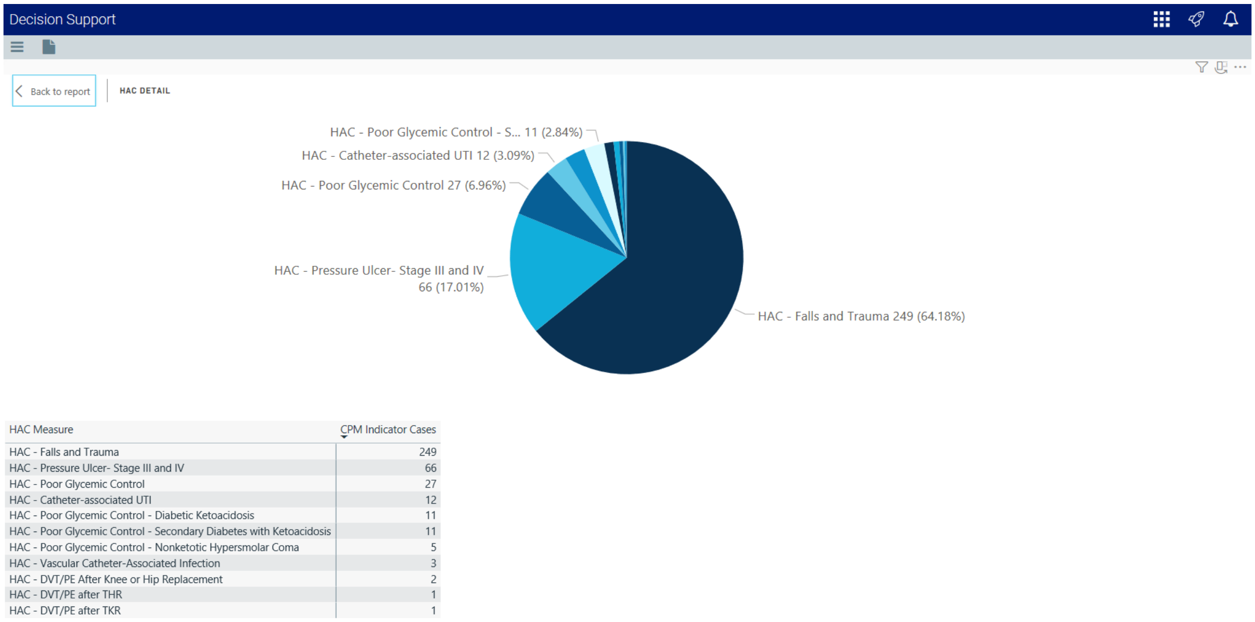

HAC Measure	CPM Indicator Cases
HAC - Falls and Trauma	249
HAC - Pressure Ulcer- Stage III and IV	66
HAC - Poor Glycemic Control	27
HAC - Catheter-associated UTI	12
HAC - Poor Glycemic Control - Diabetic Ketoacidosis	11
HAC - Poor Glycemic Control - Secondary Diabetes with Ketoacidosis	11
HAC - Poor Glycemic Control - Nonketotic Hypersmolar Coma	5
HAC - Vascular Catheter-Associated Infection	3
HAC - DVT/PE After Knee or Hip Replacement	2
HAC - DVT/PE after THR	1
HAC - DVT/PE after TKR	1

Copying data for other reports

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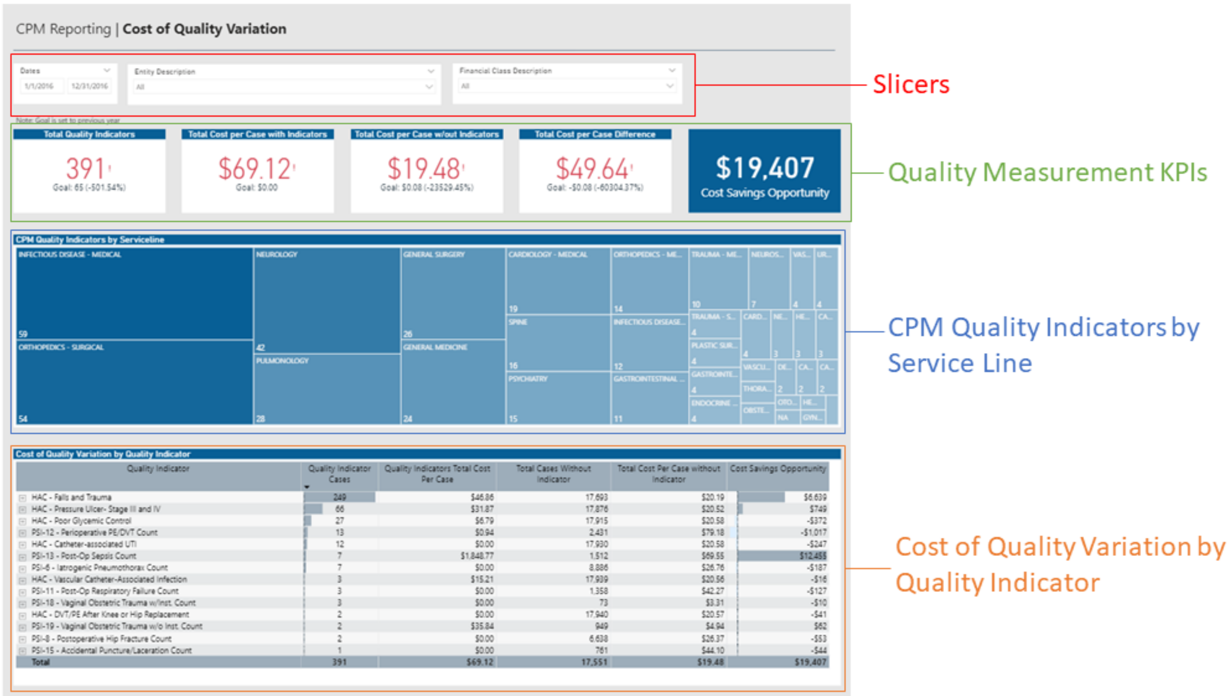
Cost of Quality Variation report

Overview

This report provides KPI measurements and other details related to determining potential cost savings opportunities. To return to the Inpatient Executive Summary Dashboard, click the arrow in the upper right corner.

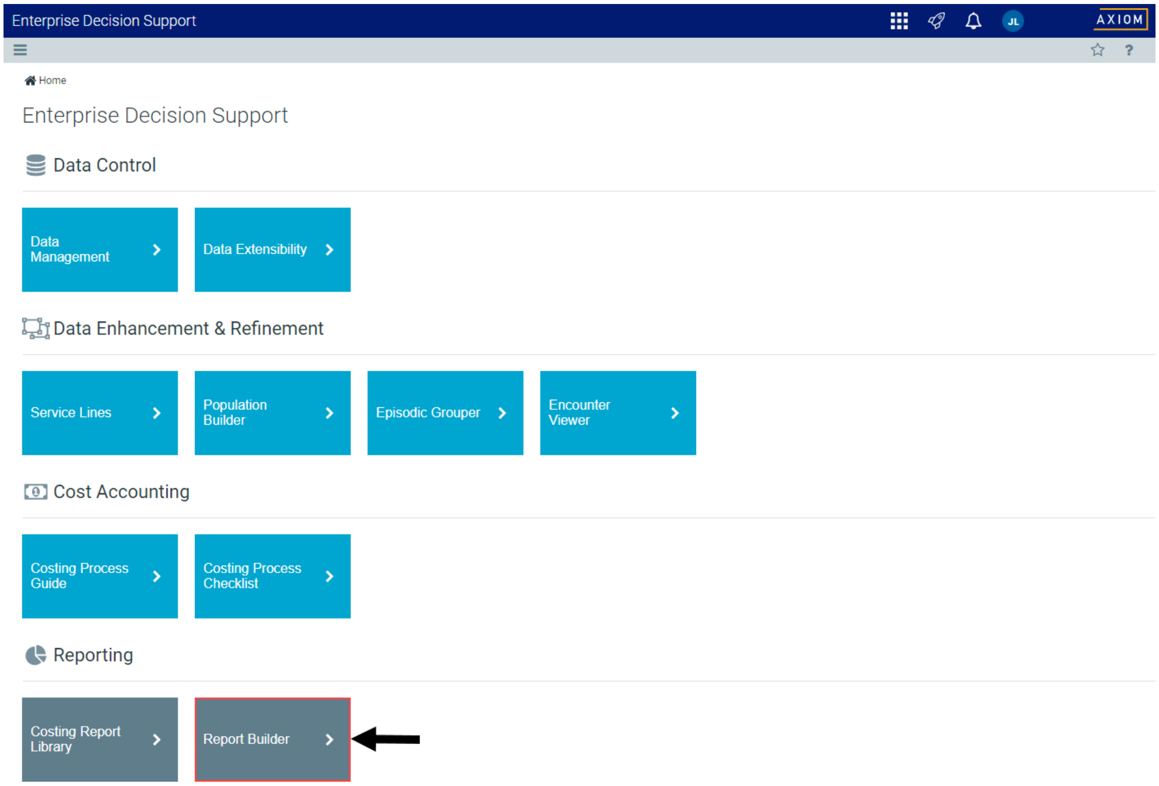


▶ Opening the report

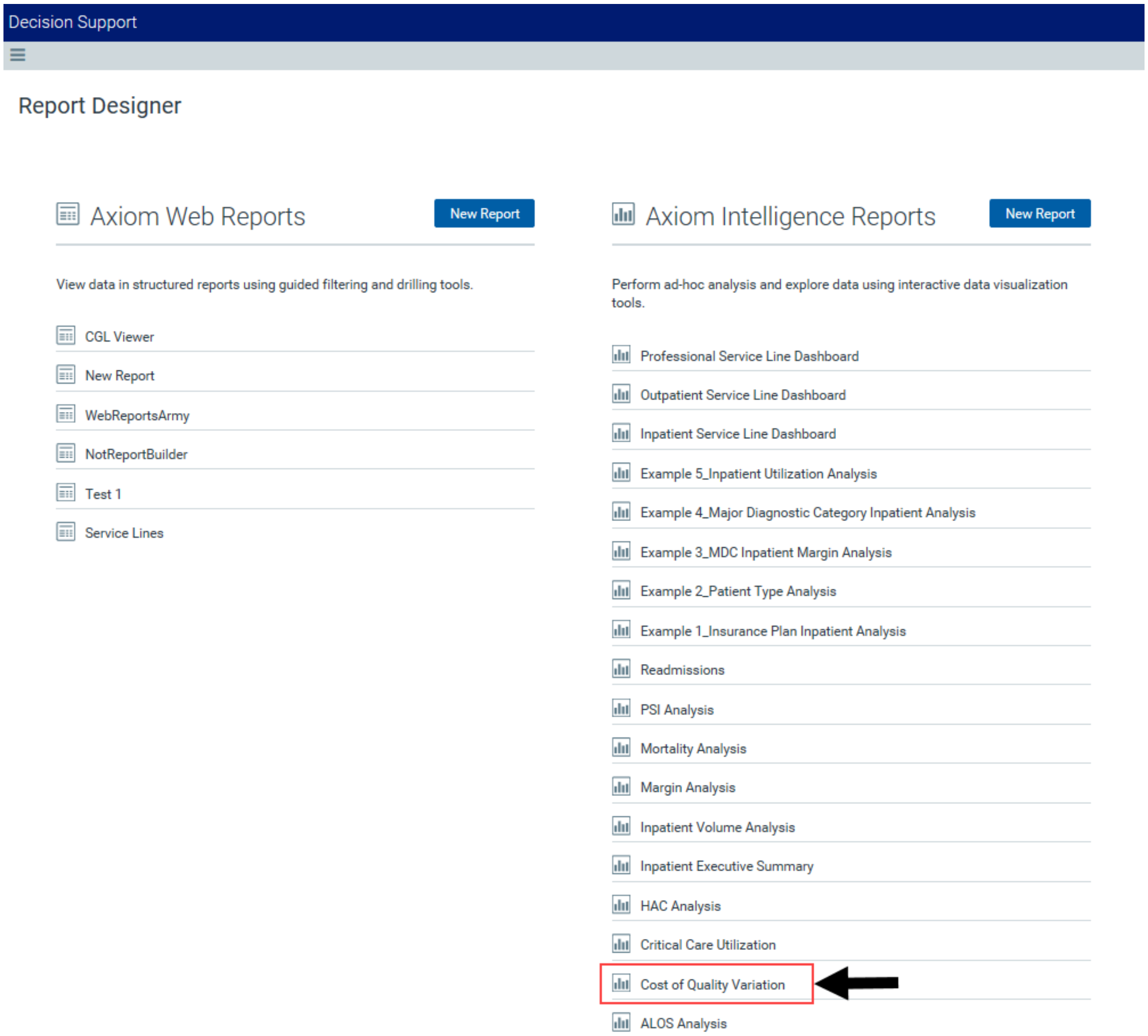
TIP: You can open this report individually or through the Inpatient Executive Dashboard.

To open the dashboard:

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



2. In the Axiom Intelligence Reports section, click **Cost of Quality Variation**.



Slicers

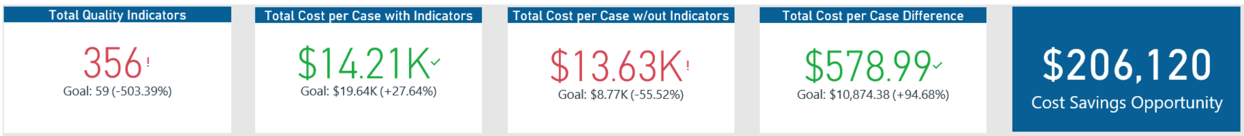
This section allows you to filter data by date range, entity, and financial class. From the drop-downs, you can select a combination of the available options to define the data parameters to include in the report.

Quality Indicator Metrics

This section shows the following metric information for the date range selected in the slicer section:

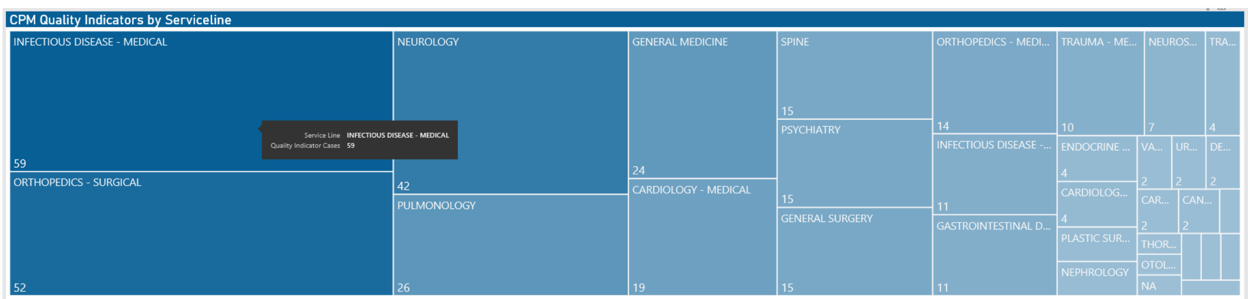
- **Total Quality Indicators** - Total number of indicators for the year, previous year goal, and percentage of goal

- **Total Cost per Case with Indicators** - Total amount per case with indicators, previous year goal, and percentage of goal
- **Total Cost per case w/out Indicators** - The amount per case without indicators, previous year goal, and percentage of goal
- **Total Cost per Case Difference** - The difference between cases with and without indicators, previous year goal, and percentage of goal
- **Total Savings Opportunity** - The amount of possible savings for the organization



CPM Quality Indicators by Service Line

This section allows you to view the number of quality indicators for each service line by hovering your cursor over a service line square. When you click a square, the system greys out the details across the page except for data specific to the service line you selected. To enable all of the data across service lines on the page again, click the square again.



Cost of Quality Variation by Quality Indicator

This section displays the value details related to the cost of quality by quality indicator.

Cost of Quality Variation by Quality Indicator

Quality Indicator	Quality Indicator Cases	Quality Indicators Total Cost Per Case	Total Cases Without Indicator	Total Cost Per Case without Indicator	Cost Savings Opportunity
HAC - Falls and Trauma	249	$13,403.80	17,693	$13,646.82	-$60,512
HAC - Pressure Ulcer- Stage III and IV	66	$15,706.70	17,876	$13,635.83	$136,678
HAC - Poor Glycemic Control	27	$14,106.30	17,915	$13,642.75	$12,516
HAC - Catheter-associated UTI	12	$22,167.63	17,930	$13,637.74	$102,359
HAC - Vascular Catheter-Associated Infection	3	$10,283.20	17,939	$13,644.01	-$10,082
HAC - DVT/PE After Knee or Hip Replacement	2	$19,203.11	17,940	$13,642.83	$11,121
Total	**356**	**$14,210.95**	**17,586**	**$13,631.96**	**$206,120**

From this section, you can do the following:

- View the details for a specific quality indicator by clicking a row. The system greys out the details for the other service lines across the page except for data specific to the quality indicator you selected.

- Sort the table by columns in ascending or descending order by clicking the column header.
- Drill up or down through the data by right-clicking the row, and then selecting **Drill Up** or **Drill Down**.

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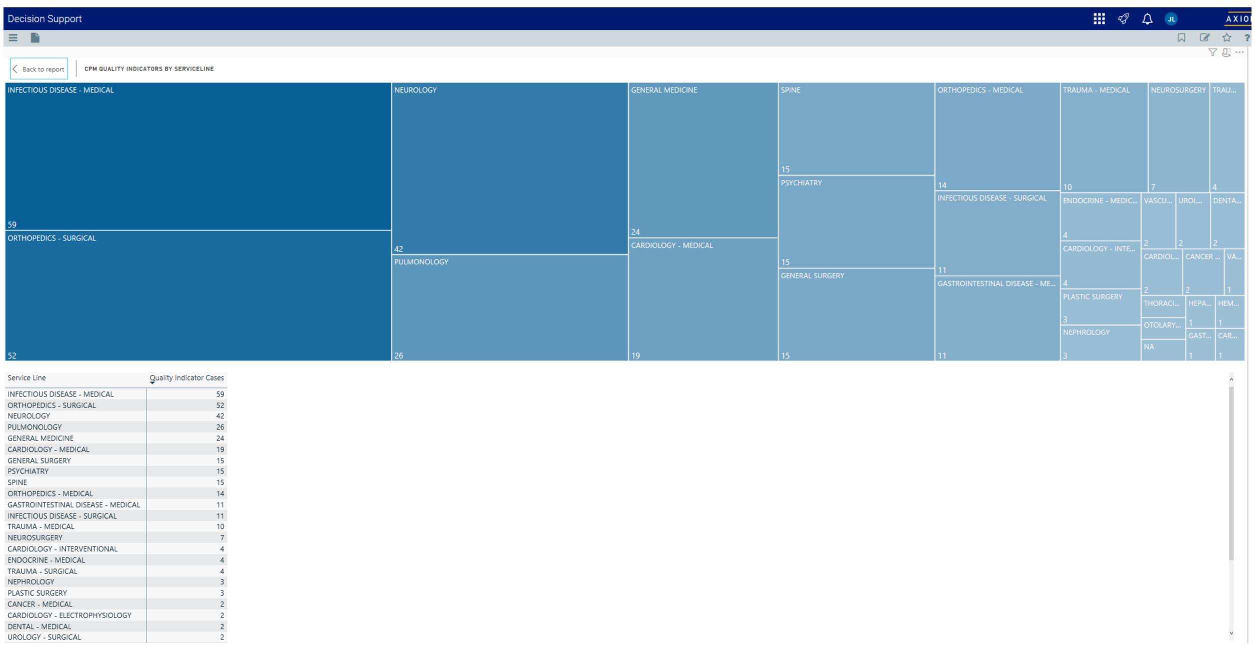

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Configuring Scheduler tasks for CPM processing and importing data

There are two Scheduler jobs used to process and import data to the CPM dashboard. In most cases, you will not need to configure or change these job settings. However, you may want to adjust the timing for when they occur.

To configure Scheduler tasks for CPM processing and importing data:

1. Open the Scheduler.
2. Select the **Trigger DME Processing** or **Import DME Processing** job, depending on the one to edit.
3. Do the following:

Scheduler Job	Description
Trigger DME Processing	a. To change the day the job runs, click the **Tasks > Trigger DME Processing** tab on the left side of the screen. b. Click **Task Control**. c. In the **Process task only if the value of this expression is true** box, after the equals sign in the formula, enter the day of the month to run the job. By default, the system runs the job on the 15th. d. To change the time the job runs, click the **Scheduler Rules** tab on the left side of the screen. e. Double-click the **Hours** cell, and enter a new time (using military time) to run the process.
Import DME Processing	a. Click the **Scheduling Rules** tab on the left side of the screen. b. Double-click the **Hours** cell, and enter a new time (using military time) to run the process. It should run about an hour after the Trigger DME Processing job.

4. After making your changes, In the **Job** tab, click **Save**.

3

Desktop Client Reports

This section describes and provides instructions for the reports currently available in the Desktop Client version of Axiom Enterprise Decision Support. This chapter also includes topics on how to interact and run reports in the Desktop Client interface.

The following table lists the Excel reports available:

Report	Description
Physician Analysis reports	Evaluates the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions.
Patient Analysis reports	Evaluates the dimensions and measures at the encounter level across the organization. In many cases, these reports include the Inpatient, Outpatient, and Professional Billing patients. In some cases, however, some reports are limited to Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS).
Payor Analysis reports	Evaluates the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions. In many cases, these reports the Inpatient, Outpatient, and Professional Billing patients. In some cases, however, some reports are limited to Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS).
Population Analysis reports	Evaluates certain dimensions and measures at both the encounter and cost detail levels across the organization. Population Analysis reports focus on grouping patient in such a way as to make comparisons across time or physicians meaningful, e.g., populations within a particular entity, service line, etc. In many cases, these reports include the Inpatient, Outpatient, and Professional Billing patients.

Report	Description
Service Line Analysis reports	Evaluates health service operations. The extremely wide and varied nature of health conditions and treatment methods makes service lines a valuable way of classifying the patients served by provider organizations into quasi-homogenous populations.
Data Dictionary report	View changes between the Axiom Database model and the Axiom Intelligence Analysis Services data model - including table or column name changes as well as denormalization of columns onto different tables.

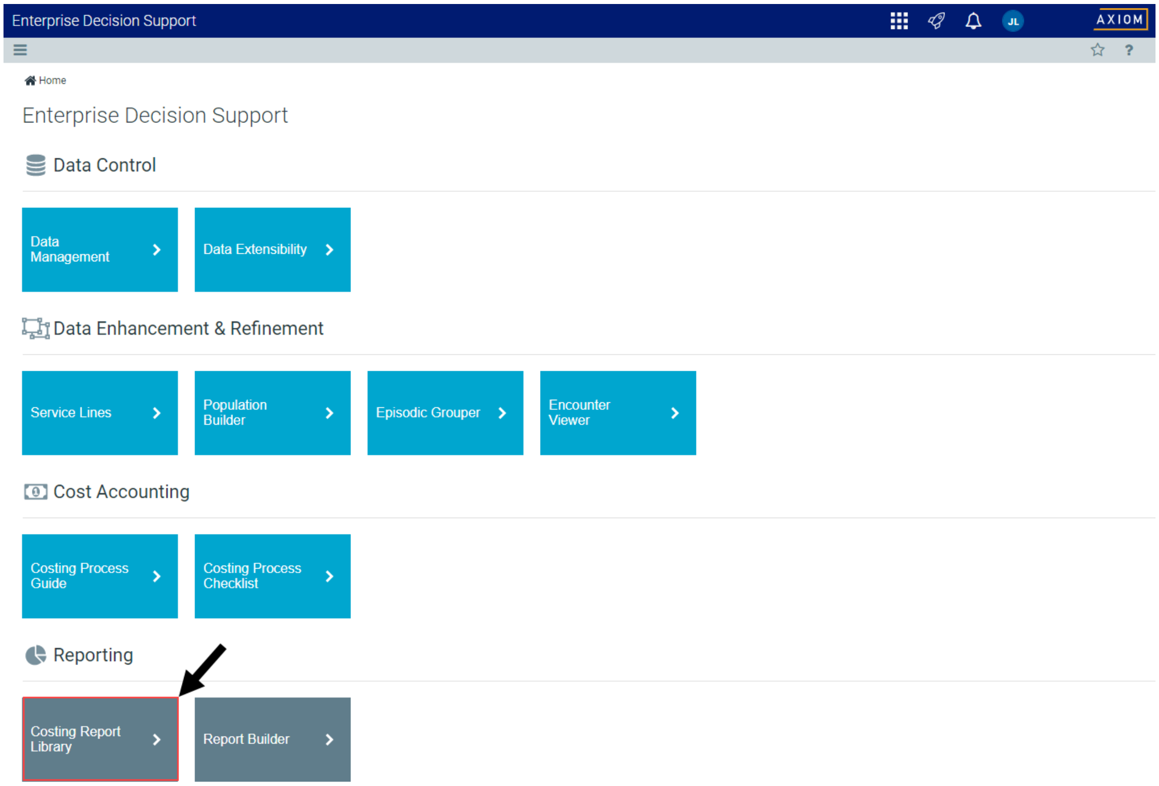
Opening costing reports

The Costing Reports page provides links to the reports available in Axiom Enterprise Decision Support, including:

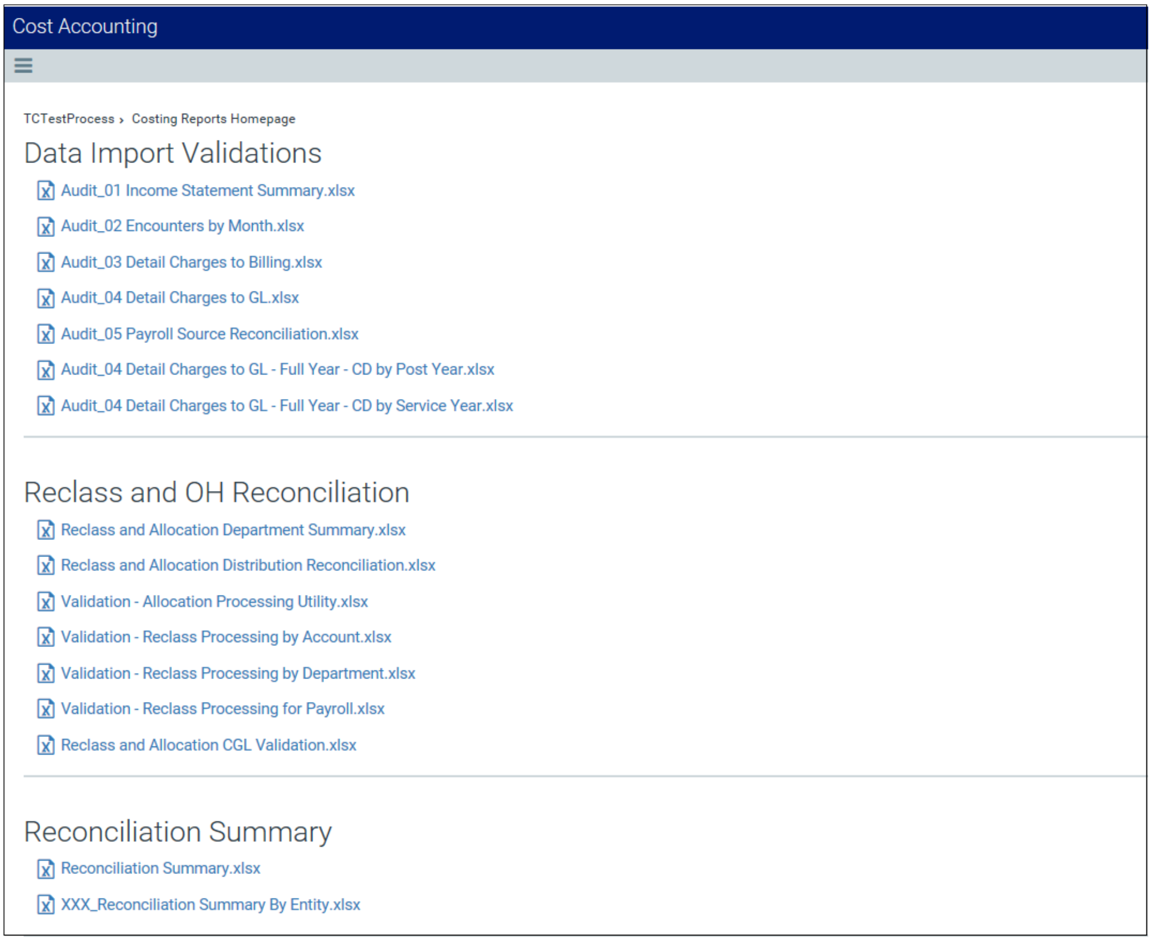
- Data import validations
- Reclass and OH reconciliation
- Reconciliation summary
- RVU development
- Transaction Microcost reconciliation
- Unit cost calcs by method
- Unit cost reconciliation

To access costing reports:

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



2. To open a report, click the link.



NOTE: The reports open as a tab in the Desktop Client version.

Using Reports

Axiom Enterprise Decision Support reports can query data from any table in the Axiom Enterprise Decision Support database. This section provides basic information about spreadsheet-based Axiom reports, and explains how to open existing reports and refresh them with data.

In addition to the report-specific functionality detailed in this section, you can use standard Axiom file features and tools. Report files use the same functionality as other Axiom files to perform actions such as changing views or navigating to file bookmarks.

Using Axiom file features

This section explains the features available when working with Axiom files in the Desktop Client. Axiom files are controlled Microsoft Excel spreadsheets that support Axiom Enterprise Decision Support features for planning and reporting.

With a few noted exceptions, all of the features discussed here are available for use in:

- Plan files
- Reports
- Supporting files for file groups (Templates, Drivers, Utilities)

This section is for users who are working with Axiom files that have already been set up to query data, save data, and use other Axiom Enterprise Decision Support features.

Drilling the data in an Axiom file

Axiom Enterprise Decision Support provides various options to drill the data in an Axiom file:

- **Drill down.** You can "drill down" a data row to view the data at a different level of detail. If hierarchies have been set up for your data, you can drill down predefined hierarchy levels. You can also drill down to the "bottom" of the data or choose any relevant column for drilling.
- **Drill through.** You can "drill through" the data in a specific cell to view the associated sub-GL detail or transactional data. This feature is only available if drill through has been enabled for the source data, using drill-through definitions.

Drilling data: Using Drill Down

You can drill down a row in an Axiom file to view the data at a different level of detail. For example, if a row of data in the report shows budget totals for the Northwest region, you can drill the row to see the values for each individual department in that region. This type of drilling is known as "drilling down."

Drilling down can be used in report files or plan files, but the most typical use case is in reports. In plan files, most data is already at the lowest level of detail, so drilling down may only be useful if the plan file has a summary sheet with drillable data.

If a row is eligible for drilling, you can drill down hierarchies that have been set up for the data. For example, your system may have a Geography hierarchy such as: Country > Region > DEPT. You can also choose to drill directly to the "bottom" of the data (all dimensions), or drill using any related column in the data.

You can drill data rows that result from an Axiom query or that are built using GetData functions. A few limitations apply, and some advanced configurations have special behaviors. For more details, see the drill down setup discussion in the *Axiom File Setup Guide*.

Drilling can be disabled on a per sheet level. If drilling has been disabled for a sheet, then the Drill option is disabled while you are on that sheet. This may be done if the data on the sheet is not conducive to drilling.

To drill down a row of data:

1. Place your cursor in the row of data that you want to drill.

   If you are drilling a row of data that is part of a multiple-row calc method, then you can place your cursor anywhere in the multiple-row calc method. The drill results will be for all rows of the calc method.

2. On the **Axiom** tab, in the **File Options** group, click **Drill**, and then select the desired drill level from the **Drill Down** sub-menu.

   NOTE: In system with installed products, this option may be located on the **Main** tab.

Drill option	Description
Hierarchies	Your system may have defined hierarchies that outline logical drilling paths. For example, you may have a Geography hierarchy that allows you to drill from Country to Region to individual departments. Hierarchies are defined per dimension (on the relevant reference table), and are specific to your system. On the **Drill** menu, hierarchies are listed first if defined. Only hierarchies relating to the current data are shown. **NOTES:** • If the data to be drilled comes from multiple data tables, then only the hierarchies from shared lookup reference tables are available. • If you are drilling an Axiom query, hierarchy options will be grayed out on the menu if you are already at that level of detail. For example, if the report is at the VP level already, VP is grayed out on the menu. However, when you are drilling GetData functions, all hierarchy options are present on the menu, because the GetData functions may all have different "sum by" levels.
All Detail	Selecting **All Detail** takes you directly to the very "bottom" of the data. Essentially, you are drilling based on all dimensions at once, rather than on one specific dimension. The drill sheet will contain one column for each dimension (key column) in the data, including a description column for each (if applicable). **NOTE:** If the row contains data from more than one data table, then this option is only available if the tables share the exact same key columns and all of the key columns are lookup columns.

Drill option	Description
Choose Columns	Selecting **Choose Columns** allows you to drill based on any relevant column for the current data, including non-lookup key columns. In the **Select Columns** dialog, select the column (or columns) that you want to drill by. You can select from any column in the primary data table, as well as any column in lookup reference tables. This drilling option is entirely free-format. There is no validation to determine if a particular column selection makes sense in relation to the current data. **NOTES:** • Calculated fields do not display and cannot be used for drilling. • If the row contains data from multiple data tables, then only columns from shared lookup reference tables can be selected.

A temporary file opens, named `Drill_`*`Filename`*`.xlsx`. This file contains a drill sheet named **Drill_*DrillLevel***, that shows the results of the selected drill. The top of the drill sheet displays your current drill context.

If you want to continue to drill, you can do either of the following:

- Return to the original sheet (or a different sheet) in the original file, and then select a new drill level. If you left the temporary drill file open, then a new drill sheet will be added to that file, with the new drill results. If you closed the temporary file, then Axiom Enterprise Decision Support creates a new temporary file.
- Select a row in the drill sheet, and continue drilling to a lower level of detail. A new drill sheet will be created in the temporary file with the results.

When you are finished viewing the drill results, close the temporary file. While it is possible to use **Save As** to save the temporary file, typically this is not useful. You can always perform the drill again at any time to see the results. If you find yourself performing the same drill over and over, you may want to create a new report that displays the data at the desired level. If you want to share the drill results with someone else, the best approach is to create a snapshot copy of the temporary drill file.

Double-click drilling

If Axiom double-click actions are enabled for the sheet, then you can drill a row of data by double-clicking it. In this case, a dialog opens, listing the drilling options for the current row selection. Select the desired drill level and then click **OK**.

NOTE: Certain double-click actions may take priority over drilling.

Drilling data: Using Drill Through

You can drill a specific data point in an Axiom file to see the associated sub-GL detail or transactional data. This feature is only available if "drill through" has been enabled for the source data, using a drill-through definition.

The drill-through feature can be used in either report files or plan files.

You can drill data values that result from an Axiom query or from a GetData function. A few limitations apply, and some advanced configurations have special behaviors. For more details, see the drill through discussion in the *Axiom File Setup Guide*.

Drilling can be disabled on a per sheet level. If drilling has been disabled for a sheet, then the Drill option is disabled while you are on that sheet. This may be done if the data on the sheet is not conducive to drilling.

To drill through the data in an Axiom file:

1. Place your cursor in the cell that contains the value you want to drill.
2. On the **Axiom** tab, in the **File Options** group, click **Drill**, and then select the desired drill from the **Drill Through** sub-menu.

   > **NOTE:** In system with installed products, this option may be located on the **Main** tab.

   If **Drill Through** is not listed on the drilling menu, then the selected cell is not eligible for drill through.

A temporary file opens, named `Drill_Filename.xlsx`. This file contains a drill sheet named ***Drill_DrillLevel***, that shows the results of the selected drill. The top of the drill sheet displays your current drill context.

Double-click drilling

If Axiom double-click actions are enabled for the sheet, then you can drill a data value by double-clicking it. In this case, a dialog opens, listing the drilling options for the current selection. Select the desired drill level and then click **OK**.

Changing views in an Axiom file

If views have been defined for a sheet in a spreadsheet Axiom file, you can change the view to change how information is presented in the sheet.

For example, you might have the option to switch between a Detail sheet view and a Summary sheet view. You might have the option to toggle certain rows and columns as hidden or shown, such as to select which quarters you want to view. The specific view options available depends on the file design.

To change the views in a sheet:

- On the **Axiom** tab, in the **File Options** group, click **Change view**.

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

This displays a menu showing all views defined in the current sheet. You can click on a view name to activate that view.

Some views are single-selection, which means that activating one view deactivates the prior view. Other views allow for "additive" selections so that multiple views can be active at one time. Some views may open a dialog where you can select specific sets of rows or columns to show. The specific behavior of each view depends on the file designer. Ideally the name of the view will give you a good idea of what to expect when that particular view is selected.

After any view is made active, the freeze panes setting for the sheet is also reapplied. Axiom Enterprise Decision Support keeps track of the currently active views in a sheet and will reapply them after you perform certain activities in a sheet, such as refreshing an Axiom query or inserting a calc method.

Jumping to GoTo bookmarks in an Axiom file

If an Axiom file has bookmarks defined in the file, you can go directly to bookmarked points by using the GoTo feature.

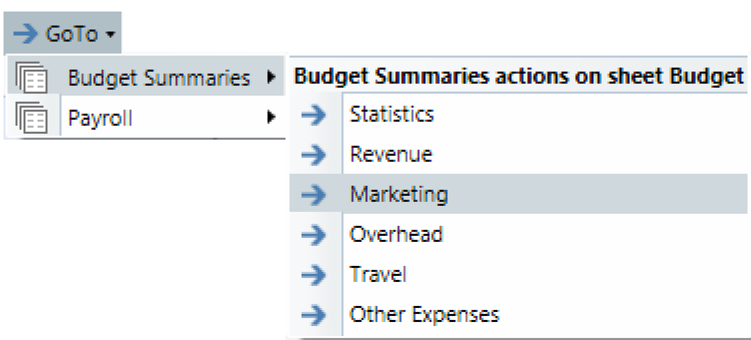
To go to a bookmark:

- On the **Axiom** tab, in the **File Options** group, click **GoTo**.

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

A list appears underneath the **GoTo** button, listing sets of bookmarks. For example, there may be a set of bookmarks for each sheet in the file.

Selecting a set brings up a list of bookmarks in that set. Click a bookmark in the list to go directly to that area.



Example GoTo bookmarks

Freezing or unfreezing panes in a sheet

Sheets in Axiom files can be configured to freeze panes at a certain location automatically when the file is opened. You can toggle these frozen panes on and off by using the **Freeze Panes** option.

This option is only available if the sheet is not protected. If you have security rights to unprotect the sheet, the **Freeze Panes** option will become available once the sheet is no longer protected.

To freeze or unfreeze panes in a sheet:

- On the **Axiom** tab, in the **File Options** group, select or clear the **Freeze Panes** check box.

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

If panes are frozen, clearing the check box unfreezes the panes.

If panes are unfrozen, selecting the check box freezes the panes. If a sheet has freeze panes settings configured on the Control Sheet, selecting the check box applies that setting, regardless of where your cursor is in the spreadsheet. Otherwise, the **Freeze Panes** option works like the Microsoft Excel feature, and freezes panes at the current cursor position.

> **NOTE:** If you have toggled freeze panes off, and then you use **Change view** to select a view (or if you otherwise perform an action that causes a view to be reapplied), the freeze panes settings for the sheet are reapplied.

Removing workbook and worksheet protections

Axiom Enterprise Decision Support applies a variety of workbook and worksheet protections to Axiom files. If you have the appropriate user rights, you can temporarily remove the workbook or worksheet protections using the unprotect options available on the Axiom ribbon.

> **NOTE:** The workbook and worksheet protection toggles are intended to allow users to temporarily remove and then reapply the protection settings of the existing file. If the sheet or file is not already configured on the Control Sheet to enable protection, selecting these options does not change that configuration. If you want to enable protection for a sheet or a file, use the Control Sheet settings.

▶ Remove worksheet protection

If a sheet is protected, you can temporarily unprotect it as follows:

- On the **Axiom** tab, in the **Advanced** group, click **Protect > Worksheet** to remove the check mark.

  > **NOTE:** In systems with installed products, this feature may be located on the **Admin** tab—either directly on the ribbon or under **File Protection**.

The sheet can now be edited as desired. If you do not have rights to remove worksheet protection, then this item does not display on the menu.

The sheet protection will be automatically reapplied the next time the file is opened. If you want to reapply it now, click **Protect > Worksheet** again to toggle the protection back on.

The Control Sheet settings for an Axiom file determine whether protection is enabled for a sheet. Sheet protection is most often applied to plan files / templates, but may also be applied to driver files and reports as needed. Protection is always applied to Control Sheets.

▶ Remove workbook protection

If a workbook is protected, you can temporarily unprotect it as follows:

- On the **Axiom** tab, in the **Advanced** group, click **Protect > Workbook** to remove the check mark.

  > **NOTE:** In systems with installed products, this feature may be located on the **Admin** tab—either directly on the ribbon or under **File Protection**.

You can now make structure changes to the workbook, such as unhiding sheets or adding sheets. If you do not have rights to remove workbook protection, then this item does not display on the menu.

The workbook protection will be automatically reapplied the next time the file is opened. If you want to reapply it now, click **Protect > Workbook** again to toggle the protection back on.

For report files and driver files, the Control Sheet settings determine whether workbook protection is enabled for the file. For plan files, workbook protection is applied automatically.

> **NOTE:** For plan files, any structure changes made to the file should be temporary (such as unhiding the Control Sheet to troubleshoot an Axiom query). If you delete or rename sheets, this may impact Axiom query settings and use of calc method libraries. Structure changes to plan files should be made in the template, not the individual plan files.

▶ Remove all protection

Users with the appropriate permissions can turn off all protections and display controls at once by using the **Show Everything** button on the **Axiom Designer** tab.

> **NOTE:** In systems with installed products, this feature may be located on the **Admin** tab—either directly on the ribbon or under **File Protection**.

Printing Files and other File Output Options

Axiom Enterprise Decision Support has a variety of features that can be used to create file output and share data with people throughout your organization.

Printing an Axiom file

You can print a spreadsheet Axiom file on a per sheet basis. You can decide to print one or more sheets, or all available sheets.

Each sheet can have one or more defined print views. The print views can be used to print different "views" of the sheet, and to set certain standard print options such as the print orientation. For example, for a plan file, you might have one print view that prints a "summary" view of the sheet (with certain columns and rows hidden for printing), and another print view that prints a "detail" view of the sheet (with all columns and rows visible).

If a sheet has no predefined print views, then the sheet can be printed using the settings defined for the spreadsheet using standard Excel printing features. For more information on defining print settings for a spreadsheet, see the Microsoft Excel Help. In the Windows Client, the spreadsheet print settings are defined in the Workbook Explorer, in the **Page Setup** section for each sheet.

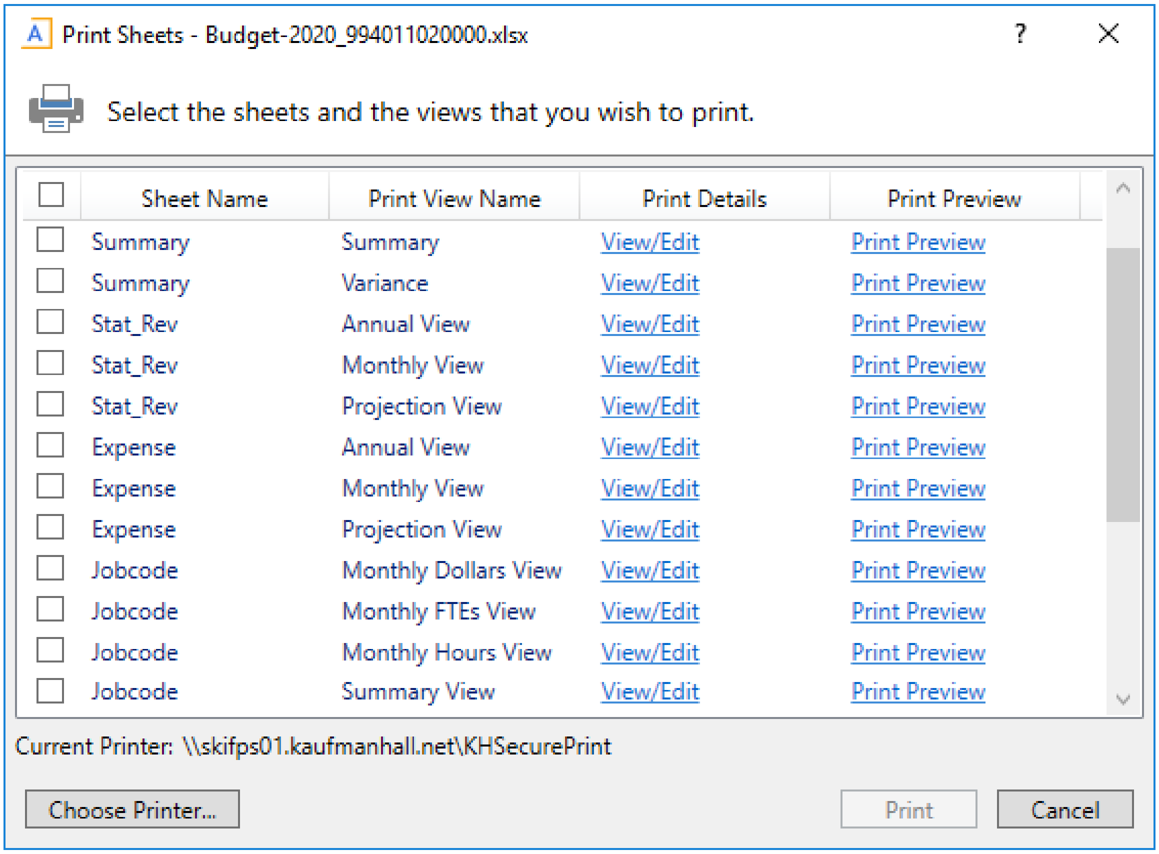
> **NOTE:** You can always print the file using standard spreadsheet print functionality, even if Axiom Enterprise Decision Support print views have been defined.

To print an Axiom file:

1. On the **Axiom** tab, in the **File Output** group, select one of the following:
    - If you want to be able to select print views from all sheets in the workbook, click **Print**.
    - If you want to print only the current sheet, then click the arrow to the right of the **Print** button, and then click **Print This Sheet**.

    > **NOTE:** In systems with installed products, this feature may be located on the **Main** tab—either directly on the ribbon or under **Publish**.

    The **Print Sheets** dialog opens. This dialog lists the available print views for the entire workbook or for the current sheet, depending on how you entered the dialog. To sort this list by the Sheet Name or Print View Name, click the column header.



Example Print Sheets dialog

NOTES:

- If a sheet does not have a defined print view, then it is listed with a print view name of "Default," and will use the print settings defined for the spreadsheet.
- Control Sheets cannot be printed using the Axiom Enterprise Decision Support printing feature, whether they are visible or hidden. If you want to print a Control Sheet, use the standard spreadsheet printing features.

2. In the **Print Sheets** dialog, select the sheet / print view combinations that you want to print.

   If you want to print all print views for all sheets, then select the check box in the column header to select all.

   If you opened this dialog by using **Print This Sheet** and the sheet has only one available print view, then that view is selected by default.

3. You can also do any of the following before printing:
   - **View and edit the print settings.** If you want to view and potentially change the print settings for a selected view, click the **View/Edit** link. In the **Print Options** dialog, you can

change any of the print settings, for the current print job only (the changes are not saved in the file).

- **Preview a print view.** If you want to preview a print view, click the **Print Preview** link. The native spreadsheet Print Preview feature will open to preview the print job. Only one view can be previewed at a time.
- **Select a printer.** If you want to print to a different printer than your default printer, click **Choose Printer** at the bottom of the dialog. In the **Printer Setup** dialog, select the printer that you want to use, and then click **OK**.

> **NOTE:** In the Windows Client, the printer is always your default printer unless you change it for a particular print job. In the Excel Client, the printer starts as your default printer, but if you change the printer for a print job, the changed selection will be remembered for any future print jobs in the current session.

4. Click **Print**.

The selected items are printed.

Print Options dialog

The **Print Options** dialog displays the print settings for the current print view. If desired, you can edit settings for the current print job only. Any changes made will not be saved in the file.

> **NOTE:** Print options are read-only when using the **Print Plan Files** option to print multiple plan files.

This dialog displays all of the settings that will be applied to the print job, whether the setting is defined in the associated Print tag or inherited from the spreadsheet settings. If a setting is blank, then that print option is not defined and will not be applied to the print job.

Print View Options

Item	Description
Print View Name	The name of the current print view.
View Name	The name of the sheet view to be applied when printing. These are the same sheet views that are available from the **Change View** menu. For example, if the sheet view is configured to hide columns or rows, those columns and rows will be hidden in the print copy. Row and column sizing is also applied.
Paper Size	The paper size for the print job, either **Letter** or **Legal**.
Orientation	The print orientation for the print view, either **Portrait** or **Landscape**.
Repeat Rows	The rows to repeat at the top of the page. Rows must be specified as a range; for example: `1:3`.

Item	Description
Repeat Columns	The columns to repeat at the left of the page. Columns must be specified as a range; for example: `A:C`.

Scaling

Item	Description
Fit To Pages Wide	The number of pages on which to fit the print area. For example, if you want the print area to fit on one page, specify 1.
Percent Zoom	The percent zoom to apply to the print range. Specify the number without a percent sign. For example, to zoom by 90%, specify 90.

Headers and Footers

Item	Description
Left Header	Header text to display in the left-hand side of the header.
Center Header	Header text to display in the center of the header.
Right Header	Header text to display in the right-hand side of the header.
Left Footer	Footer text to display in the left-hand side of the footer.
Center Footer	Footer text to display in the center of the footer.
Right Footer	Footer text to display in the right of the footer.

Printing multiple plan files

You can print multiple plan files in batch by using the **Print Plan Files** feature. You can select multiple plan files within a file group, and then select one or more print views for each plan file. The available print views for each plan file are based on the template that was used to create the plan file.

To print multiple plan files from a file group:

1. On the **Axiom** tab, in the **File Output** group, click the down arrow to the right of the **Print** button, and then click **Print Plan Files**.

   > **NOTE:** In systems with installed products, this feature may be located on the **Main** tab—either directly on the ribbon or under **Publish**.

   > **TIP:** If you have access to the file group menu for a file group, then you can access **Print Plan Files** from the file group menu. In this case, the current file group is pre-selected in the dialog.

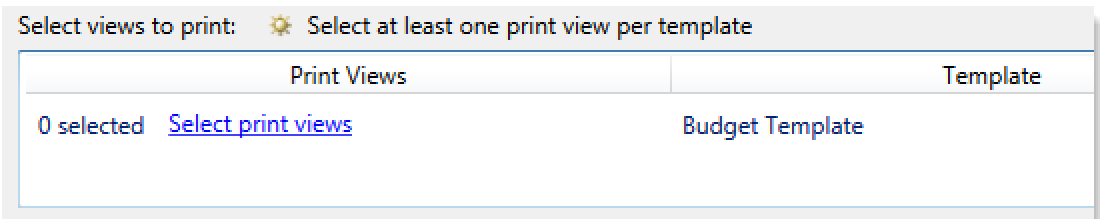
2. In the **Print Plan Files** dialog, use the **File Group** list to select the file group that contains the plan files that you want to print.

Only one file group can be printed at a time. Once a file group is selected, the dialog displays a list of the available plan files.

3. In the **Select plan files to print** section, select the plan files that you want to print.
   - You can sort and filter the list using standard Axiom grid functionality to find the plan files that you want to print.
   - To select multiple plan files at once, highlight the plan files, and then right-click and select **Select**. If you want to print all plan files that currently display in the dialog, select the check box in the header row.

   Once at least one plan file has been selected, you can select which print views to print.

4. In the **Select views to print** section (at the bottom of the dialog), select the views that you want to print. You must do this for each source template used for the selected plan files.

   - Click the **Select print views** link.
   - In the **Select Print Views** dialog, select the sheet / print view combinations that you would like to print, and then click **OK**.

     If you want to see the settings that will be applied to the print job, click the **View** link. Print settings are read-only in this context.

     > **NOTE:** All template sheets are listed in this context (except for Control Sheets), including sheets that you may not normally see in plan files because they are hidden. If you select a sheet that is hidden in one of the selected plan files, it will not be printed. A message will inform you of the unprinted sheet when the printing process is complete.

   - Repeat this process for each source template.

   If all of the selected plan files were built using the same template, then there will be only one template listed. If the selected plan files were built using multiple templates, then multiple templates will be listed. The print selections for each template will only apply to the plan files that were built using that template.

5. If you want to print to a different printer than your default printer, click **Choose Printer** at the bottom of the dialog. In the **Printer Setup** dialog, select the printer that you want to use, and then click **OK**.

> **NOTE:** In the Windows Client, the printer is always your default printer unless you change it for a particular print job. In the Excel Client, the printer starts as your default printer, but if you change the printer for a print job, the changed selection will be remembered for any future print jobs in the current session.

6. Click **Print**.

The selected plan files are printed, using the print view selections.

If a selected print view is not found in a target plan file, a message displays at the end of the process, listing the affected plan file and the relevant sheet / print view. This may occur if the print views in either the template or the plan file have been modified after plan file creation.

Running file processing on an Axiom file

If a file is set up to use file processing, you can process the file to automatically create various file outputs, such as:

- Save snapshot copies of the file and automatically email them to various recipients
- Print one or more sheets in the file using one or more print views
- Export data in the file to a CSV or TXT file
- Collect multiple output files into a single report package
- Process multiple reports in batch

File processing can be used in all spreadsheet Axiom files except file group templates, however, report files are the most common use case.

> **NOTE:** The file processing menu command and the associated task pane are only available to administrators and to users with the **Allow File Processing** permission for the file.

To process a file using file processing:

1. Open the file. If you want to see what the file is configured to do during file processing before executing it, you can check the settings in the **File Processing** task pane.
2. In the **File Processing** task pane, in the **Actions** section, click one of the following options to start processing:
    - **Process File**: The file is processed once "as is." The file is refreshed and the file processing action is performed. No multipass filter or settings are applied.
    - **Process File Multipass**: The file is processed multiple times, with a unique filter applied for each pass. For example, if the file is set up to process by DEPT, then the file is processed once for each department. The data queries in the file are automatically filtered to return data for the current pass department only.

> **TIP:** You can also process the file using the **File Processing** menu on the Axiom tab. (In systems with installed products, this feature may be located on the **Main** tab.)

Once file processing is initiated, the following occurs:

- The file is refreshed. If you are performing multipass processing, the file is refreshed using a data filter for the current pass item.
- The file processing action is performed. If you are performing multipass processing, the action may be performed after each pass, or it may be performed once all passes are complete, depending on the file processing settings.

A status bar displays the progress of the file processing. When the processing is complete, a confirmation box displays information about the process, such as how many passes were performed, how many files were created, etc.

Note that the file itself is not saved as part of file processing. You can process a file even if you have read-only rights to the file. However, if the file processing is set up to save to the database, you must have rights to save data for that file.

Taking a snapshot copy of an Axiom file

You can take a "snapshot" of a spreadsheet Axiom file, so that you can save a copy as a normal Excel file and then open it in Microsoft Excel (without needing Axiom Enterprise Decision Support). For example, you may want to send a copy of a report to someone that does not have access to Axiom Enterprise Decision Support.

When you create a snapshot of an Axiom file, the file is copied as an XLSX file, and the following occurs:

- All Control Sheets and any hidden sheets are automatically removed. You can choose whether to include all remaining sheets, or only the active sheet.
- All Axiom formulas are replaced with values. You can choose whether to retain Excel formulas, or replace them with values. If Excel formulas are preserved, certain formulas will be replaced with values if they reference sheets or cells that are deleted as part of the snapshot processing.
- Rows and columns flagged for delete are deleted.

Due to the file format, any VBA macros in the file are also removed.

To take a snapshot of an Axiom file:

1. Open the file in Axiom Enterprise Decision Support.
2. On the **Axiom** tab, in the **File Output** group, click **Snapshot**.

   > **NOTE:** In systems with installed products, this feature may be located on the **Main** tab—either directly on the ribbon or under **Publish**.

   The **Snapshot File** dialog opens.
3. In the **Formula Replacements** section, select one of the following:
   - **Convert All Formulas** (default): All formulas are replaced with values.
   - **Retain Excel Native Formulas**: All Excel formulas in the spreadsheet will be retained as is,

with one exception. If a cross-sheet formula references a sheet that will not be present in the snapshot (depending on the **Sheets To Snapshot** setting), that formula will be replaced with values.

> **NOTE:** If the file contains a pivot table, this option must be selected in order for the pivot table to work in the snapshot copy.

4. In the **Sheets to Snapshot** section, select one of the following:
   - **Limit to Active Sheet** (default): Include only the active sheet in the snapshot.
   - **All Sheets In File**: Include all sheets in the file (except any Control Sheets and hidden sheets, which are always removed).
5. Click **OK**.

The snapshot file is created and is opened in Axiom Enterprise Decision Support. The navigation tab for the file is titled either ***Sheetname*_snapshot** (if the snapshot contains only one sheet) or ***FileName*_snapshot** (if the snapshot has multiple sheets). You can now use **Save As** features to save the file locally or to a network location.

> **NOTE:** If you are using the Excel Client and you want to save a copy of the snapshot as a PDF file, you can use standard Excel functionality to do so. Use **File > Save As**, and then select PDF as the file type. This is an Excel-specific feature that is not available in the Windows Client.

If you want to email a snapshot to someone directly, you can use the **E-Mail Workbook** feature. This creates a snapshot and attaches it to an email (instead of opening it in Axiom Enterprise Decision Support).

Emailing a snapshot of an Axiom file

You can email a snapshot of a spreadsheet Axiom file using the **E-mail** feature. Axiom Enterprise Decision Support creates a snapshot copy of the file and attaches it to an email. The copy can then be viewed outside of Axiom Enterprise Decision Support by someone who may have no access to the system. When you use this feature, Axiom Enterprise Decision Support creates a snapshot copy of the file just like it would if you used the **Snapshot** feature.

The email can be sent using your default email client (such as Microsoft Outlook), or you can send the file using the Axiom Enterprise Decision Support Scheduler email service. Note that the Scheduler email service does not support HTML format for email.

NOTES:

- The name of the emailed file is either ***Sheetname*_snapshot** (if the snapshot contains only one sheet) or ***FileName*_snapshot** (if the snapshot has multiple sheets). The name cannot be changed.
- You can also email snapshot copies using the File Processing feature. File processing is typically used when you want to automate the process and employ multipass processing to send the same file to different people using different data. The E-mail feature is best used to send "one-off" snapshots as needed.

To email a snapshot copy of an Axiom file:

1. Open the file in Axiom Enterprise Decision Support.
2. On the **Axiom** tab, in the **File Output** group, select **E-mail**.

   NOTE: In systems with installed products, this feature may be located on the **Main** tab—either directly on the ribbon or under **Publish**.

   The **E-mail Active Workbook** dialog opens.
3. For **Send As**, select **Snapshot**.
4. For **Send using**, select one of the following:
   - **Outlook**: Send the email using the default email client on your local machine (for example, Microsoft Outlook). The name of this option may be customized for your organization.
   - **Axiom Mail Service**: Send the email using the Axiom Enterprise Decision Support Scheduler email service.
5. Complete the following **Snapshot Options** in the dialog:

Option	Description
Send file as	Select **XLS**, **XLSX**, **XLSM**, or **PDF**. XLSX is selected by default.
Include	Select one of the following: • **Entire Workbook**: All sheets are included in the snapshot (except Control Sheets and hidden sheets, which are always removed). • **Active Worksheet Only** (default): Only the active worksheet is included in the snapshot.

Option	Description
Formulas	• **Convert All Formulas** (default): All formulas are converted to values. • **Retain Excel Native Formulas**: Axiom formulas are converted to values, but Excel formulas are left as is. Note that if an Excel formula references a sheet that is not included in the snapshot, that formula will be converted to a value. **NOTE:** If the file contains a pivot table, this option must be selected in order for the pivot table to work in the snapshot copy. This option does not apply if PDF is the selected file type.

6. Click **OK**.

If you selected to send the file using your default email client, then a new email message opens, with the snapshot file attached. You can then specify the recipient, subject, and body text for the email, and then send it.

If you selected to send the file using the Axiom mail service, then an **E-Mail** dialog opens so that you can specify the recipient, subject, and body text for the email. In the address boxes (**To**, **Cc**, and **BCC**), you can either type an email address, or click the button to select an Axiom Enterprise Decision Support user. If you select a user, the email will be sent using the user's email address as defined in Axiom Enterprise Decision Support security. When you click **OK**, the email settings are saved to the database, to be sent the next time the Scheduler SMTP Email Delivery task is run.

Emailing a hyperlink to an Axiom file

You can email a hyperlink to a spreadsheet Axiom file using the **E-mail** feature. Axiom Enterprise Decision Support creates a URL hyperlink to the file and includes it in an email. The email recipient can click on the link to launch the system and open the file directly, assuming that the recipient is an Axiom Enterprise Decision Support user who has rights to access the file.

The email can be sent using your default email client (such as Microsoft Outlook), or you can send the file using the Axiom Enterprise Decision Support Scheduler email service. Note that the Scheduler email service does not support HTML format for email.

NOTES:

- Alternatively, you can obtain a URL to an Axiom file using a variety of ways and then paste it into an email that you create manually. For example, you can use GetDocumentHyperlink or right-click a file in Axiom Explorer to obtain a URL. The email hyperlink feature is provided as a convenience to quickly send a hyperlink to the current file.
- The email hyperlink feature cannot be used to send a hyperlink to open a form-enabled file as an Axiom form; the source file will always be opened as a spreadsheet.
- The hyperlink included in the email uses the same format as hyperlinks generated using GetDocumentHyperlink, including the differing URL format for systems using SAML or OpenID Authentication.

To email a hyperlink to an Axiom file:

1. Open the file in Axiom Enterprise Decision Support.
2. On the **Axiom** tab, in the **File Output** group, select **E-mail**.

   NOTE: In systems with installed products, this feature may be located on the **Main** tab—either directly on the ribbon or under **Publish**.

   The **E-mail Active Workbook** dialog opens.
3. For **Send As**, select **Document Link**.
4. For **Send using**, select one of the following:
   - **Outlook**: Send the email using the default email client on your local machine (for example, Microsoft Outlook). The name of this option may be customized for your organization.
   - **Axiom Mail Service**: Send the email using the Axiom Enterprise Decision Support Scheduler email service.
5. Optional. Complete the **Document Link Options** in the dialog:

Option	Description
Sheet Filter	If desired, enter a filter to apply to the file when it is opened. You can type the filter statement or use the Filter Wizard. The filter is applied like a Quick Filter and affects any data queries in the file. For example, `Dept.Region='West'` means that all data queried will be limited to the West region.

Option	Description
Cell Address	If desired, specify the cell to be made active when the document is opened. For example: `Sheet1!D22` If the specified location would not be in view normally then the file will be scrolled to that location; otherwise the file will open in its default view with the cursor placed at that location.

6. Click **OK**.

If you selected to send the hyperlink using your default email client, then a new email message opens, with the hyperlink included in the body text. You can then specify the recipient, subject, and additional body text for the email, and then send it.

If you selected to send the hyperlink using the Axiom mail service, then an **E-Mail** dialog opens so that you can specify the recipient, subject, and additional body text for the email. In the **To** and **Cc** boxes, you can either type an email address, or click the button to select an Axiom Enterprise Decision Support user. If you select a user, the email will be sent using the user's email address as defined in Axiom Enterprise Decision Support security. When you click **OK**, the email settings are saved to the database, to be sent the next time the Scheduler SMTP Email Delivery task is run.

Using spreadsheet features

All Axiom spreadsheet files—plan files, reports, templates, and drivers—are Microsoft Excel spreadsheets. In addition to Axiom Enterprise Decision Support features, you can use spreadsheet features for formatting, formulas, and other functions.

> **NOTE:** Your organization may choose to deploy certain files as web-enabled Axiom forms instead of as spreadsheets. In this case you will interact with the file as if it were a web page, and spreadsheet features will not be available.

▶ Using spreadsheet features in the Excel Client

When you work on Axiom files in the Axiom Enterprise Decision Support Excel Client, all of the features of Microsoft Excel are available to you. You can use standard Excel features to format cells, create charts and graphs, create formulas, etc.

Where appropriate, standard Excel menus and shortcuts can be used to perform their equivalent Axiom Enterprise Decision Support function. For example, if you want to save an Axiom file, you can click **Save** on the **Axiom** tab of the ribbon, or you can use the Excel menu **Save** command (or Excel's keyboard shortcut of CTRL+S). However, note that you cannot use Excel's file **Open** command to open files that are stored in the Axiom Enterprise Decision Support database—managed Axiom files must be opened using Axiom menu commands.

While you are working in the Excel Client, you can open "regular" Excel spreadsheets and work with them as normal alongside any Axiom files that you have open. You do not need to open another Excel session or close your Axiom Enterprise Decision Support session in order to work with regular Excel files.

Using spreadsheet features in the Windows Client

The Axiom Enterprise Decision Support Windows Client emulates the Microsoft Excel spreadsheet environment. While the spreadsheet itself and the Axiom file features are essentially the same in either client, the way that you work with spreadsheet features is different in the Windows Client.

In the Windows Client, you access spreadsheet features from the following locations:

- **File menu**: Similar to the File menu in Excel, this menu provides access to basic commands such as Open, Close, Print, and Save.
- **Home tab**: Similar to the Home tab in Excel, this tab contains some common spreadsheet formatting commands such as copy and paste, font and number formatting, and other cell and sheet formatting options.
- **Range Explorer**: Using the Range Explorer, you can format cells and define cell-related features such as validation and conditional formatting. Available from the Axiom Button and the right-click menu.
- **Workbook Explorer**: Using the Workbook Explorer, you can add and delete sheets, and work with sheet-level settings. You can also define named ranges. Available from the Axiom Button and the right-click menu.
- **Display**: In the **Display** group on the **Axiom** tab, you can toggle the formula bar and row / column headings on and off.

For example, the following table details some common spreadsheet actions and how to perform them in the Windows Client:

Action	Windows Client
Open an external spreadsheet file	From the **File** menu, click **Open**.
Change the name of a sheet	On the **Home** tab, in the **Cells** group, click **Format > Rename Sheet**.
Add a sheet to a file	On the **Home** tab, in the **Cells** group, click **Insert > Insert Sheet**.
Set row width or column height	On the **Home** tab, in the **Cells** group, click **Format > Row Height** or **Format > Column Width**.
Hide or unhide a sheet	On the **Home** tab, in the **Cells** group, click **Format > Hide & Unhide**.

Closing Axiom files

You can close an Axiom file in one of the following ways:

- Click the **X** in the right-hand side of the file tab.
- Right-click the file tab and select **Close** or **Close All**. Note that using Close All will not close the Home file.
- Click **File > Close**.
- Click the lower **X** in the right-hand side of the application window (Excel Client only).

If the file has any unsaved changes, you will be prompted to save the file before it is closed.

If you are using the Excel Client, and you close all open files, then the application will automatically close. In the Windows Client, the application will remain open with a blank file area.

If close options are not available for a particular file, such as the Home file, that means the file has been designated as "non-closeable" by a system administrator. This file is intended to always remain open while you are in Axiom Enterprise Decision Support.

▶ Closing multiple files

When using **Close All** or **Close All But This**, or when closing the application with open files, Axiom Enterprise Decision Support checks all files for unsaved changes before closing. If any are found, the **Save Modified Items** dialog opens, listing each file with unsaved changes.

By default, all modified read/write files are selected to save before closing. If you do not want to save a particular file, clear the check box for that file. You can also use the **Select All** and **Clear All** options.

If you choose to save files as part of the close, this will perform a full save (both saving the file and performing a save-to-database if applicable).

Refreshing a report with data

To update a spreadsheet Axiom report with the most current data from the database, refresh the file. A refresh does the following:

- Updates active Axiom queries with data, according to the update settings defined for the query
- Updates Axiom functions with data
- Performs an Excel calculation
- Reapplies the currently active views (if applicable)

To refresh a report:

- On the **Axiom** tab, in the **File Options** group, click **Refresh**.

  This refreshes all sheets in the workbook. If you want to refresh the current sheet only, click the down arrow on the right-hand side of the **Refresh** button, and then click **Refresh Active Sheet**.

  In systems with installed products, this feature may be located on the **Main** tab.

You may be prompted to define values before the refresh occurs. If so, these values will be applied to the report to impact the data refresh.

TIP: You can also use F9 to refresh the entire workbook, and SHIFT+F9 to refresh only the active sheet.

Applying a Quick Filter to a report

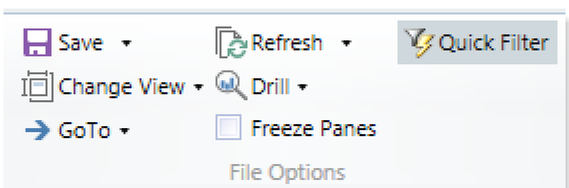
Using the Quick Filter feature, you can apply a temporary filter to a report. This allows you to quickly view the data at a different level of detail, without needing to alter the report configuration.

For example, you may be viewing an Income Statement report for the entire consolidated organization, and you want to view the same report at a different level of detail, such as for just North America or just the South region. You can use the Quick Filter to recalculate the report at the desired level of detail, and then clear the filter when you are done.

The Quick Filter is combined with your table security filters and any filters that are currently defined in the report, such as sheet filters and filters defined for Axiom queries.

To apply a Quick Filter to a report:

1. On the **Axiom** tab, in the **File Options** group, click **Quick Filter**.



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

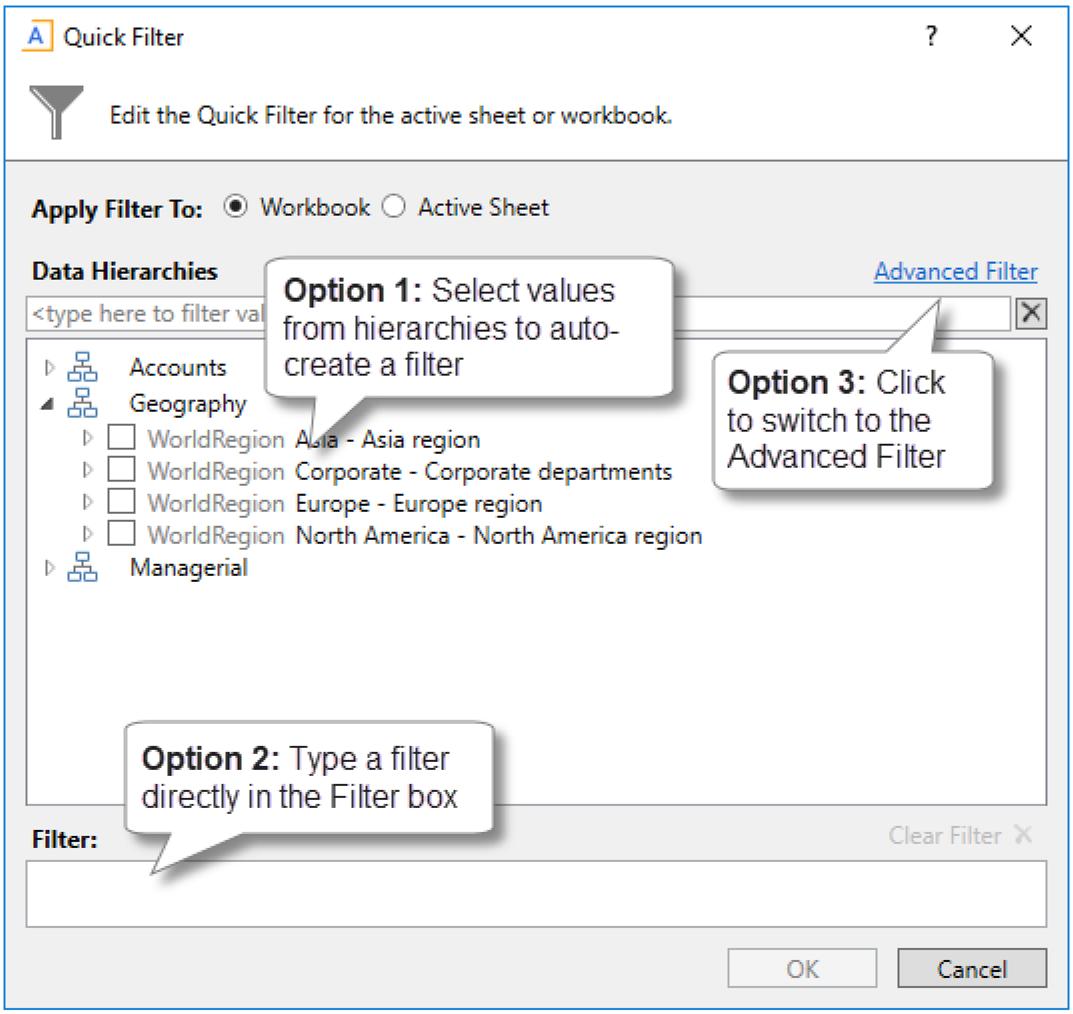
2. At the top of the dialog, specify how the filter should be applied:
   - **Workbook** (default): The Quick Filter is applied to all sheets in the workbook.
   - **Active Sheet**: The Quick Filter is only applied to the currently active sheet.

   This selection may determine which hierarchies and tables are available in the dialog to build the filter. See Hierarchy and table availability in the Quick Filter dialog.

3. In the **Quick Filter** dialog, define a filter using one of the following methods:
   - **Data Hierarchies**: Select the desired hierarchy levels(s) from the hierarchies listed in the dialog. As you select items in the hierarchy, the corresponding filter is automatically built in the **Filter** box.

For example, you might have a hierarchy named Geography, which has local regions rolling up into countries, and countries rolling up into world regions. You can select the desired items that you want to see in the report, such as Europe, Asia, or North America as world regions. For more information and examples, see Understanding hierarchy-based Quick Filters.

- **Manual Filter**: You can manually type a filter into the **Filter** box using standard filter criteria statement syntax. Fully qualified Table.Column syntax must be used.
- **Advanced Filter**: Click **Advanced Filter** to create a filter using any reference table columns (not just hierarchy columns).



Example Quick Filter dialog

4. Click **OK**.

If the Quick Filter is applied to the entire workbook, a warning message informs you that the entire workbook will be refreshed. If you do not want to see this message again in the future, select **Don't show this message again**. Click **OK** to continue.

If the Quick Filter is applied to the current sheet, that sheet is refreshed and no warning message appears.

If the file has been configured with GetCurrentValue("QuickFilter") functions, then these functions will display the currently applied Quick Filter for your reference. If not, you can view the current Quick Filter by clicking the **Quick Filter** button again. The current filter displays in the **Filter** box.

Clearing the Quick Filter

Once a Quick Filter has been applied to a report, the filter remains applied until one of the following occurs:

- The file is closed. Quick Filters cannot be saved in the file and are always cleared when the file is closed.
- A new Quick Filter is applied by using the **Quick Filter** button and selecting a different filter.
- The Quick Filter is manually cleared. To clear the Quick Filter, click the **Quick Filter** button again and then click **Clear Filter**.

Hierarchy and table availability in the Quick Filter dialog

The hierarchies and tables shown in the Quick Filter dialog are based on the Axiom queries in the report. Axiom Enterprise Decision Support looks up the primary tables for the queries, and only shows the hierarchies and reference tables that are relevant to those primary tables. This is done to help ensure that the Quick Filter will be applicable to at least one query in the report.

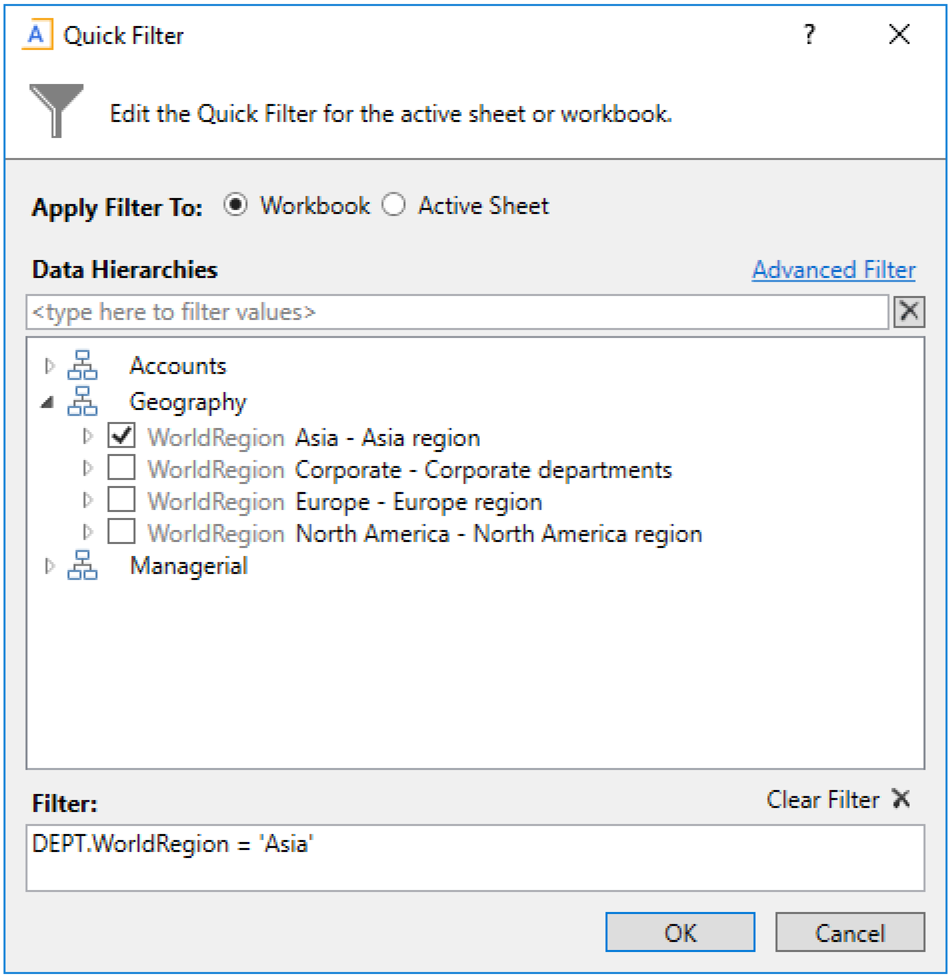
If the filter applies to the entire workbook, then Axiom Enterprise Decision Support looks at the primary tables for all Axiom queries in the workbook. If the filter applies to the active sheet only, then Axiom Enterprise Decision Support looks at only the primary tables for the Axiom queries defined on the active sheet.

NOTE: In the Advanced Filter view, only reference tables are shown unless the primary table has potentially ambiguous lookup relationships. In that case, the primary data table is also shown so that the selections can be made directly on these lookup relationships, to avoid any ambiguity. For example, if the primary data table has columns PrimaryPhysician and SecondaryPhysician that both look up to Physician.Physician, then the selection must be made through the primary data table so that the correct path to Physician.Physician is used.

If the report uses GetData functions instead of an Axiom query, then all hierarchies and reference tables are listed in the dialog because Axiom Enterprise Decision Support cannot determine the "primary table" in this context. In this case, it is possible to define a Quick Filter that does not apply to any GetData functions in the workbook. If this occurs, the filter will simply have no effect.

Understanding hierarchy-based Quick Filters

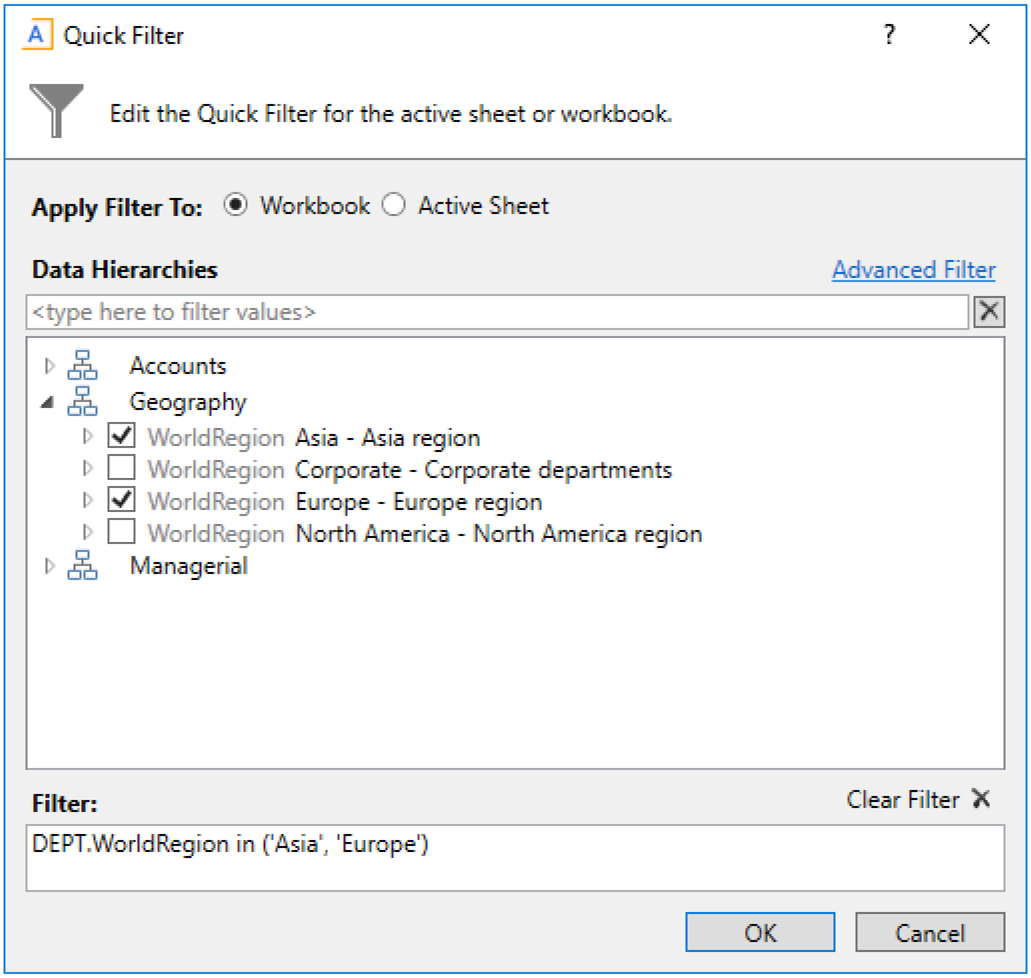
When you use hierarchies to create a Quick Filter, Axiom Enterprise Decision Support automatically creates the filter based on your selections. When only one item it selected, the filter is simple—only data that matches the selected item is included. For example, if you select Asia from a Geography hierarchy, you will get a filter something like: `Dept.WorldRegion='Asia'`.



Simple Quick Filter

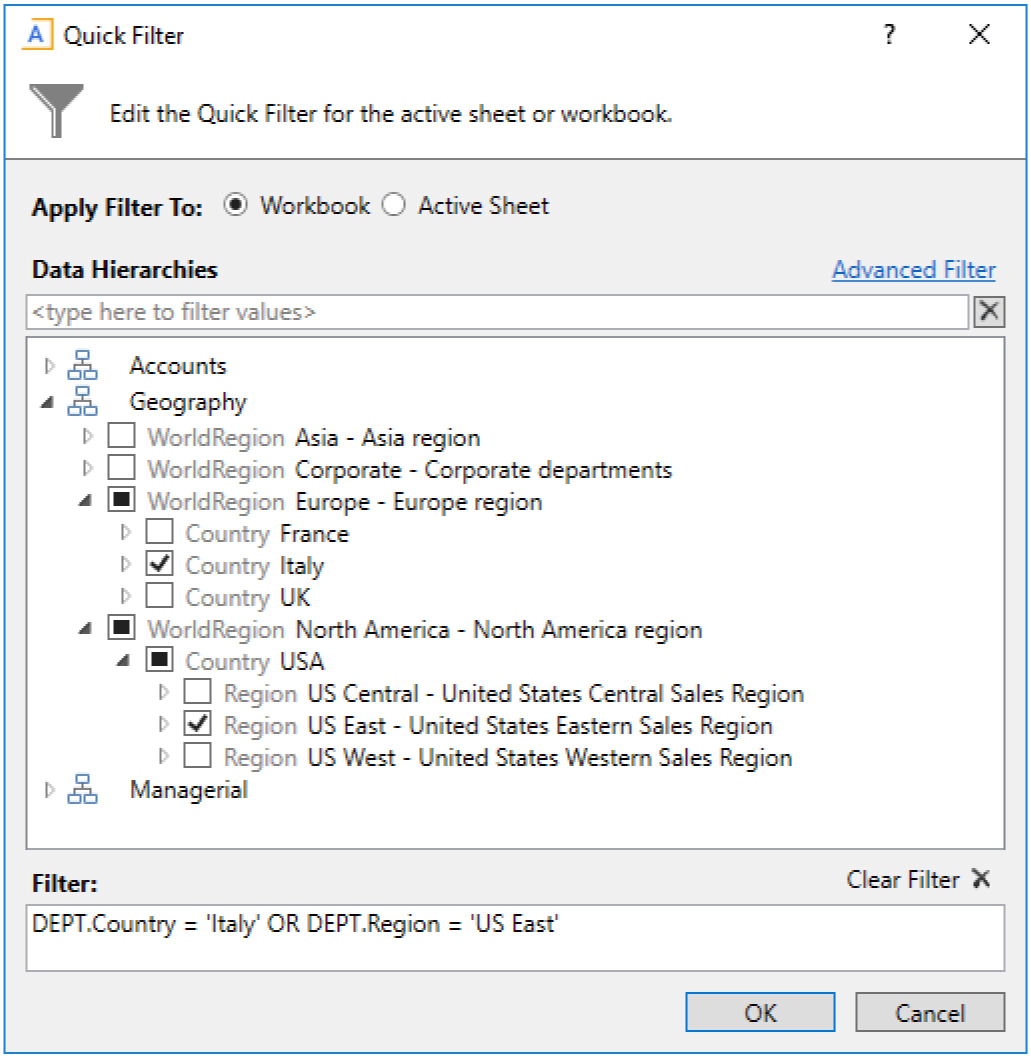
NOTE: Sometimes when you select a single "child" item underneath a "parent" item, the child and parent will be joined with AND. For example: `DEPT.VP='Jones' AND DEPT.Manager='Smith'`. This means that the DEPT table has other instances of Manager Smith that belong to different VPs, so the compound statement is to ensure that you only get the data where Manager Smith is under VP Jones. (You can manually edit the filter to remove the Jones portion of the statement if you want to see all data for Manager Smith, regardless of VP). If instead Axiom Enterprise Decision Support constructs the filter as just `Dept.Manager='Smith'`, that means all instances of Manager Smith are also under VP Jones.

You can select multiple items in the same hierarchy or from different hierarchies. Items from the same hierarchy are combined using OR, which means data matching any of the selected items is included. Items from different hierarchies are combined using AND, which means only data that matches both selected items is included.



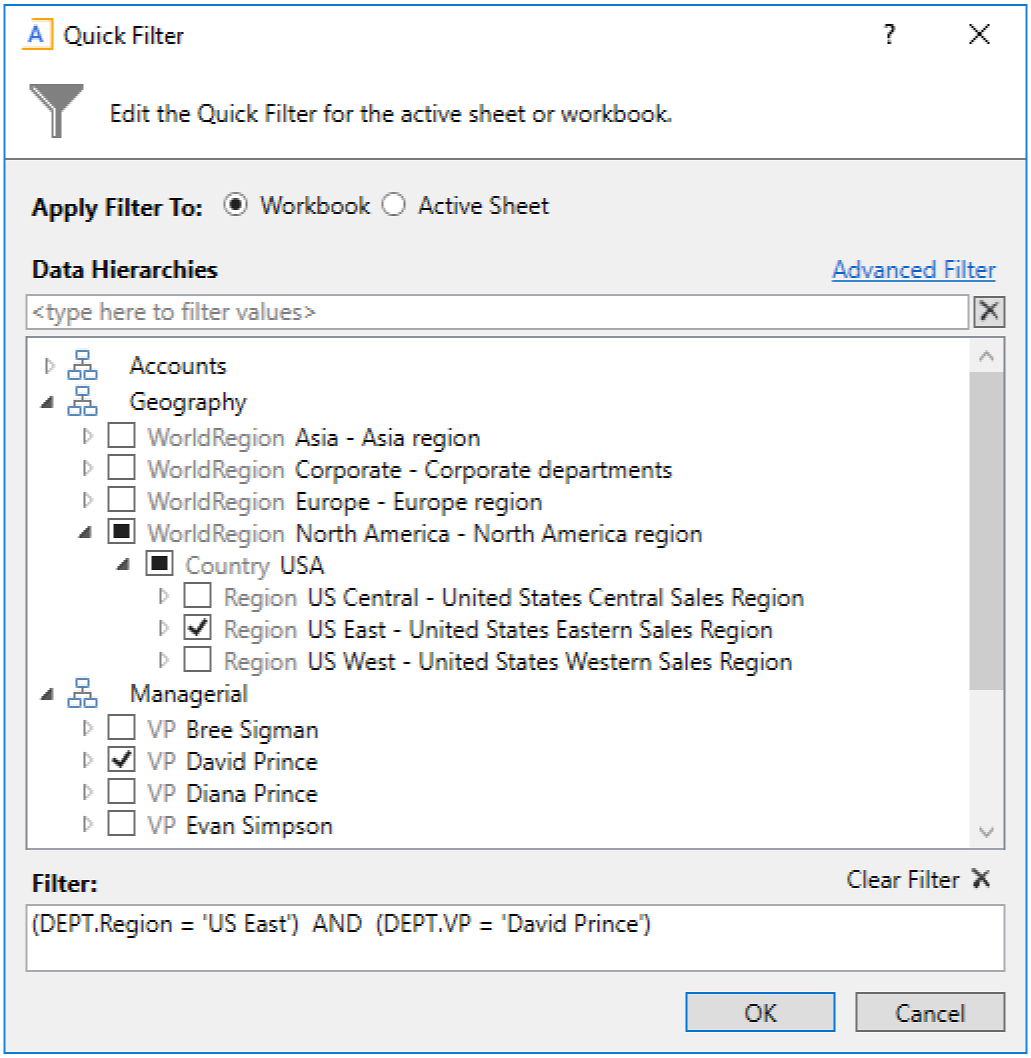
Example 1

In example 1, we have selected two items from the same grouping level in a single hierarchy, so a simple filter criteria statement is created using IN. The resulting filter will include all data from Asia and Europe.



Example 2

In example 2, we have selected two items from different grouping levels, but within the same hierarchy. In this case a compound filter criteria statement is created using OR. The resulting filter will include all data that belongs to either Italy or US East.



Example 3

In example 3, we have selected two items from different hierarchies, so a compound filter criteria statement is created using AND. The resulting filter will include only data that belongs to both US East and VP David Prince.

Processing a report

If a report is set up to use file processing, you can process the report to automatically perform actions such as:

- Save snapshot copies of the file and automatically email them to various recipients
- Export data in the file to a CSV or TXT file
- Save data in the file to the database as part of a multipass process
- Collect multiple output files into a single report package
- Process multiple reports in batch

This topic explains how to process a file that has already been configured for file processing. For details on how to set up a file for file processing, see the *Axiom File Processing Guide*.

NOTES:

- The File Processing menu command and the associated task pane are only available to administrators or to users with the **Allow File Processing** permission for the current file.
- Other file types can be set up to use file processing, but the most common use is in a report.

To process a file using file processing:

1. Open the file. If you want to see what the file is configured to do during file processing before executing it, you can check the settings in the **File Processing** task pane.
2. In the **File Processing** task pane, in the **Actions** section, click one of the following options to start processing:
   - **Process File**: The file is processed once "as is." The file is refreshed and the file processing action is performed. No multipass filter or settings are applied.
   - **Process File Multipass**: The file is processed multiple times, with a unique filter applied for each pass. For example, if the file is set up to process by DEPT, then the file is processed once for each department. The data queries in the file are automatically filtered to return data for the current pass department only.

   TIP: You can also process the file using the **File Processing** menu on the Axiom tab. (In systems with installed products, this feature may be located on the **Main** tab.)

Once file processing is initiated, the following occurs:

- The file is refreshed. If you are performing multipass processing, the file is refreshed using a data filter for the current pass item.
- The file processing action is performed. If you are performing multipass processing, the action may be performed after each pass, or it may be performed once all passes are complete, depending on the file processing settings.

A status bar displays the progress of the file processing. When the processing is complete, a confirmation box displays information about the process, such as how many passes were performed, how many files were created, etc.

Note that the file itself is not saved as part of file processing. You can process a file even if you have read-only rights to the file. However, if the file processing is set up to save to the database, you must have rights to save data for that file.

Saving a report

When you save a report, the report file is updated in the Axiom Enterprise Decision Support file system. If the report is configured to save data to the database, a save-to-database also occurs.

To save a report:

- On the **Axiom** tab, in the **File Options** group, click **Save**. (In systems with installed products, this feature may be located on the **Main** tab.)

Your file permission settings in Security determine whether you can save a particular report. If a report is open with read/write permissions, then you can save it. If the report is open as read-only, then the report file cannot be saved, but you may still be able to save data. You may also be able to save a copy of the report.

> **NOTE:** Some files may use a Control Sheet setting that causes the data in the report to zero when the file is saved. This is a security precaution that is normally enabled in reports only. You can click **Refresh** to restore the data.

▶ Save-to-database reports

Some reports may be configured to save data to the database. If the report is configured to save to the database, then the file is validated before saving. If errors are found, the file still saves but the data save is stopped and the errors are displayed in the **Save Errors** pane. These errors must be corrected before data can be saved to the database. If no errors are found, then a confirmation message displays, with information about the number of records saved.

Your file permission settings in Security determine whether you can perform a save-to-database for a particular report. Note that the permission to save data is managed separately from the file access permission. Therefore, it is possible that you could have read-only permissions for the file, but still have rights to save data (or the opposite—you could have read/write permissions for the file, but not have the rights to save data).

When you click **Save**, Axiom Enterprise Decision Support automatically performs all save actions that your user rights allow and that the file is configured to perform. If desired, you can use the additional save options to only save the file, or to only save data.

To save only the file:

- In the **Axiom** tab, in the **File Options** group, click the down arrow to the right of the **Save** button, and then click **Save File Only**.

The plan file is saved. All save-to-database processes are ignored.

To save only the data:

- In the **Axiom** tab, in the **File Options** group, click the down arrow to the right of the **Save** button, and then click **Save Data Only**.

Data from the file is saved to the database. The file itself is not saved.

> **NOTE:** In systems with installed products, the additional save options may be located on the Main tab. In all systems, you can also access these options by right-clicking the file tab.

Saving a copy of a report

You can save a copy of a report using **Save As** features. You might want to save a copy of a report to use as a starting point to create a new report, or to create an archive copy before making changes to the report.

In most cases, you should save the report to the Axiom Enterprise Decision Support file system (in the Reports Library). However, it is possible to save report files outside of the Axiom Enterprise Decision Support system (as non-managed files). Non-managed files have limited functionality, and are not covered by Axiom Enterprise Decision Support security or included in system processes.

To save a copy of a report to the Reports Library:

1. On the **Axiom** tab, in the **File Options** group, click the down arrow to the right of the **Save** button, and then click **Save As (Repository)**.

   > **TIP:** The Save As options are also available by right-clicking the file tab.

   The **Save As** dialog opens, displaying the contents of the Reports Library.

   > **NOTE:** By default this dialog only displays files with the same file extension as the current file. If you want to view all file types when using this dialog, select **View > Show All Files**. This setting will be remembered.

2. In the left-hand side of the dialog, navigate to the folder in the Reports Library where you want to save the file.

   You must have read/write permissions to a folder in order to save a copy of the report there. A lock icon displays next to folders where you do not have read/write permissions to any folder in that folder tree.

3. In the **File name** box, type a name for the new report.
4. Optional. In the **Description** box, type a description for the report.
5. Click **OK**.

To save a copy of a report locally (as a non-managed file):

1. On the **Axiom** tab, in the **File Options** group, click the down arrow to the right of the **Save** button, and then click **Save As (Local File)**.

   > **TIP:** The Save As options are also available by right-clicking the file tab.

   The **Save As** dialog opens.

2. Navigate to the desired location on your local computer or on a network file share, and then click **Save**.

You can change the name of the file and its file format when saving. In the Excel Client, you can save the file using any file format that your Excel version supports. In the Windows Client, you can save the file as XLSM, XLSX, or XLS.

Working with Physician Analysis reports

Physician Analysis reports evaluate the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions. In many cases, these reports include the Inpatient, Outpatient, and Professional Billing patients. In some cases, however, some reports are limited to Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS).

The Physician Analysis reports valuate patient information in a variety of ways. The following are a few examples:

- Evaluate the physician variation in treatment patterns based on the day of stay for inpatients.
- Evaluate the utilization, total, and per-case revenues and costs at the department and the cost item level for the top physicians within a Service Line.

NOTE: Service Lines are used to limit the encounters into homogenous patient groups where physician comparisons are meaningful. Comparing dissimilar patients by physician has very limited value.

Like nearly every Axiom Enterprise Decision Support report, you can use either the Admit or Discharge dates in the Physician Analysis reports to select the patient population to analyze. Additionally, you can use either the Estimated Payments or Actual Payments when evaluating the net patient revenue and the resulting margin.

These Physician Analysis reports are provided as examples of what is possible or as starter report templates that you can copy and modify for physician analysis.

The following table describes the types of Physician Analysis reports available in the Desktop Client version of Axiom Enterprise Decision Support::

Report	Description
Key Performer Inpatient Period Comparison report	Provides a high-level inpatient period comparison volume activity and analysis of margin performance
Physician Utilization Detail report	Provides a comprehensive view of the providers' utilization of department services for a selected Service Line
Utilization by Day-of-Stay report	Shows a day-of-stay utilization and costs for top physicians in a select Service Line

Key Performer Inpatient Period Comparison report

This report provides a high-level inpatient period comparison of volume activity and an analysis of margin performance. It includes flexible Group By options for evaluating inpatient utilization and financial performance for key performers such as physicians, DRGs, payors, or service lines.

This period comparison report evaluates key performers (either top or bottom) for inpatient cases, days, ALOS, and summary financial measures. This is a highly flexible report that enables you to select a dimension from the Fields table to use as a Primary Group By for row definition and sort by cases, patient days, gross patient revenue, net patient revenue, or direct expenses on the Primary Group By.

Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Key Performer Inpatient Period Comparison**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue.
Group By	The column to use as summarization level for each row, often Service Line, Provider, etc.
Sort By	Select which column in the report by which to sort the rows (results always in Descending order).
Top or Bottom	Select to display either the top or bottom range of report data.
Limit to Top Number of Physicians	Select the number of report rows of data to display.
Current Calendar Year	The year for the current period of this report.
Current Starting Month	The month the begin analysis for the prior year time frame.
Prior Calendar Year	The year for the prior period of this report.
Prior Year Starting Month	The month to begin analysis for the prior year time frame.

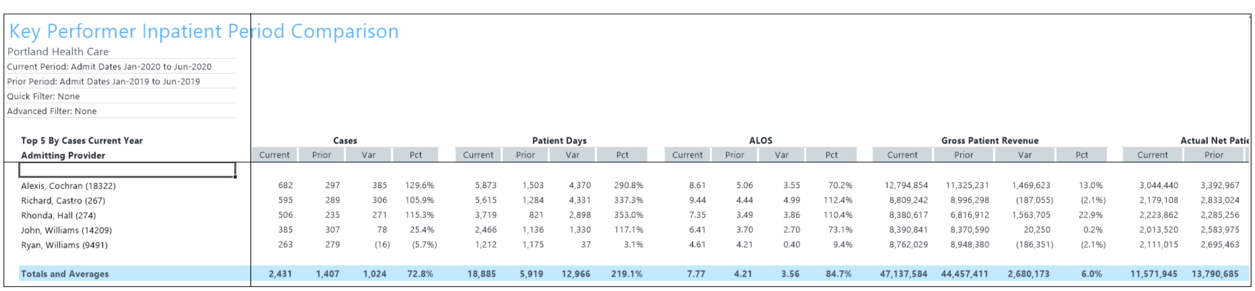
Option	Description
Number of Months to Compare	The number of months to compare between the two time frames.
Limited Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	• Primary Group By – controlled by the Fields Table • Sort By – Cases, Patient Days, Gross Patient Revenue, Actual Patient Revenue, Direct Expense of the Current Year
Measure Options	• Discharge or Admit • Actual or Estimate Net Revenue
Views	• Variances – shows variance for each set of measures, the default view • Current Year Only – shows only current year measures • All – Shows current year, prior year and variance
Quick Filtering	Yes – Select from Folders or Tables
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report based on a multiple nested AQ architecture

Report example


Key Performer Inpatient Period Comparison
Portland Health Care
Current Period: Admit Dates Jan-2020 to Jun-2020
Prior Period: Admit Dates Jan-2019 to Jun-2019
Quick Filter: None
Advanced Filter: None

Top 5 By Cases Current Year	Cases				Patient Days				ALOS				Gross Patient Revenue				Actual Net Patie	
Admitting Provider	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior
Alexis, Cochran (18322)	682	297	385	129.6%	5,873	1,503	4,370	290.8%	8.61	5.06	3.55	70.2%	12,794,854	11,325,231	1,469,623	13.0%	3,044,440	3,392,967
Richard, Castro (267)	595	289	306	105.9%	5,615	1,284	4,331	337.3%	9.44	4.44	4.99	112.4%	8,809,242	8,996,298	(187,055)	(2.1%)	2,179,108	2,833,024
Rhonda, Hall (274)	506	235	271	115.3%	3,719	821	2,898	353.0%	7.35	3.49	3.86	110.4%	8,380,617	6,816,912	1,563,705	22.9%	2,223,862	2,285,256
John, Williams (14209)	385	307	78	25.4%	2,466	1,136	1,330	117.1%	6.41	3.70	2.70	73.1%	8,390,841	8,370,590	20,250	0.2%	2,013,520	2,583,975
Ryan, Williams (9491)	263	279	(16)	(5.7%)	1,212	1,175	37	3.1%	4.61	4.21	0.40	9.4%	8,762,029	8,948,380	(186,351)	(2.1%)	2,111,015	2,695,463
Totals and Averages	**2,431**	**1,407**	**1,024**	**72.8%**	**18,885**	**5,919**	**12,966**	**219.1%**	**7.77**	**4.21**	**3.56**	**84.7%**	**47,137,584**	**44,457,411**	**2,680,173**	**6.0%**	**11,571,945**	**13,790,685**

Physician Utilization Detail report

This report provides a comprehensive view of the providers' utilization of department services for a selected Service Line. It displays the utilization of the top (highest) cost providers by department for a select Service Line. Costs are reported in total and per case for the provider, with drill-down ability to the department cost-item detail.

The columns represented on this report include Cases, Total Costs, and Cost Per Case for each provider. You can report on the top 5, 10, 15, 20, or 25 providers (admitting or attending), and you can evaluate utilization mix within a Service Line patient population, providing a view of the provider's department costs and utilization (volumes).

Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Physician Utilization Detail**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Select Type of Provider	Select the provider type.
Select Patient Type	Select the patient type.
Select Entity and Entities	Select one or more entities.
Select Discharges From	The starting year/month.
Select Discharges To	The ending year/month.
Select Service Line Filter	Select the service line to filter by.
Select Filter For	Select the value to include in the filter for the service line.
Limit to Top Number of Physicians	Select the number of report rows of data to display.
Select Department Sort	Sort the departments by Number, Name, or Total Cost.
Select Cost Item Sort	Sort the cost items by Number, Name, or Total Cost.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	• Admitting or Attending • Service Line • Entity
Measure Options	Months to aggregate data to specific months, quarters and years in Fiscal and Calendar Years depending on the selection
Views	• All • Summary • Cost Detail
Quick Filtering	Yes – From the iDimensions, Costing, or DSS folder
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses a combination of Axiom Queries and GetData architecture

Report example

Physician Utilization Detail

Portland Health Care

Discharge Dates: Apr-19 to Dec-19
Patient Type(s): 'SRGAD','THPLB','VSN','WCOMP','WDSR'
Entity: 'Portland Health Home Care','Portland Health Medical Group','Portland Health Oregon Memorial Hospital','Portland Willamette Memorial Hospital','Willamette Outpatient Services'
Advanced Filter: None

Quick Filter:
None

By ENCOUNTER.PCPNum, Sorted by Dept Number and Item Number

Department	Description	Top 5 Doctors by Total Cost			
		Cases	201002		
		Cases	Total Cost	Case Avg	Detail Avg
			1,284,811	6.39	
100064003	PHC Transcription Services	665	0	0.00	0.00
200066100	Laboratory Willamette Memorial Hospital	9	1,578	0.01	175.34
200075300	Outpatient Department Willamette Memorial Hospita	8	2,893	0.01	361.60
200077000	Pharmacy Willamette Memorial Hospital	18	556	0.00	30.88
200077200	Wound Center	95	135,835	0.68	1,429.84
400067600	Distribution and In House Transport	6	7,891	0.04	1,315.13
400068250	OPC Wound Care	118	596,248	2.97	5,052.95
400068300	Medical Oncology Oregon Memorial	1	542	0.00	541.85
400070200	Laboratory Oregon Memorial	13	2,851	0.01	219.27
400073000	Pharmacy Oregon Memorial	53	11,844	0.06	223.47

Department	Christina, Leblanc					
	Total Cases/Provider : 94802					
	Cases	Total Cost	Case Avg	Detail Avg	Case Var	Detail Var
		575,921.67	6.07			
100064003	515	0	0.00	0.00	0.00	0.00
200066100	6	751	0.01	125.16	(0.00)	50.19
200075300	3	733	0.01	244.31	0.01	117.29
200077000	10	287	0.00	28.68	(0.00)	2.20
200077200	49	63,984	0.67	1,305.81	0.00	124.04
400067600	0	0	0.00	0.00	0.00	0.00
400068250	16	16,213	0.17	1,013.30	2.80	4,039.65
400068300	0	0	0.00	0.00	0.00	0.00
400070200	0	0	0.00	0.00	0.00	0.00
400073000	7	1,994	0.02	284.85	0.04	(61.38)

Department	Melanie, Wilson			
	Total Cases/Provider : 19677			
	Cases	Total Cost	Case Avg	Detail Avg
		203,362.22	10.34	
100064003	45	0	0.00	0.00
200066100	3	827	0.04	275.71
200075300	0	0	0.00	0.00
200077000	2	28	0.00	13.93
200077200	28	62,287	3.17	2,224.55
400067600	0	0	0.00	0.00
400068250	4	130,591	6.64	32,647.84
400068300	0	0	0.00	0.00
400070200	3	650	0.03	216.55
400073000	1	59	0.00	58.81

Utilization by Day of Stay report

This report shows the day-of-stay utilization and costs for top physicians in a select Service Line. It presents the total cost and per-case cost day-of-stay for top (high cost) providers for a select Service Line.

You can view this report at the summary day-of-stay or with department detail for each day-of-stay.

You can use this report to evaluate the utilization mix within a patient population, providing for each day-of-stay among the top (high cost) physicians. The department detail at the cost-item level provides full detail of utilization across the top cost physicians for the selected service lines.

Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Utilization by Day of Stay**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Select Provider Type	Select the provider type.
Select Entity and Entities	Select one or more entities.
Select Service Line Filter	Select the service line to filter by.
Select Filter For	Select the value to include in the filter for the service line.
Limit to Top Number of Physicians	Select the number of report rows of data to display.
Select Discharges From	The starting year/month.
Select Discharges To	The ending year/month.
Limit to Top Number of Physicians	Select the number of report rows of data to display.
Select Department Sort	Sort the departments by Number, Name, or Total Cost.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Provider Type, Service Line Group, and Entity
Measure Options	Months to aggregate data to specific months, quarters and years in Fiscal and Calendar Years depending on the selection
Views	Summary, Department Detail, or All
Quick Filtering	Yes from the !Dimensions, DSS, or Costing folder
Drills	No

Option	Description
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses a combination of Axiom Queries and GetData architecture.

Working with Patient Analysis reports

Patient Analysis reports evaluate the dimensions and measures at the encounter level across the organization. In many cases, these reports include the Inpatient, Outpatient, and Professional Billing patients. In some cases, however, some reports are limited to Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS.)

The Patient Analysis reports evaluate patient information in a variety of ways. The following are a few examples:

- Compare the patient volumes, revenues costs, and margins across two different time periods, e.g., quarter to quarter or year to year.
- Evaluate the total and per-case revenues, costs (down to the Cost Category level), and margins for a particular time frame across a defined patient population.
- Develop a trend of patient activity and financial performance by entity and patient type.

  TIP: Trend reports allow you to see data anomalies and to understand patient performance over time. An easy way to create a trend is to use a date field as a row or you can group by refresh variable. Make the date dimension the last variable defined to create an easy-to-analyze trend report. This type of reporting is not appropriate for a prior-period comparison report as the encounter will only fall within one period.

- Evaluate the patient population across one, two, or three dimensions at the encounter level.
- Use any dimension or attribute on the encounter level to group patients together for performance analysis.

NOTE: If a dimension or attribute is unexpectedly missing from a variable pick list, determine if that field has been appropriately added to the DSSBreakFields table.

Like nearly every Axiom Enterprise Decision Support report, you can use either the admit or discharge dates in the Patient Analysis reports to select the patient population to analyze. Additionally, you can use either the estimated payments or actual payments when evaluating the net patient revenue and the resulting margin.

TIP: The Margin Analysis report may be the most useful Patient Analysis report to use as a template due to its flexibility and the key measures contained therein.

The following table describes the types of Patient Analysis reports available in the Desktop Client version of Axiom Enterprise Decision Support::

Report	Description
Encounter Viewer	Provides a view of the entire data set for the patient's encounters, including service line and population assignment groups, diagnosis and procedure codes, providers, payments and cost details, payors, surgeries, and clinical details
Cost Category Expense Analysis report	Provides a period comparison margin analysis with a focus on expenses at the Cost Category level
Inpatient Period Comparison Analysis report	Provides a high-level inpatient period comparison margin analysis with flexible Group By options for evaluating changes in inpatient utilization, averages, and financial performance
Inpatient Summary Analysis report	Provides an analysis of inpatient period comparison margin with statistics and payor mix at the financial-class level
Margin Analysis report	Provides a summary of financial information for inpatient, outpatient, and combined with two subtotals

Cost Category Expense Analysis report

This report provides a period comparison margin analysis with a focus on expenses at the Cost Category level. This report is for viewing inpatient, outpatient, and in total data. The report includes absolute measures as well as per-case or per-encounter data.

The main purpose of this period comparison report is to evaluate inpatient, outpatient, and combined changes in volumes, summary financial measures, and per-case/encounter analysis. You can use this report to evaluate those changes across a variety of time frames for a selected encounter population, e.g., an entity using a Report Filter.

Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Cost Category Expense Analysis**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Entity (optional)	Select the entities to include in the report.
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue.
Current From	The starting year/month of the current period.
Current To	The ending year/month of the current period.
Prior From	The starting year/month of the comparison period.
Prior From	The starting year/month of the comparison period.
Prior To	The ending year/month of the comparison period.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	None – fixed report structure with different views
Measure Options	Actual or Estimated Revenue
Views	• Summary – Shows expenses using the Report Group for Cost Categories • Detail – Shows expenses at the Cost Category level • All – Displays both the Report Group and the Cost Categories for expenses
Quick Filtering	No – the Report Filter is available directly in the Report
Drills	No
Printable	Yes
Primary Source Table	Encounter

Option	Description
Design Notes	Report based on a GETDATA architecture using nested AQs against the COSTCAT Table for row definitions

▶ Report example

Cost Category Expense Analysis

Current Period: Discharge Dates Nov-2010 to Nov-2010
Previous Period: Discharge Dates Oct-2009 to Oct-2010
Entity: 1 - KH HOSPITAL

Quick Filter: None

	Inpatient							
Current View: Summary	Current	Prior	Var	Pct	Per Case Current	Per Case Prior	Per Case Var	Per Case Pct
Patient Days	1,374	1,603	(229)	(14.3%)				
Discharges or Adjusted Discharges	333	367	(34)	(9.3%)				
ALOS	4.13	4.37	(0.24)	(5.5%)				
Revenue								
Gross Patient Revenue	6,665,483	7,505,364	(839,882)	(11.2%)	20,016.46	20,450.58	(434.12)	(2.1%)
Deductions from Revenue	3,480,418	4,402,266	(921,848)	(20.9%)	10,451.71	11,995.27	(1,543.57)	(12.9%)
Estimated Net Patient Revenue	**3,185,065**	**3,103,098**	**81,967**	**2.6%**	**9,564.76**	**8,455.31**	**1,109.45**	**13.1%**
Write-Off %	52.2%	58.7%			52.2%	58.7%		
Direct Expense								
Salary and Wages	785,327	734,813	50,514	6.9%	2,358.34	2,002.21	356.12	17.8%
Benefits	55,041	51,290	3,750	7.3%	165.29	139.76	25.53	18.3%
Drugs	240,685	216,809	23,876	11.0%	722.78	590.76	132.02	22.3%
Supplies	371,619	350,642	20,978	6.0%	1,115.97	955.43	160.55	16.8%
Professional Fees	19,468	19,095	373	2.0%	58.46	52.03	6.43	12.4%
Purchased Services	52,239	44,347	7,892	17.8%	156.87	120.84	36.04	29.8%
Depreciation	73,658	66,424	7,234	10.9%	221.20	180.99	40.20	22.2%
Other Expenses	70,932	64,252	6,679	10.4%	213.01	175.07	37.93	21.7%
Total Direct Expense	1,668,968	1,547,673	121,296	7.8%	5,011.92	4,217.09	794.83	18.8%
Direct Margin	**1,516,097**	**1,555,426**	**(39,329)**	**(2.5%)**	**4,552.84**	**4,238.22**	**314.63**	**7.4%**
Indirect Expense								
Salary and Wages	549,921	505,113	44,808	8.9%	1,651.41	1,376.33	275.08	20.0%
Other Expenses	523,783	481,105	42,678	8.9%	1,572.92	1,310.91	262.01	20.0%
Total Indirect Expense	1,073,704	986,218	87,486	8.9%	3,224.34	2,687.24	537.09	20.0%
Net Margin	**442,393**	**569,208**	**(126,815)**	**(22.3%)**	**1,328.51**	**1,550.97**	**(222.47)**	**(14.3%)**
Margin %	13.9%	18.3%						

Inpatient Period Comparison report

This report is a high-level inpatient period comparison margin analysis with flexible Group By options for evaluating changes in inpatient utilization, averages, and financial performance.

This period comparison report evaluates inpatient changes in cases, days, ALOS, and summary financial measures. This highly flexible report enables you to select from a variety of dimensions from the Fields table to use as a primary and secondary Group By for row definition and sub-total on the Primary Group By.

Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Inpatient Period Comparison**.

Refresh variables

The Inpatient Period Comparison report allows you to select how to group the data on each row. There is a Primary Group By variable and a Secondary Group By variable. These variables are controlled by the data populated for the Encounter.

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Determines whether to show estimated or actual net revenue.
Current Calendar Year	The year for the current period of this report.
Current Starting Month	The month to begin analysis for the current year time frame.
Prior Calendar Year	The year for the prior period of this report.
Prior Starting Month	The month to begin analysis for the prior year time frame.
Number of Months to Compare	The number of months to compare between the two time frames.
Select Primary Group By	The column to use as header for each row, often Service Line, Provider, etc.
Select Secondary Group By	The column to use as sub-header for each row, often Service Line, Provider, etc.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	• Primary Group By – Controlled by the Fields table • Secondary Group By – Controlled by the Fields table.
Measure Options	• Discharge or Admit • Actual or Estimate Net Revenue
Views	• Variances – Shows variance for each set of measures, the default view • Current Year Only – Shows only current year measures • All – Shows current year, prior year and variance
Quick Filtering	Yes – Select from Folders or Tables
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	This report is based on a multiple nested AQ architecture

Report example

Inpatient Period Comparison

Current Period: Discharge Dates Nov-2010 to Nov-2010
Previous Period: Discharge Dates Oct-2010 to Oct-2010

Quick Filter: None
Advanced Filter: None

Encounter.DischargeStatus.Description	Cases		Patient Days		ALOS		Gross Patient Rev		Net Patient Rev		Direct Expense		Direct Margin	
Encounter.Insplan.FinClassDescription	Var	Pct	Var	Pct	Var	Pct	Var	Pct	Var	Pct	Var	Pct	Var	Pct
HOME OR SELF CARE	(14)	(4.4%)	(380)	(12.2%)	(0.80)	(8.2%)	(1,584)	(0.0%)	82,615	4.3%	105,476	17.4%	(22,861)	(1.8%)
BLUE CROSS BLUE SHIELD	14	60.9%	26	29.9%	(0.73)	(19.3%)	127,743	34.3%	103,038	42.5%	27,775	36.4%	75,263	45.3%
COMMERCIAL	8	19.0%	28	14.0%	(0.20)	(4.2%)	224,277	55.3%	99,946	41.5%	64,176	177.4%	35,771	17.5%
MEDICAID	(14)	(20.3%)	(375)	(28.9%)	(2.03)	(10.8%)	(186,473)	(23.7%)	(48,641)	(17.9%)	4,368	8.0%	(53,009)	(24.5%)
MEDICARE	(13)	(9.6%)	93	12.5%	1.35	24.5%	(91,225)	(4.6%)	(123,654)	(12.5%)	14,531	4.1%	(138,185)	(21.6%)
OTHER	0	0.0%	0	0.0%	0.00	0.0%	28,813	61.4%	40,024	281.5%	6,036	60.7%	33,988	796.1%
SELF PAY	(9)	(18.8%)	(152)	(19.7%)	(0.18)	(1.1%)	(151,877)	(26.9%)	(19,849)	(14.5%)	(20,695)	(27.9%)	846	1.3%
WORKERS COMP	0	0.0%	0	0.0%	0.00	0.0%	47,158	623.6%	31,750	559.8%	9,285	377.5%	22,465	699.3%
HOSPICE HOME	1	16.7%	25	125.0%	3.10	92.9%	83,695	123.5%	26,362	41.6%	22,664	137.6%	3,697	7.9%
MEDICAID	2	0.0%	7	0.0%	3.50	0.0%	10,405	0.0%	8,428	0.0%	3,010	0.0%	5,418	0.0%
MEDICARE	(1)	(16.7%)	18	90.0%	4.27	128.0%	73,290	108.2%	17,934	28.3%	19,655	119.3%	(1,721)	(3.7%)
INTERMEDIATE CARE FACILIT	1	50.0%	0	0.0%	(4.67)	(33.3%)	(46,307)	(42.5%)	(4,675)	(18.0%)	(14,764)	(45.9%)	10,089	(164.7%)
MEDICAID	0	0.0%	7	175.0%	7.00	175.0%	10,802	125.2%	(6,662)	(81.2%)	3,312	146.7%	(9,974)	(167.7%)
MEDICARE	1	100.0%	(7)	(29.2%)	(15.50)	(64.6%)	(57,108)	(56.9%)	1,987	11.1%	(18,076)	(60.4%)	20,063	(166.1%)
NO DESCRIPTION	51	13.5%	51	13.5%	0.00	0.0%	22,880	18.7%	13,034	20.1%	0	0.0%	13,034	20.1%
	(1)	(100.0%)	(1)	(100.0%)	(1.00)	(100.0%)	0	0.0%	0	0.0%	0	0.0%	0	0.0%
BLUE CROSS BLUE SHIELD	1	10.0%	1	10.0%	0.00	0.0%	6,774	372.4%	3,621	369.6%	0	0.0%	3,621	369.6%
COMMERCIAL	(6)	(75.0%)	(6)	(75.0%)	0.00	0.0%	(3,925)	(51.0%)	(1,269)	(33.5%)	0	0.0%	(1,269)	(33.5%)
MEDICAID	17	77.3%	17	77.3%	0.00	0.0%	2,362	11.8%	1,805	23.5%	0	0.0%	1,805	23.5%
MEDICARE	40	11.9%	40	11.9%	0.00	0.0%	17,602	19.2%	8,845	17.0%	0	0.0%	8,845	17.0%
NO DESCRIPTION	0	0.0%	0	0.0%	0.00	0.0%	67	10.7%	32	8.5%	0	0.0%	32	8.5%
PSYCHIATRIC HOSPITAL	2	66.7%	6	75.0%	0.13	5.0%	7,369	29.6%	2,237	16.8%	(34)	(0.9%)	2,271	23.5%
BLUE CROSS BLUE SHIELD	1	0.0%	2	0.0%	2.00	0.0%	7,858	0.0%	5,928	0.0%	2,440	0.0%	3,488	0.0%
COMMERCIAL	1	100.0%	8	400.0%	3.00	150.0%	6,240	57.2%	(1,722)	(18.7%)	(3,136)	(100.0%)	1,413	23.2%

Inpatient Summary Analysis report

This report analyses inpatient period comparison margin with statistics and payor mix at the financial-class level. This period comparison report evaluates inpatient trends in the following areas:

- Volumes
- Days
- ALOS
- Summary financial measures, such as net patient revenue
- Direct margin and net margin
- Financial performance indicators
- Payor mix

By using this report, you can evaluate those trends across a variety of time frames and dimensions, e.g., entity, using the Quick Filter. The current period is trended on a monthly basis and the comparison to the compare period is in total.

▶ Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Inpatient Summary Analysis**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Determines whether to show estimated or actual net revenue.
Current Calendar Year	The year for the current period of this report.
Current Starting Month	The month to begin analysis for the current year time frame.
Compare Calendar Year	The year to compare to the current year.
Compare Starting Month	The month to compare to the current starting month.
Number of Months to Compare	The number of months to compare between the two time frames.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

▶ Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	None – fixed report structure
Measure Options	• Admit or Discharge • Actual or Estimated Revenue • Months to trend for the current period via Refresh Variables and Views
Views	• Default – hides empty columns • All – displays empty columns
Quick Filtering	Yes
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report based on a GETDATA architecture

▶ Report example

Inpatient Summary Analysis

	5 Month Total	5 Month Average	5 Month Annualized	5 Month Total	5 Month Average	Variances Total	Variances Pct	Variances Average	Variances Pct
Financials									
Cases	984	197	2,362	7,514	1,503	(6,530)	(86.9%)	(1,306.00)	(86.9%)
Patient Days	3,137	627	7,529	29,186	5,837	(26,049)	(89.3%)	(5,209.80)	(89.3%)
Average Length of Stay	3.19	3.19	3.19	3.88	3.88	3.99	102.7%	3.99	102.7%
Inpatient Gross Revenue	27,082,916	5,416,583	64,998,999	266,058,750	53,211,750	(238,975,833)	(89.8%)	(47,795,167)	(89.8%)
Deductions	27,011,101	5,402,220	64,826,643	(16,423,071)	(3,284,614)	43,434,172	(264.5%)	8,686,834	(264.5%)
Estimated Net Patient Revenue	**71,815**	**14,363**	**172,356**	**282,481,821**	**56,496,364**	**(282,410,006)**	**(100.0%)**	**(56,482,001)**	**(100.0%)**
Direct Expense	0	0	0	54,957,434	10,991,487	(54,957,434)	(100.0%)	(10,991,487)	(100.0%)
Direct Margin	**71,815**	**14,363**	**172,356**	**227,524,387**	**45,504,877**	**(227,452,572)**	**(100.0%)**	**(45,490,514)**	**(100.0%)**
Indirect Expense	0	0	0	28,517,644	5,703,529	(28,517,644)	(100.0%)	(5,703,529)	(100.0%)
Net Margin	**71,815**	**14,363**	**172,356**	**199,006,742**	**39,801,348**	**(198,934,927)**	**(100.0%)**	**(39,786,985)**	**(100.0%)**
Statistics									
Adjusted Patient Days	5,538	1,108	13,292	85,933	17,187	(80,395)	(93.6%)	(16,079)	(93.6%)
Adjusted Discharges	1,754	351	4,210	22,124	4,425	(20,369)	(92.1%)	(4,074)	(92.1%)
Direct Margin as a % of Net Rev	100.0%	100.0%	100.0%	80.5%	80.5%	19.5%	24.2%	19.5%	24.2%
Net Margin as a % of Net Rev	100.0%	100.0%	100.0%	70.4%	70.4%	29.6%	41.9%	29.6%	41.9%
Collection %	0.3%	0.3%	0.3%	106.2%	106.2%	(105.9%)	(99.8%)	(105.9%)	(99.8%)
Revenue Per Case	27,523.29	27,523.29	27,523.29	35,408.40	35,408.40	(7,885)	(22.3%)	(7,885.12)	(22.3%)
Total Cost per Case	0	0	0	11,109	11,109	(11,109)	(100.0%)	(11,109.27)	(100.0%)
Cost/Revenue Ratio	0.0%	0.0%	0.0%	31.4%	31.4%	(31.4%)	(100.0%)	(31.4%)	(100.0%)
Direct Margin Per Case	72.98	72.98	72.98	30,280.06	30,280.06	(30,207.08)	(99.8%)	(30,207.08)	(99.8%)
Net Margin Per Case	72.98	72.98	72.98	26,484.79	26,484.79	(26,411.81)	(99.7%)	(26,411.81)	(99.7%)
Payor Mix									
Aetna	158	32	379	7590	1,518	(7,432)	(97.9%)	(1,486)	(97.9%)
Anthem	651	130	1,562	43427	8,685	(42,776)	(98.5%)	(8,555)	(98.5%)
Anthem Preferred	485	97	1,164	22752	4,550	(22,267)	(97.9%)	(4,453)	(97.9%)
Behavioral Health	8	2	19	69	14	(61)	(88.4%)	(12)	(88.4%)
Chapter 55	0	0	0	0	0	0	0.0%	0	0.0%

Margin Analysis report

This highly flexible and widely used report of inpatient and outpatient financial information that allows you to select the Group By or rows in the report. It provides summary financial information for inpatient, outpatient, and combined with two subtotals that you can control.

The columns on this report include the following:

- Cases
- Days
- ALOS
- Patient Revenue
- Actual Net Revenue
- Percent of Charges
- Variable Direct Expense
- Variable Direct Margin
- Fixed Direct Expense
- Direct Margin
- Indirect Expense
- Net Margin.

Net Revenue Per Case, Direct Margin Per Case, and Net Margin Per Case are included as metrics by each Service Line. This report enables you to evaluate those trends across a variety of time frames and dimensions, e.g., entity using the Quick Filter.

▶ Opening the report

In the DSS Reporting task pane, in the **Physician Analysis Reports** section, double-click **Margin Analysis**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Determines whether to show estimated or actual net revenue.
Select Current From	The starting year/month of the current period.
Select Current To	The ending year/month of the current period.
Select Primary Group By	The column to use as header for each row.

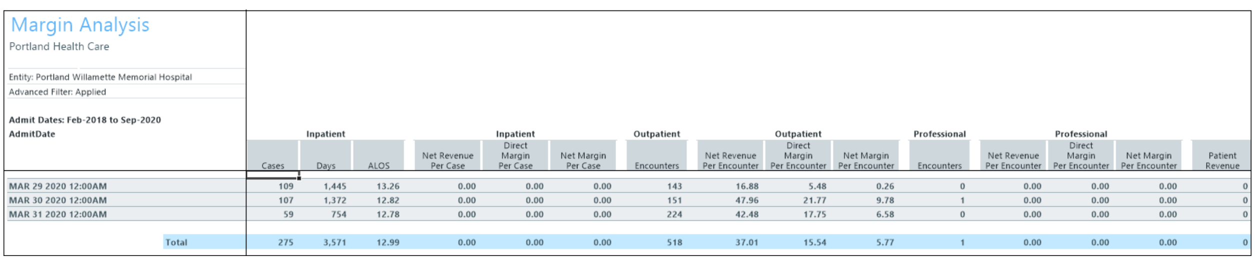
Option	Description
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Dimensions from the Fields table (!Dimensions)
Measure Options	• Actual or Estimated Revenue • Months to aggregate data to specific months, quarters and years in Fiscal and Calendar Years depending on the selection
Views	• Inpatient • Outpatient • Combined
Quick Filtering	Yes
Drills	Yes
Printable	No
Primary Source Table	Yes
Design Notes	Reports uses a combination of Axiom Queries and GetData architecture

Report example


Margin Analysis
Portland Health Care
Entity: Portland Willamette Memorial Hospital
Advanced Filter: Applied
Admit Dates: Feb-2018 to Sep-2020

AdmitDate	Inpatient Cases	Inpatient Days	Inpatient ALOS	Inpatient Net Revenue Per Case	Inpatient Direct Margin Per Case	Inpatient Net Margin Per Case	Outpatient Encounters	Outpatient Net Revenue Per Encounter	Outpatient Direct Margin Per Encounter	Outpatient Net Margin Per Encounter	Professional Encounters	Professional Net Revenue Per Encounter	Professional Direct Margin Per Encounter	Professional Net Margin Per Encounter	Patient Revenue
MAR 29 2020 12:00AM	109	1,445	13.26	0.00	0.00	0.00	143	16.88	5.48	0.26	0	0.00	0.00	0.00	0
MAR 30 2020 12:00AM	107	1,372	12.82	0.00	0.00	0.00	151	47.96	21.77	9.78	1	0.00	0.00	0.00	0
MAR 31 2020 12:00AM	59	754	12.78	0.00	0.00	0.00	224	42.48	17.75	6.58	0	0.00	0.00	0.00	0
Total	275	3,571	12.99	0.00	0.00	0.00	518	37.01	15.54	5.77	1	0.00	0.00	0.00	0

Working with Payor Analysis reports

Payor Analysis reports evaluate the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions. In many cases, these reports the Inpatient, Outpatient, and Professional Billing patients. In some cases, however, some reports are limited to Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS).

The Payor Analysis reports evaluate patient information in a variety of ways. The following are a few examples:

- Evaluate the payor mix and financial performance of the patient population for selected time periods, e.g. Medicare versus Medicaid, etc.
- Evaluate the total and per case revenues, costs and margins for a particular time frame across financial classes with the ability to see the Payors associated with the Financial Class

Like nearly every Axiom Enterprise Decision Support report, you can use either the Admit or Discharge dates in the Payor Analysis reports to select the patient population to analyze. Additionally, you can use either the Estimated Payments or Actual Payments when evaluating the net patient revenue and the resulting margin.

These Payor Analysis reports are provided as examples of what is possible or as starter report templates that you can copy and modify for payor analysis.

The following table describes the types of Patient Analysis reports available in the Desktop Client version of Axiom Enterprise Decision Support::

Report	Description
Insurance Plan Inpatient Analysis and Graph report	A combination report that includes a graph in a separate worksheet that shows inpatient data by payor, displaying volume and key financial metrics information.
Payor Analysis report	Evaluates the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions.
Insurance Plan Inpatient Analysis and Graph report	Evaluate the total and per case revenues, costs, and margins for a particular time frame across financial classes with the ability to see the Payors associated with the Financial Class.

Insurance Plan Inpatient Analysis and Graph report

This is a combination report that includes a graph in a separate worksheet that shows inpatient data by payor, displaying volume and key financial metrics information.

The purpose of this report is to provide financial information such as payor mix and insurance plan performance for inpatients by payor. The first visual represents the selected financial class or payor activity based on the selected sort measure. The second visual provides a chart of the net patient revenue per case for the selected payor.

This visual analysis report allows you to evaluate the mix and net patient revenue per case of a selected financial class and payor across a variety of time frames and dimensions, e.g., entity, using the Quick Filter. The View by Payor allows you to examine trends within a service line across insurance providers.

▶ Opening the report

In the DSS Reporting task pane, in the **Payor Analysis Reports** section, double-click **Insurance Plan Inpatient Analysis and Graph**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

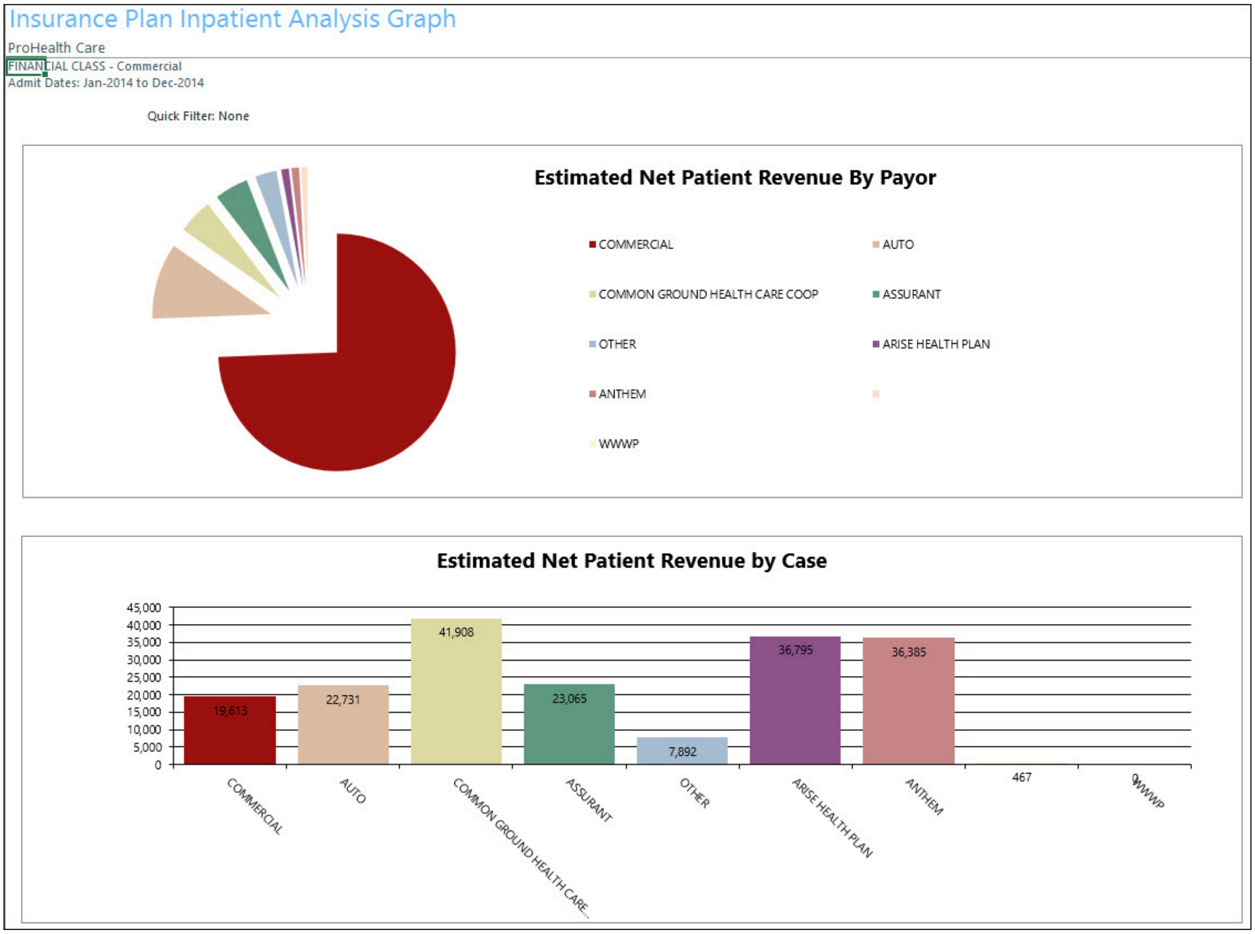
Option	Description
Select Financial Class or Payor	Select which level of payor for the report.
Select a Payor or Select Financial Class	Select the payors or financial class to include in the report.
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue.
Current From	The starting year/month of the current period.
Current To	The ending year/month of the current period.
Sort By	Select which column in the report in which to sort the rows.
Limited Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

▶ Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Choose from the following: Cases, Patient Days, ALOS, Gross Patient Revenue, Net Patient Revenue, Direct Expense, Direct Margin, Indirect Expense, and Net Margin
Measure Options	• Actual or Estimated Revenue • Months to aggregate data to specific months, quarters and years in Fiscal and Calendar Years depending on the selection (see Refresh Variables)
Views	One Default View
Quick Filtering	Yes – Select from Folders or Tables (i.e., Entity, Service Line, MSDRG)
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses a combination of Axiom Queries and GetData architecture

Report example



Payor Analysis report

This report evaluates the dimensions and measures at the encounter level across the organization with a focus on the Insurance Plan, Payor, and Financial Class dimensions.

Opening the report

In the DSS Reporting task pane, in the **Payor Analysis Reports** section, double-click **Payor Analysis**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Insurance Plan Group	Select from payor description or financial class.
Current From	The starting year/month of the current period.
Current To	The ending year/month of the current period.
Prior From	The starting year/month of the comparison period.
Prior To	The starting year/month of the comparison period.
Encounter.ServiceLine1	The Service Line filer for the report.
Sort By	Select which column in the report in which to sort the rows.
Limited Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report example

Payor Analysis - 'Allergy And Immunology','Breast Health','Burns - Medical','Burns And Wounds','Burns','Cancer - Medical','Cancer - S

ProHealth Care

Current Discharge Period: Oct-2011 to Dec-2013

Prior Discharge Period: Oct-2017 to Jan-2018

Quick Filter:
None

Advanced Filter: None

	Cases			Patient Days			ALOS			Gross Patient Revenue			Net Patient Revenue			Direct Exp	
Encounter.InsPlan.Description	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior
MEDICARE PARTS A AND B	219	1		339	13		1.55	13.00		3,044,407	99,108		668,831	0		393,464	
MEDICARE UHC	109	0		186	0		1.71	0.00		1,919,737	0		454,996	0		112,813	
UHC CHOICE PLUS	480	0		137	0		0.29	0.00		1,745,948	0		851,398	0		185,949	
ANTHEM ACCESS	195	0		74	0		0.38	0.00		864,359	0		665,465	0		109,500	
SELF-PAY	3,322	0		26	0		0.01	0.00		675,011	0		344,158	0		142,056	
HUMANA PREFERRED	143	0		51	0		0.36	0.00		458,585	0		203,500	0		16,302	
ZZHIRSP	20	0		46	0		2.30	0.00		407,198	0		139,833	0		52,851	
TRILOGY US HEALTH AND LIFE	15	0		33	0		2.20	0.00		327,622	0		155,855	0		40,743	
AETNA PROHEALTH PPO	61	0		28	0		0.46	0.00		311,903	0		217,141	0		47,230	
CIGNA	42	0		43	0		1.02	0.00		308,142	0		272,824	0		58,201	
MEDICAID	54	0		30	0		0.56	0.00		260,653	0		70,508	0		20,230	
UMR UHC 79480	70	0		23	0		0.33	0.00		257,280	0		141,907	0		20,242	
DEAN HEALTH PLAN	21	0		12	0		0.57	0.00		241,100	0		168,850	0		13,527	
HUMANA MEDICARE	15	0		22	0		1.47	0.00		232,288	0		50,088	0		13,823	
ANTHEM PREFERRED/LUMENOS	126	0		15	0		0.12	0.00		222,218	0		102,265	0		9,184	
TRILOGY ASSURANT	11	0		12	0		1.09	0.00		209,684	0		66,188	0		8,620	
ZZHUMANA MEDICARE PFFS (USE 11020301)	6	0		16	0		2.67	0.00		184,868	0		27,901	0		2,583	
MEDICARE ADVANTAGE UNASSIGNED	16	0		33	0		2.06	0.00		179,939	0		22,812	0		16,855	
MEDICAID CHILDRENS HEALTH	113	0		11	0		0.10	0.00		174,051	0		39,616	0		38,102	
HEALTHEOS UNASSIGNED	12	0		8	0		0.67	0.00		156,561	0		136,494	0		854	
ANTHEM TRADITIONAL	8	0		33	0		4.13	0.00		153,564	0		151,621	0		41,561	
UHC CHOICE	45	0		11	0		0.24	0.00		148,754	0		71,212	0		2,524	
ANTHEM MEDICARE	5	0		9	0		1.80	0.00		144,555	0		26,115	0		276	
UHC INTEGRATED SERVICES	28	0		6	0		0.21	0.00		144,027	0		53,091	0		24,561	
WPS	53	0		6	0		0.11	0.00		107,349	0		80,784	0		3,469	
FIRST HEALTH UNASSIGNED	3	0		4	0		1.33	0.00		104,322	0		77,881	0		6,705	

Payor Analysis by Insurance Plan report

This report evaluates the total and per case revenues, costs, and margins for a particular time frame across financial classes with the ability to see the Payors associated with the Financial Class.

Opening the report

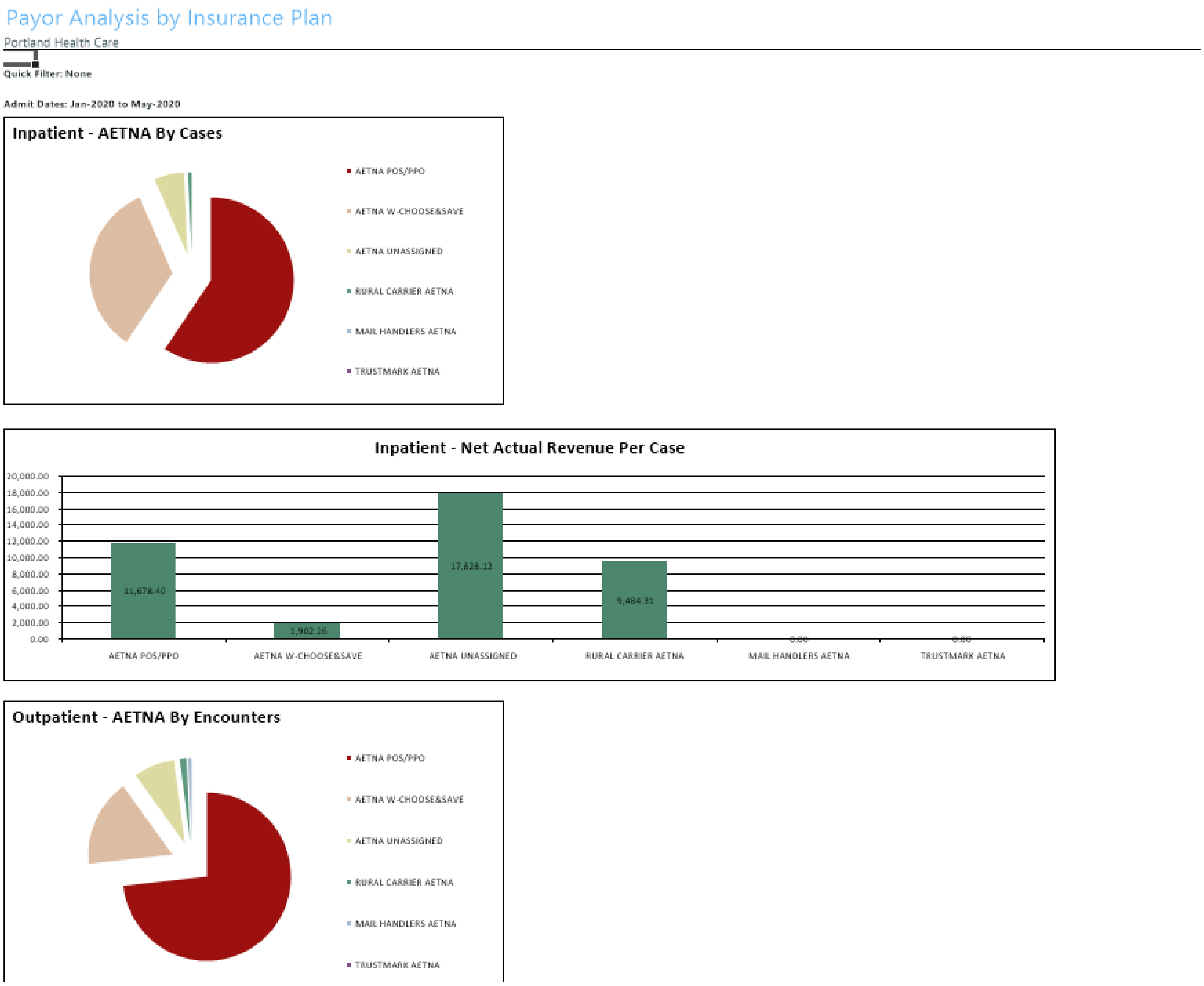
In the DSS Reporting task pane, in the **Payor Analysis Reports** section, double-click **Payor Analysis by Insurance Plan**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Select Payor Description	Select a payor description.
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Current From	The starting year/month of the current period.
Current To	The ending year/month of the current period.
Sort By	Select which column in the report in which to sort the rows.
Limited Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report example



Working with Population Analysis reports

Population Analysis reports evaluate certain dimensions and measures at both the encounter and cost detail levels across the organization. Population Analysis reports focus on grouping patient in such a way as to make comparisons across time or physicians meaningful, e.g., populations within a particular entity, service line, etc. In many cases, these reports include the Inpatient, Outpatient, and Professional Billing patients. However, there is a Professional Billing specific report that enables one to evaluate the financial performance including net margin at the Cost Detail level. This report is designed for clients that have medical group or physician practice encounter information. In some cases, reports use a view to limit the population to only Inpatients due to the different measures available for these encounters, e.g., Average Length of Stay (ALOS).

The Population Analysis reports evaluate patient information in a variety of ways. The following are a few examples:

The Population Analysis reports evaluate patient information in a variety of ways. The following are a few examples:

- Compare two time period in order to understand the changes between a current period and a prior period for trending purposes for cases, patient days, ALSO, payer mix, etc.
- Evaluate the Department and Cost Detail Utilization for a defined Patient Population
- Evaluate the performance of Professional Services at the CPT level within the Cost Detail table where charges, costs and payments have been applied

Like nearly every Axiom Enterprise Decision Support report, you can use either the Admit or Discharge dates in the Population Analysis reports to select the patient population to analyze. Additionally, you can use either the Estimated Payments or Actual Payments when evaluating the net patient revenue and the resulting margin. These reports also leverage the new Advanced Filtering capabilities to isolate the population desired using limit filters across other encounter related tables, such as Encounter Procedures or Encounter Diagnosis.

These Population Analysis reports are provided as examples of what is possible or as starter report templates that you can copy and modify to meet your unique needs. The Population Trends analysis is a good example of using a multi-worksheet reporting approach. The Department Summary and Detail reports are examples of returning Cost Category detailed information at the Department and Cost Detail levels. As previously mentioned, the Professional Utilization Department Analysis is a good template for those set up for and needing margin results at the CPT level within Cost Detail.

The following table describes the types of Population Analysis reports available in the Desktop Client version of Axiom Enterprise Decision Support::

Report	Description
Population Trends report	Provides a more detailed view of a patient population’s volumes and financial information in a multi-worksheet styled report
Population Utilization Department Detail report	Provides a more comprehensive view of providers’ utilization of department services for a selected Service Line at the Cost Item level
Population Utilization Department Summary report	Provides an analysis of the utilization of a population by Department
Professional Utilization Department Analysis report	Provides an analysis of the utilization of a population by Department, Provider, and Cost Item with the ability to reflect the actual margin at the Department and CPT level.

Population Trends report

This report provides a more detailed view of a patient population's volumes and financial information. It is an example of a multi-tab or worksheet report. Each worksheet contains specific information about the population selected. This report provides volume and financial information for selected patient populations by displaying IP Trends, OP Trends, Payor Mix, and the top-N Admitting Physicians.

The IP columns represented on this report are the following:

- Cases
- ALOS
- Patient Days
- Charges
- Net Revenue (Actual or Estimated)
- Direct Expense
- Indirect Expense
- Net Margin

The OP columns displayed on this report are the following:

- Encounters
- Charges
- Net Revenue (Actual or Estimated)
- Direct Expense
- Direct Margin
- Indirect Expense
- Net Margin

The Payor Mix tab displays the following:

- Encounters
- Total Patient Charges
- Payor Mix
- Actual or Estimated Net Patient Revenue.

This report enables you to evaluate those trends across a variety of time frames and dimensions, e.g., entity using the Quick Filter.

▶ Opening the report

In the DSS Reporting task pane, in the **Population Analysis Reports** section, double-click **Population Trends**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Report Filter Group	Select the column from the Encounter table to filter the report
Report Filter	Select the element in the Encounter column to filter the entire report data
Select Trend Detail	Select the row detail for the IP Trend and OP Trend worksheets
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date
Net Revenue Type	Select whether to show estimated or actual net revenue
Current Calendar Year	Select the year for the current period of this report
Current Starting Month	Select the month to begin analysis for the current year time frame
Prior Calendar Year	Select the year for the prior period of this report
Prior Starting Month	Select the month to begin analysis for the prior year time frame
Number of Months to Compare	Select the number of months to compare between the two time frames
Limit to Top Number of Physicians	Select the number of report rows of data to display
Cost Categories to Show (IP and OP Trends)	Select the Cost Categories to include in the report
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	• Service Line 1, Service Line 2, or Service Line 3. You can specify the name. • Trend Detail – Options include but are not limited to Insurance Plan, Service Line, Discharge Month, Diagnosis, Procedure, Attending Provider, and Admitting Provider (See the Fields table for more information on available sorts)
Measure Options	• Actual or Estimated Revenue • Months to aggregate data to specific months, quarters, and years in Fiscal and Calendar Years depending on the selection
Views	• IP Trends – Summary, Cost Category Per Case, or All • OP Trends – Summary, Cost Category Per Case, or All • Payor Mix – Financial Class, Payors, Financial Class Key Indicators, Payor Key Indicators, or All • Admitting Physicians – Summary, Cost Category Per Case, or All
Quick Filtering	Yes
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses combined GetData and Axiom Architecture

Report examples

Inpatient Trends

Current Period: Admit Dates Nov-2010 to Nov-2010
Prior Period: Admit Dates Oct-2010 to Oct-2010

Quick Filter:
None

Advanced Filter: None

Encounter.Entity - 1

	Cases					ALOS					Patient Days				
Encounter.DischargeStatus	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert
10	178	192	(14)	(7.3%)	↓	3.21	3.03	0.18	6.0%	→	572	582	(10)	(1.7%)	↓
12	2	3	(1)	(33.3%)	↓	8.50	13.00	(4.50)	(34.6%)	↓	17	39	(22)	(56.4%)	↓
14	1	1	0	0.0%	↓	6.00	6.00	0.00	0.0%	↓	6	6	0	0.0%	↓
15	2	1	1	100.0%	↑	1.50	2.00	(0.50)	(25.0%)	↓	3	2	1	50.0%	↑
19	7	11	(4)	(36.4%)	↓	4.29	7.00	(2.71)	(38.8%)	↓	30	77	(47)	(61.0%)	↓
20	25	15	10	66.7%	↑	4.08	2.47	1.61	65.4%	↑	102	37	65	175.7%	↑
4	54	68	(14)	(20.6%)	↓	7.04	5.50	1.54	27.9%	↑	380	374	6	1.6%	↓
5	7	5	2	40.0%	↑	6.43	2.80	3.63	129.6%	↑	45	14	31	221.4%	↑
8	49	53	(4)	(7.5%)	↓	5.61	5.06	0.56	11.0%	→	275	268	7	2.6%	↓
Totals	325	349	(24)	(6.9%)	↓	4.40	4.01	0.39	9.8%	→	1,430	1,399	31	2.2%	↓

Inpatient trends

Outpatient Trends

Current Period: Admit Dates Nov-2010 to Nov-2010
Prior Period: Admit Dates Oct-2010 to Oct-2010

Quick Filter:
None

Advanced Filter: None

Encounter.Entity - 1

	Encounters					Charges					Actual Net Revenue				
Encounter.DischargeStatus	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert
10	7,282	8,143	(861)	(10.6%)	↓	10,796,491	12,031,609	(1,235,118)	(10.3%)	↓	4,697,812	5,073,245	(375,433)	(7.4%)	↓
11	10	18	(8)	(44.4%)	↓	6,310	25,887	(19,576)	(75.6%)	↓	2,024	9,846	(7,822)	(79.4%)	↓
14	1	0	1	0.0%	↓	1,465	0	1,465	0.0%	↓	541	0	541	0.0%	↓
15	10	9	1	11.1%	→	17,463	15,416	2,047	13.3%	→	2,952	3,217	(266)	(8.3%)	↓
17	180	172	8	4.7%	↓	306,313	376,990	(70,677)	(18.7%)	↓	105,451	132,722	(27,272)	(20.5%)	↓
19	8	3	5	166.7%	↑	25,976	11,766	14,210	120.8%	↑	6,177	1,436	4,742	330.3%	↑
2	1	1	0	0.0%	↓	13,736	2,886	10,850	375.9%	↑	10,461	667	9,794	1469.1%	↑
20	28	49	(21)	(42.9%)	↓	118,349	220,855	(102,505)	(46.4%)	↓	39,490	48,477	(8,988)	(18.5%)	↓
4	8	2	6	300.0%	↑	31,038	5,201	25,837	496.8%	↑	5,237	818	4,419	540.0%	↑
5	1	0	1	0.0%	↓	5,026	0	5,026	0.0%	↓	954	0	954	0.0%	↓
6	1	1	0	0.0%	↓	576	1,266	(690)	(54.5%)	↓	131	0	131	0.0%	↓
7	1	0	1	0.0%	↓	6,767	0	6,767	0.0%	↓	2,842	0	2,842	0.0%	↓
8	4	2	2	100.0%	↑	22,431	26,464	(4,033)	(15.2%)	↓	4,109	4,423	(314)	(7.1%)	↓
9	1	2	(1)	(50.0%)	↓	1,697	2,971	(1,274)	(42.9%)	↓	1,293	0	1,293	0.0%	↓
NA	9	7	2	28.6%	↑	0	271	(271)	(100.0%)	↓	0	0	0	0.0%	↓
Totals	7,545	8,409	(864)	(10.3%)	↓	11,353,639	12,721,581	(1,367,943)	(10.8%)	↓	4,879,473	5,274,852	(395,379)	(7.5%)	↓

Outpatient trends

Payor Mix Analysis

Current Period: Admit Dates Nov-2010 to Nov-2010
Prior Period: Admit Dates Oct-2010 to Oct-2010

Quick Filter:
None

Advanced Filter: None

Encounter.Entity - 1

	Total Encounters					Total Patient Charges				
	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert
Financial Class Total	7,870	8,762	(892)	(10.2%)	↓	18,154,627	19,486,419	(1,331,792)	(6.8%)	↓
BLUE CROSS BLUE SHIELD	2,021	2,146	(125)	(5.8%)	↓	3,629,147	3,945,930	(316,783)	(8.0%)	↓
COMMERCIAL	1,004	1,031	(27)	(2.6%)	↓	2,041,194	1,991,777	49,417	2.5%	↓
MEDICAID	712	809	(97)	(12.0%)	↓	1,379,658	1,691,087	(311,429)	(18.4%)	↓
SELF PAY	513	591	(78)	(13.2%)	↓	887,296	1,099,219	(211,923)	(19.3%)	↓
OTHER	85	105	(20)	(19.0%)	↓	252,452	207,501	44,951	21.7%	↑
WORKERS COMP	55	66	(11)	(16.7%)	↓	243,444	111,304	132,140	118.7%	↑
INSTITUTIONAL	4	1	3	300.0%	↑	574	421	153	36.3%	↑

Payor mix analysis

Admitting Physician Inpatient Analysis

Current Period: Admit Dates Nov-2010 to Nov-2010
Prior Period: Admit Dates Oct-2010 to Oct-2010

Quick Filter:
None

Advanced Filter: None

Limited to the top 5 Physicians by Case Count
Encounter.Entity - 1

	Cases					Patient Days					ALOS				
	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert	Current	Prior	Var	Pct	Alert
Totals	148	125	23	18.4%	↑	695	491	204	41.5%	↑	4.70	3.93	0.77	19.6%	↑
DR. Willa Hardy (DR516)	34	45	(11)	(24.4%)	↓	135	176	(41)	(23.3%)	↓	3.97	3.91	0.06	1.5%	↑
DR. Roydon Widaman (DR586)	34	20	14	70.0%	↑	122	64	58	90.6%	↑	3.59	3.20	0.39	12.1%	↑
DR. Prissy Tilton (DR594)	31	38	(7)	(18.4%)	↓	129	146	(17)	(11.6%)	↓	4.16	3.84	0.32	8.3%	↑
DR. Douglas Powers (DR13)	26	12	14	116.7%	↑	183	60	123	205.0%	↑	7.04	5.00	2.04	40.8%	↑
DR. Roddy Christner (DR599)	23	10	13	130.0%	↑	126	45	81	180.0%	↑	5.48	4.50	0.98	21.7%	↑

Admitting physician inpatient Analysis

Population Utilization Department Detail report

This report provides a more comprehensive view of providers' utilization of department services for a selected Service Line at the Cost Item Level. The purpose of report is to analyze the utilization of a population by Department, Provider, and Cost Item.

There are multiple views available for this report within two groups:

- Display Total Patient Revenue, Total Expense, Direct Expense and Indirect Expense
- Display by Cost Category Detail

This report provides the ability to see totals by Department, by Provider and down to the Cost Item level. The Provider is based on the Provider stored in the Cost Detail table – it is not pulling information from the Encounter Provider or Encounter tables.

This report enables you to evaluate utilization mix within a patient population, providing a view of the patient's charges and volumes by department. The additional view by Cost Category allows you to analyze the mix of expenses by department across the selected patient population.

▶ Opening the report

In the DSS Reporting task pane, in the **Population Analysis Reports** section, double-click **Population Utilization Department Detail**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Report Filter Group	Select the column from the Encounter table to filter the report.
Report Filter	Select the element in the Encounter column to filter the entire report data.
Select Trend Detail	Select the row detail for the IP Trend and OP Trend worksheets.
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Net Revenue Type	Select whether to show estimated or actual net revenue.
Current Calendar Year	Select the year for the current period of this report.
Current Starting Month	Select the month to begin analysis for the current year time frame.
Prior Calendar Year	Select the year for the prior period of this report.
Prior Starting Month	Select the month to begin analysis for the prior year time frame.
Number of Months to Compare	Select the number of months to compare between the two time frames.
Limit to Top Number of Physicians	Select the number of report rows of data to display.
Cost Categories to Show (IP and OP Trends)	Select the Cost Categories to include in the report.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Report Filter Group	Select the column from the Encounter table to filter the report
Report Filter	Select the element in the Encounter column to filter the entire report data
Group by Options (rows)	• Admit or Discharge • Service Line • Entity
Measure Options	Months to aggregate data to specific months, quarters and years in Fiscal and Calendar Years, depending on the selection
Views	Department Totals, Provider Totals, Cost Item Detail, Department Totals by Cost Category, Provider Totals by Cost Category, Cost Item Detail by Cost Category, All
Quick Filtering	Yes – From the !Dimensions, Costing, or DSS folder
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Uses a combination of Axiom Queries and GetData architecture

Report example

Key Performer Inpatient Period Comparison

PHC Development Sandbox

Current Period: Admit Dates Feb-2020 to Jun-2020

Prior Period: Admit Dates Jan-2019 to May-2019

Quick Filter: None

Advanced Filter: None

Top 25 By Patient Days Current Year	Cases				Patient Days				ALOS				Gross Patient Revenue				Actual Net Patie	
Admitting Provider	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior	Var	Pct	Current	Prior
Alexis, Cochran (18322)	639	0	639	0.0%	5,748	0	5,748	0.0%	9.00	0.00	9.00	0.0%	11,287,373	0	11,287,373	0.0%	2,392,020	0
Richard, Castro (267)	558	0	558	0.0%	5,421	0	5,421	0.0%	9.72	0.00	9.72	0.0%	6,941,336	0	6,941,336	0.0%	1,549,927	0
Lisa, Bowen (1068)	351	0	351	0.0%	4,229	0	4,229	0.0%	12.05	0.00	12.05	0.0%	602,501	0	602,501	0.0%	135,337	0
Rhonda, Hall (274)	423	0	423	0.0%	3,386	0	3,386	0.0%	8.00	0.00	8.00	0.0%	5,948,461	0	5,948,461	0.0%	1,501,509	0
Shelly, Hayes (218)	351	0	351	0.0%	3,274	0	3,274	0.0%	9.33	0.00	9.33	0.0%	3,799,957	0	3,799,957	0.0%	916,035	0
Kayla, Clark (11601)	298	0	298	0.0%	3,115	0	3,115	0.0%	10.45	0.00	10.45	0.0%	1,957,535	0	1,957,535	0.0%	325,571	0
Chris, Bennett (18323)	303	0	303	0.0%	3,115	0	3,115	0.0%	10.28	0.00	10.28	0.0%	2,598,250	0	2,598,250	0.0%	532,685	0
John, Williams (14209)	336	0	336	0.0%	2,190	0	2,190	0.0%	6.52	0.00	6.52	0.0%	6,358,461	0	6,358,461	0.0%	1,541,548	0
Greg, Buck (850)	264	0	264	0.0%	2,175	0	2,175	0.0%	8.24	0.00	8.24	0.0%	5,042,990	0	5,042,990	0.0%	1,123,861	0
Edward, Flores (9637)	218	0	218	0.0%	1,899	0	1,899	0.0%	8.71	0.00	8.71	0.0%	4,422,258	0	4,422,258	0.0%	1,124,234	0
Susan, Pena (18324)	226	0	226	0.0%	1,893	0	1,893	0.0%	8.38	0.00	8.38	0.0%	4,210,561	0	4,210,561	0.0%	893,622	0
David, Marsh (886)	220	0	220	0.0%	1,866	0	1,866	0.0%	8.48	0.00	8.48	0.0%	2,666,128	0	2,666,128	0.0%	524,474	0
Edward, Smith (472)	198	0	198	0.0%	1,793	0	1,793	0.0%	9.06	0.00	9.06	0.0%	1,944,143	0	1,944,143	0.0%	476,409	0
Mark, Jones (9500)	204	0	204	0.0%	1,740	0	1,740	0.0%	8.53	0.00	8.53	0.0%	2,613,645	0	2,613,645	0.0%	778,456	0
Rhonda, Perry (417)	198	0	198	0.0%	1,737	0	1,737	0.0%	8.77	0.00	8.77	0.0%	4,241,324	0	4,241,324	0.0%	1,132,587	0
Tina, Griffin (14204)	146	0	146	0.0%	1,728	0	1,728	0.0%	11.84	0.00	11.84	0.0%	2,687,410	0	2,687,410	0.0%	527,261	0
Heather, Murillo (12229)	126	0	126	0.0%	1,530	0	1,530	0.0%	12.14	0.00	12.14	0.0%	402,641	0	402,641	0.0%	85,754	0
Eric, Farrell (217)	153	0	153	0.0%	1,505	0	1,505	0.0%	9.84	0.00	9.84	0.0%	768,835	0	768,835	0.0%	195,873	0
Ryan, Williams (9491)	248	0	248	0.0%	1,068	0	1,068	0.0%	4.31	0.00	4.31	0.0%	8,118,587	0	8,118,587	0.0%	1,992,829	0
Debbie, Mcclain (254)	228	0	228	0.0%	940	0	940	0.0%	4.12	0.00	4.12	0.0%	6,959,293	0	6,959,293	0.0%	1,473,646	0
Perry, Baker (258)	177	0	177	0.0%	756	0	756	0.0%	4.27	0.00	4.27	0.0%	5,755,006	0	5,755,006	0.0%	1,134,907	0
Paige, Fisher (239)	164	0	164	0.0%	680	0	680	0.0%	4.15	0.00	4.15	0.0%	5,327,820	0	5,327,820	0.0%	1,344,259	0
Steven, Logan (225)	72	0	72	0.0%	370	0	370	0.0%	5.14	0.00	5.14	0.0%	1,229,573	0	1,229,573	0.0%	277,507	0
Colin, James (969)	66	0	66	0.0%	273	0	273	0.0%	4.14	0.00	4.14	0.0%	4,160,393	0	4,160,393	0.0%	1,043,318	0
Patricia, Long (471)	50	0	50	0.0%	204	0	204	0.0%	4.08	0.00	4.08	0.0%	1,693,759	0	1,693,759	0.0%	311,200	0

Population Utilization Department Summary report

The purpose of report is to analyze utilization at the department level of a specific patient population.

There are two views available for this report:

- Display Total Patient Revenue, Total Expense, Direct Expense, and Indirect Expense
- Display by Cost Category

This report enables you to evaluate utilization mix within a patient population providing a view of the patient's charges and volumes by department. The additional view by Cost Category allows you to analyze the mix of expenses by department across the selected patient population.

Opening the report

In the DSS Reporting task pane, in the **Population Analysis Reports** section, double-click **Population Utilization Department Summary**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Report Filter Group	Select the column from the Encounter table to filter the report.

Option	Description
Report Filter	Select the element in the Encounter column to filter the entire report data.
Select Entity	Select one or more Entities to display in the report.
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date.
Current From	The year and month to begin the Admit or Discharge period of this report.
Current To	The year and month to end the Admit or Discharge period of this report.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Service Line 1, Service Line 2, or Service Line 3. You can specify the names.
Measure Options	Months to aggregate data to specific months, quarters, and years in Fiscal and Calendar years, depending on the selection.
Views	• Department Summary – Total Patient Revenue, Total Expense, Direct Expense, and Indirect Expense • Departments by Cost Category • All
Quick Filtering	Yes – From the !Dimensions, Costing, or DSS folder
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Uses a combination of Axiom Queries and GetData architecture

Report example

Population Utilization Department Summary

Portland Health Care

Discharge Dates: Jan-2020 to Jun-2020

Entity: Portland Willamette Memorial Hospital

Advanced Filter: None

Quick Filter

None

Encounter.PrimaryServiceID.Name - CANCER

Case Count: 11,477

			Volume	Total Patient Revenue		Total Expense		Direct Expense		Indirect Expense	
		Cases	Total	Total	Per Case	Total	Per Case	Total	Per Case	Total	Per Case
Dept	**Name**			115,127,187	10,031.12	(73,266,534)	(6,383.77)	(83,655,372)	(7,288.96)	10,388,839	905.19
200060302	Family Practice Clinic	38	45	14,224	374.32	30,442	801.11	21,660	569.99	8,782	231.11
200061101	Neuroscience Center	5	5	1,293	258.66	1,381	276.11	850	169.94	531	106.17
200064900	Distribution Willamette Memorial Ho	15	32	8,179	545.29	9,675	645.03	6,385	425.70	3,290	219.33
200065100	Emergency Department Willamette	13	33	16,162	1,243.24	3,192	245.51	1,987	152.83	1,205	92.68
200065120	Emergency Department Tigard	5	12	4,695	939.01	2,294	458.74	1,270	253.91	1,024	204.83
200066100	Laboratory Willamette Memorial Ho	7,275	41,711	4,529,600	622.63	1,137,447	156.35	758,445	104.25	379,002	52.10
200066120	Laboratory Tigard	1	1	22	21.81	6	5.73	4	3.78	2	1.95
200066140	Laboratory Prescott	1,756	3,389	159,251	90.69	42,804	24.38	29,907	17.03	12,897	7.34
200066200	Cardiovascular Willamette Memorial	57	60	73,354	1,286.91	15,317	268.71	5,060	88.77	10,257	179.95
200066220	Cardiovascular Tigard	34	39	32,708	962.00	4,835	142.19	2,048	60.23	2,787	81.97
200066240	Cardiovascular Prescott	84	111	33,944	404.10	5,233	62.29	3,054	36.35	2,179	25.94
200066600	Respiratory Therapy Willamette Men	576	679	189,390	328.80	8,917	15.48	5,782	10.04	3,135	5.44
200066620	Respiratory Therapy Tigard	2	2	416	207.81	283	141.60	112	56.20	171	85.40
200067000	Radiology Diagnostic Willamette Me	147	128	45,831	311.78	15,949	108.49	10,164	69.14	5,785	39.35
200067001	Interventional Radiology Willamette	105	311	413,520	3,938.29	124,879	1,189.32	79,589	757.99	45,290	431.34
200067020	Radiology Diagnostic Tigard	72	84	25,336	351.89	15,855	220.20	7,467	103.71	8,387	116.49
200067040	Radiology Diagnostic Prescott	275	325	107,440	390.69	142,711	518.95	76,434	277.94	66,277	241.01

Professional Utilization Department Analysis report

The Professional Utilization Department Utilization Analysis report analyzes the utilization of a population by Department, Provider, and Cost Item. This is a unique report as it is designed to evaluate performance at the CPT or Cost Item level to include margin analysis. In order to use this report, users will need to ensure that payments have been applied to the Cost Item or CPT level. This is generally done and only possible with Professional Billing claims were payments are associated to the line item rather than the claim level.

NOTE: If you have Professional Billing information in your system and are not set up to apply actual payments or expected payments at the CPT or Cost Item level, please contact you Implementation Consultant or Client Success for additional assistance.

Opening the report

In the DSS Reporting task pane, in the **Population Analysis Reports** section, double-click **Population Utilization Department Analysis**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Report Filter Group	The column from the Encounter table to filter the report.
Report Filter	The element in the Encounter column to filter the entire report data.
Select Entity	Select the entity to display in the report.
Select Payment Option	Select Actual or Estimated to determine what values to use for net patient revenue and the resulting margin to be calculated in the report.
Select Date Option	Select the date to use to determine whether to populate the report based on encounter admit or discharge date.
Load Detail	Determine if a Department summary is desired or the Cost Detail is to be used in the report
Current From	The Year and Month to begin the Admit or Discharge period of this report.
Current To	The Year and Month to end the Admit or Discharge period of this report.
Limit Encounters	To remove a limit encounters filter, on the Report sheet, simply double-click the **Limit Encounters** filter, and then click **Apply**.

▶ Report options

To select a different view, in the **Main** ribbon tab, click **Change View**, and select one of the following:

- Department Summary
- Departments by Cost Category

Working with Service Line Analysis reports

Service line analytics and reporting are instrumental in evaluating health service operations. The extremely wide and varied nature of health conditions and treatment methods makes service lines a valuable way of classifying the patients served by provider organizations into quasi-homogenous populations. These service line classifications creating quasi-homogenous populations are vital to comparative report across multiple dimensions, such as:

- Comparing services offered across multiple care settings or multiple hospitals
- Comparing physician performance using risk adjusted service lines

- Comparing alternative treatment plans for quality and patient outcomes
- Comparing insurance plans or payers relative to the services rendered and reimbursed by service line provides a means of normalization for comparative purposes

The following table describes the types of Service Line Analysis reports available in the Desktop Client version of Axiom Enterprise Decision Support:

Report	Description
Service Line Inpatient Period Comparison report	Trend performance for a selected service line across two different time periods. It is a flexible report that enables you to determine the current and prior periods and how many monthly periods to include within the report.
Service Line Margin Analysis report	Evaluate performance across service lines by Inpatient, Outpatient or Combined. It is a report that provides an Inpatient, Outpatient or Combined View and also has totals and per case values.
Service Line Payor Inpatient Analysis report	Provides a service line payor mix related report with multiple refresh variables. It is designed to provide a template for other payor analysis type of reporting. The report is useful in comparing payors and insurance plans to each other using key financial metrics and across time.

Service Line Inpatient Period Comparison report

This report provides the ability to trend performance for a selected service line across two different time periods. It is a flexible report that enables you to determine the current and prior periods and how many monthly periods to include within the report. Encounters can be selected by Admit or Discharge date and Net Revenue can be determined based on Actual or Estimated.

This report also provides an option to Limit the Encounters to specific patients based on other tables, e.g., certain procedures in the ENC_CPT or ENC_Proc tables, or for selected physicians in the ENC_Provider table.

▶ Opening the report

In the DSS Reporting task pane, in the **Service Line Analysis** section, double-click **Service Line Inpatient Period Comparison**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue
Current Year	Select the year for the current year of this report
Current Starting Month	Select the month to begin analysis for the current year time frame
Prior Year	Select the year for the current period of this report
Prior Year Starting Month	Select the month to begin analysis for the current year time frame
Number of Months to Compare	Select the number of months to compare between the two time frames
Primary Group By	Select the column to use as definition for each row, often Service Line 1.
Secondary Group by	Select the column to use as sub-definition for each row, for example Attending Provider, Discharge Status, etc.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

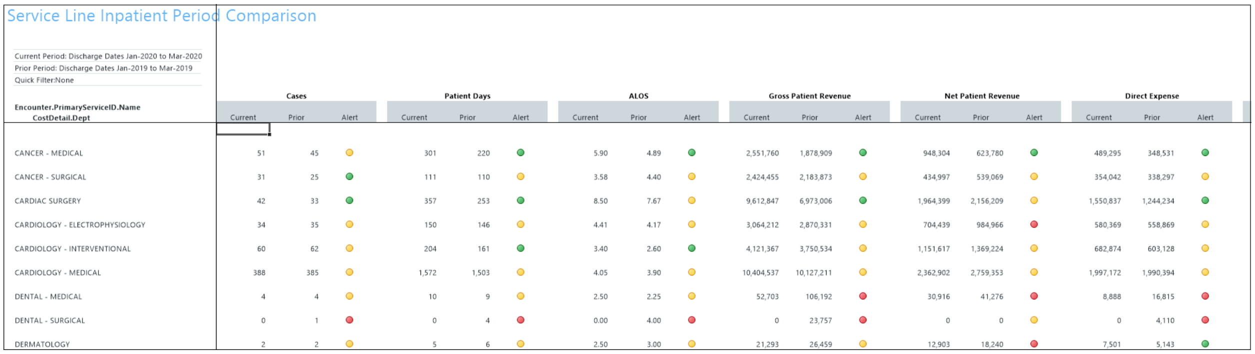
Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	• Service Line 1, Service Line 2, or Service Line 3. You can specify the name. • Data elements from the DSSBreakFields Table.
Measure Options	• Actual or Estimated Revenue. • Months, quarters, and years in Fiscal and Calendar Years depending on the selection.
Views	• Alerts – limits the columns in the report to the period data and the associated alert for each row. • Variances – suppress the alert and reflects the actual variance from period to period in percentages. • All – shows both values for each periods the variance and the alert.
Quick Filtering	Yes

Option	Description
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses combined GetData and Axiom Architecture

▶ Report example



Service Line Inpatient Period Comparison

Current Period: Discharge Dates Jan-2020 to Mar-2020
Prior Period: Discharge Dates Jan-2019 to Mar-2019
Quick Filter:None

Encounter.PrimaryServiceID.Name CostDetail.Dept	Cases			Patient Days			ALOS			Gross Patient Revenue			Net Patient Revenue			Direct Expense		
	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert	Current	Prior	Alert
CANCER - MEDICAL	51	45		301	220		5.90	4.89		2,551,760	1,878,909		948,304	623,780		489,295	348,531	
CANCER - SURGICAL	31	25		111	110		3.58	4.40		2,424,455	2,183,873		434,997	539,069		354,042	338,297	
CARDIAC SURGERY	42	33		357	253		8.50	7.67		9,612,847	6,973,006		1,964,399	2,156,209		1,550,837	1,244,234	
CARDIOLOGY - ELECTROPHYSIOLOGY	34	35		150	146		4.41	4.17		3,064,212	2,870,331		704,439	984,966		580,369	558,869	
CARDIOLOGY - INTERVENTIONAL	60	62		204	161		3.40	2.60		4,121,367	3,750,534		1,151,617	1,369,224		682,874	603,128	
CARDIOLOGY - MEDICAL	388	385		1,572	1,503		4.05	3.90		10,404,537	10,127,211		2,362,902	2,759,353		1,997,172	1,990,394	
DENTAL - MEDICAL	4	4		10	9		2.50	2.25		52,703	106,192		30,916	41,276		8,888	16,815	
DENTAL - SURGICAL	0	1		0	4		0.00	4.00		0	23,757		0	0		0	4,110	
DERMATOLOGY	2	2		5	6		2.50	3.00		21,293	26,459		12,903	18,240		7,501	5,143	

Service Line Margin Analysis report

This report provides the ability to evaluate performance across service lines by Inpatient, Outpatient or Combined. It is a report that provides an Inpatient, Outpatient or Combined View and also has totals and per case values. Expenses are classified as Variable or Fiexed, which allows you to evaluate the contribution margin by service line. Encounters can be selected by Admit or Discharge date and Net Revenue can be determined based on Actual or Estimated.

This report also provides an option to Limit the Encounters to specific patients based on other tables, e.g., certain procedures in the ENC_CPT or ENC_Proc tables, or for selected physicians in the ENC_ Provider table.

▶ Opening the report

In the DSS Reporting task pane, in the **Service Line Analysis** section, double-click **Service Line Margin Analysis**.

▶ Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue
Current From	Select the starting year and month of the report
Current To	Select the ending year and month of the report
Group By	Select the column to use as a header for each row, often Service Line 1, Service Line 2, etc.
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Service Line 1, Service Line 2, or Service Line 3. You can specify the name.
Measure Options	• Actual or Estimated Revenue • Months to aggregate data to specific months, quarters, and years in Fiscal and Calendar Years depending on the selection
Views	• Inpatient – Shows cases, patient days, ALOS and financial performance for Inpatient cases • Outpatient – Shows encounters and financial performance for Outpatient cases • Combined – shows both Inpatient and Outpatients datal
Quick Filtering	Yes
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses combined GetData and Axiom Architecture

Report example

Service Line Margin Analysis

Quick Filter:
None

Advanced Filter: None

	Inpatient						Inpatient						Inpatient		
Encounter.ServiceLine1	Cases	Days	ALOS	Patient Revenue	Actual Net Revenue	Percent of Charges	Variable Direct Expense	Variable Direct Margin	Fixed Direct Expense	Direct Margin	Indirect Expense	Net Margin	Net Revenue Per Case	Direct Margin Per Case	Net Margin Per Case
General Medicine	113	456	4.04	2,761,048	855,346	31.0%	304,047	551,299	296,658	254,640	340,617	(85,977)	7,569.43	2,253.45	(760.86)
General Medicine/Surgery	0	0	0.00	0	0	0.0%	0	0	0	0	0	0	0.00	0.00	0.00
General Surgery	66	385	5.83	4,248,223	1,399,049	32.9%	455,271	943,778	363,446	580,332	437,563	142,769	21,197.72	8,792.91	2,163.16
Gynecology	12	33	2.75	473,398	201,888	42.6%	37,376	164,512	38,207	126,305	51,344	74,961	16,824.02	10,525.40	6,246.74
Hematology	13	44	3.38	363,075	201,373	55.5%	76,097	125,276	27,284	97,992	36,611	61,381	15,490.22	7,537.82	4,721.60
Hepatobiliary Disease - Medical	18	82	4.56	573,634	172,797	30.1%	75,437	97,360	55,401	41,959	81,181	(39,222)	9,599.83	2,331.07	(2,178.99)
Hepatobiliary Disease - Surgical	20	83	4.15	1,098,500	369,186	33.6%	88,835	280,351	82,994	197,358	105,839	91,519	18,459.30	9,867.88	4,575.93
Infectious Disease	0	0	0.00	0	0	0.0%	0	0	0	0	0	0	0.00	0.00	0.00
Infectious Disease - Medical	392	1,711	4.36	11,027,146	3,472,481	31.5%	1,171,496	2,300,985	1,131,658	1,169,326	1,354,690	(185,364)	8,858.37	2,982.98	(472.87)
Infectious Disease - Surgical	40	340	8.50	3,514,538	1,446,933	41.2%	412,182	1,034,750	374,466	660,284	484,916	175,368	36,173.31	16,507.09	4,384.20
Neonate	164	923	5.63	2,431,479	1,437,236	59.1%	645,495	791,741	575,964	215,776	448,604	(232,827)	8,763.63	1,315.71	(1,419.68)
Neonatology	0	0	0.00	0	0	0.0%	0	0	0	0	0	0	0.00	0.00	0.00
Nephrology	45	182	4.04	1,072,375	315,842	29.5%	112,082	203,760	107,111	96,649	134,488	(37,839)	7,018.72	2,147.75	(840.88)
Neurology	98	407	4.15	3,059,566	882,996	28.9%	344,946	538,050	299,866	238,184	342,592	(104,408)	9,010.17	2,430.45	(1,065.39)
Neurosciences	0	0	0.00	0	0	0.0%	0	0	0	0	0	0	0.00	0.00	0.00
Neurosurgery	20	104	5.20	1,202,103	485,903	40.4%	118,382	367,521	93,979	273,542	115,567	157,975	24,295.14	13,677.12	7,898.75
Normal Newborn	254	511	2.01	1,008,181	520,620	51.6%	241,600	279,020	237,291	41,729	151,467	(109,739)	2,049.69	164.29	(432.04)
Obstetrics	407	1,152	2.83	7,721,041	3,066,235	39.7%	800,677	2,265,558	1,125,758	1,139,801	1,091,423	48,378	7,533.75	2,800.49	118.86
Ophthalmology	0	0	0.00	0	0	0.0%	0	0	0	0	0	0	0.00	0.00	0.00

Service Line Payor Inpatient Analysis report

This report provides a Service Line payor mix related report with multiple refresh variables. It is designed to provide a template for other payor analysis type of reporting. The report is useful in comparing payors and insurance plans to each other using key financial metrics and across time. The report compares data across a current and prior period, which is controlled by the user. It is designed to be used as an inpatient report, but can be modified to have alternative views or patient types.

This report is also a good example of how to control the sorting of a report. A number of options exist to determine who the top plans, payors or financial classes are by sort on cases, patient days, ALOS or other monetary measures such as Net Patient Revenue or Net Margin. The complete list of sorting options are listed below.

Opening the report

In the DSS Reporting task pane, in the **Service Line Analysis** section, double-click **Service Line Payor Inpatient Analysis**.

Refresh variables

The following table describes the variables you can configure for this report:

Option	Description
Option	Description
Admit or Discharge Date	Select whether to populate the report based on encounter admit or discharge date
Actual or Estimated Net Revenue	Select whether to show estimated or actual net revenue
Service Line Filter 1	Select the Service Line field to use in the report

Option	Description
Service Line Filter 2	Select the Service Line filter from for the report
Insurance Plan Description	Select from financial class description, payor description or insurance plan description or code
Current From	Select the starting year and month of the current period
Current To	Select the ending year and month of the current period
Prior From	Select the starting year and month of the comparison period
Prior To	Select the ending year and month of the comparison period
Sort By	Select the column in the report by which to sort the rows, options include: • Cases • Patient Days • ALOS • Gross Patient Revenue • Net Patient Revenue • Direct Expenses • Direct Margin • Indirect Expenses • Net Margin
Limit Encounters (optional)	Select the encounters in which to include in the report by using the Filter Wizard.

▶ Report options

The following table describes the options available for this report:

Option	Description
Group by Options (rows)	Financial Class, Payor or Insurance Plan. You can specify the level of the group by based on the Refresh Variables.
Measure Options	• Actual or Estimated Revenue. • Months to aggregate data to specific months, quarters, and years in Fiscal and Calendar Years depending on the selection. You control the From and To for both the Current and the Prior Periods.

Option	Description
Views	• Alerts – limits the columns in the report to the period data and the associated alert for each row. • • Variances – suppress the alert and reflects the actual variance from period to period in percentages.
Quick Filtering	Yes
Drills	No
Printable	Yes
Primary Source Table	Encounter
Design Notes	Report uses combined GetData and Axiom Architecture

Report example

Service Line Payor Inpati

Quick Filter:
None

Advanced Filter: None

ServiceLine1 - Cardiology

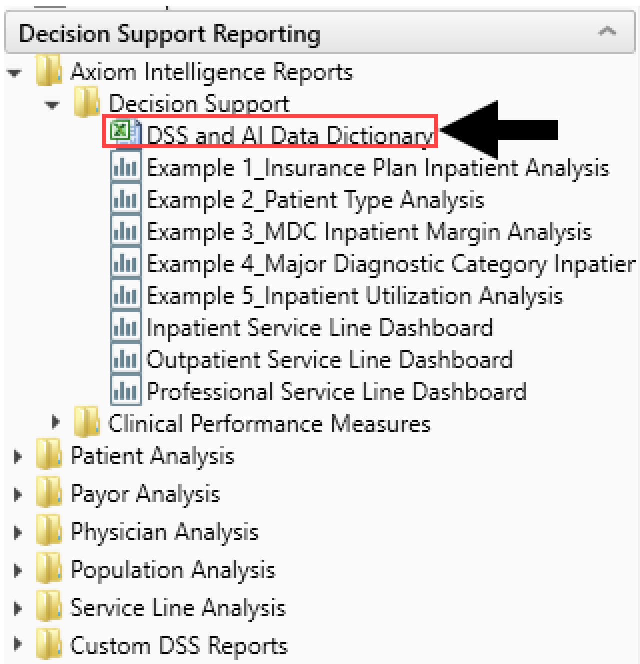
	Actual Net Patient Revenue				Direct Expense			
Financial Class	Current	Prior	Var	Pct	Current	Prior	Var	Pct
Medicare	2,678,414	2,332,142	346,272	14.8%	3,272,056	2,852,490	419,567	14.7%
Medicare Complete	1,351,773	1,062,964	288,809	27.2%	1,703,689	1,186,925	516,764	43.5%
UHC	2,241,850	2,061,087	180,763	8.8%	1,101,054	963,347	137,707	14.3%
Medicare Other HMO	488,908	364,897	124,011	34.0%	616,462	435,157	181,305	41.7%
Anthem	947,451	751,535	195,916	26.1%	473,959	354,854	119,105	33.6%
Medicaid HMO	76,889	88,326	(11,437)	-12.9%	279,174	236,768	42,406	17.9%
Anthem Preferred	414,526	438,350	(23,823)	-5.4%	223,832	208,023	15,809	7.6%
Commercial	99,365	135,964	(36,598)	-26.9%	126,432	105,434	20,998	19.9%

Running the Axiom Data Dictionary report

Use this report to view changes between the Axiom Database model and the Axiom Intelligence Analysis Services data model - including table or column name changes as well as denormalization of columns onto different tables.

To run the Axiom Data Dictionary report:

1. In the **DSS Admin** task pane of the Desktop Client, in the **Decision Support Reporting** section, click **Axiom Intelligence Reports > Decision Support**, and double-click **DSS and AI Data Dictionary**.



2. To filter the columns, click the arrow in the column header, select the check mark next to the items to include or exclude, and click **OK**.