

Release Notes

Axiom Rolling Forecasting
Version 2020.4

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple, which are slightly offset from each other.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2020.4 release of Axiom Rolling Forecasting. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

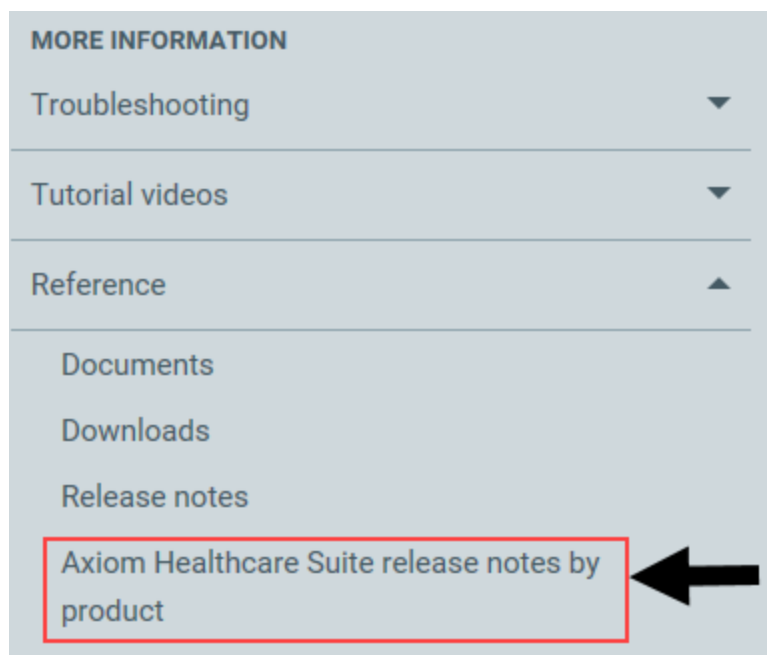
The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

TIP: Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Rolling Forecasting online help. On the help home page, simply click the Release Notes link at the top of the page.

► Accessing current and older release notes for Axiom Healthcare products

The online help for Axiom Healthcare products includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and navigate to the **More Information** section.



New features in 2020.4

Axiom Rolling Forecasting 2020.4 delivers expanded innovations across the entire Customer 360 platform, empowering you to get a single shared view of your customers and deliver more moments that matter.

► Navigation

The following updated feature applies to using the RF Admin and RF Fcst task panes.

Updated task panes

The RF Admin and RF Fcst task panes have been updated for easier access to Axiom Rolling Forecasting's functional areas. We have added new sections and removed or regrouped some features where needed to improve visibility and navigation, and with the needs of different user roles in mind.

For more information, in the online help, see "Updated task panes."

► Setup and data preparation

The following new or updated features apply to setting up your system and importing data.

Update Year Period utility

This utility, available in some other Axiom Healthcare products, is now also available in Axiom Rolling Forecasting. Use this utility to set your primary fiscal year and start month used throughout your Axiom Rolling Forecasting system, and to set the default employee hours and monthly work hours used in the Workday Periods driver.

For more information, in the online help, see "Update Year Period utility."

New System Settings utility

Use this utility to set a data scaling factor (formerly named Data conversion factor) and Current Year End for your forecasts. Additionally, now that Axiom Rolling Forecasting is monthly by default, you have the option to select Quarterly instead using this utility. This new utility replaces some of the driver settings that used to be in the Configuration tab of the Drivers setup utility.

For more information, in the online help, see "New System Settings utility."

New Planning Configuration utility

The Planning Configuration utility provides administrators easy access to plan file settings that govern the current fiscal period, visibility of tabs and columns in plan files, and Workday Period defaults. This configuration utility replaces some of the settings that were located in the Configuration tab of the Drivers utility in Axiom Rolling Forecasting systems prior to 2020.4.

For more information, in the online help, see "New Planning Configuration utility."

Simplified, faster data summarization

Bringing summarized historical data (actuals) into your system is a critical step toward creating your plan files. Now that Axiom Rolling Forecasting uses a monthly model as its base, when information is summarized and rolled into RF Codes and RF Groups, it is put directly into the RF_Forecast[year] table using SQL processing. This provides a more efficient, faster process.

For more information, in the online help, see “Simplified, faster data summarization.”

Drivers

The following new or updated features apply to managing drivers.

Redesigned Drivers utility

Each rolling forecast plan file includes a set of associated driver files with configuration settings and assumptions referenced by other files associated with it. The Drivers utility, renamed Planning Assumptions, has been redesigned for improved usability. The Configuration, Workday Periods, and Visibility drivers, which typically are set annually, have been put into a new, separate utility named Planning Configuration. Settings adjusted more frequently have been left in the Planning Assumptions utility.

For more information, in the online help, see “Redesigned Drivers utility.”

Updated Input Monthly Statistics utility

The RF Monthly Statistics Update utility allows you to manually enter rolling forecasting statistics that are not always available from the summarization rollout of the Departments and Accounts in the ACTYYYY financial tables.

For more information, in the online help, see “Updated Input Monthly Statistics utility.”

Dimensions

The following new or updated feature applies to using Dimensions in Axiom Rolling Forecasting.

Updated dimensions

Dimensions are the key index fields for the tables in the Axiom Rolling Forecasting database. All data in the system is associated with one or more dimensions. New dimension tables have been added and existing tables have been updated with new data columns to support the new features and functionality in this release.

For more information, in the online help, see “New and updated dimensions.”

Plan Files

The following new or updated features apply to Axiom Rolling Forecasting plan files.

Overview of plan file changes

Plan files are now associated with scenarios, which enables you to create many different possible forecasts using one set of plan files for all. Plan files are also now virtual, which means they are no longer static copies in the database. Instead, they are created upon open from the main plan file template and the applied scenario.

For more information, in the online help, see “Overview of plan file changes.”

Updates to the plan file Summary tab

This plan file worksheet compares historical data and forecast projections for each month and quarter, presented in monthly or quarterly columns (monthly includes quarterly), and indicates whether each month’s or quarter’s figures represent a favorable or unfavorable change from previous months/quarters. Use the Summary sheet to review trending patterns to identify anomalies in forecast values that you may not see in the more detailed Forecast tab.

For more information, in the online help, see “Updates to the plan file Summary tab.”

Scenarios

New Scenario Manager utility

Scenarios enable you to produce multiple forecasts while maintaining one set of plan files. Starting with the 2020.4 release, Axiom Rolling Forecasting provides a better way to create and manage scenarios. The new Scenario Manager is an easy-to-access utility in which you can create, copy, modify, reprocess, and delete scenarios that you use to model forecasts. The Scenario Manager also provides access to a report that allows you to compare scenario forecasts.

For more information, in the online help, see “New Scenario Manager utility.”

Reports

The following new or updated features apply to reports and reporting dashboards.

New Manager Dashboard simplifies reporting

The Manager Dashboard provides a single place for managers, executives, analysts and other users to view forecast results for the entire organization and segments of the organization. High-level data is presented in easy-to-digest formats with the ability to drill down to data for a specific RF Group.

For more information, in the online help, see “New Manager Dashboard simplifies reporting.”

Manager Dashboard Configuration Utility

The Dashboard Configuration Utility allows administrators to control access to the tabs in the Manager Dashboard based on user role, and to set certain default data display options for each subtab.

For more information, in the online help, see “Manager Dashboard Configuration Utility.”

New report compares multiple scenarios

Scenarios enable you to produce multiple forecasts while maintaining one set of plan files. The Multi Scenario Ratio Comparison Report enables you to view a comparison of selected scenario forecasts for one or more RF Groups.

For more information, in the online help, see “New report compares multiple scenarios.”

► Calculators

The following new or updated features apply to calculators.

RF Deductions Setup utility

Now administrators can configure which payor categories and plan groups to include or exclude in the Deductions Calculator using a separate utility. The Deductions Model Configuration Utility allows for more precise control down to the RF Plan Group level, and also lets you set up payors using a dimension rather than adding payor codes manually.

For more information, in the online help, see “RF Deductions Setup utility.”

► Security

The following new or updated features apply to user access to features.

Driver Security Setup Utility

The Axiom Rolling Forecasting Drivers Security Setup utility allows you to manage user access to the global drivers in the Drivers utility for RF Admins and RF Analysts who do not have the RF Global Driver Management role.

For more information, in the online help, see “Driver Security Setup Utility.”

What to know before upgrading

IMPORTANT: You must apply the Axiom 2020.4 upgrade before applying any 2020.4 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2020.4 before the first product upgrade. Refer to the **Axiom 2020.4 Release Notes** and **Axiom Healthcare Suite 2020.4 Release Notes** for considerations before upgrading.

When upgrading to the 2020.4 version of Axiom Rolling Forecasting, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, and remediated defects.
- Syntellis delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

Preparing and scheduling upgrades

Summary of the upgrade process:

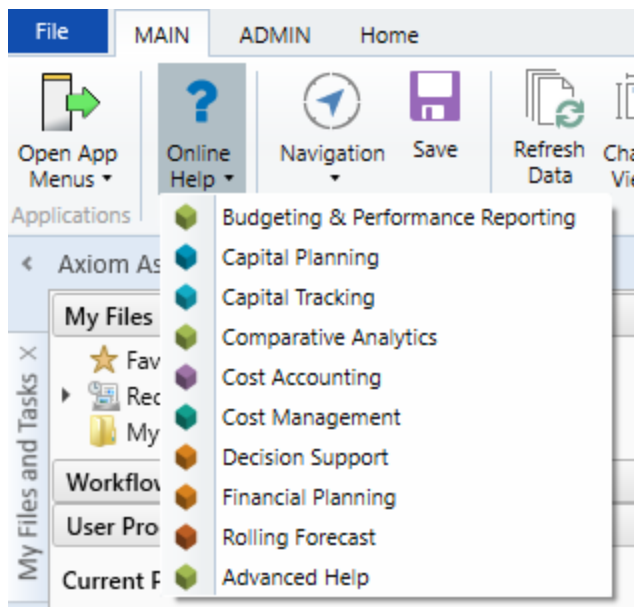
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a [support ticket](#) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
 - Desired Axiom platform version.
 - Desired Axiom for Healthcare product and version.
 - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Getting help and training

Syntellis provides world-class resources at your fingertips directly within the Axiom system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Windows and Excel Clients** – From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

NOTE: The online help will only open for products you are licensed to use.



- **Form/Web pages** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and/or instructions specifically related to the screen you are using. You can access this information by clicking the question mark in the upper right corner of the screen. To access the full Axiom Help system, click **Open Help** at the top of the contextual help dialog.



► Syntellis Central

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Rolling Forecasting platform and suite of products. Using Syntellis Central, you can:

- Search help across all Axiom products
- Access tips, tricks, and best practices in our knowledge base

- Find training and certification content including on-demand, video, webinars, labs, and instructor-led courses
- Submit a support issue, find suggested content, and manage any outstanding issues directly with us
- Review open Software Service project status and details

Issues fixed in 2020.4

No client-facing issues were addressed in 2020.4, released on December 14, 2020.

Issues fixed in 2020.4.3

The following table lists the resolutions for issues addressed in 2020.4.3, released on April 12, 2021:

Excel system only

Issue	Description
PFB-09516 - RF 2.0 Target Variance AQ5 limiting Key Stats [87248]	<p>Summary: In the Target Variance report, the filter in Axiom Query 5 is pulling key statistics from only certain RF Codes and is also defaulting to using Calendar Days for most RF Groups.</p> <p>Resolution: Corrected by adjusting the Axiom Query 5 data filter to use RFCode.Type IN ('KeyStat') instead of static lists.</p>
Consolidated Summary-refresh variables default on open should look to the RF_Forecast table and not RF_driver table [87467]	<p>Summary: In the Consolidated Summary report, when the refresh variable is opened and the default is used, it could result in an error if the default period was not a valid period in the Forecast table.</p> <p>Resolution: Corrected by updating the formula in the refresh variable so that it correctly references the RF_Config.PrevPeriod as a default selection.</p>
PFB-09521 - OTA Cost per Unit Calculation [88147]	<p>Summary: In the plan file Forecast tab, when a user adds a one-time adjustment in the Volume section, the adjustment is not included in the Current OTA Cost per unit line. The calculation method formula is not including the adjustment when it divides by the key statistic amount.</p> <p>Resolution: Corrected by updating the Expense and Salary calculation method formulas to include the volume OTA when dividing by key statistic.</p>
PFB-09523 - Fixed Salary not Dynamic with Fixed FTE OTA Adjustments [88173]	<p>Summary: Two issues:</p> <ol style="list-style-type: none">1. The OTA Salary Adjustment row heading does not indicate that this is a fixed amount.2. In the plan file Forecast tab, when a user enters a Fixed FTE One Time Adjustment in the Salaries block, the adjusted amount is not being calculated into the "Fixed Salaries including OTA" row. <p>Resolution: Corrected the first issue by relabeling the row header to read "Fixed OTA Salary Adjustment." Corrected the second issue by updating the forecast column formulas to include the One Time Adjustment in the calculation.</p>

Issues fixed in 2020.4.4

The following table lists the resolutions for issues addressed in 2020.4.4, released on May 10, 2021:

Excel system only

Issue	Description
PFB-09522 - FTE OTA Impact on Benefits (Based upon Rate per FTE or % Salaries) [92186]	<p>Summary: In the Forecast tab of the plan file template, data for One Time Adjustments (OTAs) for FTEs and for Salaries is not being automatically included in the Benefits blocks that are based on either FTEs or Salaries. Additionally, because of the way they are handled, Fixed OTA Salary adjustments and Fixed OTA FTE adjustments are not reflected in salaries totals while Variable adjustments are.</p> <p>Resolution: Corrected by adding calculations to the affected rows so that they find the Salary OTAs from the Salary calculation method. The subsequent calculations reference the Total, including the Salary OTA line. A similar change was made for the FTE OTAs.</p>

Issues fixed in 2020.4.5

The following table lists the resolutions for issues addressed in 2020.4.5, released on June 21, 2021:

Excel system only

Issue	Description
RF Admins and Analysts are unable to save anything using the deductions calculator [95787]	<p>Summary: In the Deductions Calculator, users with the RF Admin and RF Analyst roles are unable to save changes made in the calculator despite having read and write access. Permissions to the associated data tables set at the subsystem level are preventing access.</p> <p>Resolution: Corrected by changing the Rolling Forecasting subsystem permissions in the Security Manager utility to allow for full read and write access.</p>