

## **Release Notes**

Axiom Healthcare Suite  
Version 2020.4

The logo for Axiom, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border that has a slight 3D effect with a darker blue shadow on the right side.

**AXIOM**

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# About the release notes

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

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

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

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

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

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

**IMPORTANT:** Prior to upgrading, make sure to review the **Axiom 2020.4 Release Notes** as well as the release notes for each product licensed by your organization.

# New features summary

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

- [Axiom Budgeting and Performance Reporting](#)
- [Axiom Capital Planning and Capital Tracking](#)
- [Axiom Capital Tracking](#)
- [Axiom Clinical Analytics](#)
- [Axiom Comparative Analytics](#)
- [Axiom Contract Management](#)
- [Axiom Enterprise Decision Support](#)
- [Axiom Enterprise Decision Support](#)
- [Axiom Financial Planning](#)
- [Axiom Rolling Forecasting](#)
- [Axiom Strategy Management](#)

# Axiom Budgeting and Performance Reporting

While no new functionality has been added or enhanced, the 2020.4 release does deliver fixes to previous issues. For more information, see the [Axiom Budgeting and Performance Reporting 2020.4 Release Notes](#).

# Axiom Capital Planning and Capital Tracking

For more information, see the [Axiom Capital Planning 2020.4 Release Notes](#) and [Axiom Capital Tracking 2020.4 Release Notes](#).

Enhancements in this release include:

## Use Excel to enter financial input values into Threshold projects

Instead of using the Threshold project web form, you can enter financial input and balance sheet values using the Excel Pro Forma utility. This gives you all of the functionality of Excel for greater control when auditing and viewing the formulas used to calculate project budget values.

## Use Excel to enter financial input values into Threshold (Pro Forma) projects

### ► Why use this feature

Instead of using the Threshold (Pro Forma) project web form, you can enter financial input and balance sheet values using the Excel Pro Forma utility. This gives you all of the functionality of Excel for greater control when auditing and viewing the formulas used to calculate project budget values.

<b>Hemodialysis Unit Blood Pump</b>									
Project ID: CP_Pending_16   CAPREQ: 16   Sheet: 1600 - Financial Inputs   Project Type: Dialysis   Department: 8 (Test Dept)   Status: Pending									
		2025	2026	2027	2028	2029	2030	2031	2032
<b>Capital Additions</b>									
Depreciation Methodology	1/2 Year Depreciation								
<b>Equipment</b>	Useful Life								
test	11								
Additions	2,000	200	20	2	0	0	0	0	0
Additions Adjustments									
Capitalization	2,000	200	20	2	0	0	0	0	0
Work in Progress	0	0	0	0	0	0	0	0	0
Depreciation - New	91	100	10	1	0	0	0	0	0
Depreciation - Drop Off	0	0	0	0	0	0	0	0	0
<b>Total Depreciation</b>	91	191	201	202	202	202	202	202	202
<b>Moveable Equipment</b>	Useful Life								
This is a new description test	160								
Additions	0	0	0	0	0	0	0	0	0
Additions Adjustments									
Capitalization	0	0	0	0	0	0	0	0	0
Work in Progress	0	0	0	0	0	0	0	0	0
Depreciation - New	0	0	0	0	0	0	0	0	0
Depreciation - Drop Off	0	0	0	0	0	0	0	0	0
<b>Total Depreciation</b>	0	0	0	0	0	0	0	0	0

► How this feature works

**What:** The Excel Pro Forma utility allows you to enter financial and balance sheet data using Excel functionality quickly and easily.

**Systems:** Web only

**Where:** A link to the utility displays in the Threshold (Pro Forma) project template.

**NOTE:** This feature will not display if a user is assigned a role profile that has read-only permission to plan files or if someone else has the plan file open and has Save Lock enabled.

**Who:** Users assigned the Capital Planning/Tracking Administrator or Capital Planning/Tracking User role profile can use this feature.

**How:** In the **Financial > Financial Input** tab of the plan file, click **Enter inputs using Excel**. Enter values in the Financial and the Balance Sheet tabs of the worksheet.

The screenshot shows the 'Capital Planning' interface. At the top, there's a header with 'Capital Planning' and a navigation bar with icons. Below the header, project details are displayed: 'Project ID CP\_Pending\_16 | CAPREQ 16 | Project Type : Dialysis | Department: 8 (Test Dept) | Status: Pending | Attachments: 0'. The main title is 'Hemodialysis Unit Blood Pump'. Below this, there's a tabbed interface with 'FINANCIAL' selected. Under the 'FINANCIAL' tab, there are sub-tabs: 'Financial Inputs', 'nextPhase', 'Balance Sheet', 'Financial Statements', and 'Discount Rate'. The 'Financial Inputs' sub-tab is active, showing a list of categories: 'Capital Additions', 'Funding Sources', 'Volume', 'Gross Charges', 'Contractual Allowances', 'Other Operating Revenue', and 'Salaries & FTEs'. The 'Enter inputs using Excel' link is highlighted with a red box and a black arrow pointing to it. Below this, the 'Capital Additions' section is visible, showing a table with columns for years 2025, 2026, 2027, 2028, and 2029.

► Where to find more information

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

- "Entering financial input values in Threshold (Pro Forma) projects using Excel"



# Axiom Clinical Analytics

No new features, enhancements, or fixes were addressed in this release.

# Axiom Comparative Analytics

No new features, enhancements, or fixes were addressed in this release.

# Axiom Contract Management

Axiom Contract Management 2020.4 delivers an updated user interface for all contract levels, with expanded functionality that enables you to better model and manage contracts. These and other enhancements are described as follows:

## Updated UI improves visibility and navigation for contract pages

The new UI provides a cleaner layout for easier viewing of, and navigating to, contract levels and their associated settings. For example, each contract level now has its own page, providing a larger workspace, and the process for navigating from one contract level to another is consistent. Other enhancements include icons and other indicators that make it easy to tell at a glance whether a contract level has additional information such as attributes or attached documents.

## New search functionality added to contract modeling

Along with improved navigation, the updated UI for contract pages and dialogs provides new sort and filter functionality for contract table grids, and search functionality for drop-down dialog fields that have numerous entries.

## Main menu additions

Axiom Contract Management's main menu header has been enhanced with some new links that provide quick access to context help pages, software version and copyright information, a queued tasks indicator, and logout.

## Manage clause and term descriptions

This feature has been updated with additional functionality and moved to the Admin menu in the main menu header. From the Clause/Term Descriptions page, administrators can search for, add, edit, and remove descriptions used for clauses and terms.

## October 15, 2020 Quarterly Release

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

## Updated UI improves visibility and navigation for contract pages

### ► Why use this feature

The new UI provides a cleaner layout for easier viewing of, and navigating to, contract levels and their associated settings. For example, each contract level now has its own page, providing a larger workspace, and the process for navigating from one contract level to another is consistent. Other enhancements include icons and other indicators that make it easy to tell at a glance whether a contract level has additional information such as attributes or attached documents.

### ► How this feature works

**What:** Navigating is more straightforward, with a larger onscreen viewing area and larger text. Instead of cramped tables, contract levels are laid out grid-style with adjustable-width columns. Other navigation improvements include:

- Contracts, versions, provisions, clauses and terms each have their own page.
- Hidden-until-needed icons at the end of contract level rows keep the look clean and provide easy access to editing features.
- Breadcrumbs at the top of contract pages make it easier to see your location as you navigate through contract levels.

**Where:** These changes apply to all contract pages.

**Who:** Administrators have full access to contract pages for creating, editing, copying, and deleting contracts. Other users have read-only access.

#### How:

1. On the **Contracts** page, navigate to the desired simulation and contract level. To navigate to the next level, place your cursor to the right of the caret ( ) to view the sub level link, and then click the link (see image in step 2).

**NOTE:** As you navigate, breadcrumbs display at the top of the page. You can click the breadcrumbs to jump back to any point in the path.

2. To access hidden icons, hover your cursor over the row to view the icons, and then click the desired icon.

+ Add a New Version ➡						
Version	Start Date	Expiration Date	Calculation Date	Ins. Plan ...	Attached ...	Attributes
1 > <a href="#">Go to Provisions</a>	1/1/2008	2/2/2008	Discharge	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 >	7/1/2009	12/31/2017	Discharge	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### ► Where to find more information

The following topic in the online help has been added or updated with information and instructions for using this feature:

- “Navigating in contracts”

## New search functionality added to contract modeling

### ► Why use this feature

Along with improved navigation, the updated UI for contract pages and dialogs provides new sort and filter functionality for contract table grids, and search functionality for some dialog fields.




### ► How this feature works

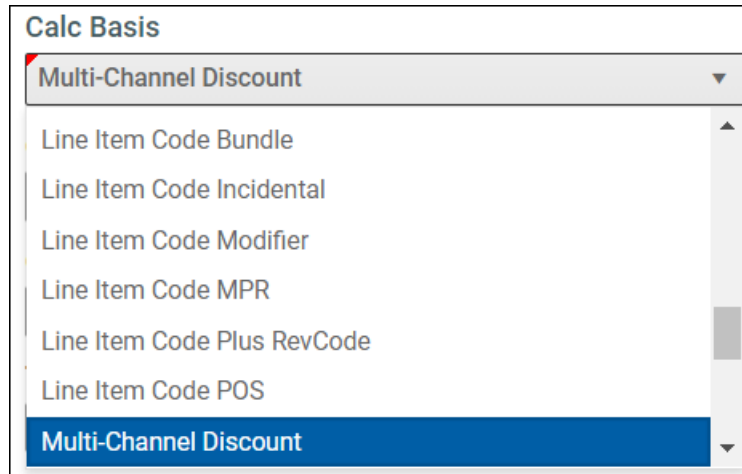
**What:** Many contract grid columns can now be sorted and filtered. In contract dialogs, if a drop-down field has a long list of entries, you can search the list.

**Where:** These changes apply to all contract pages. Drop-down search capability applies to certain drop-down selection menus in various contract-level and sublevel dialogs.

**Who:** Only Axiom Contract administrators have access to the full functionality of these features. Other users may have read-only access.

#### **How:**

1. To sort a column, click the head. A sort up () or sort down arrow () displays in the column head if the column can be sorted.
2. To filter a column:
  - a. In the column head, click the filter icon ()
  - b. In the filter dialog, from the first drop-down, select the parameter to use, and then type the word into the field provided. If desired, add another filter parameter.
  - c. Click **Filter**. The list filters to display results that meet the filter parameters.
  - d. To clear the filter, click the icon again and then, in the filter dialog, click **Clear**.
3. To search a long list of entries in a dialog drop-down field:
  - a. Click the drop-down, and then start typing a search word or letter.
  - b. The list changes to begin with the search word or letter. A small red triangle displays at the upper left corner of the field to show that the entry has changed. Select the desired option from the list.



## Main menu header additions

### ► Why use this feature

Axiom Contract Management's main menu header has been enhanced with some new links that provide quick access to context help pages, software version and copyright information, a queued tasks indicator, and logout.

### ► How this feature works

**What:** New and improved functionality has been added to the main menu header in Axiom Contract Management:

- **Help > About** – Opens a window providing version, copyright, and legal information on your installed Contract Management software.
- **Logout** – Click to log out of your Contract Management system. This link is located to the right of your username.
- **Queued Tasks** – Displays the number of tasks you have in the Scheduler queue, along with priority, task type, queued by, and total number of claims.
- **Contextual Help link icon (?)** – Located at the right end of the main menu bar, this icon links to help topics specific to the page you are on, when context help is available for the page.

**Where:** This change applies to all Axiom Contract Management pages that have the main menu header.

**Who:** All Axiom Contract Management users have access to the main menu header.

**How:** Open Axiom Contract Management, and then view the main header at the top of the page:

- To access the software version and copyright information, from the main menu, select **Help > About Contract Management**.

- To log out of the system, on the right side of the header after your username, click **Logout**.
- To view the number and type of your queued tasks, on the right side of the header, **Queued Tasks: #** displays the number of tasks you have in the queue. To view a drop-down list of your queued tasks, hover your cursor over the **Queued Tasks** text.
- To view the online help topic for the specific page you are on, on the far-right side of the main menu header, click the Context Help icon (?)



## Manage clause and term descriptions

### ► Why use this feature

This feature has been updated with additional functionality and moved from the Clause/Terms page to the Admin menu in the main menu header. From the Clause/Term Descriptions page, administrators can search for, add, edit, and remove descriptions used for clauses and terms.

### ► How this feature works

**What:** The description is the first criterion that you need to define for a clause or term. Some standardized descriptions are included with Axiom Contract Management, but you can add, edit, and delete descriptions at any time using this feature.

**Where:** This change applies to the Admin menu in the main menu header, and to the new Clause/Term Descriptions pages.

**Who:** Only Axiom Contract Management administrators can manage clause and term descriptions.

#### **How:**

1. In the main menu header, from the **Admin** menu, select **Manage Clause/Term Descriptions**.
2. On the **Create New Clause/Term Descriptions** page, in the **Description** field, type the description.
3. Do one of the following:
  - To save and return to the main Clause/Term Descriptions page, click **Save**, and then, in the upper right corner of the page, click **Back to Descriptions**. The new description is added to the list.

Launch Page

Contracts

Claims

Import Data

Reports

Admin

Help

Logout

Queued Tasks: 0

?

Clause/Term Descriptions

Create New Record

Description	
BRACHYTHERAPY	
BRACHYTHERAPY USING RCC	
BURN UNIT	
CARDIAC CATH	
CARDIAC CATH DOUBLE	
CARDIAC CATH SINGLE	
CARDIAC SERVICES	
CARDIOLOGY	
CATARACT EXTRACTION	
CHEMO	

41 - 50 of 409 items

- To save and close the page, click **Save and Close**.

### ► Where to find more information

The following topic in the online help has been added or updated with information and instructions for using this feature:

- “Managing clause and term descriptions”

## October 2020 Quarterly Release

### ► Why use this feature

Each quarter, 3M provides an update to the 3M GPS Grouper software integrated into Axiom Contract Management. This update includes grouping, pricing, and regulatory updates to the APC and State-specific eAPG groupers. These updates are necessary for clients to get the latest software and regulatory changes for accurately grouping and pricing APC and eAPG claims.

### ► How this feature works

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

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

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



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

# Axiom Enterprise Decision Support

No new features, enhancements, or fixes were addressed in this release.

# Axiom Financial Planning

While no new functionality has been added or enhanced in Axiom Financial Planning 2020.4, it does deliver fixes to previous issues.

For more information, see the [Axiom Financial Planning 2020.4 Release Notes](#).

# Axiom Rolling Forecasting

Axiom Rolling Forecasting 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.

For more information, see the [Axiom Rolling Forecasting 2020.4 Release Notes](#).

## ► 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.

## ► 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.

### **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.

### **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.

### **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.

## ► 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.

### **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 rollup of the Departments and Accounts in the ACTYYYY financial tables.

## ► 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.

## ► 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.

### **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.

## ► 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.

## ► 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.

### **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.

### **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.

## ► 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.

## ► 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.

# Axiom Strategy Management

No new features, enhancements, or fixes were addressed in this release.



# What to know before upgrading

**IMPORTANT:** Refer to the respective release notes of each Axiom Healthcare Suite product licensed by your organization for product-specific considerations before upgrading. **You must apply the Axiom 2020.4 upgrade before applying any 2020.4 product upgrades.** The Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2020.4 before the first product upgrade.

When upgrading to Axiom Healthcare Suite 2020.4, keep in mind the following:

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

# Upgrade considerations

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

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

Product	Considerations
Axiom Strategy Management	There are no required upgrade considerations with this release.
Axiom Treasury Cash Management	This is a new product install. Contact your Syntellis representative for more information.

# Preparing for 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.

# Issues fixed in 2020.4.1

No client-facing issues were addressed in this release. Consult the release notes for each of the Axiom Healthcare products for a list of addressed issues.