

# **Health Plan Budgeting Guide**

Axiom Budgeting

Version 2021.1

**AXIOM**

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# Setting up and managing health plan budgeting

With the Health Plan product for Axiom Budgeting, your organization can budget health plan and insurance costs by calculating revenues and expenses based on Membership Per Member Per Month (PMPM) calculations. You can then use this information to determine the profitability of each health plan and/or insurance product.

Complete the following steps to configure and budget health plans and insurance products in your organization:

**NOTE:** As you add or retire plans each year, you will need to complete these steps.

1. [Update the LOCATION, INSCODE, and DATATYPE dimension tables.](#)
2. Configure user access and the data filter in the **HealthPlan** column of the [Budget Security Update utility](#).
3. Add or edit plans and the corresponding actual account data into the [ACT\\_HP\\_20XX table](#).
4. [Configure the Membership Enrollment Trend driver.](#)
5. [Configure the Membership Per Member Per Month \(PMPM\) driver.](#)
6. Open the [HealthPlan Operations utility](#).

## Updating dimensions for health plan budgeting

To implement health plan budgeting in your organization, start by making the following changes to the following dimensions:

### ► LOCATION

The LOCATION dimension contains all of the physical locations that have been billed within the organization and is used for monthly reporting and provider-level budgeting. This information is also used for the Axiom Budgeting Health Plan product.

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

Column	Description
LOCATION	The LOCATION used in Axiom Budgeting. This must be an alpha code (i.e. WestClinic). Default should be used as the Location code if this dimension is not being used.
Description	Identifies the LOCATION description to be used for budgeting and reporting.
KHABgtCode	Used for combining accounts together during budget plan file creation. If there are historical values for two accounts that you want to budget as one combined account, list the surviving account number on both lines. If not combining accounts, this value should match value in the LOCATION column. The default value is NA.
KHAInt	Currently no needed for health plan budgeting so the default is NA.

## ► INSCODE

The INSCODE dimension stores information for the insurance/health product plans offered by your organization. This information is used to manage and configure the plans included in related driver tables and in the Health Plan Operations utility. Similar to other dimension tables like ACCT, there are column structures to control what insurance plans will be allowed to interface to the HealthPlan tab and at what level of rollup, if any.

**IMPORTANT:** Use caution when using multi-layer mapping of the plan codes.

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

Column	Description
INSCODE	The short name or code your organization uses to represent the insurance/health plan product.
Description	The long description of the insurance/health plan.
InsCode.BgtCode	The code used to group the insurance/health plan products together. For example, grouping all commercial or FFS plans.

Column	Description
KHAIInt	<p>Specify whether to include the insurance product in the list of available plans in the <a href="#">Health Plan Operations utility</a>. Enter one of the following:</p> <p><b>NOTE:</b> The system will allow you to enter any text into this field, however, it only recognizes HealthPlan as the way to add the plan to the interface</p> <ul style="list-style-type: none"> <li>• <b>HealthPlan</b> - Enter this option to include the product in the list of available plans.</li> <li>• <b>NA</b> - Enter this option to remove the product from the list of available plans.</li> </ul> <p><b>NOTE:</b> The system will retain historical information for plans removed from the list.</p>

## ► DATATYPE

The DATATYPE dimension for health plan budgeting purposes is used to load configurable categories for revenues and expenses. Use the Axiom provided default for members. Data imported or entered into the data tables will need to include a valid data type from this table.

**NOTE:** Version 1 DATATYPE dimension permits DATATYPE.DataType='HP\_Members' and DATATYPE.BudgetType IN ('HP\_Expense','HP\_Revenue') - supplied by default data (i.e. one HP\_Members DataType and multiple versions of Revenue and Expense).

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

Column	Description
DATATYPE	<p>The DATATYPE used in Axiom Budgeting and Performance Reporting. This must be an alpha code.</p> <ul style="list-style-type: none"> <li>• <b>HP_Members</b> - This is a required default for members data.</li> <li>• <b>HP_Revenue</b> - This is a recommended default for revenue, but you may use other codes. For example, other types of revenue may be desired to load and recognized as a separate revenue line item. (i.e. HP_Revenue1, HP_Revenue2).</li> <li>• <b>HP_Revenue</b> - This is a recommended default for revenue, but you may use other codes. For example, other types of revenue may be desired to load and recognized as a separate revenue line item. (i.e. HP_Revenue1, HP_Revenue2).</li> </ul>
Description	Identifies the description to be use for budgeting and reporting.

Column	Description
BudgetType	<p>Used in related driver tables and in the <a href="#">Health Plan Operations utility</a>. Valid codes will typically be what was used in the Datatype column, however these can be used as a mapping code similar to how KHABgtCode is used in other dimensions. For example, if there are codes used in DataType for Revenue1, Revenue2, and so on but the desired configuration is to map Revenue2 to Revenue1, this column would be used for the mapping.</p> <ul style="list-style-type: none"> <li>• <b>HP_Members</b> - This is a required default for members data.</li> <li>• <b>HP_Revenue</b> - This is a recommended default for revenue, but you may use other codes. For example, other types of revenue may be desired to load and recognized as a separate revenue line item. (i.e. HP_Revenue1, HP_Revenue2).</li> <li>• <b>HP_DrugME</b> - This is a recommended default for Drug Medical Expense, but you may use other codes.</li> <li>• <b>HP_HospME</b> - This is a recommended default for Hospital Medical Expense, but you may use other codes.</li> <li>• <b>HP_OutPTME</b> - This is a recommended default for OutPatient Medical Expense, but you may use other codes.</li> </ul>
KHAIInt	<p>Used to identify which Datatype categories to use in the related driver tables and in the <a href="#">Health Plan Operations utility</a>. Valid entries include the following:</p> <ul style="list-style-type: none"> <li>• HealthPlan - Use this code to include the data type.</li> <li>• NA - Use this code to exclude the data type.</li> </ul> <p><b>NOTE:</b> You may have data you want to record in the actual tables but not necessarily include them for planning purposes.</p>

## Managing the ACT\_HP\_20XX data table

### ► Overview

The ACT\_HP\_20XX table stores the actual data used by the [HealthPlan Operations utility](#) to budget for your organization's health and insurance plans across entities and departments. This information is used primarily by the [Membership Per Member Per Month \(PMPM\)](#) driver to calculate actual and budget amounts by period by the number of members in a particular period. The table includes the following information for each plan (INSCODE column):

- Department (DEPT)
- Location (LOCATION)
- Data type (DATATYPE) (includes membership numbers and revenue/expense streams)

- Values for periods 1-12 (P1-P12)

**NOTE:** The following columns are reserved for future use at this time: GROUP, ACCT, NYBKHA, SaveCustom, and SaveTagDocID

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
		Data Type	String	Integer	String	String	String		Integer	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Integer	String	Integer	
		String Length	25	25	25	50																100		
		Insurance Code key	Department	Location	Data Type	Group			Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	Fiscal Period	NYBKHA	Custom save identifier	Required to use zero on save functionality
		Account	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
		INSCODE	DEPT	LOCATION	DATATYPE	GROUP	ACCT	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	NYBKHA	SaveCustom	SaveTagDocID		
9		AARP	27200 Hosp	HP_DrugME	NA		0	3801971.25	3839990.96	3878390.87	3917174.78	3956346.53	3995909.99	4035869.09	4076227.78	5299096.12	5352087.08	5405075.55	5455664.03	0	0	0		
10		AARP	27200 Hosp	HP_HospME	NA		0	10561031.25	10666641.56	10773307.98	10881041.06	10989851.47	11099749.98	11210747.48	11322854.96	14719711.45	1486608.56	15015577.65	15165733.42	0	0	0		
11		AARP	27200 Hosp	HP_Members	NA		0	84488.25	85333.13	86186.46	87048.33	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0	0	0		
12		AARP	27200 Hosp	HP_OutPMTIME	NA		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
13		AARP	27200 Hosp	HP_Revenue	NA		0	24924033.75	25173274.09	25425066.83	25679256.90	25936049.47	26195409.94	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791330.88	0	0	0		
14		AARP	27200 Office	HP_DrugME	NA		0	2957088.75	2986659.64	3016526.23	3046691.50	3077158.41	3107930.00	3139009.30	3170399.39	4121519.20	4162734.40	4204361.74	4246405.36	0	0	0		
15		AARP	27200 Office	HP_HospME	NA		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
16		AARP	27200 Office	HP_Members	NA		0	84488.25	85333.13	86186.46	87048.33	87918.81	88798.00	89685.98	90582.84	117757.69	118935.27	120124.62	121325.87	0	0	0	0	
17		AARP	27200 Office	HP_OutPMTIME	NA		0	422441.50	4266656.63	4309323.19	4352416.42	4399490.59	4448989.99	44984298.99	4529511.98	5887884.58	5946763.42	6006231.06	6066293.37	0	0	0	0	
18		AARP	27200 Office	HP_Revenue	NA		0	24924033.75	25173274.09	25425066.83	25679256.90	25936049.47	26195409.94	26457364.06	26721937.70	34738519.01	35085904.20	35436763.24	35791330.88	0	0	0	0	
19		Anthem	101010 NorthClinic	HP_DrugME	NA		0	512050.00	517170.50	522342.21	527565.63	532841.28	538169.70	543551.39	548986.91	554476.78	560021.54	565621.76	571277.98	0	0	0	0	
20		Anthem	101010 NorthClinic	HP_HospME	NA		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
21		Anthem	101010 NorthClinic	HP_Members	NA		0	14630.00	14776.30	14924.06	15073.30	15224.04	15376.28	15530.04	15685.34	15842.19	16000.62	16160.62	16322.23	0	0	0	0	
22		Anthem	101010 NorthClinic	HP_OutPMTIME	NA		0	1097250.00	1108222.50	1119304.73	1130497.77	1141802.75	1153220.78	1164752.99	1176400.52	1188164.52	1200046.17	1212046.63	1224167.09	0	0	0	0	
23		Anthem	101010 NorthClinic	HP_Revenue	NA		0	2911370.00	2940483.70	2969888.54	2999587.42	3029583.30	3059879.13	3090477.92	3121382.70	3152596.53	3184122.49	3215963.72	3248123.35	0	0	0	0	
24		Conesco	101012 NorthClinic	HP_DrugME	NA		0	307230.00	310302.30	313405.32	316539.38	319704.77	322901.82	326130.84	329392.14	332686.07	336012.93	339373.06	342766.79	0	0	0	0	
25		Conesco	101012 NorthClinic	HP_HospME	NA		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
26		Conesco	101012 NorthClinic	HP_Members	NA		0	8778.00	8865.78	8954.44	9043.98	9134.42	9225.77	9318.02	9411.20	9505.32	9600.37	9696.37	9793.34	0	0	0	0	
27		Conesco	101012 NorthClinic	HP_OutPMTIME	NA		0	658350.00	664933.50	671582.84	678298.66	685081.65	691932.47	698851.79	705840.31	712898.71	720027.70	727227.98	734500.26	0	0	0	0	
28		Conesco	101012 NorthClinic	HP_Revenue	NA		0	1746822.00	1764290.22	1781933.12	1799752.45	1817749.98	1835927.48	1854286.75	1872829.62	1891557.92	1910473.50	1929578.23	1948874.01	0	0	0	0	
29		JohnDeere	27210 WestClinic	HP_DrugME	NA		0	58857.50	594746.08	600953.54	606700.47	612767.48	618895.15	625084.10	631334.94	637648.29	644024.78	650465.02	656969.67	0	0	0	0	
30		JohnDeere	27210 WestClinic	HP_HospME	NA		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
31		JohnDeere	27210 WestClinic	HP_Members	NA		0	16824.50	16992.75	17162.47	17334.30	17507.64	17682.72	17859.55	18038.14	18218.52	18400.71	18584.71	18770.56	0	0	0	0	
32		JohnDeere	27210 WestClinic	HP_OutPMTIME	NA		0	1430082.50	1444381.33	1458827.16	1473415.43	1488149.58	1503031.08	1518061.39	1533242.00	1548574.42	1564060.17	1579700.77	1595497.78	0	0	0	0	
33		JohnDeere	27210 WestClinic	HP_Revenue	NA		0	3230304.00	3262607.04	3295233.11	3328185.44	3361447.30	3395081.97	3429032.79	3463323.12	3497956.35	3532935.91	3568265.27	3603947.92	0	0	0	0	
34		McCareAdv	27200 Hosp	HP_DrugME	NA		0	512050.00	517170.50	522342.05	527565.62	532841.83	538169.66	543551.93	548986.97	554476.76	560021.46	565621.75	571277.77	0	0	0	0	
35		McCareAdv	27200 Hosp	HP_HospME	NA		0	1097250.00	1108222.50	1119304.25	1130497.72	1141802.70	1153220.77	1164752.93	1176400.55	1188164.55	1200046.16	1212046.67	1224167.03	0	0	0	0	
36		McCareAdv	27200 Hosp	HP_Members	NA		0	146300.00	147763.00	149240.60	150733.03	152240.36	153762.76	155300.40	156853.40	158421.94	160006.16	161606.22	163222.28	0	0	0	0	
37		McCareAdv	27200 Hosp	HP_OutPMTIME	NA		0	12435500.00	12559855.00	12684543.55	12812308.09	12940431.17	13069835.48	13200533.83	13332539.17	13465864.56	13600523.21	13736528.44	13873893.72	0	0	0	0	
38		McCareAdv	27200 Hosp	HP_Revenue	NA		0	36428700.00	36792987.00	37160916.87	37532526.04	37907851.30	38286929.81	38669799.11	39056497.10	39447062.07	39841532.69	40239948.02	40642347.50	0	0	0	0	

You can enter the data in this table manually or as part of an import. Your Kaufman Hall Implementation Consultant will help you set up the table for your organization. There is no pre-defined import available to import health plan data at this time, but you can work with your Kaufman Hall Implementation Consultant to create a custom import.

**IMPORTANT:** Your organization cannot enter any health plan data containing patient identifying information into the system. Please do not send any transmission of data in any form to Kaufman Hall related to this feature containing any patient identifying information.

**NOTE:** The Health Plan product relies on data identified in this table for refresh variables and blocks of data. Without the data, refresh variable picklist(s) will display blank. You will need to maintain this table as plans, revenue streams, and expense streams are added or changed. If you need to remove a plan, do not delete it from this table. For instructions, see [Removing or retiring plans](#).

## ► About this table

Note the following before configuring this table:

- This table is only accessible if your organization is licensed for the Axiom Budgeting Health Plan product. Only users assigned the Budget Administrator role profile can access this table.



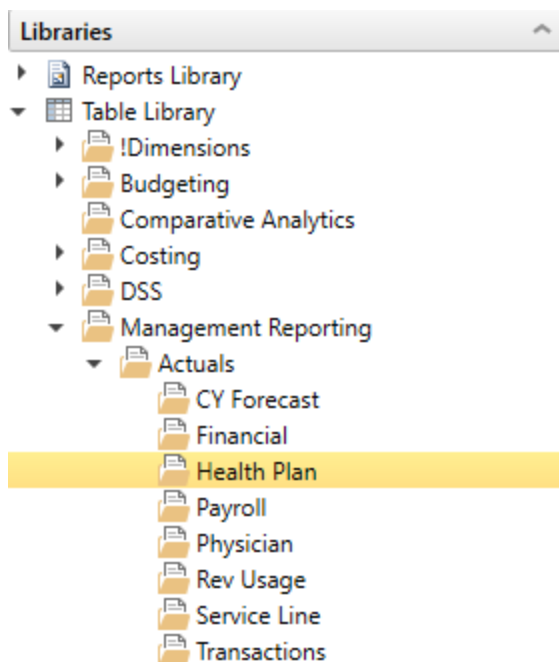
- Before configuring this table, you will need to do the following:
  - Add or edit insurance or health plan products in the INSCODE dimension.
  - Add or edit the health plan budget data types in the DATATYPE dimension.
  - Add or edit department locations in the LOCATION dimension.

For instructions, see [Updating dimensions for health plan budgeting](#).

## ► Adding or editing plans

To add or edit a plan:

1. In the Admin ribbon tab, click **System Browser**.
2. In the Libraries section, click **Table Library > Management Reporting > Actuals > Health Plan**.



3. Double-click the file for the planning year. For example, if you are planning for 2021, double-click ACT\_HP\_2021.

Name	Modified	Locked By	Table Type	Classificati	Modified By	Description
ACT_HP_2019	1/30/2020 3:25 PM		HealthPlan	Data		Actuals table for Health Plan
ACT_HP_2020	1/30/2020 3:25 PM		HealthPlan	Data		Actuals table for Health Plan
ACT_HP_2021	1/30/2020 3:25 PM		HealthPlan	Data		Actuals table for Health Plan

4. Add or edit the following columns for each plan:

Column	Description
INSCODE	Double-click to select the plan name.

Column	Description
DEPT	Double-click to select the department.
LOCATION	Double-click to select the department location.
DATATYPE	Double-click to select the data type.
GROUP	Reserved for future use.
ACCT	Reserved for future use.
P1-P12	Enter the actual or budgeted amount for the period.
NYBKHA	Reserved for future use.
SaveCustom	Reserved for future use.
SaveTagDocID	Reserved for future use.

5. After making your changes, in the **Admin** ribbon tab, click **Save**.

## Membership Enrollment Trend driver

### ► Overview

Use this driver to enter enrollment percentages for each health plan or insurance product offered by your organization. The purpose of this driver is to determine the membership trend of each insurance product. The trend percentages are then used in the Membership Per Member Per Month (PMPM) driver to adjust the membership statistics.

**TIP:** If the membership percentages are provided by the health plan company's actuaries, you can enter those values in this driver.

### ► About this driver

Note the following before configuring this driver:

- This driver is only accessible if your organization has the Axiom Budgeting Health Plan license.
- You must first add/edit insurance or health plan products in the [INSCODE dimension table](#). The system automatically populates the driver with the information from this dimension. The system does not allow you to manually enter plans directly into the driver.
- You must first complete this driver setup before configuring the [Membership PMPM driver](#).
- Only users assigned the GlobalDriverMgmt role profile can access and update this driver.

Access to the data table that stores the health plan records is controlled using the [Budget Security Update utility](#). In the HealthPlan column, you can configure the filter for the health plan data. This column only displays if your organization has an Axiom Budgeting Health Plan license.



### Budget/Mgmt Reporting Security Update v1.4

\* Note: This utility only adds users to systems & roles. If you need to REMOVE a user from a system or role, You must use the Security Manager.



Input	Input	Input	Input	Input	Select	HealthPlan
LoginName	PrincipalID	FirstName	LastName	EmailAddress	AuthenticationType	Computed / Input
Update	<< Update Database on SAVE?		Select [SAVE] to post update the Security -or- [Process File] in the T			Health Plan Filter
EXISTING EPM USERS						Green [Save] indicates a change was detected and user will be updated.

[Save]	8		Windows User	DEPT.Approver = 'adebruhi' OR DEPT.Owner = 'adebruhi' OR DE
	1		Axiom Prompt	DEPT.Approver = 'admin' OR DEPT.Owner = 'admin' OR DEPT.Re
	63		Windows User	DEPT.Approver = 'aherr' OR DEPT.Owner = 'aherr' OR DEPT.Rev
	14		Axiom Prompt	DEPT.Approver = 'ASDAdmin' OR DEPT.Owner = 'ASDAdmin' OR
	55		Windows User	DEPT.Approver = 'ct-jguppy' OR DEPT.Owner = 'ct-jguppy' OR D
	60		Windows User	DEPT.Approver = 'ct-jszeto' OR DEPT.Owner = 'ct-jszeto' OR DE
	57		Windows User	DEPT.Approver = 'CT-MHardy' OR DEPT.Owner = 'CT-MHardy' C
	61		Windows User	DEPT.Approver = 'ct-rsohler' OR DEPT.Owner = 'ct-rsohler' OR D
	56		Windows User	DEPT.Approver = 'ct-sdonchek' OR DEPT.Owner = 'ct-sdonchek'

## ► Understanding the interface

The driver displays the list of insurance plans by clearly grouping them together by entity. By default, the list of insurance plans is expanded, but you can double-click  to expand or double-click  to contract it. After you save your changes, the system remembers this setting the next time you open the driver.

### Membership Enrollment Trend Driver

			Actuals 2049				
			ACT2049 P1	ACT2049 P2	ACT2049 P3	ACT2049 P4	ACT2049 P5
Save		1 KH Health System					
		Commercial	211.0%	200.0%	200.0%	200.0%	200.0%
		CommFlex	100.0%	100.0%	100.0%	100.0%	100.0%
		CommPlus	100.0%	100.0%	100.0%	100.0%	100.0%
		CommSaver	100.0%	100.0%	100.0%	100.0%	100.0%
		CommSR	100.0%	100.0%	100.0%	100.0%	100.0%
		FFS	100.0%	100.0%	100.0%	100.0%	100.0%
		FFSMcaid	100.0%	100.0%	100.0%	100.0%	100.0%
		FFSMcare	100.0%	100.0%	100.0%	100.0%	100.0%
		McaidCap	100.0%	100.0%	100.0%	100.0%	100.0%
Save		2 KH Medical Center					
		Commercial	100.0%	100.0%	100.0%	100.0%	100.0%
		CommFlex	100.0%	100.0%	100.0%	100.0%	100.0%
		CommPlus	100.0%	100.0%	100.0%	100.0%	100.0%
		CommSaver	100.0%	100.0%	100.0%	100.0%	100.0%
		CommSR	100.0%	100.0%	100.0%	100.0%	100.0%
		FFS	100.0%	100.0%	100.0%	100.0%	100.0%
		FFSMcaid	100.0%	100.0%	100.0%	100.0%	100.0%
		FFSMcare	100.0%	100.0%	100.0%	100.0%	100.0%
		McaidCap	100.0%	100.0%	100.0%	100.0%	100.0%

To remove an entity from the driver, click the **Save** drop-down, and select **Delete**. After you save your changes, the system will remove the entity from the driver.

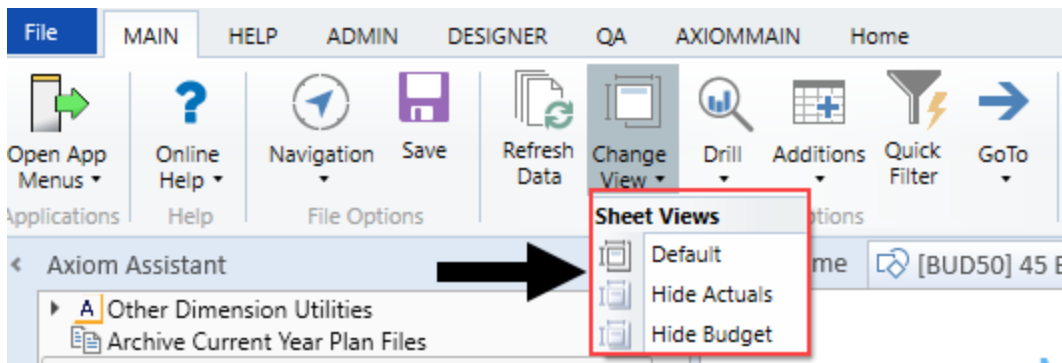
**NOTE:** This action does not delete the entity from the system. It simply removes the entity from the driver list. To add the entity again, in the **Main** ribbon tab, click **Refresh Data**. You can also press **F9** on your keyboard.

## Membership Enrollment Trend Driver

		Actuals 2049	
		ACT2049 P1	ACT2049 P2
Insurance Plan	Description		
1	KH Health System		
Commercial	Commercial	211.0%	200.0%

You can view specific parts of the driver from the **Main** ribbon tab by clicking **Change View**, and selecting one of the following:

- **Default** - Displays both the actuals and budget columns for each period as well as the Projected Actuals.
- **Hide Actuals** - Hides the actuals columns for each period. The projected actuals column remains available.
- **Hide Budget** - Hides the budget columns for each period.

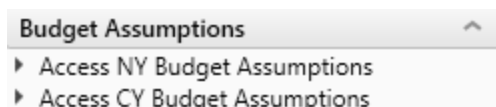


### ► Settings

Complete the following steps to configure this driver:

1. In the **Bud Admin** task pane, in the **Budget Assumptions** section, do one of the following:

- To open next year's budget drivers, click **Access NY Budget Assumptions**.
- To open this year's budget drivers, click **Access CY Budget Assumptions**.



2. Double-click **45 Budget HealthPlan Enrollment Trend**.
3. In the **Refresh Variables** dialog, type the entity number(s) in the field or click **Choose Value** to select the entities, and then click **OK**.

4. To display the plans to budget for the entities, in the first column click the **Select Option** cell, and select **Save**.

**NOTE:** The list that displays populates from the [INSCODE dimension table](#). If you add a plan to the table, the new plan is automatically added to this driver. Removing a plan causes an unmatched records message on the screen. For more information, see [Unmatched records](#) below.

5. In the actuals columns for each period, enter the actual percentage of growth or reduction of membership that the plan experienced or expect to experience.
6. By default, and upon initial use, all Projected Actuals and Budget columns display 100% for all plans. The configured growth or reduction of membership percentages provides the basis for budgeting plan membership for the next budget year. You can change this number, if needed.
7. In the **Comments** column, enter any additional information related to the Actual or Projected Actuals columns.
8. In the budget columns for each period, enter the percentage of growth or reduction of membership that you expect the plan to experience.
9. After making your changes, click **Save**.

#### ► Managing unmatched records (orphan data)

If a plan is removed from the INSCODE dimension table (i.e., a plan is retired or discontinued), an Unmatched Records area displays at the bottom of the driver page. This is often referred to as orphan data. The list of unmatched records means there are plans in the driver table that are no longer valid because of the changes in the dimension table. The system lists the unmatched records and will remove them from the driver table the next time you save.

**TIP:** The Unmatched Records area displays at the bottom of the driver page, so you may need to scroll to see this information. You can also jump to this section from the Main ribbon tab by clicking **Go To > Unmatched Records**. This option only displays when unmatched records exist. The driver screen will also display a warning message.

## Membership Enrollment Trend Driver

Click to view - Unmatched records will be deleted on the next save

			Actuals 2049				
			ACT2049 P1	ACT2049 P2	ACT2049 P3	ACT2049 P4	ACT2049 P5
Insurance Plan	Description						
Save	1	KH Health System					
	Commercial	Commercial	211.0%	200.0%	200.0%	200.0%	
	CommFlex	Commercial Flex Membership	100.0%	100.0%	100.0%	100.0%	
	CommPlus	Commercial Plus Membership	100.0%	100.0%	100.0%	100.0%	
	CommSaver	Commercial Saver Membership	100.0%	100.0%	100.0%	100.0%	
	CommSR	Commercial Premium Membership (Shared Risk)	100.0%	100.0%	100.0%	100.0%	
	FFS	Fee for Service	100.0%	100.0%	100.0%	100.0%	
	FFSMcaid	FFS Medicaid Membership	100.0%	100.0%	100.0%	100.0%	
	FFSMcare	FFS Medicare Membership	100.0%	100.0%	100.0%	100.0%	
	McaidCap	Medicaid Capitated Membership	100.0%	100.0%	100.0%	100.0%	
Select Option	2	KH Medical Center					
Select Option	3	KH Physician Group					
Unmatched Records							
The following unmatched records will be deleted from the database on the next save							
Entity	Entity Description	Insurance Plan	Insurance Plan Description				
1	KH Health System	FFSPPO	FFS PPO Membership				
1	KH Health System	McareAdv	Medicare Advantage Membership				

**NOTE:** More unmatched records may occur for other entities in the database, however the system will only delete the plans for those entities you selected in the Refresh Variables dialog.

## Membership Per Member Per Month (PMPM) driver

### ► Overview

This driver provides the basis for several important planning activities needed for your organization to budget health plans and insurance products. The system uses the information in this driver to populate the [HealthPlan Operation utility](#).

- Depending on the level of detailed records loaded by your organization in the [ACT\\_HP\\_20XX data table](#), the driver can bring in actual data for members, revenues, and expenses by entity, department, insurance code, location, and data type. The driver calculation methods then calculate historical PMPM values based on available history.
- The historical PMPM rates carry forward to any non-actual period. For example, if six months of actual is used, then month seven of the current year in the driver refers to the month six PMPM rate. The rates in all non-actual months can be edited.
- The PMPM rates in the projection and monthly budget columns are then used to calculate the projection and monthly budget for revenues and expenses in the HealthPlan Operations utility.

This driver provides a central location to review member lives, revenue PMPM, and expense PMPM for each health plan and specifically within each entity (or department). The enrollment percentages from the Membership Enrollment Trend driver updates the planned member lives, which also flows to the HealthPlan Operation utility.

### ► About this driver

Note the following before configuring this driver:

- This driver is only accessible if your organization is licensed for the Axiom Budgeting Health Plan product. Only users assigned the GlobalDriverMgmt role profile have access to this driver.
- You must complete the following before configuring this driver:
  - Add or edit insurance or health plan products in the INSCODE dimension. The system does not allow you to manually enter plans directly in this driver because the system automatically populates it with the plans listed in the INSCODE dimension.
  - Add or edit the health plan budget data types in the DATATYPE dimension.
  - Add or edit department locations in the LOCATION dimension.

For instructions on updating these dimensions, see [Updating dimensions for health plan budgeting](#).

  - Configure the [Membership Enrollment Trend driver](#) before configuring this driver. If the Membership Enrollment Trend driver is not configured, the Membership PMPM driver will default to 100%.
- The system auto populates the driver with data that is stored in the [ACT\\_HP\\_20XX data table](#). You can enter the data manually in this table or as part of an import. Your Syntellis Implementation Consultant will help you set up the table for your organization, but you will need to maintain this table as new plans are added.

**NOTE:** There is no pre-defined import available to import health plan data at this time, but you can work with your Syntellis Implementation Consultant to create a custom import.



- To remove or retire a plan, you cannot delete it from the driver. For instructions, see [Removing or retiring plans](#).

### ► Understanding the interface

The driver makes it easy to view and manage plans by displaying entities and department using a tiered structure that follows this format:

- Entity
  - Department
    - Insurance/Health Plan
      - Location
        - Data Type

2	KH Medical Center
27200	EMC Radiology - MRI (JobCode)
AARP	AARP
↑ HOSP	Hospital_HP
	Members
	HP_DrugME
	HP_HospME
	HP_OutPTME
	HP_Revenue
	Previous Input
	Previous Input
	Previous Input
	Default
	Previous Input
	No additional Datatypes available for insertion

When you first open the driver, the list of locations is expanded, but you can double-click  to expand or  to contract it. After you save your changes, the system remembers this setting the next time you open the driver.

The columns to the right of the listed data types are the actuals columns that display the data stored in the Act\_HP\_20XX data table. The blue cells allow you to edit remaining projected by month and budgeted values, if needed. By default, the values for the membership row are calculated using the [Membership Enrollment Trend driver](#). The system calculates these values by multiplying the previous month's enrollment numbers by the percentage for the period in the Membership Enrollment Trend driver.

Per Member Per Month (PMPM) Driver			Actuals 2020						Actuals 2020						Members Months	Comments
Insurance Plan	Description	Spread Tag	ACT2020 P1	ACT2020 P2	ACT2020 P3	ACT2020 P4	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8	ACT2020 P9	ACT2020 P10	ACT2020 P11	ACT2020 P12	ACT2020 Projected	
KH Medical Center EMC Radiology - MRI (JobCode) AARP Hospital_HP	Members	Previous Input	84,488	85,133	86,188	87,048	87,819	88,798	88,798	88,798	88,798	88,798	88,798	88,798	1,052,561	
	HP_DrugME	Previous Input	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	45.00	
	HP_HospME	Previous Input	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	125.00	
	HP_OutPTME	Default	-	-	-	-	-	-	-	-	-	-	-	-	-	
	HP_Revenue	Previous Input	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	295.00	
	No additional Datatypes available for insertion															

Let's say an organization expects a 10% growth in their membership for period 7. The membership number for period 6 was 88,798. The system multiplies this number by 1.10 for a projected actual of 97,678 members. This calculation continues throughout the blue cells for both actuals and budgeted in the membership row. You can edit this value two ways:

- Adjust the percentage in the Membership Enrollment Trend driver
- Edit the value directly in the actual or budget blue cell in the Membership PMPM driver



**NOTE:** You can usually get the plan percentages from an actuary at the insurance or health plan company.

Membership Enrollment Trend Drive					
Insurance Plan	Description	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8
2 KH Medical Center					
AARP	AARP	100.0%	100.0%	110.0%	100.0%
Anthem	Anthem Blue Cross	100.0%	100.0%	100.0%	100.0%
Conesco	Conesco	100.0%	100.0%	100.0%	100.0%
JohnDeere	John Deere	100.0%	100.0%	100.0%	100.0%

Per Member Per Month (PMPM) Driver							
Insurance Plan	Description	Spread Tag	ACT2020 P4	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8
2	KH Medical Center						
27200	EMC Radiology - MRI (JobCode)						
AARP	AARP						
T HOSP	Hospital_HP						
	Members	Default	87,048	87,919	88,798	97,678	97,678
	HP_DrugME	Default	45.00	45.00	45.00	45.00	45.00
	HP_HospME	Default	125.00	125.00	125.00	125.00	125.00

The values in the data types from both the actual and budget columns are derived by dividing the data type period value (located in the ACT\_HP\_20XX data table) by the number of members in the same period. In the following example, the value for hospital medical expenses for this departments plan in period 6 is \$11,099,749. The system divides this amount by the number of members, in this case 88,798 and calculates the expense as \$125 per member. The Membership Enrollment Trend driver provides a starting point for budgeting your health plan costs for the remainder of the year.

Data Type	String	Integer	String	String	String	Numeric	Numeric	Numeric
String Length	25		25	25	50			
Description	Insurance Code key field	Department	Location	Data Type	Group	Fiscal Period 4	Fiscal Period 5	Fiscal Period 6
Delete Row	INSCODE	DEPT	LOCATION	DATATYPE	GROUP	P4	P5	P6
	AARP	27200 Hosp	HP_DrugME	NA		3917174.78	3956346.53	3995909.99
	AARP	27200 Hosp	HP_HospME	NA		10881041.06	10989851.47	11099749.98
	AARP	27200 Hosp	HP_Members	NA		87048.33	87918.81	88798.00
	AARP	27200 Hosp	HP_OutPTME	NA		0.00	0.00	0.00
	AARP	27200 Hosp	HP_Revenue	NA		25679256.90	25936049.47	26195409.96

Per Member Per Month (PMPM) Driver							
Insurance Plan	Description	Spread Tag	ACT2020 P4	ACT2020 P5	ACT2020 P6	ACT2020 P7	ACT2020 P8
2 KH Medical Center							
27200	EMC Radiology - MRI (JobCode)						
AARP	AARP						
† HOSP	Hospital_HP						
	Members	Default	87,048	87,919	88,798	97,678	97,678
	HP_DrugME	Default	45.00	45.00	45.00	45.00	45.00
	HP_HospME	Default	125.00	125.00	125.00	125.00	125.00
	HP_OutPTME	Default	-	-	-	-	-
	HP_Revenue	Previous Input	295.00	295.00	295.00	295.00	295.00
No additional Datafeeds available for insertion							

When entering remaining projected and budget values, you can either use the values that are automatically calculated by the system using the Membership Trend Enrollment driver, or you can enter your own custom values. The option you choose is indicated by the Spread Tag column. When entering and saving custom values, the Spread Tag column automatically changes from **Default** to **Previous Input**. The Previous Input option means that the system stores and retrieves the values from the Membership PMPM driver table versus using the default calculations. Even if you use custom values, you can return to using the driver-calculated values at any time by selecting **Default** from the Spread Tag column.

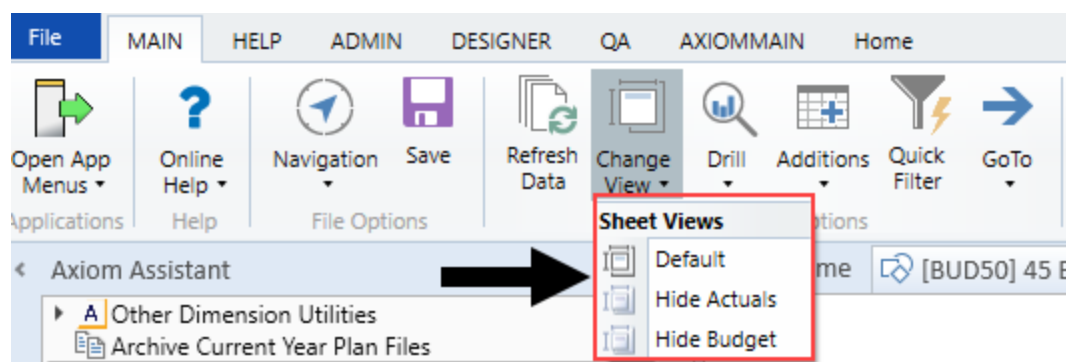
2	KH Medical Center
27200	EMC Radiology - MRI (JobCode)
AARP	AARP
HOSP	Hospital_HP
	Members
	HP_DrugME
	HP_HospME
	HP_OutPTME
	HP_Revenue
	No additional Datatypes available for insertion

Default
Default
Previous Input
Default
Default
Previous Input

## ► Changing views

You can view specific parts of the driver from the **Main** ribbon tab by clicking **Change View**, and selecting one of the following:

- **Default** - Displays both the actuals and budget columns for each period as well as the projected actuals.
- **Hide Actuals** - Hides the actuals columns for each period. The projected actuals column remains available.
- **Hide Budget** - Hides the budget columns for each period.

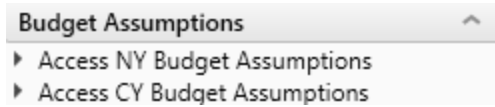


## ► Settings

Complete the following steps to configure this driver:

1. In the **Bud Admin** task pane, in the **Budget Assumptions** section, do one of the following:

- To open next year's budget drivers, click **Access NY Budget Assumptions**.
- To open this year's budget drivers, click **Access CY Budget Assumptions**.



2. Double-click **46 Budget HealthPlan Membership PMPM**.

3. In the **Refresh Variables** dialog, do the following to filter the entities or departments that display in the driver:

- a. In the **Filter by Entity** field, type the entity number(s) or click **Choose Value** to select the entities, and then click **OK**.
- b. Optionally, in the **Filter by DEPT.KHABgtMap** field, type the department number(s) or click **Choose Value** to select the departments, and then click **OK**.

4. In the actuals and budget columns, do one of the following:

- To use the default values derived from the Membership Trend Enrollment driver, select **Default** in the **Spread Tag** column (if it is not already selected).
- To use custom values, type the values in the columns. When you save your changes, the **Spread Tag** column changes from **Default** to **Previous Input**.

**TIP:** Even if you enter custom values, you can go back to using the default values by selecting **Default** from the **Spread Tag** column. The system will automatically use the values calculated using the Membership Enrollment Trend driver. After you save your change, the system will change the spread tag from **Previous Input** back to **Default** to indicate that these are driver-calculated values.

For more information on how the spread tags work, see [Understanding the interface](#) in the section above.

5. After making your changes, click **Save**.

## ► Adding data types

**To add a data type:**

1. In the list of data types, double-click **Double click to Add New Datatype**.

**NOTE:** The purpose of this option is to allow you to add a revenue or expense category that contains no actual history. For example, if the AARP health plan does not contain drug expense historically, but now we wish to include it for planning, this option will accommodate that expense category.

2		KH Medical Center	
27200		EMC Radiology - MRI (JobCode)	
AARP		AARP	
↑	HOSP	Hospital_HP	
		Members	Default
		HP_DrugME	Default
		HP_HospME	Default
		HP_OutPTME	Default
		HP_Revenue	Previous Input
		Double click to Add New Datatype	

2. In the **Select Datatype** field, type the name of the data type or click **Choose Value** to select the data types.
3. Click **OK**.

Because you can only add one instance of a data type, the list of available data types diminishes as they are added to the driver for a particular location. If all the data types have been used, then the message **No additional Datatypes available for insertion** replaces **Double click to Add New Datatype** at the bottom of the list.

2		KH Medical Center	
27200		EMC Radiology - MRI (JobCode)	
AARP		AARP	
↑	HOSP	Hospital_HP	
		Members	Default
		HP_DrugME	Default
		HP_HospME	Default
		HP_OutPTME	Default
		HP_Revenue	Previous Input
		No additional Datatypes available for insertion	

### ► Deleting data types

After you select the data types to delete, the system does not remove them until after you save the driver.

**To delete a data type:**

1. Next to the name for each data type to delete, click the **Save** cell drop-down, and select **Delete**.



- Budget Reporting
  - Budget Analysis
  - Budget Utilities
    - Balance Sheet & Deductions
    - Budget Planning HomePage
    - Budget Reconciliation
    - Budget Setup
    - Extract from EPM
    - Provider Utilities
    - Report Batches
    - Security
      - Budget Driver Security Update
      - Budget Security Update

Use to update the Driver security settings and filters for Admin users who have access to update driver files.

### Budget Driver Security Setup

\* Note: This utility configures Budget Admin Role users to Driver Budget Groups.

LoginName	PrincipalID	FirstName	LastName	EmailAddress	Member of Global Driver Mgmt	Select General Budget Drivers	Select Admin Provider Drivers	Select Filtered Budget Group 1	Select Filtered Budget Group 2	Select Filtered Budget Group 3	Select Filtered Budget Group 4	Select Filtered Budget Group 5	Select Filtered Budget Group 6
Update	<< Update Database on SAVE?			Select [Process File] in the File Processing task pane to Save.									
BP_NextYear	<< Select Budget Filegroup to Update			BUDGET2019									
No Save	admin	1	Admin	Admin	admin@axiomepm.com	FALSE	No	No	No	No	No	No	No
No Save	bpadmin	2	bp	admin	nella@kaufmanhall.com	FALSE	No	No	No	No	No	No	No

Use to update security settings and filters for all users.

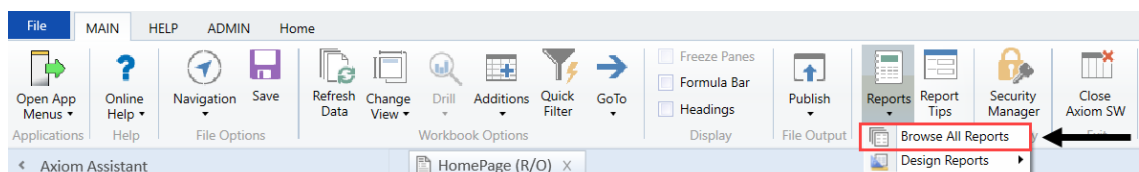
[illegible]

## Browsing the Report Library

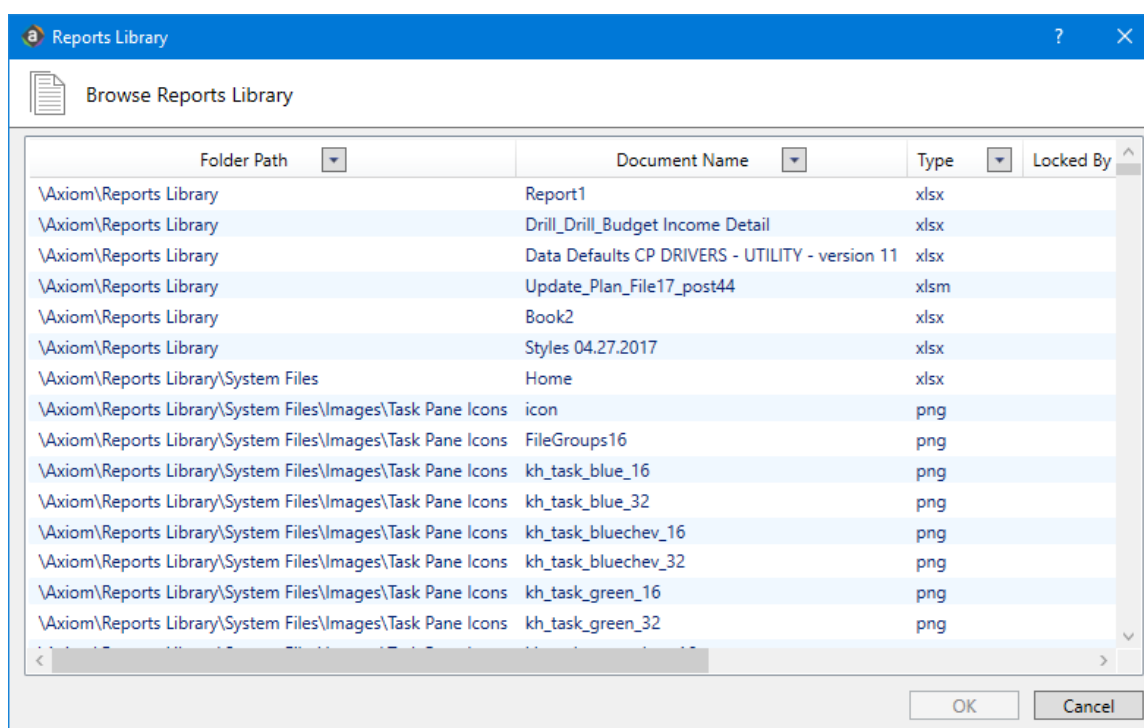
In addition to browsing the report folders in the Axiom Budgeting task panes, you can search all of the available Axiom reports in the Reports Library.

To browse the Report Library:

1. In the **Main** ribbon tab, in the **Reports** group, click **Reports > Browse All Reports**.



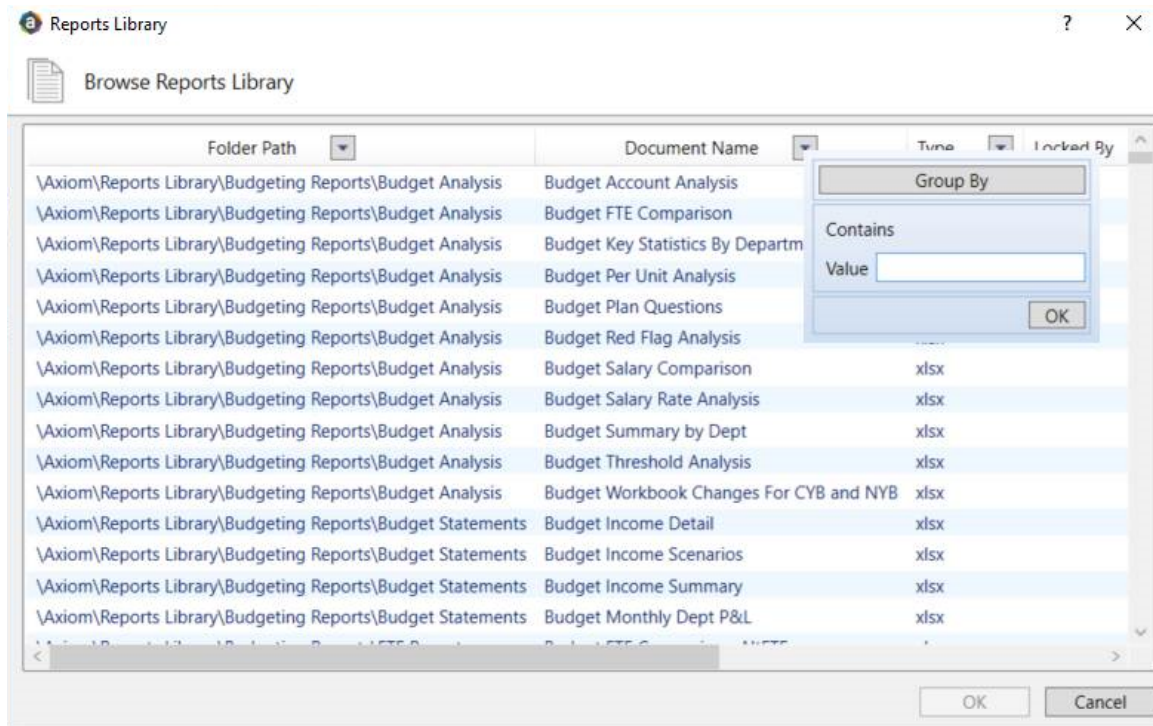
2. In the **Reports Library** dialog, you can do the following:



- To sort, group, or search by any of the columns, click the drop-down arrow next to the column label.
- To open a report, select it from the list, and click **OK**.

The system includes many different reports, but you can search through them more easily by using the following search functionality:

1. Click the down arrow beside the **Document Name** column header.



2. In the **Group By** box, type a search value, and click **OK**.

The system will display the reports that include the value you entered in the report name.

## Removing or retiring plans

As new plans are added for your employees or for your service area, you may need to retire old plans from the system. We do not recommend deleting plans from the [ACT\\_HP\\_20XX data table](#). Instead, open the [INSCODE dimension table](#), and in the **KHAIInt** column, type **NA**. After you save the dimension, the system will remove the plan from the Health Plan drivers as well as the budget plan files while still retaining the plan history.



<b>Data Type</b>	String	String	String	String
<b>String Length</b>	25	100	25	25
<b>Description</b>	Dimension field for Insurance/Health Plan	Extended description of the INSCODE key field	Insurance Code Mapping (lookup to INSCODE key field)	Interface indicator
Delete Row	INSCODE	Description	InsCode_BgtCode	KHAIN
	Commercial	Commercial	Commercial	HealthPlan
	CommFlex	Commercial Flex Membership	CommFlex	HealthPlan
	CommPlus	Commercial Plus Membership	CommPlus	HealthPlan
	CommSaver	Commercial Saver Membership	CommSaver	HealthPlan
	CommSR	Commercial Premium Membership (Shared Risk)	CommSR	HealthPlan
	FFS	Fee for Service	FFS	HealthPlan
	FFSMcaid	FFS Medicaid Membership	FFSMcaid	HealthPlan
	FFSMcare	FFS Medicare Membership	FFSMcare	HealthPlan
	FFSPPO	FFS PPO Membership	McareAdv	HealthPlan
	McaidCap	Medicaid Capitated Membership	McaidCap	HealthPlan
	McareAdv	Medicare Advantage Membership	McareAdv	NA
	NA	Default INSCODE	NA	NA



# Budgeting health plans

The HealthPlan Operations utility allows your organization to calculate revenues and expenses based on Membership Per Member Per Month (PMPM) calculations, which you can then use to determine the profitability of each health plan and/or insurance product.

**TIP:** The ability to determine profitability depends on the data provided by your organization. The more revenue and expense data you enter into the system, the closer you can get to a true margin ratio.

This utility is primarily for Axiom Budgeting administrators and/or finance liaisons of health plan companies and their key stakeholders.

The following list and image describe the different areas and functions of the utility:

- a. **Key Results Summary** - Summarizes the results of all the health plans included in the utility.
- b. **Insurance Plans** - Displays a list of all the health plans and their key metrics for members as well as the PMPM rates for revenue and expenses. The system calculates historical PMPM values for historical periods such as Last Year Actual and Year-to-Date. Projection and monthly budget values are calculated based on members multiplied by the PMPM rate for revenues and expenses. The header bar for each entity/department displays the entity and department number, the insurance plan product, and the location. For each entity/department, the system shows the number of covered members, the revenue, and the expenses.
- c. **Annual Comparison and Budget** - The first half of the sheet displays the Annual Comparison section, which shows values for the current year, including the current fiscal year budget, YTD actuals, and projected actuals and next year budget. The other half of the sheet is the Budget section, which shows the monthly and total budgeted values for the next fiscal year.
- d. **Expand/Contract entity/department rows** - By default, the list of entities/departments is expanded, but you can double-click  to expand or double-click  to contract it. After you save your changes, the system remembers this setting the next time you open the driver.

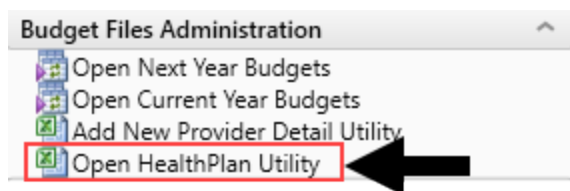
## HealthPlan Operations

				Annual Comparison						
				Dec YTD	Jan-Jun	FY 2020	FY 2021	Variance	Variance %	Comments
Entity	Dept	Insurance Plan	Location	Actual	Projected	Projected	Budget			
<b>Key Results Summary</b>										
Covered Members				2,187,097	2,295,140	4,482,237	4,662,107	179,870	4.0%	
Percent Change										
Premium Revenue				579,306,119	609,529,076	1,188,835,195	1,237,972,472	49,137,277	4.1%	
Revenue (PMPM)				264.87	265.57	265.23	265.54	273.18	103.0%	
Percent Change (PMPM)										
Medical Expenses				336,311,123	353,789,683	690,100,806	720,120,504	30,019,698	4.4%	
Expense (PMPM)				153.77	154.15	153.96	154.46	166.90	108.4%	
Percent Change (PMPM)										
Medical Expense Ratio (MER)				58.1%	58.0%	58.0%	58.2%	61.1%	105.2%	
2	27200	AARP	HOSP							
Covered Members										
HP_Members				519,773	586,067	1,105,840	1,183,855	78,015	7.1%	Test Comment
Total Covered Members				519,773	586,067	1,105,840	1,183,855	78,015	7.1%	
Enrollment Trend						100.0%				
Revenue										
HP_Revenue (PMPM)				295.00	295.00	295.00	295.00	0.00	0.0%	
HP_Revenue				153,333,031	172,889,706	326,222,737	349,237,206	23,014,469	7.1%	
Total Revenue				153,333,031	172,889,706	326,222,737	349,237,206	23,014,469	7.1%	
Expenses										
HP_DrugME (PMPM)				45.00	45.00	45.00	45.00	0.00	0.0%	
HP_DrugME				23,389,784	26,373,006	49,762,790	53,273,472	3,510,682	7.1%	
HP_HospME (PMPM)				125.00	125.00	125.00	125.00	0.00	0.0%	
HP_HospME				64,971,623	73,258,350	138,229,973	147,981,867	9,751,894	7.1%	
HP_OutPTME (PMPM)				-	-	-	-	-	0.0%	
HP_OutPTME				-	-	-	-	-	0.0%	
Total Expenses				88,361,408	99,631,356	187,992,764	201,255,339	13,262,575	7.1%	
Margin				64,971,623	73,258,350	138,229,973	147,981,867	9,751,894	7.1%	
Margin Percentage				57.6%	57.6%	57.6%	57.6%	0.0%	0.0%	

**IMPORTANT:** The utility does not allow your organization to enter any health plan data containing patient identifying information.

### To budget health and insurance plans:

1. In the Bud Admin task pane, in the **Budget Files Administration** section, double-click **Open HealthPlan Utility**.

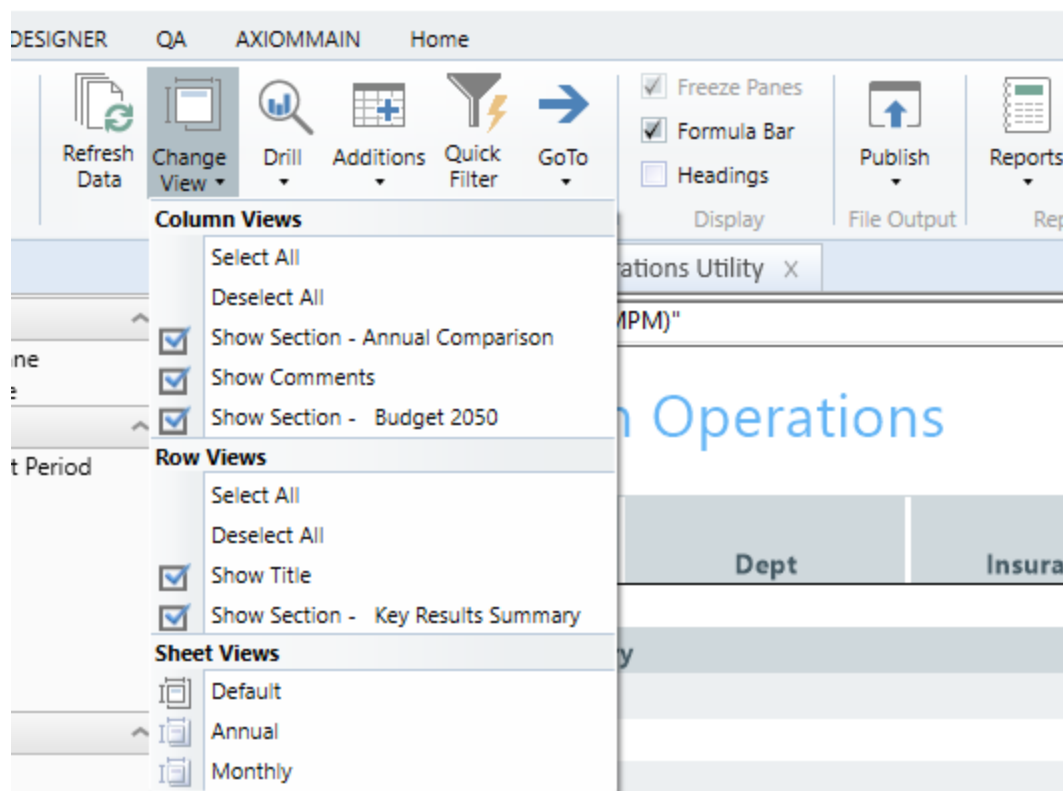


2. In the **Refresh Variables** dialog, do any of the following to filter the list of records that display in the utility, and click **OK**:
  - In the **Filter by ENTITY** field, enter or select one or more entities.
  - In the **Filter by DEPT.KHABgtMap** field, enter or select one or more departments.
  - To include all entities and departments, leave the fields blank.
3. To enter details for a line item, in the **Comments** column, type information in the blue cells for the appropriate line item.

**NOTE:** The information in the HealthPlan Operations utility is controlled by a series of dimension tables and drivers. See the [Managing utility information](#) section below on how to update information and calculations in the utility.

► Using different views

The system provides several different ways to view the sheet information. In the **Main** ribbon tab, click **Change View**.



The following table provides a description of the different options.

Column views

View	Description
Select All	Show all Annual Comparison, Comments, and Budget columns
Deselect All	Hide all Annual Comparison, Comments, and Budget columns
Show Section - Annual Comparison	Hide or show the Annual Comparison columns
Show Comments	Hide or show only the Comments column
Show Section - Budget	Hide or show only the Budget columns

## Row views

View	Description
Select All	Show both the HealthPlan Operations title and Key Results Summary Area
Deselect All	Hide both the HealthPlan Operations title and Key Results Summary area
Show Title	Hide or show the HealthPlan Operations title
Show Section - Key Results Summary	Hide or show the Key Results Summary area

## Sheet views

View	Description
Default	Show both the Annual Comparison, Comments, and Budget rows and columns
Annual	Show only the Annual Comparison and Comments rows and columns
Monthly	Show only the Comments and Budget row and columns

## ► Managing utility information

The information that displays in the utility comes from several different sources. The following table lists where to update information, as needed:

**NOTE:** To update dimensions specific for health plan budgeting, see "Updating dimensions for health plan budgeting" in the online help.

Location	Description
LOCATION dimension	Add or edit department locations.
INSCODE dimension	Add or edit healthcare or insurance plans.
DATATYPE dimension	Assign budget types to plan revenue and expense streams.
ACT_HP_20XX table	Add or edit plans and the corresponding actual account data.
Membership Enrollment Trend driver	Enter enrollment percentages for each health plan or insurance product offered by your organization. The purpose of this driver is to determine the membership trend of each product. The trend percentages are then used in the Membership Per Member Per Month (PMPM) driver to adjust the membership statistics.
Membership Per Member Per Month driver	Review member lives, revenue PMPM, and expense PMPM for each health plan.

## ► Printing the HealthPlan Operations utility

Axiom Budgeting allows you to save the Annual or Monthly version of the HealthPlan Operations utility as a PDF.

### To print the HealthPlan Operations utility:

1. [Open the HealthPlan Operations Utility.](#)
2. In the **Main** ribbon tab, click **Publish > Print > Print This Sheet**.
3. In the **Print Sheet** dialog, do any of the following:
  - **Print Details** - Click the **View/Edit** link to edit print view options, scaling, and header/footer information.
  - **Print Preview** - Click the **Print Preview** link to view a preview of the report.
4. Next to the sheet name, click the check box for the report to print, and click **Print**.