Release Notes

Axiom Budgeting and
Performance Reporting
Version 2021.1

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Contents

About the Release Notes

Syntellis is pleased to announce the 2021.1 release of Axiom Budgeting and Performance Reporting. 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 Budgeting and Performance Reporting online help. On the help home page, simply click the Release Notes link at the top of the page.

New features in 2021.1

Axiom Budgeting and Performance Reporting includes the following new feature in this release:

Report Center and Report Builder

Easily access all of your reports using a centralized hub in the Web Client as well as create and edit web reports using a drag-and-drop interface. Web reports are intended to be intuitive for report builders to create, and easy for report viewers to use.

Map standard specialty data for providers

NOTE: The Provider Standards Review report is only available with a Comparative Analytics Provider license. To acquire this license, contact your sales representative or Client Relations Executive (CRE).

The new Provider Standards Review report allows you to map standard data for providers in your organization, such as NPI and Standard Specialty Code.

IMPORTANT: For manual configuration steps related to changing the standard Build&Process and Recalc Scheduler jobs related to the issue addressed in defect 50080, see Manual configuration instructions and technical considerations.

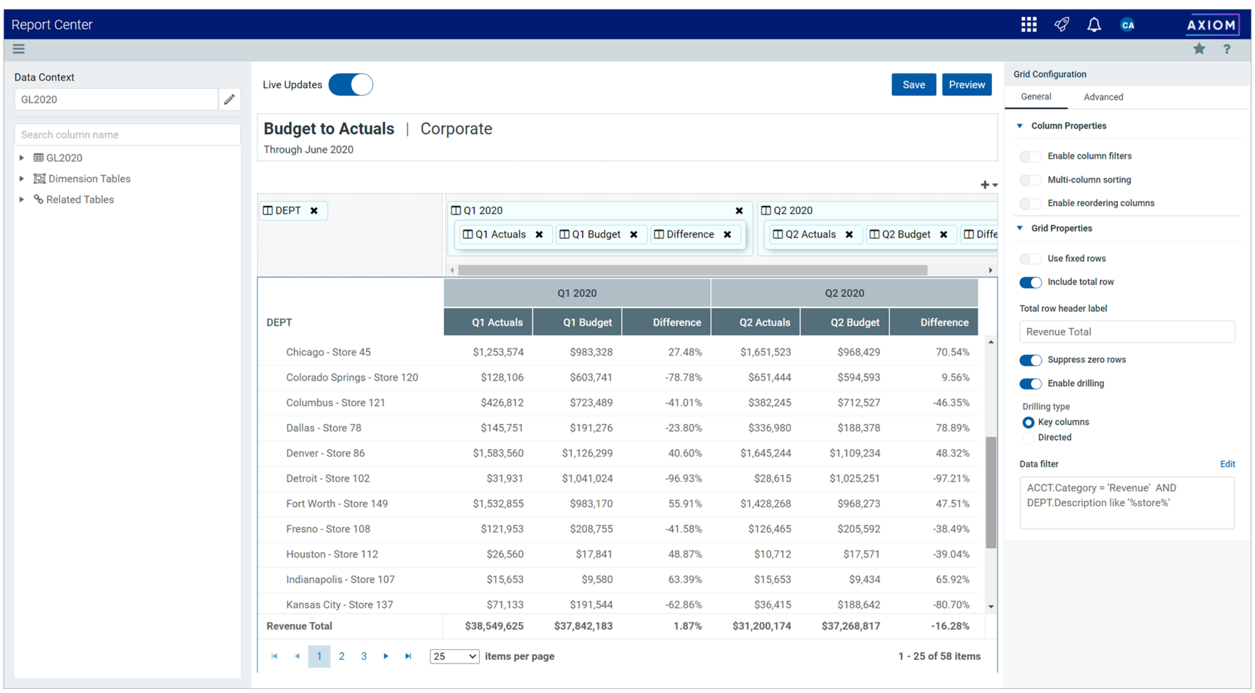
Report Center and Report Builder

This section provides an overview of the new features and enhancements for Report Center and Report Builder.

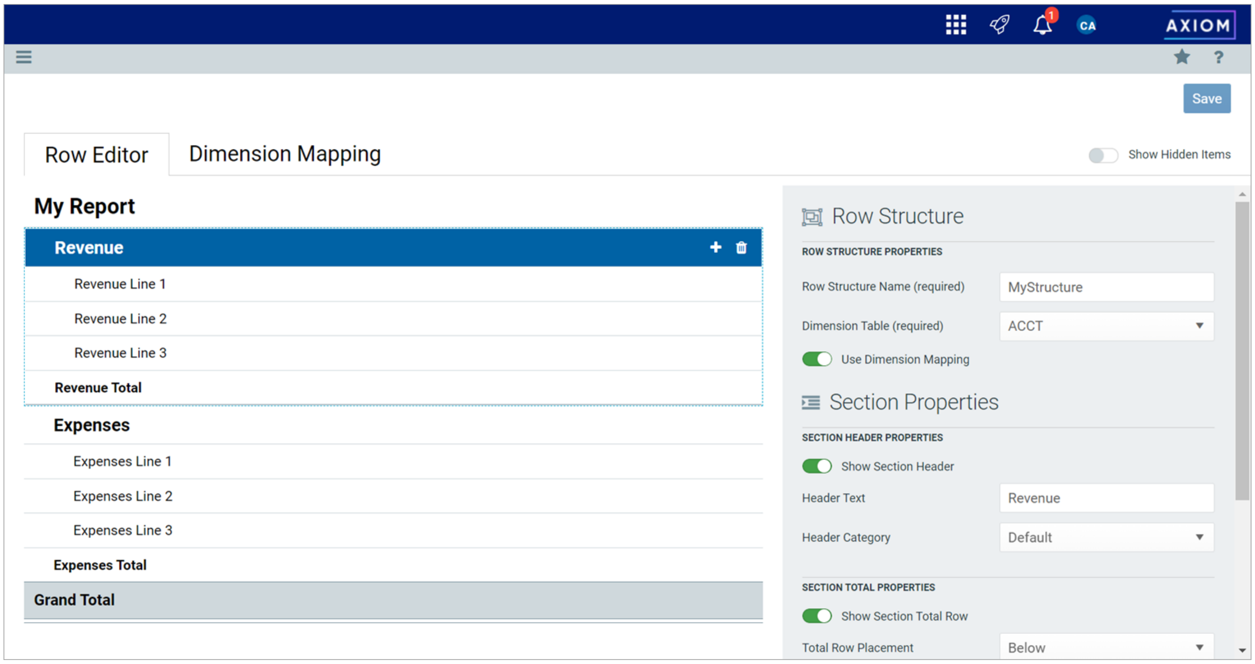
New drag-and-drop Report Builder for ad hoc reporting

Version 2021.1 introduces phase 1 of our new Report Builder, where you can create reports in the browser using an intuitive drag-and-drop interface.

- Build browser-based reports that use a dynamic row dimension or a fixed row structure to display data in a grid
- Browse related tables and drag-and-drop columns out to the report grid—the grid updates immediately in response to changes so you can easily see what you are building
- Create simple calculations for display in grid columns such as total, difference, and percent difference
- Intuitive configuration of report titles, column properties, and grid properties
- Use the separate fixed row structure editor to create reusable row structures with multiple sections, headers, subtotals, and totals
- Report viewers can explore data in the resulting web reports using features such as filtering, sorting, drilling, and exporting to PDF or Excel



Example dynamic grid report in the new Report Builder



Example fixed row structure editor to build sections for fixed report grids

For more information, see the following topics in help:

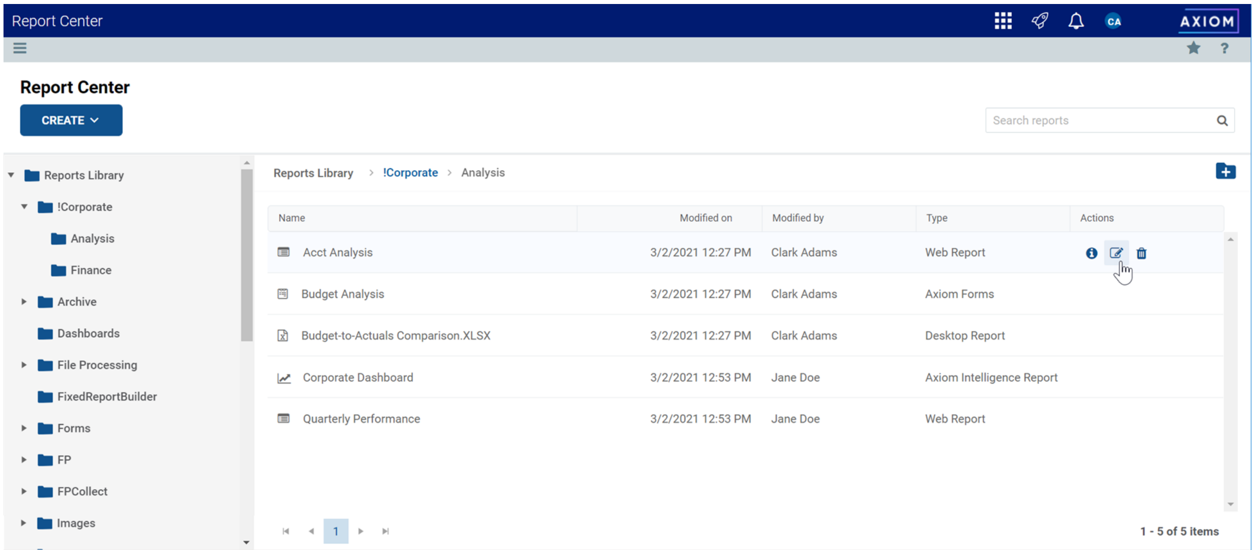
- "Web Reports"
- "Using the Report Builder"
- "Managing Fixed Row Structures fixed row structures for web reports"

NOTE: The ability to create new web reports and use the Report Builder is controlled by a new security permission, **Create Web Reports**. Enable this permission for any users or roles who you want to be able to create web reports using this new feature.

New Report Center for easy report access

Now you can easily access all of your reports using a centralized hub in the Web Client. Using the new Report Center, you can:

- Create new web reports (all clients) and Axiom Intelligence reports (clients with certain product licenses)
- Browse report folders and view any report that you have access to—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports
- Open reports for editing, in the appropriate editor for the report type
- Perform other report management activities, such as creating new report folders, deleting unneeded reports and folders, and renaming folders



New Report Center in the Web Client

For more information, see "Report Center" in the online help.

Additional enhancements

- You can now define a constraint expression for a column to limit the valid values for that column. This can be a good option when you want to limit a column to a short list of values and do not otherwise have a need to create a full lookup table.
- When assigning a lookup column to a column to limit the valid values for that column, the lookup can now optionally point to an alternate key column of a reference table.

Map standard specialty data for providers

> **NOTE:** The Provider Standards Review report is only available with a Comparative Analytics Provider license. To acquire this license, contact your sales representative or Client Relations Executive (CRE).

▶ Why use this feature

The new Provider Standards Review report allows you to map standard data for providers in your organization, such as NPI and Standard Specialty Code.

▶ How this feature works

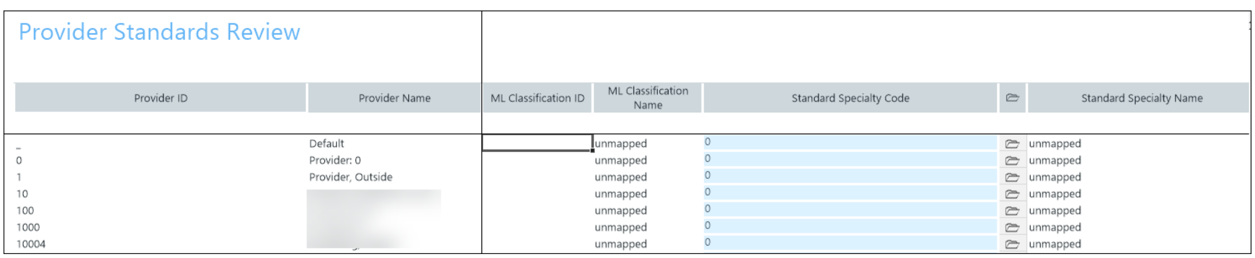
What: Update the Provider Standards Review report with provider standard values to post to the Axiom database.

Where: In the **Mgmt Admin** task pane, in the **Data Maintenance** section, click **Data Reconciliation > Provider Standards Review**.

Who: Users must be assigned the Performance Reporting Admin role.

How: Complete the blue columns, and save the workbook to post the changes to the Provider dimension.

> **NOTE:** The **ML Classification ID** and **ML Classification Name** columns are used primarily by the Syntellis machine learning feature. To activate these columns, contact Syntellis Support. For more information, see the topic "Standardizing data" in the online help.



Example of the Provider Standard Review report

▶ Where to find more information

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

- "About machine learning classifications"

- "Data Reconciliation utilities"

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.1 upgrade before applying any 2021.1 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.1 before the first product upgrade. Refer to the **Axiom 2021.1 Release Notes** and **Axiom Healthcare Suite 2021.1 Release Notes** for considerations before upgrading.

When upgrading, keep in mind the following:

- Along with upgrading to Axiom 2021.1, you will also need to upgrade to Axiom Comparative Analytics 2021.1.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- 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:

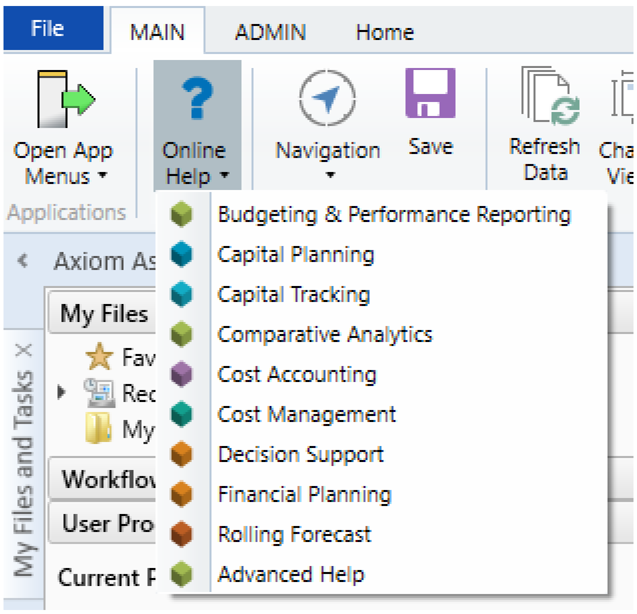
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation 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 Budgeting and Performance Reporting 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 & 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 2021.1.1

The following tables list the resolutions for issues addressed in 2021.1.1, released on April 12th, 2021:

Driver, template, calc method, and other updates

Drivers

Issue	Description
PFB-09260 - 04 Budget Driver setting changes [TFS 57824]	**Issue:** The following changes were made to the 04 Budget Driver as the result of user feedback to address specific issues. 1. Changed row 62, column H on the ControlSheet to "Off". This allows for the Convert Axiom Query results to zero on save so that if an error is encountered on the driver, the user will not lose the data and can still select Save Data Only so that the file content remains. 2. Changed Refresh Forms Run Behavior in row 60 on the Control sheet to "OnManualRefreshAndOpen" for consistency with other drivers. This allows the user to select the budget group(s) upon open. **Resolution:** The changes listed above were applied in this release.

Templates

Issue	Description
PFB-08433 - CYPMethod when changing calc methods in plan files [TFS 43779]	**Issue:** In a plan file, column BT brings in the CYPMethod column from the ACCT dimension table according to the selection/code in the Department table, ProjDimGrp column. The first row of the Budget Type section interfaces as a hard value. Subsequent rows refer to the row above each row, so row 110 refers to row 109, row 111 refers to row 110, and so on. When a user changes the calc method for the first row, the default is the standard calc method, which refers to column BT in the row above it. Because this is the first row of the section, the cell above is blank. As a result, the CYPMethod has no value to read and becomes zero. **Resolution:** Corrected by referencing a single location in a work area for the CYPMethod.
PFB-08590 - Changing calc method from fixed to variable and back to fixed [TFS 46290]	**Issue:** When a workbook was first created, the default calc method for an account was Fixed History. When a user changes it to Variable and then back to Fixed History, the numbers did not revert to the original budget numbers. **Resolution:** Corrected by adjusting the logic to work with calc method rules of preserving values to allow for multiple calc method changes.
PFB-08767 - FIF: ProviderComp: provider expense account is added to the FICA account, which causes an error for an erroneous GL account [TFS 48345]	**Issue:** A user has GL accounts set up by provider and their account filled in on the Provider Dimension table. However, when reviewing the Provider Comp block, the provider expense account is added to the FICA account, causing an erroneous GL account error. **Resolution:** Corrected the logic between interfaced and add new calc methods to require column CO to be the same or blank on the FICA line in the Provider Comp block.
PFB-08860 - Expense tab: Rate per unit format should be the same as column M (two decimals) [TFS 48859]	**Issue:** In the Expense tab, the format on the subtotal rows in column Q should be the same as column M (two decimals). **Resolution:** Corrected the formatting in column Q to two decimals.

Issue	Description
PFB-09155 - Merit/Market increases on Empl_List tab do not reflect effective month [TFS 54639]	**Issue:** For the Employee calc method on the Empl_List tab, the formula to calculate the monthly dollars compares each of the Merit/Market effective months (going from left to right) to the current month. If the effective month is less than or equal to the current month, then the formula uses the final rate for that category to calculate dollars by subtracting the previous rate to get the increase. The problem is, for example, when Market 2 has an effective month prior to the effective month of Merit. If you have a Merit increase effective in month 6, and a Market 2 increase is effective in month 3, then the formula uses the Final Rate for Market 2 minus the final rate for Market 1 to calculate the rate increase. In this case, since this is the first effective increase for the year, it should instead take the beginning rate plus the increase percent, and use that difference to calculate the rate increase. **Resolution:** Corrected by adjusting the formula based on the proposed description above for a supplemental logically determined value to add to the total in columns BA-BL "Dollars" (e.g. if Market Month AND Fiscal Month are less than the Review Month).

Utilities

Issue	Description

PFB-09387 - Budget deductions [TFS 71740]	**Issue:** The Charity and BadDebt sections pull in consolidated values - not just those limited by the DEPT.BudgetGroup parameter. This causes the Charity and BadDebt sections to show values that are too high. Also, outpatient for Charity and BadDebt does not display results due to missing formula logic
	
	Resolution: Corrected by doing the following:
	• Added a filter component to the GetData() functions in cells BP1169, BQ1169, BP1178, and BQ1178.
	• Made the following cell changes:
	  ◦ AA1169 - Changed from Charity to CharityIP.
	  ◦ AA1170 - Changed from blank to CharityOP.
	  ◦ AA1178 - Changed from BadDebt to BadDebtIP.
	  ◦ AA1179 - Changed from blank to BadDebtOP.
	• Column Y is the ACCT.BPCode associated with the selected account from the DeductionsModel worksheet. This uses a GetData() function. Column Z is the lookup to the relevant Charity and BadDebt columns from the DeductionsModel worksheet.

Report updates

Biweekly Productivity reports

Issue	Description
Biweekly Productivity Reports-Header with date not dependent on Entity.Paycycle - Phase 1-3 [TFS 23714]	**Issue:** On the Report worksheet, the For the Pay Period Ending header with date requires Entity.PayCycle compliance. **Resolution:** For a given DEPT.Prodmap, an assigned pay cycle could have a different date. Corrected by adjusting the subtitle to identify the pay cycle to improve the accuracy of the subtitle period ending date. **NOTE:** The Biweekly Productivity Reports Batch is associated with file processing.

Issue	Description
PFB-07961 - Graph display is incomplete/incorrect on Biweekly Productivity dashboard [TFS 39108]	**Issue:** When job code data exists in a prior year and zero in the current year, the system will prevent the job code from displaying in the graph due to a suppress zero option. **Resolution:** Corrected by adding a Productivity!AQ1 field definition of HOURS.TOT for ACT_PAY27 LY (prior year).
PFB-09171 - Average Hourly Rate incorrect due to AQ5 on Data sheet [TFS 58840]	**Issue:** On the Productivity graph, a display issue may occur with the content in the Average Hourly Rate not matching the same categories as the Skill Mix graph. This can be caused by results of the individual AQs retrieving values on different rows. **Resolution:** Corrected for the consistency required for AQ suppress zero parameter and filtering out JOBCODE.JobClass of NA.

Daily Productivity reports

Issue	Description
PFB-09369 - Daily Productivity Trend report graph [TFS 71751]	**Issue:** In the Daily Productivity Trend report, the graph for Volumes and Productive Hours per Unit references the opposite ranges of source data. The Volume line references the Prod Hrs/Unit data range, and the Prod Hrs/Unit line references the Workload data range. **Resolution:** Corrected the Productivity & Unit Trend line chart by swapping data references for each line. Adjusted references units to workload data and prod/hrs/unit to prod hrs/unit data.

Dashboards

Issue	Description
Month End Review Dashboard - Reselecting the same KPI displays unexpected data set in Detail card visualization [TFS 78081]	**Issue:** This issue occurs in Operational Overview > Patient Revenue, Other Revenue, and Other Expenses tabs. The dashboard tabs open to a default KPI and presents the associated visualizations (i.e. first KPI). If a user selects a KPI multiple times in a row, the KPI is initially selected and the next time is deselected. If a KPI is deselected AND is not the default, the selected KPI redirects to the default KPI. The issue occurs when the same KPI that is not the default is reselected multiple times in a row. As expected, the KPI in the deselected state displays that the KPI is deselected and reverts to the default, but the "Detail" card visualization does not properly display the expected data set for the selected KPI. For example, Dashboard default for Revenue Summary defaults to Inpatient Revenue. Then click to OutPatient Revenue and data values change correctly. However, click back to Inpatient Revenue and data in data grid at right still displays Outpatient content. **Resolution:** Corrected by adjusting the overall logic for each applicable tab to handle selected ID 0 and default to the first KPI, selected ID 1.

Labor Planning reports

Issue	Description
PFB-07786 - PayType Mapping Analysis filters [TFS 37171]	**Issue:** When a BudgetGroup is selected from the refresh variable of the report that does not have a Labor Configuration driver exception defined in the driver, the report does not properly lookup the Defaults for the Global Budget group and the Control Sheet is not properly filtered. **Resolution:** Corrected by identifying that when a selection of a Budget Group does not apply to an exception in the Labor Configuration driver, the Axiom UDFs do not convert to the Global.

Monthly reports

Issue	Description
PFB-09184 - The Budget Income Scenarios report includes BUD2017 hard-coded in AQ1 [TFS 58835]	**Issue:** The Budget Income Scenarios report has BUD2017 hard-coded in AQ1. It should use a formula that results in the current active budget data table. This fails for any new client as they do not have the BUD2017 data table in their system. **Resolution:** Corrected by identifying that the AQ1 primary table was set to a static value, which requires dynamic logic to determine the active Bud table.
PFB-09318 - Budget Department Audit report formula issues-only section hide logic [TFS 62537]	**Issue:** The Budget Department Audit report includes a formula that does not properly hide rows with no issues. **Resolution:** Corrected by identifying that when a user selects the refresh variable "Issues Only", the logic does not set the tag [hiderow] for non-issue line items.
Variance Review - Summary Level codes - data not consistently retrieved; maintain Comparison Time Series variables [TFS 28960]	**Issue:** The system does not consistently receive data for Summary Level codes. Any changes need to preserve the Comparison Time Series variables functionality that already exists. There exists a table in the "attic" that is intended to handle various logic to include identify General FSSummary codes and Entity Level FSSummary codes based on the selected department. **Resolution:** Corrected by incorporating the missing logic.
PFB-09366 - Labor Distribution Report Hours Total [TFS 71752]	**Issue:** The total hours (column T) of the Labor Distribution report does not include On Call or Other hours from columns AD or AF. **Resolution:** Corrected by adjusting the formula AQ1 cell T6 in the calc method row to include all hours columns for the sum.
PFB-09411 - Executive Monthly Package-Dept Trend [TFS 73472]	**Issue:** The Report tab in the Executive Monthly Package report includes an incorrect reference to the variables tab in the header formulas for DEPT Trend. **Resolution:** Corrected by adjusting the logic to identify the period in the trend report table column on the SupportingData tab for the Period table.

Issue	Description
Executive Monthly Package - AQs require dynamic logic for AlertFlag when selected year is >= 2019 [TFS 80792]	**Issue:** The following issues need to be addressed in the Executive Monthly Package: • AQs require dynamic logic for AlertFlag when selected year is >= 2019. • Sum by for the AlertFlag is not required. • Set the Variance_Overview!AQ1 property suppress zeros = On. **Resolution:** Corrected by making the suggested fixes as listed above that will associate the alert flag to the selected period.
ProductivityExecReview: Control_ Drilling logic referencing incorrect columns for drill path and filter [TFS 81312]	**Issue:** An error message displays when using Control_ Drilling. The logic references incorrect columns for the drill path and filter. **Resolution**: Corrected by adjusting the logic on Control_ Drilling for report columns AB:AC.

Provider reports

Issue	Description
Provider Key Indicators By Month: No files were created during multipass [TFS 16763]	**Issue:** When opening the report, the refresh variable does not refresh, and if a user wants to run file processing multipass first, the refresh variable does not fill in with a selection of either Visits or Encounters. The report is not handy to actually refresh first before processing multipass, which would fill in the visits or encounters because it does not filter down the providers and there could be too many records. Right now, when running multipass without the Visits or Encounters, the third section is visible but empty and the third graph is empty for all output reports. **Resolution:** Corrected by identifying that the refresh variable requires a default value on open.
PFB-06699 - Provider Productivity Summary: Coding Distribution charts reference incorrect data ranges [TFS 26694]	**Issue:** There are two Coding Distribution charts in this report, both of which reference incorrect data ranges. **Resolution:** We identified that the Coding Distribution charts require the percentage Visits data references instead of the Visits counts. Corrected by adjusting to percentage dataset (columns N:S) within the Visit Information calculated section.

Utilities

Issue	Description
PFB-09124 - Monthly to BiWeekly utility uses leap day for 2021 [TFS 54764]	**Issue:** In the Monthly to BiWeekly utility, when selecting BUD for 2021, the accrual matrix uses calendar days for the current year 2020, which includes the leap day in February. On the PP12_to_PP27RAccrual tab in cells G36 and G37, "CY" is hard coded and does not update to "NY" when the budget is selected. When Budget is selected, there is a hard coded reference to "CY" for current year. The days in the NY (Next Year) in the period table needs to be referenced. **Resolution:** Corrected by implementing the missing NY logic for the refresh variable BUD selection: If BUD NY data, ACT CY data.

Variance Comments reports

Issue	Description
Variance Review is not taking entity exception into account for Hours section when one is defined in Thresholdlevel table [TFS 29384]	**Issue:** When paid hours is set up at the Summary level, the system looks like for paid hours at the Detail level. This is inconsistent with other sections and may not produce expected results. **Resolution:** Corrected by adjusting the logic required to retrieve H_Hours data from ThresholdLevel when exception exists.

Issue	Description

Variance Overview report: Summary account data may not display for entity exceptions [TFS 33906]	**Issue:** The summary account data in the Variance Overview reports does not display account for entity exceptions. The system pulls the Entity exception summary accounts into the report based on their FSSummary value, but the 'GetData's do not trigger unless the summary account is also used at the General Threshold Levels. This appears to be occurring in the standalone Variance Overview report as well as on the Variance_Overview tab of the Executive Monthly Package.
	
	Resolution: The following issues were addressed:
	
	• Executive Monthly Package - By design, the ThresholdLevel utility sets exceptions per entity. Corrected the Executive Monthly Package to now identify if a single entity exists from the selected refresh variables.
	• Executive Monthly Package and Variance Overview - Both reports require logic to identify that an exception exists for the selected entity for Summary level settings. Corrected by doing the following:
	  ◦ Implemented logic to handle entity exceptions
	  ◦ Added a single selection entity refresh variable
	  ◦ Adjusted the data filter for entity refresh variable selection
	  ◦ Revised the instructions tab

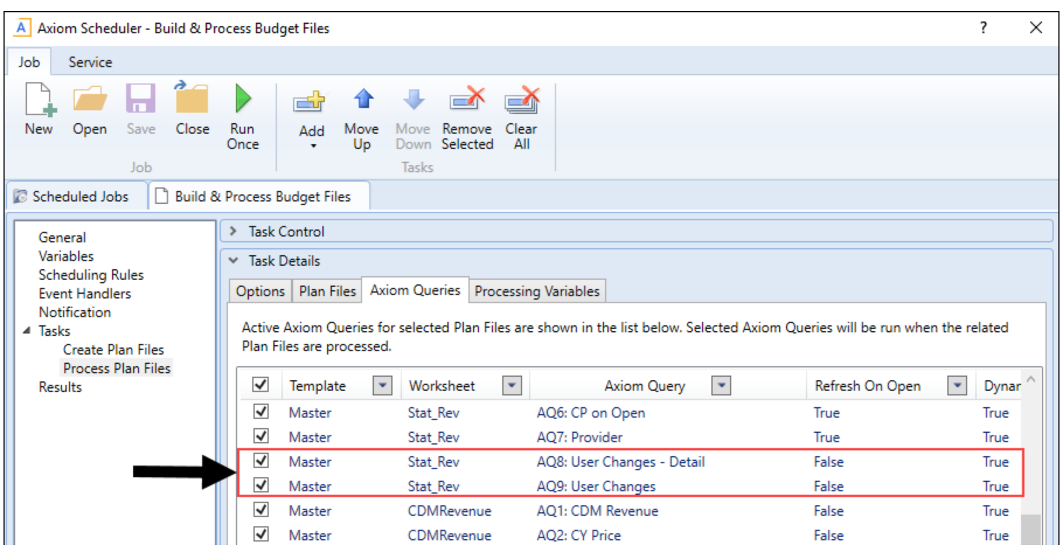
Manual configuration instructions and technical considerations

Complete the following steps to manually change the standard Build&Process and Recalc Scheduler jobs related to the issue addressed in defect 50080 from version 2020.4. The resolution for this defect corrected the Build & Process Budget Files Scheduler job to check the Active check box for AQs 8-9 on the Stat_rev tab and AQ13 on the Expense tab.

NOTE: Complete these steps for any Saved As versions, if applicable.

To manually change the standard Build & Process Budget Files and Recalculate Budget Files Scheduler jobs:

1. In the **Admin** ribbon tab, click **Scheduler**.
2. In the **Job** ribbon tab, click **Open**.
3. In the **Libraries** section, click the **Budgeting** folder.
4. In the list of jobs, double-click **Build & Process Budget Files**.
5. In the **Build & Process Budget Files** tab, click **Tasks > Process Plan Files** in the left-hand navigation.
6. In the **Axiom Queries** tab, do the following:
    - For the StatRev worksheet, select the **Active** checkbox for AQ8 and AQ9.



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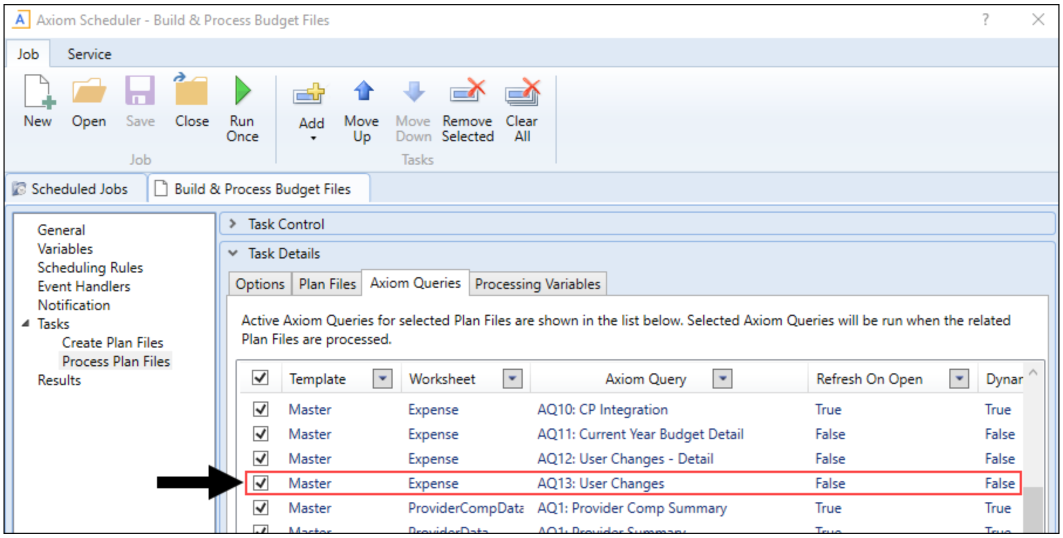
    - For the Expense worksheet, select the **Active** checkbox for AQ13.



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7. Close the Scheduler dialog.