Release Notes

Axiom Rolling Forecasting
Version 2021.1

AXIOM

10 S. Wacker Dr, Suite 3375
Chicago, IL 60606
(847) 441-0022
www.syntellis.com

info@syntellis.com

Syntellis® is a trademark of Syntellis Performance Solutions, LLC. Microsoft®, Excel®, and Windows® are trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

This document is Syntellis Performance Solutions Confidential Information. This document may not be distributed, copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable format without the express written consent of Syntellis Performance Solutions.

Copyright © 2021 Syntellis Performance Solutions, LLC. All rights reserved.

Version: 2021.1.2

Updated: 5/10/2021

Contents

About the Release Notes

Syntellis is pleased to announce the 2021.1 release of Axiom Rolling Forecasting. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.
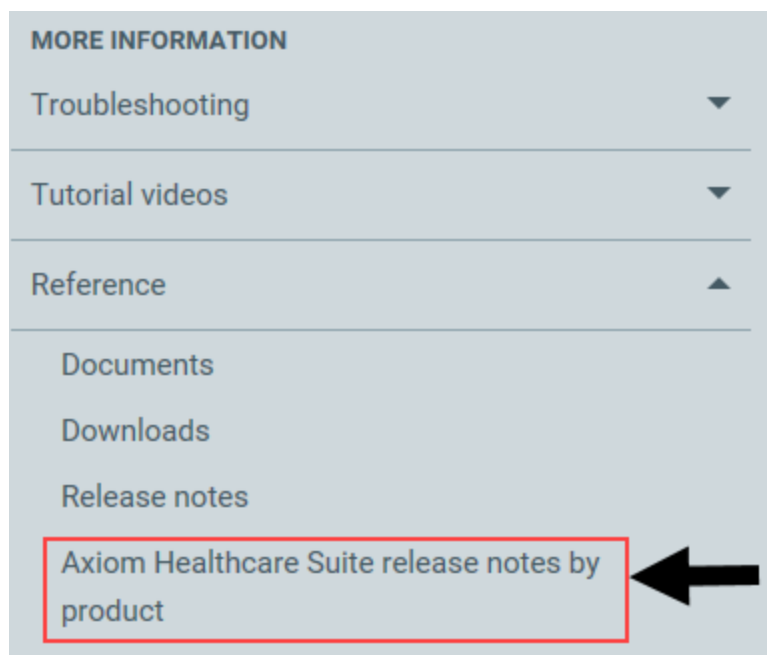
The purpose of these release notes is to provide you with the following:

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

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

▶ Accessing current and older release notes for Axiom Healthcare products

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

New features in 2021.1

Axiom Rolling Forecasting includes the following new feature in this release:

Updated Variance Comments Collection Setup Utility

The Variance Comments Collection Setup utility enables administrators and analysts to configure the Month End Variance report requirements for users. The new version of this utility provides a cleaner presentation and smoother functionality than the previous version, with added functionality.

Updated Month End Variance report

The Month End Variance report is used to review and analyze variances and enter comments about the variances and any course correction actions needed. The updated version of this report provides a cleaner presentation and smoother functionality than the previous version. New functionality includes an action plan section where users can enter course correction steps for handling the variance.

New mapping tool for data transformation

During implementation, rather than customize the import process for data that requires alternative mapping, consultants and administrators can now map data use exceptions for incoming Axiom Management Reporting data using a simple 5-column table.

Global Driver now includes multilevel configuration

When configuring the Global Driver tab, you can now select drivers at an Entity and RFGroup level.

Updated Variance Comments Collection Setup Utility

▶ Why use this feature

The updated utility provides a cleaner presentation and smoother functionality than the previous version. It contains collapsible sections that reduce scrolling, and it enables you to add entity level exceptions without copying from an existing exception.

▶ How this feature works

What: Administrators and analysts use this utility to configure variance comment alert thresholds for the Month End Variance report.

Where: This change applies to the RF Admin task pane and the Month End Variance report. The utility is available under the Setup section of the RF Admin task pane.

Who: Only Axiom Rolling Forecasting administrators and analysts can use this utility to configure comment alerts for the Month End Variance report.

How:

1. To open the utility, in the **RF Admin** task pane, go to **Setup** > **Variance Comments Collection Setup Utility**.

2. In the top section of the utility, select the actuals period to be compared and a comparison type. If you select Forecast as the comparison type, you need to select the Forecast RFPeriod, as shown in the following example:

3. In the **General Threshold Levels** section of the table, do the following:

a. **Summary** subsection – For each item listed, set the desired **Min Yellow**, **Max Red**, and **Threshold Red** variance levels in the corresponding columns, and then select the level of comments to enter. For items set to summary comments, in the **Summary RFCODE** column, select the RFCode from the drop-down.

b. **Detail Level** subsection – For each item listed, set the minimum, maximum, and threshold variance levels.

c. **Per Unit Level** subsection – Select whether or not to require comments for items in this section, and then set the **Max Red** variance levels that trigger alerts. If needed, set a **Summary RFCode**.

4. To create an entity exception, click **Add Entity Exception to Threshold Level Table**. Select and configure the entity.

5. Save your work.

▶ Where to find more information

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

- "Setting up Month End Variance comment alerts"
- "Using the Month End Variance report"

Updated Month End Variance report

▶ Why use this feature

The updated report provides a cleaner presentation and smoother functionality, and it allows you to collapse and expand subsections for easier viewing. New filter options allow you to display or hide various sections as needed.

▶ How this feature works

What: This report displays data variances between the selected actuals month and the comparison period. Key Performance Indicator (KPI) icons provide performance status for selected metrics and indicate which variances require comments.

Where: This change applies to the RF Admin and Rolling Fcst task panes, and to the Month End Variance report.

Who: This report is available to all users by default.

How:

1. To open the report, in the task pane, go to **Reporting** > **Month End Variance**.

2. In the **Filters** panel, select the RFGroup to report on, and then select view options. Click **Apply**.

3. In the **Variance Explanation** column fields of the report, enter variance comments for the required items. Required items display a red triangle inside a yellow rectangle in the Alert column.

4. To add course correction information to any variance explanation, enter this information into the corresponding **Action Plan** column fields.

Month End Variance

RFGroup: **EMC_Imaging** | Entity: **2** | VP: **Scott Johanson** | Director: **Dianne Parnell** | Manager: **Chris Sparks** | Period ending **February 29, 2020**

Save

Summary of your filter selections

Month-End Variance Explanation - Aug-2020

RFCode	Description	Aug-2020 Actual	Jul-2020 3 Mth Avg	Variance	Variance %	3 Mth Avg Alert	Variance Explanation (500 character limit)	Action Plan (500 character limit)
VCCSum		38,048	38,770	723	1.86%	●		
	FTE	214.78	218.87	4.08	1.86%			
	Hours Per Unit of Service	3.00	3.25	0.25	7.71%			
	Revenue Per FTE	31,082.19	24,050.89	7,031.30	29.24%			
	Wages Per Hour	12.12	11.64	(0.49)	(4.18%)			
	Salary & Benefit Expenses	551,157	512,574	(38,582)	(7.53%)	⚠		
E_Benefits_Fixed	Benefits - Fixed	15,841	2,081	(13,760)	(661.38%)	⚠		
E_Benefits_FTE	Benefits - Based upon Rate per FTE	31,877	22,679	(9,199)	(40.56%)	⚠		
E_Benefits_Sal	Benefits - Based upon Percent of Salaries	42,129	36,592	(5,537)	(15.13%)	⚠		
E_Salaries	Salaries	370,275	363,905	(6,370)	(1.75%)	⚠		
E_Salaries_Contract	Salaries - Contract Labor	91,034	87,319	(3,716)	(4.26%)	⚠		
	Supply Expense	180,156	187,984	7,829	4.16%	●		
	Other Operating Expense	426,494	449,064	22,571	5.03%	●		
	Total Expense	1,157,806	1,149,623	(8,183)	(0.71%)	⚠		
Other Detail								
VCCSum_KeyStat	Key Volume Statistics	12,702	11,946	756	6.33%	●		
VCCSum_PtRev	Patient Revenue	6,675,985	5,263,900	1,412,085	26.83%	●		

Click to expand/collapse the section

Summary-level comment field

Detail-level comment field

KPI Icons indicate variance status and whether comments are required

5. Save your work.

▶ **Where to find more information**

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

- "Using the Month End Variance report"
- "Setting up Month End Variance comment alerts"

New mapping tool for data transformation

▶ Why use this feature

When implementing systems or importing monthly data, consultants and administrators can now use a simple 5-column table to map data-use exceptions for data coming from Axiom Management Reporting. This allows users to use some of the incoming data in more than one place in the system or in an alternate place instead of the standard destination. Data in the table can change as needed while the import and summarization processes remain unaltered.

▶ How this feature works

What: When Actual and Budget data coming from Axiom Management Reporting is imported and summarized into RFGroups and RFCodes, it is automatically mapped to set destinations. You specify exceptions to these destinations in the RFSummarizationMap table. The automated summarization processes check this table for exceptions during import and then update the RFGroup and RFCode data as specified in the table.

Where: This change applies to the RFSummarizationMap table and the Summarize Actual Data and Summarize Budget Data data transformation processes, and the RF Admin task pane.

Who: Only Axiom Rolling Forecasting administrators using systems integrated with Axiom Management Reporting can use this mapping tool.

How: Use this feature to map data use exceptions when importing data from Axiom Management Reporting.

1. To open the RFSummarizationMap, in the **RF Admin** task pane, go to **Data Transformation** > **RFSummarizationMap**.

2. In the first two columns, double-click the cells to select the names of the RFGroups and RFCodes to be remapped. This is the "From" column set.

3. In the next two columns, double-click the cells to select the new designations. This is the "To" column set.

4. To flip the multiplier, in the **SignAdjustment** column for those items that need it, change the number from positive to negative or negative to positive, as needed.

Data Type	String	String	String	String	Decimal
String Length	50	50	50	50	
Description	Primary RFGroup	Primary RFCode	Remapped RFGroup	Remapped RFCode	Adjustment to the data values. Default is +1. Options are +1 and -1.
Delete Row	RFGroup	RFCode	RFGroup_Remap	RFCode_Remap	SignAdjustment
	Non Operating	E_Benefits_Sal	_Non Operating	E_Benefits_Sal_Nonop	-1.00
	Non Operating	E_Depreciation	_Non Operating	E_Depreciation_Nonop	-1.00
	Non Operating	E_MaintRepairs	_Non Operating	E_MaintRepairs_Nonop	-1.00
	Non Operating	E_OtherExp	_Non Operating	E_OtherExp_Nonop	-1.00
	Non Operating	E_PurchSvcs	_Non Operating	E_PurchSvcsNonop	-1.00
	Non Operating	E_Supplies_Medical	_Non Operating	E_Supplies_Medical_Nonop	-1.00
	Non Operating	E_Supplies_Other	_Non Operating	E_Supplies_Other_Nonop	-1.00
	Non Operating	E_Utilities	_Non Operating	E_Utilities_Nonop	-1.00
	Non Operating	R_OtherRev_Other	_Non Operating	R_OtherRev_Other_Nonop	1.00

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

▶ 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:

- "Setting up alternative data transformation mapping"
- "Summarizing data"

Global Drivers tab now includes multilevel configuration

▶ Why use this feature

When configuring the global driver, in addition to creating forecast assumptions at the RFPlanGroup level, you can now add forecast assumptions at an entity and RFGroup level.

▶ How this feature works

What: The assumption selection drop-down list now contains three levels to select from when adding a new forecast assumption in the Drivers tab: RFPlanGroup, Entity, and RFGroup.

Where: This change applies to the Planning Assumptions' Drivers tab and plan files where the global driver configurations are used.

Who: Only Axiom Rolling Forecasting administrators and analysts with the Rolling Forecast Global Driver Management role can configure the global driver.

How:

1. To open the Drivers utility, in the **RF Admin** task pane, go to **Setup** > **Drivers**.

2. Select a scenario.

3. In the **Planning Assumptions** utility, select the **Drivers** tab.

4. Select desired **View Options**.

5. In the **Driver Forecast Assumptions** section, click **Insert New Forecast Assumption**.

6. From the new assumption drop-down, select the driver down to the desired combination level. For example, you can select from the following combination levels:

   - RFPlanGroup and statistic

   - RFGroup and statistic
   - Entity code and statistic

   > **NOTE:** In the selection lists, RFPlanGroup + statistic combinations are listed first, followed by RFGroup + statistic combinations, followed by Entity code + statistic.

7. Select from the other remaining driver settings as needed.

8. Click **Save**.

▶ 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 the global driver"

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 to the 2021.1 version of Axiom Rolling Forecasting, keep in mind the following:

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

Preparing and scheduling upgrades
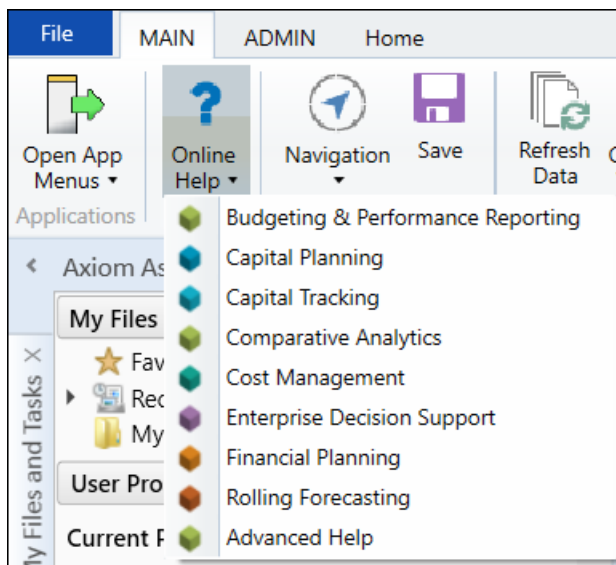
Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.

2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation date and time with at least three days of advance notice. The request should include the following information:

   - Desired Axiom platform version.
   - Desired Axiom for Healthcare product and version.
   - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
   - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).

3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Getting help and training

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

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

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

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

▶ Syntellis Central

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

- Search help across all Axiom products

- Access tips, tricks, and best practices in our knowledge base

- Find training and certification content including on-demand, video, webinars, labs, and instructor-led courses

- Submit a support issue, find suggested content, and manage any outstanding issues directly with us

- Review open Software Service project status and details

Issues fixed in 2021.1

No client-facing issues were addressed in 2021.1, released on March 15, 2021.

Issues fixed in 2021.1.1

The following table lists the resolutions for issues addressed in 2021.1.1, released on April 12, 2021:

Excel system only

Issue	Description
Consolidated Summary-refresh variables default on open should look to the RF_Forecast table and not RF_driver table [83920]	**Summary:** In the Consolidated Summary report, when the refresh variable is opened and the default is used, it could result in an error if the default period was not a valid period in the Forecast table. **Resolution:** Corrected by updating the formula in the refresh variable so that it correctly references the RF_Config.PrevPeriod as a default selection.
PFB-09516 - RF 2.0 Target Variance AQ5 limiting Key Stats [84683]	**Summary:** In the Target Variance report, the filter in Axiom Query 5 is pulling key statistics from only certain RFCodes and is also defaulting to using Calendar Days for most RFGroups. **Resolution:** Corrected by adjusting the Axiom Query 5 data filter to use RFCode.Type IN ('KeyStat') instead of static lists.
RF2.0 Deductions Calculator - 6 month average Forecast Method referencing incorrect cell [85486]	**Summary:** In the Deductions Calculator, when 6 Month Avg is the selected Forecast Method, the calculator references the wrong cell when determining the forecast method. **Resolution:** Corrected by updating the code used by the calculator so that it correctly determines the forecast method when 6-month average is the selected Forecast Method.
RF2.0 Deductions Calculator - Charity & BadDebt rows are not populating with historical values [85516]	**Summary:** In the Charity and Bad Debt rows of the Deductions Calculator, when the Data Selection method is set to History, the Charity and Bad Debt rows are not populating with historical values. **Resolution:** Corrected by updating the Charity and Bad Debt block calculation method formulas so that historical data populates the rows when Data Selection is set to History.
PFB-09521 - OTA Cost per Unit Calculation [88148]	**Summary:** In the plan file Forecast tab, when a user adds a one-time adjustment in the Volume section, the adjustment is not included in the Current OTA Cost per unit line. The calculation method formula is not including the adjustment when it divides by the key statistic amount. **Resolution:** Corrected by updating the Expense and Salary calculation method formulas to include the volume OTA when dividing by key statistic.

Issue	Description
PFB-09523 - Fixed Salary not Dynamic with Fixed FTE OTA Adjustments [88175]	**Summary:** Two issues:

1. The OTA Salary Adjustment row heading does not indicate that this is a fixed amount.

2. In the plan file Forecast tab, when a user enters a Fixed FTE One Time Adjustment in the Salaries block, the adjusted amount is not being calculated into the "Fixed Salaries including OTA" row.

Resolution: Corrected the first issue by relabeling the row header to read "Fixed OTA Salary Adjustment." Corrected the second issue by updating the forecast column formulas to include the One Time Adjustment in the calculation.

Issues fixed in 2021.1.2

The following table lists the resolutions for issues addressed in 2021.1.2, released on May 10, 2021:

Excel system only

Issue	Description
PFB-09522 - FTE OTA Impact on Benefits (Based upon Rate per FTE or % Salaries) [92185]	**Summary:** In the Forecast tab of the plan file template, data for One Time Adjustments (OTAs) for FTEs and for Salaries is not being automatically included in the Benefits blocks that are based on either FTEs or Salaries. Additionally, because of the way they are handled, Fixed OTA Salary adjustments and Fixed OTA FTE adjustments are not reflected in salaries totals while Variable adjustments are. **Resolution:** Corrected by adding calculations to the affected rows so that they find the Salary OTAs from the Salary calculation method. The subsequent calculations reference the Total, including the Salary OTA line. Made a similar change for the FTE OTAs.