Data Management Guide

Axiom Enterprise Decision Support

Version 2021.2

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Version: 2021.2

Updated: 8/12/2021

Contents

Working with Axiom Enterprise Decision Support

Axiom Enterprise Decision Support is a web-based application that allows you to manage your costing process and run reports to help your organization make decisions.

When you log into Axiom and launch the application, the Axiom Enterprise Decision Support home page displays a series of card buttons that open utilities, reports, and other functions. Cards can include multiple levels, depending on the number of tasks to complete. A breadcrumb link at the top of the page informs you of where you are in the system. You can use these links to move through the system quickly and easily.

To view instructions on using the Axiom interface, see Axiom basics.

The home page groups includes the following areas:

Data control

Define data sources

Configure where Axiom acquires the data used when processing cost models.

Maintain data

Manage core financial dimension data for your organization, which is used by the Axiom system for the costing process and reporting purposes.

Data enhancement and refinement

Define service lines

Create, manage, and process the tagging of encounters with service lines for reporting purposes.

Define populations

Create and manage population definitions, including specifying criteria. The tagged encounters can then be pushed to Axiom Intelligence for reporting capability.

Define episodes

Identify patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition.

View encounters

View details regarding a patient encounter to help you understand overall reporting results.

▶ Cost accounting

Modify and create a cost model

Creating, manage, and processing cost models using a series of grouped utilities and functions specifically for cost model configuration.

▶ Reporting

Report Center

View any reports that you have access to in the Axiom Reports Library—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports.

▶ Administration

Configure security

Assign users to subsystems and roles. This feature provides a browser-based, easy-to-use interface for managing role and subsystem assignments.

View job status

View the status of jobs currently processing or the results of all processed jobs.

Defining data sources

The purpose of this page is to configure where Axiom acquires the data used when processing cost models.

NOTE: The acquisition of data does not happen until you cost models are processed. For more information, see "Processing cost models" in the online help.

Payroll data is often required to help provide a greater level of detail for costing purposes than is stored in the general ledger. Payroll dollars interface directly to the general ledger, but the amount of detail needed for financial reporting is often at a higher level than that desired for cost accounting purposes. The payroll data is used as a basis or statistic to reclass general ledger accounts into more granular categories.

To define data sources:

1. From the Enterprise Decision Support home page, in the **Data control** section, click **Define data sources**.
2. Complete the following:

> **NOTE:** In most cases, these settings are configured and any custom imports set up for you by the Syntellis Implementation Consultant. Once they are configured, you will likely not need to change them.

Option	Description
Where will the GL data come from?	Do one of the following: • To use your organization's general ledger data imported into the Axiom actual table, select **Summarize from the Axiom actual table**. • To use data imported using a custom import, select **Use the following custom import**, and click **Browse** . Select the import, and click **OK**.
Will you load payroll detail to use for labor distributions?	a. Do one of the following: • To use your organization's imported payroll data, click the toggle to **Yes**. **TIP:** Using your imported payroll data will allow better distributions based on actuals. • To use the payroll data from your general ledger, click the toggle to **No**. b. If you selected Yes above, do one of the following: • To use your organization's payroll data imported into the Axiom actual table, select **Summarize from the Axiom actual table**. • To use data imported using a custom import, select **Use the following custom import**, and click **Browse** . Select the import, and click **OK**.

Option	Description
How will you compute cost item volumes?	**NOTE:** Volumes include length of stay, labs pulled, etc. Do one of the following: • To use data from the cost detail table, select **Summarize from the Axiom cost detail table**. • To use data imported using a custom import, select **Use the following custom import**, and click **Browse** . Select the import, and click **OK**.

3. Click **Save**.

2

Maintaining dimension data

Dimensions are the key index fields for the tables in the Axiom database. For cost accounting, there are three types of dimensions: core, encounter, and reference. The core dimensions store generic data and options used throughout most Axiom products. The encounter dimensions store information specific to the services provided by your organization. The reference dimensions are specific to cost accounting.

Working with core dimensions

Core dimensions allow you to maintain the following core financial data for your organization and used by the Axiom system for the costing process and reporting:

Dimension	Description
Accounts	The records for each account in the general ledger of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.
Cost categories	The cost category and represents a grouping of accounts in the general ledger used to perform the costing process.
Cost items	The cost object to which costs are allocated during the unit cost calculation processes for all methods.
Departments	The records for each department within an organization.
Entities	The basic information about the entities supported by the Axiom and can determine for some products which entities to include in processing of data.
Job codes	The records for all of the job codes within your organization.
Pay types	The records for all possible categories of compensation that an employee might receive.

Accounts dimension

This dimension contains records for each account in the general ledger of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and

statistics.During the cost model set up process, any manual statistic accounts added by a user are automatically added to the core Account dimension as well with a type of Statistic. For more information, see "Managing manual statistics" in the online help.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system database. For more information, see Editing dimensions using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Core dimensions > Accounts**.

Filtering records

The page can only display up to a maximum of 10,000 records. As a result, you will need to filter the records to display.

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an account

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit an account:

1. In the table, do any of the following:
   - To add an account, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an account, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display any new accounts in order by the **ACCT** column.

Deleting an account

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an account:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.

The account row is removed from the table.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ACCT - The Axiom Software account number. This can be the combination of the prime account and sub account if that is how your general ledger system is set up.

Description - The account description from the general ledger.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Other

NOTE: Most of the columns in this section are Axiom standard columns and categories used by other Axiom products. These columns cannot be added or edited.

Credit - Used during the interface process to reverse the signs so values are stored in a positive condition in the database. Select one of the following valid entries:

- dr
- C
- NA

Normally, revenue and liabilities are C, and all others are dr.

RptMap - Used to group accounts. Valid entries include any account numbers in the ACCT column. The system automatically copies the information in the ACCT column to this column during installation.

Statement - Used to identify the financial statement category. Select one of the following valid entries:

- NA
- Statistic
- KeyStat
- Hours
- IS

Type - Used to identify the major Financial Statement category. Select one of the following valid entries:

- NA
- Statistic
- KeyStat
- Hours
- Revenue
- Deduction
- Expense

FS Summary - Used to identify summary-level Financial Statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name. For example, R_PatientRev or E_Salaries.

FS Detail - Used to identify line-item financial statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name.

FS Payor - A variation of FSDetail used if GL accounts have payor categories; used for Budgeting Deductions models. If this is not used, match to FSDetail. Categories can be added or edited. The default value is a blank.

Cost categories dimension

This dimension defines the cost category and represents a grouping of accounts in the general ledger used to perform the costing process. The cost category is the lowest level of detail at which costs are calculated for unit costs. They are stored for the calculated variable and fixed amounts.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Core dimensions** > **Cost categories**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a cost category

Due to the large number of records that this table may contain, the page can only display a maximum of 10,000 records.

To edit a cost category:

1. In the table, do any of the following:
   - To add a cost category, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a cost category, click in the cell(s) to make your changes.

NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display any new cost categories in order by the **CostCatID** column.

Deleting a cost category

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a cost category:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

CostCatID - The Axiom ID assigned to the cost category.

Name - The name of the cost category.

Description - A full description of the cost category.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

ReportGroup - The grouping of cost categories for reporting purposes.

ReportDetail - The detail expense assignment for reporting. This should either be at the FSDetail level or highly correlated. Some FSDetail accounts can be grouped for costing purposes and may not have a corresponding cost category, e.g., EX_Utilities may be grouped into OtherExpenses.

EHRCostCat - The cost category used by the EHR Extract. This field is used in grouping cost categories for input into an EHR system.

Cost items dimension

This dimension defines the cost object to which costs are allocated during the unit cost calculation processes for all methods. It can be a chargeable activity or item, thus the foreign key reference to CDM codes, but it can also be a non-chargeable item. The cost item can also be created during a Direct to Encounter costing process, whereby the encounters can be assigned cost items based on business rules.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Core dimensions > Cost items**.

Adding or editing a cost item

To add or edit a cost item:

1. Do one of the following:
    - To add a cost item, click **Add Row**. The new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To edit a cost item, in the **Actions** column for the existing cost item, click the notepad icon  .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display any new cost items in order by the **Cost item ID column**.

Deleting a cost item

To delete a cost item:

1. In the **Actions** column for the existing cost item, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

> **NOTE:** The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Cost item ID - The Axiom ID associated with the cost item.

Cost item - The unique alphanumeric code associated with the cost item.

Description - The detailed description for the cost item.

Department - The default department for the cost item.

> **NOTE:** If a cost item is used across multiple departments, you will need to set it up for each department.

CDM code - The reference to the CDM code potentially associated to the cost item, if not set to the default.

Revenue code - The UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

CPT - The CPT code associated with a chargeable cost item in an institutional or professional setting.

Type - A client-controlled Type indicator helpful in filtering cost items of particular nature or category. This can be used to indicate different cost treatment in the costing process.

HCPCS ID - The HCPCS code associated with a chargeable cost item in an institutional or professional setting.

Create date - The date the cost item was created.

Departments dimension

This dimension contains records for each department within an organization. For example, radiology, emergency, finance, and so on. This dimension table is the core dimension table that all department dimension versions are based upon. For more information on how versions work, see "Working with

dimension versions" in the online help.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Core dimensions** > **Departments**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting a department

To manage departments in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing dimension versions using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

DEPT - The Axiom Software department number, which is formed by combining the entity and cost center.

Description - The department description. The naming convention is entity abbreviation with department description. For example, MHS Operating Room.

NOTE: For closed departments, add three asterisks to the beginning of the description. For example, MHS *** Operating Room. Descriptions should not be in all capital letters.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Other

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

Entity - The Axiom entity code. The description lookup table is in the ENTITY dimension table. This should be the Business Unit, and match the first three to four characters of the department number.

CostCenter - The cost center portion of the department number. You can use this for comparative reporting across entities, such as comparing the cost per unit of all operating rooms across your health system.

RptMap - Used to consolidate departments for reporting.

VP - The Vice President responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

Director - The director responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

Manager - The manager responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

Division - The division for rollup reporting, which is defined by your organization. You can use this information to consolidate types of departments together for reporting. For example, you can use the word Radiology to combine all radiology departments across all entities.

KeyStatDesc - Used to identify the description of the primary statistic for each department.

Entities dimension

This dimension provides basic information about the entities supported by the Axiom and can determine for some products which entities to include in processing of data.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Core dimensions** > **Entities**.

The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an entity

To add or edit an entity:

1. In the table, do any of the following:
   - To add an entity, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an entity, click in the cell(s) to make your changes.

     NOTE: Columns that are grayed out cannot be edited.

   - To undo your changes, click the left arrow icon .
   - To redo your changes, click the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will any new entities in order by the **ENTITY** column.

Deleting an entity

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an entity:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides description for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

ENTITY - The primary key for the table using an integer data format.

Description - The long entry description for the entity.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

Abbrev - The standard abbreviation for the entity.

Other

Beds - The bed size of the entity.

Job codes dimension

This dimension includes records for all of the job codes within your organization. Each job code represents a job position or role within the organization.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Core dimensions** > **Job codes**.

The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Filtering records

Due to the large number of records that this table may contain, the page can only display a maximum of 10,000 records.

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a job code

To edit a job code:

1. In the table, do any of the following:

- To add a job code, click **Add Row**. The new row displays at the bottom of the table.

  IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a job code, click in the cell(s) to make your changes.

  NOTE: Columns that are grayed out cannot be edited.

- To delete a job code, select the row to highlight it, and then click **Delete Row**. At the **Continue?** prompt, click **OK**.
- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display any new job codes in order by the **JOBCODE** column.

Column descriptions

The following section describes the areas and columns in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

JOBCODE - The Axiom Software job code. This entry must be an alpha-numeric field so that during the import process a J is prepended to all job codes to ensure they are alpha numeric.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - The job code description from the payroll system.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

Variable - Determines whether the job code is a fixed or variable cost.

Other

JobClass - The major job classes of individual job codes. You can use this to apply salary increases for specific groups. Commonly used entries include the following:

- Management
- Physician
- Professional
- Technical
- RN
- LPN
- Assistant
- Support
- Other
- Clerical
- Contract

GLClass - Used to identify the GL class each job code is assigned to for budget and reporting salary-mapping purposes. The exception-mapping table is located in the GLPayrollMapping table. If mapping payroll by job code or pay type is not an option, this mapping table allows for special exceptions for payroll mapping.

Pay types dimension

This dimension includes records for all of the possible categories of compensation that an employee might receive. For example, regular pay, paid time off, sick pay, incentive pay, and so on.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Core dimensions > Pay types**.

The page can only display up to a maximum of 10,000 records.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a pay type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a pay type:

1. In the table, do any of the following:
   - To add a pay type, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a pay type, click in the cell(s) to make your changes.

     NOTE: Columns that are grayed out cannot be edited.

   - To undo your changes, click the left arrow icon .
   - To redo your changes, click the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display any new pay types in order by the **PAYTYPE** column.

Deleting a pay type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a pay type:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

PAYTYPE - The Axiom Software pay type. This must be an alpha-numeric field, so that during the import process, a P is prepended to all pay types to ensure they are alpha numeric.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - Identifies the pay type description from the payroll system. Be as explicit as possible, avoid abbreviations, and use layman's terms.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

CostVariable - Determines whether the pay type is a fixed or variable cost.

Other

PaySummary - Used in reporting to identify major pay categories. Select one of the valid entries:

- Prod
- NonProd
- Other
- Stat
- NA

PayDetail - Used in reporting to identify detail pay categories. Select one of the valid entries:

- Contract
- NA
- NonProd
- Other
- Overtime
- Regular
- Stat

FTE - Indicates whether to include hours in FTE calculations. Select one of the valid entries:

- To assign to pay types to count for FTE calculations such as Regular, Overtime, Education, PTO, Jury Duty, Bereavement, Sick, and so on, select **Yes**.
- To assign to pay types to not count for FTE calculations such as Differentials, Call Pay (not callback), Bonus, Benefits, and so on, select **No**.
- To assign to your productivity stat pay types, select **Stat**.
- If none of the above scenarios apply, select **NA**.

Working with encounter dimensions

Encounter dimensions allow you to maintain the following encounter and transaction-related records and codes:

Dimension	Description
Ages	The ages of the patients during the loaded encounter.
Bill types	The bill types for the primary insurance claim upon final bill drop for the encounter.
Discharge statuses	The discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter.
Financial classes	The insurance plans grouped into financial classes for the primary insurance claim.

Dimension	Description
Insurance plans	The insurance plan of the subscriber or guarantor for the loaded patient encounter.
Locations	The physical locations that have been billed within the organization and is used for monthly reporting and provider-level budgeting.
Patient types	The type of patient for the loaded encounter.
Places of Service codes	The Place of Service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.
Point of Origin codes	The source of the patient admission and/or how the patient was presented to the provider for the loaded encounter.
Providers	The providers within the organization.
Services	The services of the patient during the encounter course of care.
Sexes	The sex of the patient during the loaded encounter.
Stations	The nursing station of a patient when first admitted to a facility as well as the station from which the discharge occurred for the loaded encounter.
Transaction codes	Used to capture the transaction codes for payments and adjustments stored in the Enc_Payments table for the loaded encounter.

Ages dimension

This dimension is used to capture the age of the patient during the loaded encounter. The codes and descriptions used here will generally match your organization's source systems and data standards, however, conversions may be warranted to improve analysis and reporting.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Ages**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting an age

To manage ages in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the Ages dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

AgeID - The Axiom ID associated with the age.

Age - A five-character string value entered as an abbreviation. Examples include the following:

- N for newborn, delivered on-premise
- 3_H, for a newborn delivered and admitted
- 1_D for one day old
- 4_M for a four month old
- 25 for a twenty five year old

Bill types dimension

This dimension is used to capture the bill type for the primary insurance claim upon final bill drop for the encounter. Codes and descriptions will generally match your organization's source systems and data standards. Bill types may also comply with regulatory requirements in some cases, e.g., CMS Medicare claims.

Accessing the Bill Type dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Bill types**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting a bill type

To add, edit, or delete bill types in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

BillTypeID - The Axiom ID associated with the bill type.

BillType - The bill type code that represents the primary insurance claim for the encounter. This must be an alpha-numeric field.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - The description for the bill type.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Discharge statuses dimension

This dimension is used to capture the discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter. Codes and descriptions generally match your organization's source systems and data standards. Discharge status codes and descriptions may also comply with regulatory requirements in some cases, e.g., CMS Medicare claim.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Discharge statuses**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, and deleting a discharge status

To manage discharge statuses in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the Discharge Status dimension table:

> **NOTE:** The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

DischargeStatusID - The Axiom ID associated with the discharge status.

DischargeStatus - The code used to identify the discharge disposition status of a patient. This must be an alpha-numeric field.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Financial classes dimension

This dimension is used to group insurance plans into financial classes for the primary insurance claim. Codes and descriptions will generally match your organization's source systems and data standards. This dimension is shared with other Axiom Healthcare solutions.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Financial classes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a financial class

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit financial classes:

1. In the table, do any of the following:

- To add a financial class, click **Add Row**. The new row displays at the bottom of the table.

  IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a financial class, click in the cell(s) to make your changes.

  NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the any new financial classes in order by the **FinClass** column.

Deleting a financial class

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a financial class:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

FinClass - The financial class code. This must be an alpha code so that an F is prefixed during the import process.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"

- Begins with + - =.

Description - The description for the code.

> **TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Insurance plans dimension

This dimension is used to capture the insurance plan of the subscriber or guarantor for the loaded patient encounter. Codes and descriptions will generally match your organization's source systems and data standards. This table also includes insurance plans grouped into payors and financial classes.

> **TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Insurance plans**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an insurance plan

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit an insurance plan code:

1. In the table, do any of the following:
    - To add an insurance plan, click **Add Row**. The new row displays at the bottom of the table.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes.

- To edit an insurance plan, click in the cell(s) to make your changes.

  NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the any new financial classes in order by the **INSPALNID** column.

Deleting an insurance plan

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete an insurance plan:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the Insurance Plans dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

INSPLANID - The Axiom ID associated with the insurance plan.

INSPLAN - The code used to for the insurance plan.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - The long name of the insurance plan.

> **TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

ENTITY - The entity associated with the insurance plan.

FinClass - The financial class code.

Payor - The code associated with the insurance plan payor.

PlanCode - The plan associated with the insurance plan code.

Locations dimension

This dimension is used to store all of the physical locations that have been billed within the organization and is used for monthly reporting and provider-level budgeting.

> **TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Locations**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a location

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a location:

1. In the table, do any of the following:
    - To add a location, click **Add Row**. The new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To edit a location, click in the cell(s) to make your changes.

      NOTE: Columns that are grayed out cannot be edited.

    - To undo your changes, click the left arrow icon .
    - redo your changes, click the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **LOCATION** column.

Deleting a location

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a location:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

LOCATION - The code used to represent the location. This must be an alpha code, so an L is prefixed during the import process. Default should be used as the Location code if this dimension is not being used.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - Describes the location associated with the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

LocationEntity - The entity location code used to identify the physical location of the department (entity).

TIP: The entity location code is different from the entity code, which is associated with a financial department. For example, departments on a hospital campus may have different entity codes but share the same entity location code because they reside in the same physical area.

Patient types dimension

This dimension is used to capture the type of patient for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Patient types**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a patient type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a patient type:

1. In the table, do any of the following:
   - To add a patient type, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a patient type, click in the cell(s) to make your changes.
   - To undo your changes, click the left arrow icon .
   - To redo your changes, click the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **PTTYPEID** column.

Deleting a patient type

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a patient type:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

PTTYPEID - The Axiom ID associated with the patient type.

PtType - The most detailed patient type referenced in the encounter data.

Description - The description of the patient type.

P1Type - Inpatient and Outpatient high-level patient type for summary reporting.

P2Type - Inpatient and Outpatient as well as some other higher types of patients for reporting.

EDSPtType - Identifying all patient types into four categories - IP, OP, PB, NA.

Places of Service codes dimension

This dimension stores the Place of Service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Places of Services codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a Place of Service code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a Place of Service code:

1. Review and/or make selections for the following columns:
    - To add a code, click **Add Row**. The new row displays at the bottom of the table.

IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a code, click in the cell(s) to make your changes.

  NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **PlaceOfServiceID** column.

Deleting a Place of Service code

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a Place of Service code:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

PlaceOfServiceID - The Axiom ID associated with the place of service.

PlaceOfService - The code used to indicate where the service was rendered.

Description - A long form description of where the service took place.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Point of Origin codes dimension

This dimension is used to capture the source of the patient admission and/or how the patient was presented to the provider for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards. Point of Origin codes and descriptions may also comply with regulatory requirements in some cases, e.g., CMS Medicare claims.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Encounter dimensions > Point of Origin codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting a Point of Origin code

To manage Point of Origin codes in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

PointOfOriginID - The Axiom ID associated with the patient admission source.

PointOfOrigin - The code for the source of the patient admission.

Description - The description or name of the source location.

Providers dimension

This dimension is used to store all of the providers within the organization that provide patient care.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Providers**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a provider

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To add or edit a provider:

1. In the table, do any of the following:
   - To add an account, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a provider, click in the cell(s) to make your changes.

     NOTE: Columns that are grayed out cannot be edited.

- To undo your changes, click the left arrow icon .
- To redo your changes, click the right arrow icon .

2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **Provider** column.

Deleting a provider

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a provider:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Provider - The Provider ID used in Axiom Budgeting and Performance Reporting. Must be an alpha code, so a D is prefixed during the import process.

Description - Identifies the provider description to use for budgeting and reporting.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Identity - An additional identification number assigned to the provider, such as an employee ID.

CostProvider - The provider to be costed under, such as nurse practitioners who perform their services under a doctor (the provider).

MedicalGroup - The practice or medical group name in which the provider offers their services.

First_Name - The first name of the provider.

Last_Name - The last name of the provider.

Middle_Name - The middle name of the provider.

NPI - The National Provider ID assigned to the provider.

Type - Used for reporting to define the provider type such as MD, NP, PA, and so on.

HomeDeptNo - The provider's home department number.

Specialty - Used for reporting to define the type of specialty.

EMPId - The employee ID used to match billing data to payroll.

Active - Used to determine if the provider is active. Valid entries include the following:

- Yes
- No

Services dimension

This dimension is used to capture the services of the patient during the encounter course of care. The codes and descriptions here may match your organization's source systems and data standards, but they can also be created to meet specific analysis and reporting needs.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Services**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a service

To add or edit a service:

1. In the table, do any of the following:
    - To add a service, click **Add Row**. The new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To edit a service, click in the cell(s) to make your changes.

      NOTE: Columns that are grayed out cannot be edited.

    - To undo your changes, click the left arrow icon .
    - To redo your changes, click the right arrow icon .
2. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **ServicesID** column.

Deleting a service

Due to the large number of records that this table may contain, you need to use the Filter panel to identify the records to display.

To delete a service:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

ServiceID - The Axiom ID associated with the service.

Services - The code the represents the service for the patient.

The system will not allow you to save the table if an entry includes one or more of the following:

- More than the maximum allowed characters

- Contains one of these characters: \\ / < > : ? | * ' \"
- Begins with + - =.

Description - The description for the service.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

DSSPtType - The patient type used to determine how those patients should display in reports. Valid options include the following:

- IP
- OP
- PB (Professionally Billed Encounters)
- NA

Sexes dimension

This dimension is used to capture the sex of the patient during the loaded encounter. The codes and descriptions will generally match your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Sexes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding a sex code

To edit in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

To add a sex code:

1. In the table, do any of the following:
    - To add a sex, click **Add Row**. The new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To undo your changes, click the left arrow icon .
    - To redo your changes, click the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the "Column descriptions" section below.
3. When you finish making changes, click **Save**. After you save, the table will display the new row in order by the **SexID** column.

Deleting a sex code

To delete a sex code:

1. In the table, select the row to highlight it, and then click **Delete Row**.
2. At the **Continue?** prompt, click **OK**.
3. When you finish making changes, click **Save**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

SexID - The Axiom ID associated with the sex of the patient.

SEX - The code for the sex of the patient.

Stations dimension

This dimension is used to capture the nursing station of a patient when first admitted to a facility as well as the station from which the discharge occurred for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Stations**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting a station

To manage stations in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

StationID - The Axiom ID associated with the nursing station.

Station - The code assigned to the nursing station.

Description - The description for the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Transaction codes dimension

This dimension is used to capture the transaction codes for payments and adjustments stored in the Enc_Payments table for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards. You can also use this table to group transaction codes into transaction types.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Encounter dimensions** > **Transaction codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding, editing, or deleting a transaction code

To manage transaction codes in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see Editing a dimension using a spreadsheet.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

TransactionCodeID - The Axiom ID associated with the transaction code.

TransactionCode - The financial class code. This must be an alpha code so that an F is prefixed during the import process.

Description - The description for the code.

> **TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

LongDescription - A longer description or comments about the transaction code.

TransactionType - Type of transaction code. Allows you to group individual transaction codes into types.

Working with reference dimensions

Reference dimensions allow you to maintain the following cost-related data for processing costs:

Dimension	Description
APR DRGs	The APR DRGs for your organization, which are commonly implemented as part of the coding and billing process.
CDM codes	The charge codes within an organization used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.
CPT codes	The CPT codes that have been billed within the organization.
HCPCS codes	The HCPCS codes used within your organization as level 3 CPT codes that provide further detail as to the services, procedures, or supplies that were used in the course of care.
ICD diagnosis codes	The International Classification of Diseases (ICD) diagnosis information, which is referred to by a number of tables in the system.
ICD procedure codes	The clinical procedures performed for the patient in the course of care for the encounter being loaded.
MDC codes	The Major Diagnostic Categories (MDC) are universally defined and apply to DRGs, MDC values, and descriptions, which will generally match your organization's source systems and data standards.
Modifiers	The additional standard codes used to further identify services or supplies used in the course of patient care.
MS DRGs	The MS DRGs for hospital acute care providers, which generally match industry standards or your organization's source systems and data standards.
Reporting DRGs	A combination or determination of the primary DRGs used for reporting purposes.
Revenue codes	The revenue codes used by your organization.

CDM codes dimension

This dimension includes the charge codes within an organization. The charge codes are used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Reference dimensions** > **CDM codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a CDM code

To add or edit a CDM code:

1. Do one of the following:
   - To add a CDM code, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a CDM code, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **CDM code** column.

Deleting a CDM code

To delete a CDM code:

1. In the **Actions** column for the existing CDM code, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

CDM code - The charge codes used within your organization. This must be an alpha numeric field so that during the import process, a C is appended to all CDM codes to ensure they are alpha numeric.

Description - Identifies the CDM code description. Try to be as explicit as possible, avoid abbreviations, and use layman's terms.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

CPT codes dimension

This dimension contains the CPT codes that have been billed within the organization.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > CPT codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a CPT code

To add or edit a CPT code:

1. Do one of the following:
   - To add a CPT code, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a CPT code, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **CPT** column.

Deleting a CPT code

To delete a CPT code:

1. In the **Actions** column for the existing CPT code, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

CPT - The CPT code. This must be an alpha code, so a C is prefixed during the import process.

Description - The CPT description used for budgeting and reporting.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

DRGs

APR DRGs dimension

This dimension is used to manage the APR DRGs for your organization, which are commonly implemented as part of the coding and billing process. These values will generally match industry standards or your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Reference dimensions** > **DRGs** > **APR DRGs**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an APR DRG

To add or edit an APR DRG:

1. Do one of the following:
   - To add an APR DRG, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an APR DRG, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.

3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **APR DRG ID** column.

Deleting an APR DRG

To delete an APR DRG:

1. In the **Actions** column for the existing APR DRG, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

APR DRG ID - The Axiom ID assigned to the APR DRG.

APRDRG - The value for the All Patient Refined DRG.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Service line - The APR service line. These are not the Axiom Enterprise Decision Support service lines.

Description - The description for the APR DRG.

Effective From date - The date the APR DRG became effective.

Effective To date - The date the APR DRG is effective to.

MDC codes dimension

This dimension is used to place a DRG into a higher level category. Major Diagnostic Categories (MDC) are universally defined and apply to DRGs, MDC values, and descriptions, which will generally match your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > DRGs > MDC codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an MDC code

To add or edit an MDC code:

1. Do one of the following:
   - To add an MDC code, click **Add Row**. The new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an MDC code, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **MDC ID** column.

Deleting an MDC code

To delete an MDC code:

1. In the **Actions** column for the existing MDC code, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

MDC ID - The Axiom ID assigned to the MDC code.

MDC - The code for the MDC.

Description - The description of MDC to be used for reporting purposes. You can enter up to 50 characters in this field.

Long description - A longer description or comments about the code.

Report description - Enter a description to be used for reporting.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

MS DRGs dimension

This dimension is used to manage the MS DRGs for hospital acute care providers. Codes and descriptions will generally match industry standards or your organization's source systems and data standards.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Reference dimensions** > **DRGs** > **MS DRGs**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an MS DRG

To add or edit an MS DRG:

1. Do one of the following:
    - To add an MS DRG, click **Add Row**. A new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To edit an MS DRG, in the **Actions** column, click the notepad icon  .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **MSDRG ID** column.

Deleting an MS DRG

To delete an MS DRG:

1. In the **Actions** column for the existing MS DRG, click the trash can icon  .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

MSDRG ID - The Axiom ID assigned to the MS DRG.

MSDRG - The value for the MS DRG.

Description - The description for the value.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Reporting DRGs dimension

This dimension is used to combine or determine the primary DRGs used for reporting purposes. In some cases, multiple DRGs may be assigned to an inpatient or in others only certain DRGs may be assigned, e.g., MS DRGs are assigned to Medicare encounters and APR DRGs are assigned to Medicaid encounters.

This reference table allows you to combine or determine which DRG to use within a single reference table. These values will generally match one of the DRG reference values.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > DRGs > Reporting DRGs**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a reporting DRG

To add or edit a reporting DRG:

1. Do one of the following:
   - To add a reporting DRG, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a reporting DRG, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **Reporting DRG ID** column.

Deleting a reporting DRG

To delete a reporting DRG:

1. In the **Actions** column for the existing reporting DRG, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Reporting DRG ID - The Axiom ID assigned to the reporting DRG.

Reporting DRG - The value for the reporting DRG.

Description - A description for the reporting DRG.

HCPCS codes dimension

This dimension includes the HCPCS codes used within your organization as level 3 CPT codes that provide further detail as to the services, procedures, or supplies that were used in the course of care.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > HCPCS codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter

statements, you can type the statement syntax directly in the Filter box.

3. Click **Apply**.

Adding or editing an HCPCS code

To add or edit an HCPCS code:

1. Do one of the following:
   - To add an HCPCS code, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an HCPCS code, in the **Actions** column, click the notepad icon  .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **HCPCS ID** column.

Deleting an HCPCS code

To delete an HCPCS code:

1. In the **Actions** column for the existing HCPCS code, click the trash can icon  .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

HCPCS ID - the Axiom ID assigned to the HCPCS code.

HCPCS - The HCPCS code, which can be unique to states, payors, etc.

Description - A long form description of the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

ICDs

ICD diagnosis codes dimension

This dimension includes the International Classification of Diseases (ICD) diagnosis information, which is referred to by a number of tables in the system. This information is used primarily used with cost detail, which may refer to up to five standard ICDDIAG fields and more if needed in COSTDETAIL.Custom.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > ICDs > ICD diagnosis codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an ICD diagnosis code

To add or edit an ICD diagnosis code:

1. Do one of the following:
   - To add an ICD diagnosis code, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an ICD diagnosis code, in the **Actions** column, click the notepad icon .

2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by an **ICD Diagnosis ID** column.

Deleting an ICD diagnosis code

To delete an ICD diagnosis code:

1. In the **Actions** column for the existing ICD diagnosis code, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the ICD Diagnosis Codes dimension table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

ICD Diagnosis ID - The Axiom ID assigned to the code.

ICDDIAG - The code for the ICD diagnosis identification.

Description - A description for the code (20-character limit)

Report description - A description to be used for reporting purposes.

ICD procedure codes dimension

This dimension is used to capture the clinical procedures performed for the patient in the course of care for the encounter being loaded. These procedures are referenced by the Encounter and Enc_Proc tables.

NOTE: These procedure codes are specific to the International Classification of Diseases (ICD) procedure codes and do not include CPT or HPCPS procedure codes.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data > Reference dimensions > ICDs > ICD procedure codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing an ICD procedure code

To add or edit an ICD procedure code:

1. Do one of the following:
   - To add an ICD procedure code, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit an ICD procedure code, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **ICD Procedure ID** column.

Deleting an ICD procedure code

To delete an ICD procedure code:

1. In the **Actions** column for the existing ICD procedure code, click the trash can icon .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

ICD Procedure ID - The Axiom ID assigned to the code.

ICDProc - The code used for the ICD procedure.

Description - The long entry description for the code.

Report description - A description to be used for reporting purposes.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Modifiers dimension

This dimension includes the additional standard codes used to further identify services or supplies used in the course of patient care. This includes modifying the CPT or the HCPCS. For example a procedure done multiple times, will have a modifier of 51. This may mean that there is a discount in reimbursement but also perhaps a reduction in the cost of the item.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Reference dimensions** > **Modifiers**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a modifier

To add or edit a modifier:

1. Do one of the following:
    - To add a modifier, click **Add Row**. A new row displays at the bottom of the table.

      IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

    - To edit a modifier, in the **Actions** column, click the notepad icon  .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **MODIFIERID** column.

Deleting a modifier

To delete a modifier:

1. In the **Actions** column for the existing modifier, click the trash can icon  .
2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in table:

NOTE: The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

MODIFIERID - The Axiom ID assigned to the modifier.

MODIFIER - The additional status codes used to identify services and supplies.

Description - The long form description of the code.

TIP: To help make reports more readable, we recommend that you do not use all capital letters in the description content.

Revenue codes dimension

This dimension includes the revenue codes used by your organization.

TIP: You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see Editing a dimension using a spreadsheet.

Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, click **Maintain data** > **Reference dimensions** > **Revenue codes**.

Filtering records

To filter records:

1. Click the funnel icon in the upper left corner of the page.

2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the Filter Wizard. To access the Filter Wizard, click **Edit**. If you are familiar with writing filter statements, you can type the statement syntax directly in the Filter box.
3. Click **Apply**.

Adding or editing a revenue code

To add or edit a revenue code:

1. Do one of the following:
   - To add a revenue code, click **Add Row**. A new row displays at the bottom of the table.

     IMPORTANT: If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

   - To edit a revenue code, in the **Actions** column, click the notepad icon .
2. Complete the columns by referring to the "Column descriptions" section below.
3. When you finish making changes, click **Save**. Any new records will display in the table in order by the **Revenue code ID** column.

Deleting a revenue code

To delete a revenue code:

1. In the **Actions** column for the existing revenue code, click the trash can icon .

2. At the confirmation prompt, click **OK**.

Column descriptions

This section provides descriptions for each column in the table:

> **NOTE:** The table may display some columns that are related to other Syntellis products or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

Revenue code ID - The Axiom ID assigned to the revenue code.

Description - A description for the code.

REVCODE - The UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

EHR cost group - The cost group set up in your organization's EHR system, which may or may not match the Axiom cost categories. This field is used in grouping cost categories after data is imported into the EHR system.

Editing dimensions using a spreadsheet

You can edit dimension values with a spreadsheet instead of using the web page user interface. The dimension data that you can download as an Excel file includes all of the data that is currently available in the dimension editor on the web.

Deleting dimensions in the downloaded spreadsheet does not remove the dimension from the system. In fact, if you have a large amount of data in the spreadsheet and to help improve performance, we recommend that you remove all the unchanged rows from the downloaded file before uploading.

Pay special attention to the following before using this feature:

- DO NOT rename the file name or the worksheets in this file.
- DO NOT add columns, change column names, or change sheet tab names.
- Ensure that there are no duplicate records.
- General formatting is applied to all numbers downloaded in the spreadsheet that you will need to correct before uploading. For instructions, see the Spreadsheet formatting section below.
- All required columns must be completed for each record before uploading.
- Use caution when entering data into the spreadsheet. Neither the spreadsheet nor the system validates the data upon upload.

- Deleting records in the spreadsheet does not remove them from the system.

  TIP: If you have a large amount of data in the spreadsheet and to help improve performance, we recommend that you remove all the unchanged rows from the downloaded file before uploading.

- If the spreadsheet includes a lot of data, it may take several minutes for the upload to complete before the system displays a confirmation message.

To edit dimensions using a spreadsheet:

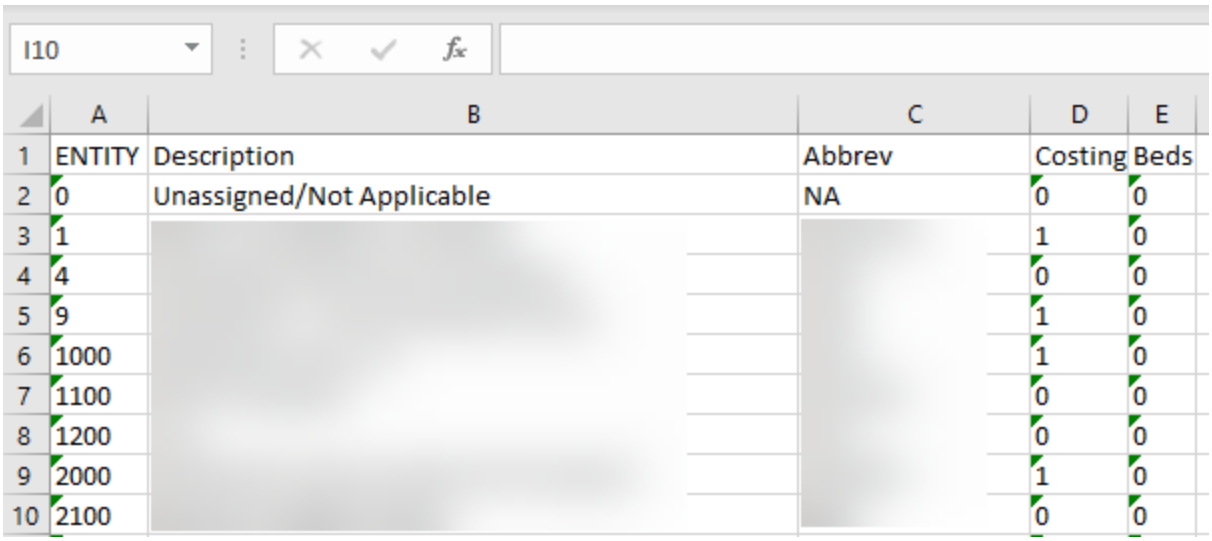
1. Open a dimension, and on the upper right-hand side of the page, do one of the following:
   - To add or edit records to an existing dimension table, click **Download table**.
   - To add records by starting with an empty spreadsheet template, click **Download template**.
2. Open the spreadsheet, or save the spreadsheet to a location first and then open it.
3. Add a new dimension by adding a row, or edit the column information for an existing dimension. If adding new dimension rows, review the Spreadsheet formatting section below.
4. After making your changes, save the spreadsheet.
5. In the dimension editor page for the spreadsheet to upload, click **Upload table**.
6. The **Review uploaded table changes** prompt displays information regarding the number of changes made, and the number of rows updated and/or added. Click **OK**.
7. The system displays the row(s) where changes occurred and/or new rows added in the **Confirm Uploaded Data** page. Do one of the following:
   - If the information is correct and you are ready to commit the changes to the system database, click **Confirm Upload**.

     IMPORTANT: This action will save ALL of the CHANGED dimension rows that you upload, not just the rows that display within the web editor confirmation page. For example, if you upload 20000 rows of changes and set the filter (while in confirm mode) to the max 10000 records, you will only be viewing half of the changes that will be saved on Confirm.

   - To correct the spreadsheet and/or make further changes, click **Cancel Upload**. Repeat the upload process starting with step 4.
8. At the confirmation prompt, click **OK**.

Spreadsheet formatting

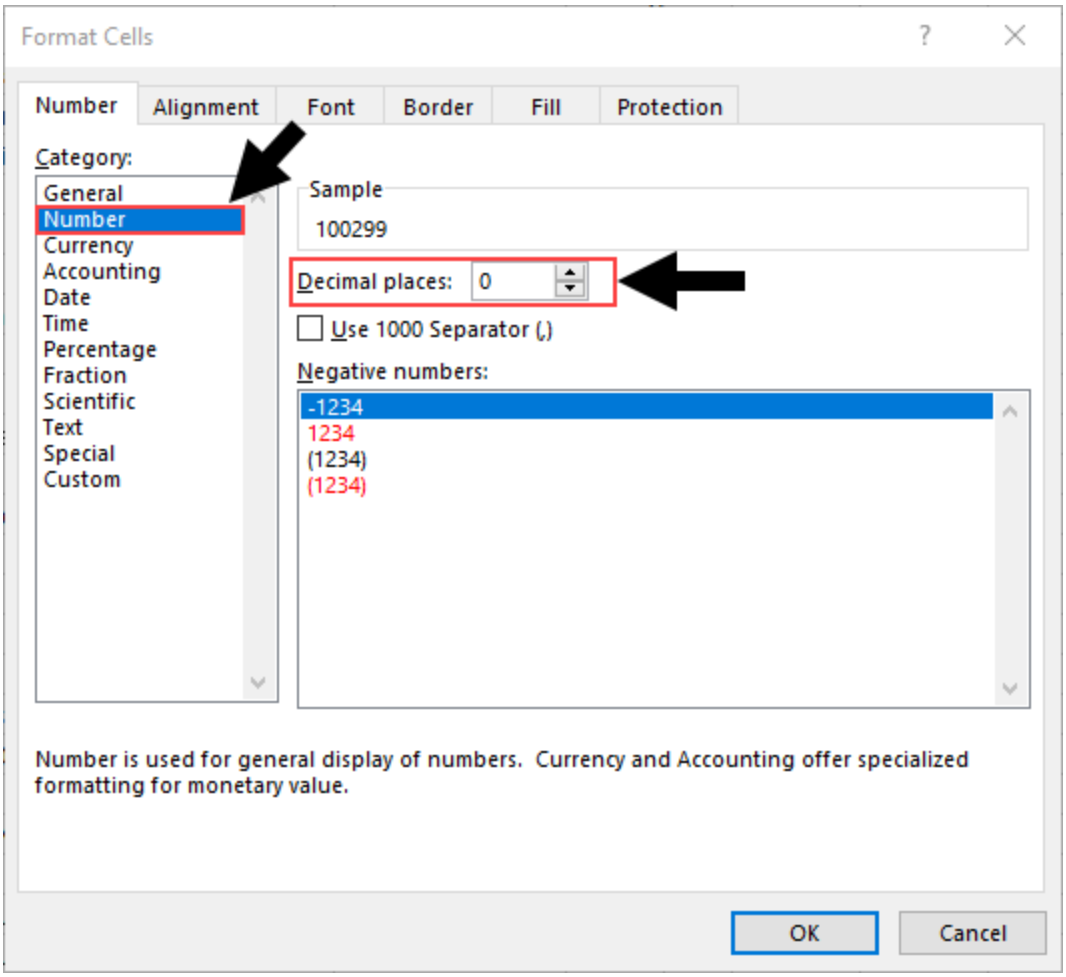
When downloading the dimensions values, they may display in the spreadsheet with General formatting. This is indicated by the green tick mark in the left corner in some cells—specifically number-based cells.



	A	B	C	D	E
1	ENTITY	Description	Abbrev	Costing	Beds
2	0	Unassigned/Not Applicable	NA	0	0
3	1			1	0
4	4			0	0
5	9			1	0
6	1000			1	0
7	1100			0	0
8	1200			0	0
9	2000			1	0
10	2100			0	0

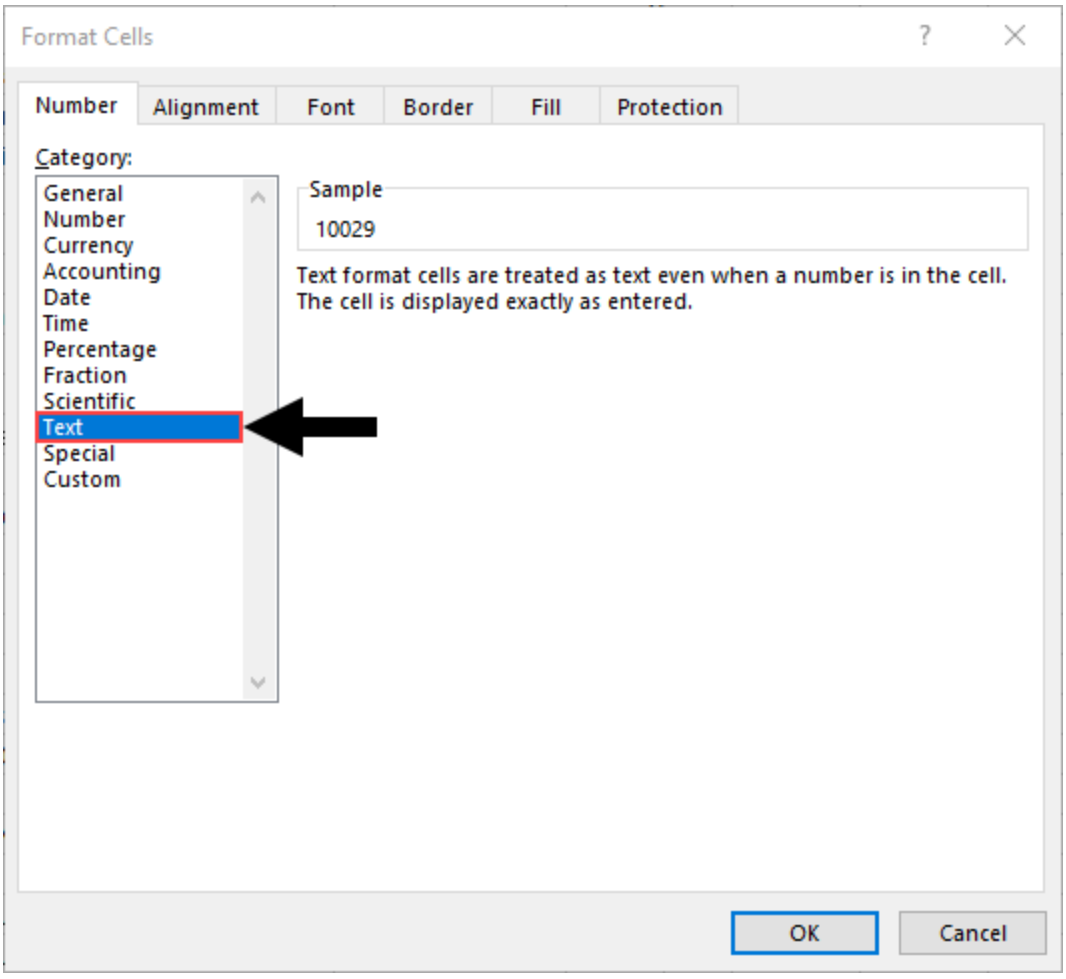
Large numbers

If you add new dimension rows that include large numbers, reformat them so they properly add to the database on return to the system by changing the number formatting to **Number** and the **Decimal places** field to zero.

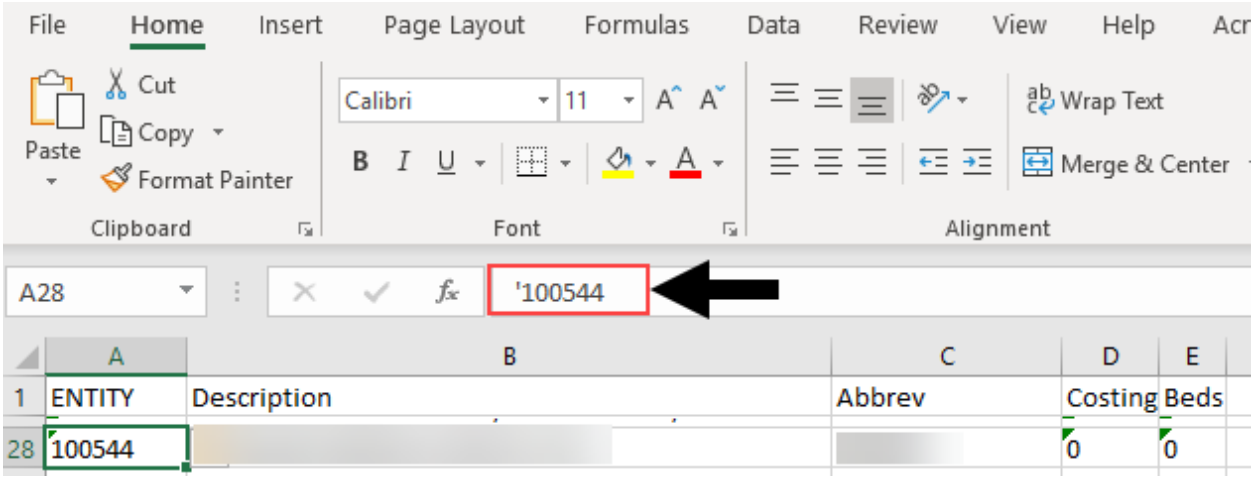


Leading zeroes

For numbers that include leading zeroes, change the formatting to **Text**.



You can also simply add a single quote in front of the zero (this quote mark is not included in the data when it is uploaded).



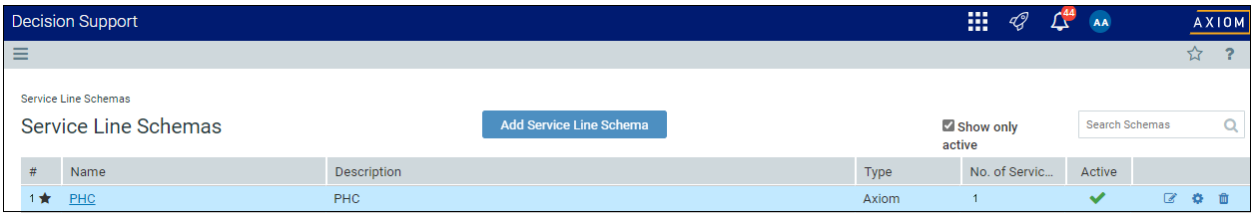
Formulas

You can include formulas in the spreadsheet, and the system will only import the results into the database.

3

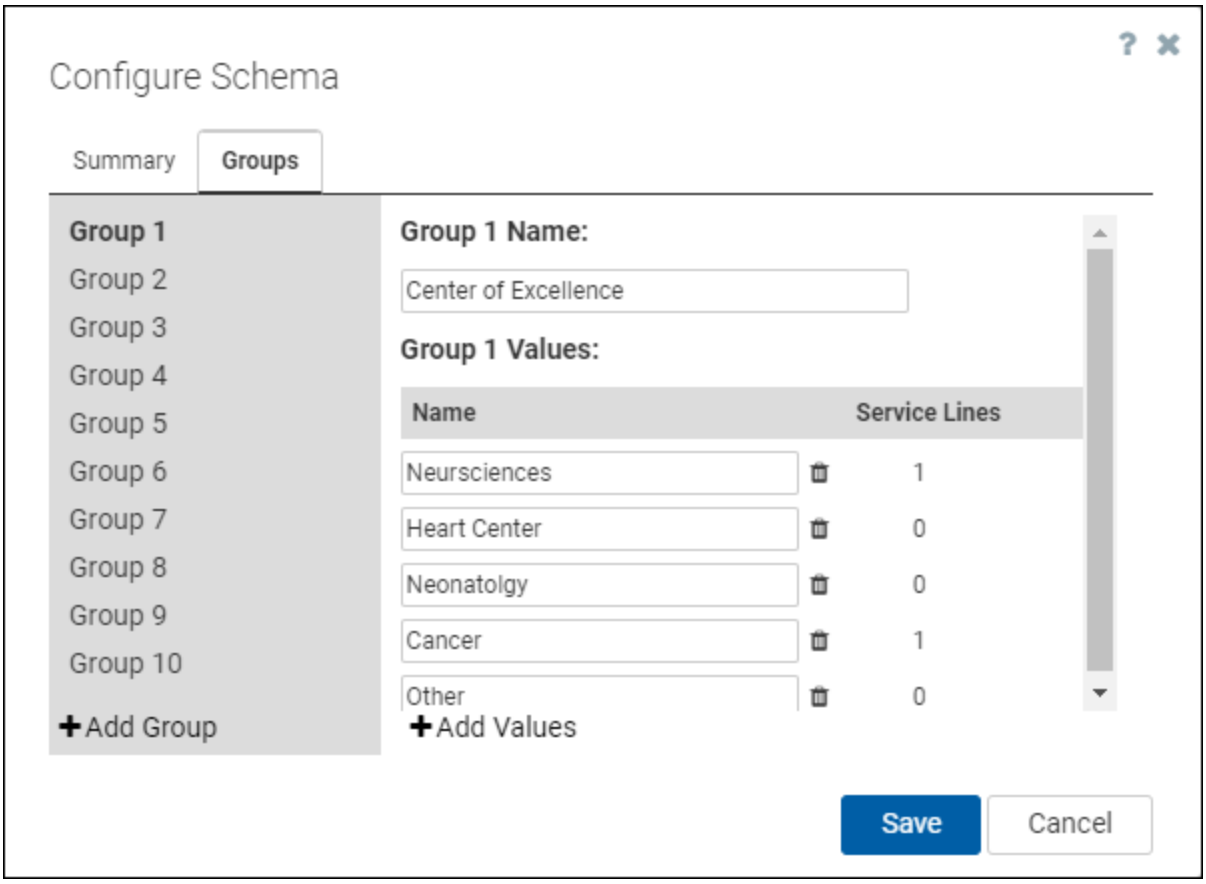
Working with service lines

The Service Line Schemas utility allows you to create, manage, and process the tagging of encounters with service lines for reporting purposes quickly and easily. You can create up to eight schemas with an unlimited number of service line definitions. Definitions allow you to specify which encounters to evaluate and tag.



When configuring a schema, you can also create an unlimited number of groups that give you the flexibility to organize encounters in different ways. Let's say your organization has a Center of Excellence. You can create a group for this and add values that addresses each center, such as Neurosciences, Cardiology, Cancer, etc. You can then create reports using these different groups.

TIP: This feature is optional, but if you plan on using groups, we recommend that you plan out your groups first, and then apply them starting with the first schema you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.



When you process a schema, the Axiom system evaluates each encounter against the definition criteria in an order that you define. When an encounter meets the criteria, the system removes it from further evaluation and tags it in the Axiom database with the service line so that it is not counted more than once.

Managing service line schemas

The Service Line Schemas utility allows you to configure, manage, and process up to eight schemas. For each schema, you can add, clone, edit, delete, and order definitions.

For details on how the Service Line Schema utility works, see Working with service lines.

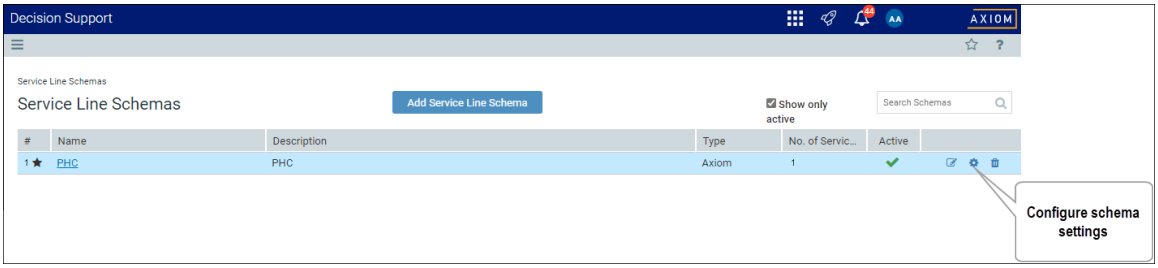
Accessing service line schemas

From the Enterprise Decision Support home page, in the **Data enhancement & refinement** section, click **Define service lines**.

Adding or editing a service line schema configuration

To add or edit a service line schema configuration:

1. Do one of the following:
   - To add a schema, click **Add Service Line Schema** at the top of the page.
   - To edit the configuration of a schema, click the schema to highlight it, and click the cog wheel icon.



2. In the **Configure Schema** dialog, complete the following fields in the **Summary** tab:

> **NOTE:** If your organization imports schemas from outside the Axiom system, some of the options in this dialog may not be available.

Option	Description
Name	Type a name for the schema. **IMPORTANT:** If service lines are imported, any name changes will also need to be made to the import map so that the data correctly loads the next time it is loaded into the system. For more information, see Implementing service lines.
Description	Type a description of the schema.
Type	Do one of the following: • If you are importing the schema, click **Client Imported**. For more information, see Implementing service lines. • To set up, manage, and process the schemas and service line definitions in Axiom, click **Axiom**.
Active	Do one of the following: • To include the schema when processing schemas, click the toggle to **On**. • To exclude the schema when processing schemas, click the toggle to **Off**. **IMPORTANT:** If you exclude the schema from processing, the data related to this schema will not be available in Axiom Intelligence reporting.

Option	Description
Schema #	Select the available number to assign the schema. **NOTE:** The drop-down list defaults to the next available number, but you can select any available number in the list. The number does not correspond to any kind of processing order. The system only allows up to eight schemas, so if all the available slots are full, the number will be grayed out.
Mark as Primary Reporting Schema	Click the check box to identify this as the main reporting schema used for Axiom Intelligence reports. **NOTE:** You can point any Axiom Intelligence report to any of schema listed in Axiom Enterprise Decision Support. However, using this check box provides a quick and easy way to switch schemas without having to manually configure it in Axiom Intelligence. **TIP:** On the Service Line Schema home page, a star icon in the **#** column identifies the primary reporting schema.

3. In the **Groups** tab, do the following:

   TIP: This feature is optional, but if you plan on using groups, we recommend that you plan your groups first, and then apply them starting with the first schema and corresponding service lines definitions you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.

   a. To add one or more groups, click **+ Add Group**.
   b. In the **Group Name** field, type a friendly name for the group.
   c. In the **Group Values** section, to add one or more values, click **+ Add Values**.
   d. In the **Name** column, type a name of the value.
   e. To delete a value, if needed, click the trash can icon next to the value.

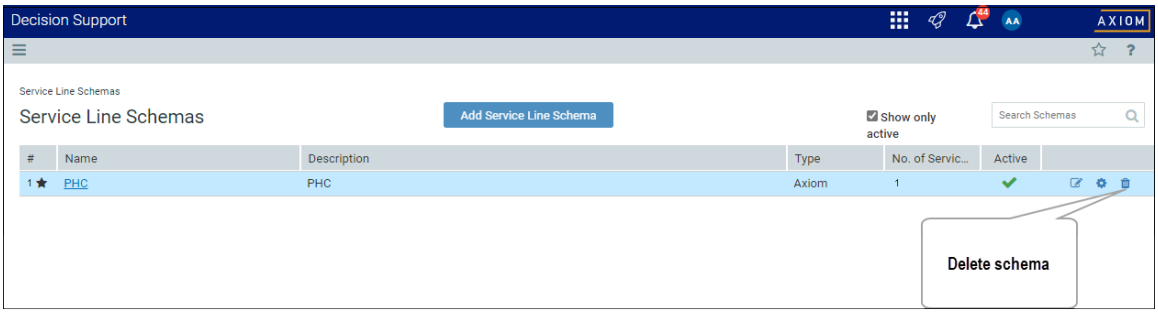
4. After making additions or edits, click **Save**.
5. Add or edit service line definitions.
6. Process the schemas.

Deleting a service line schema

IMPORTANT: Deleting a schema deletes all associated service line definitions and groups as well as current and historical data. This action cannot be undone.

To delete a service line schema:

1. Click the schema to highlight it, and click the trash can icon.



2. Review the warning prompt.
3. To continue with the deletion process, click **OK**.

Implementing service lines

Before you begin setting up service lines, you need to decide how you want to add, manage, and process them. You can choose one of the following options:

- **Axiom rule-based service lines** - You add, manage, and process schemas and definitions all within Axiom, which runs each encounter through a series of filters to determine what encounters to assign to a service line. You can create up to eight service line schemas that include an unlimited number of service line definitions. You order the definitions the way you want the system to evaluate each encounter. Each night, the system automatically processes and tags each encounter using a job in Axiom Scheduler. You can also activate or deactivate definitions, as needed. For example, let's say you want to add a new service line at the beginning of the fiscal year. You can add the new service line definition at any time but keep it inactive until you are ready to use it.
- **Client imported service lines** - If your organization uses a third-party application to define service lines—such as Sg2, Truven Health Analytics, or even your own host system—you can import them directly into Axiom without needing to create an entire set of service line rules from scratch. This allows you to continue managing and processing service lines outside the Axiom system, and simply import them with the help of a job in Axiom Scheduler.

NOTE: Once you choose a method on how to manage and process schemas, you should continue to use that method. Do not mix methods.

Importing third-party service lines

This section walks you through the best practice for importing third-party service lines into Axiom. You should first familiarize yourself with Axiom's import and scheduling capabilities before completing these steps.

TIP: During the implementation process, your Syntellis Implementation Consultant can help you complete these steps. If you need help after implementation, create a support case with Syntellis Support.

To import service lines:

1. In the Service Line Schemas utility, create the schemas and service lines to be imported.
2. Create an import to map the data from your raw data file that includes the encounters and service lines to the **\Axiom\Table Library\DSS\Service Line Builder\Enc_ServiceLineStaging** table. For instructions on creating an import, see "Importing external source data" in the online help.

   NOTE: Only users assigned both the DSS Admin and the CostDSS Import Admin role profiles can complete steps 2 and 3 in this procedure.

3. Create a Scheduler job to run the **\Axiom\Imports Library\DSS\Import Enc_Serviceline from staging** import to move the data from the Enc_ServiceLineStaging table to the Enc_ServiceLine table. For instructions, see "Scheduler job setup" in the online help.

If the service lines happen to be imported before creating them in Axiom (as described in step 1 above), the system will still create the schemas for you. Axiom makes these easy to identify by displaying them as *****Schema Created From Client Import***** in the Service Line Schemas utility. You will simply need to update the schema or service line definition by doing the following:

- Update the name.

  IMPORTANT: Use caution when changing the name since it maps to the schema or service line with the same name in the imported file. If you change the name, you will also need to change it in the mapping of the imported file so that the data loads correctly.

- Type a description of the schema or service line.
- Activate the schema or service line when ready to push data to Axiom Intelligence for reporting (schemas or service lines imported in this way are automatically set to inactive).
- Identify a schema as the main reporting schema used for Axiom Intelligence reports, if applicable.
- The encounter filters do not display in the service line definitions nor can you process schemas because it is assumed that encounters have already been processed and tagged outside the Axiom system. Importing just provides a way to get this information into the Axiom database for reporting purposes.

Managing service line definitions

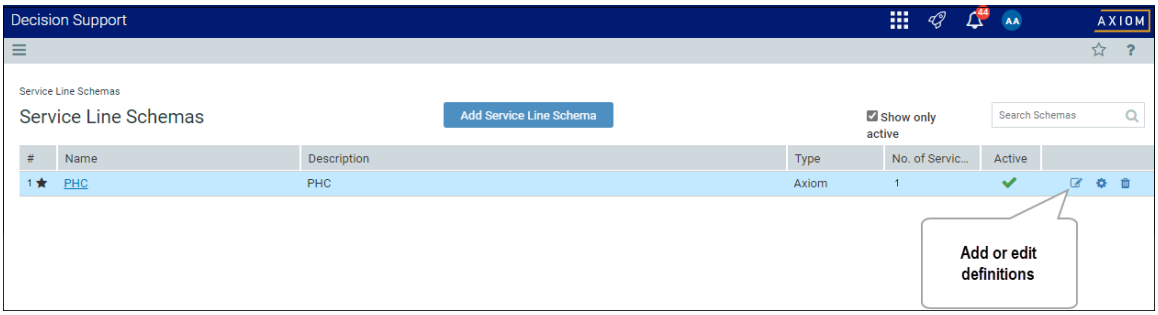
Schemas are comprised of one or more service line definitions. The system uses these definitions to identify the encounters to evaluate and tag with the specified service line. You can create an unlimited number of definitions for a schema. For details on how the Service Line Schema utility works, see

Working with service lines.

Accessing definitions

To access definitions:

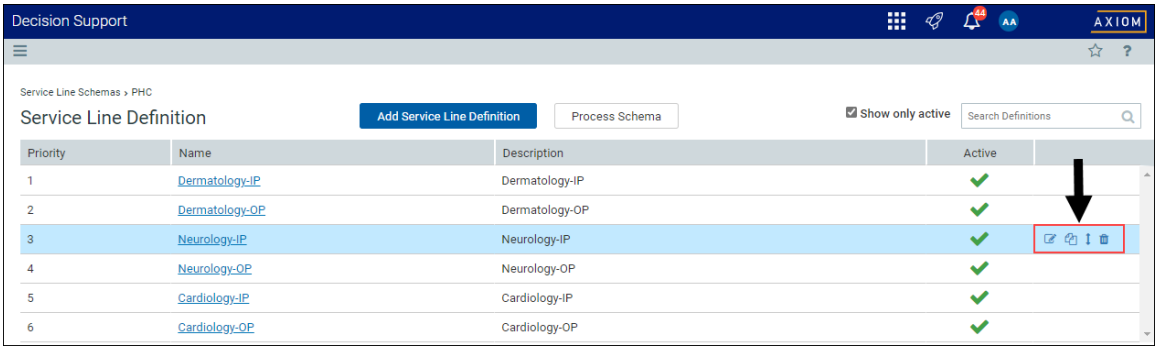
1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define service lines**.
2. In the list of schemas, click the schema to highlight it, and click the notepad icon.



Adding or editing definitions

To add or edit definitions:

1. Open the service line schema.
2. Do any of the following:
   - To add a definition, click **Add Service Line Definition** at the top of the page.
   - To clone a definition, click the definition to highlight it, and click the double page icon.
   - To edit a definition, click the definition to highlight it, and click the notepad icon.

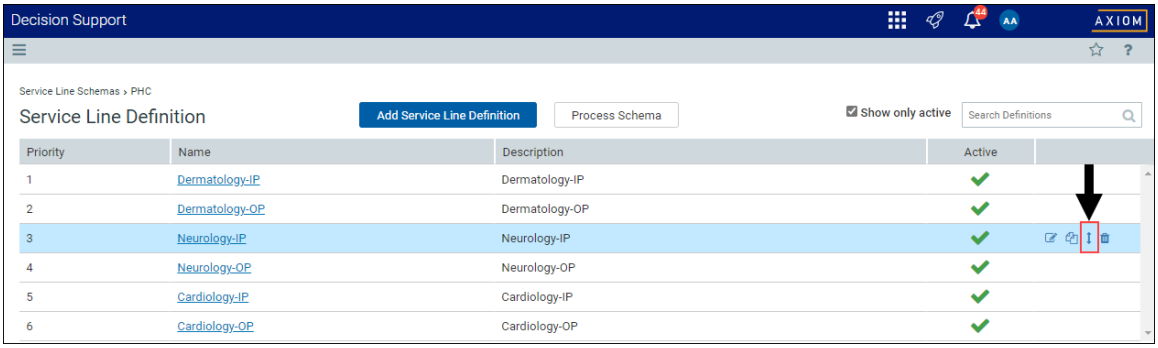


3. In the **Service Line Assignment** page, complete the following fields:

Option	Description
Name	Type a name for the definition. **IMPORTANT:** If service lines are imported, any name changes will also need to be made to the import map so that the data correctly loads the next time it is loaded into the system. For more information, see Implementing service lines.
Description	Type a description of the definition.
Type	Indicates if the schema was imported or created in Axiom. This field is not editable and is set at the schema configuration.
Active	Do one of the following: • To include the definition when processing the schema, click the toggle to **On**. • To exclude the definition when processing the schemas, click the toggle to **Off**. **IMPORTANT:** If you exclude the definition from processing, the information will not be available in Axiom Intelligence reporting.
Filters	Use the Filter Wizard to define the encounters for the system to evaluate for service line tagging. For instructions on writing filter syntax, see Filter criteria syntax. **TIP:** The system only evaluates encounter data, so by default, the system evaluates all of the data in the Encounter table. Because of this, the Filter Wizard defaults to the Encounter table. However, you can limit processing scope with a filter that points to other subsets of tables that include encounter IDs. For example, if you have a diagnostic table that includes the encounter sequence, you can narrow down the filter to that diagnostic, and the system will only process those encounters. **NOTE:** If service lines are imported, the filter option does not display because it is assumed that encounters are processed and tagged outside the Axiom system in the service line application used by your organization. For more information, see Implementing service lines.
Group Mapping	If applicable, select the group to associate the definition. For example, let's say your organization creates a group named Neurology. Any definitions created for neurology across schemas can be included in the Neurology group. **TIP:** Groups are an optional feature that provide a flexible way for your organization to group encounters, such as Centers of Excellence (Neurology, Dermatology, Cancer, Cardiology, and so on). Groups are set up at the schema configuration level. For more information, see Adding or editing a service line schema configuration.

4. Click **Save**.
5. Click the definition in the list to highlight it, and click the double arrow icon. Place the definition in the order in which you want the system to evaluate and tag encounters.

   Ordering definitions instructs the system how to evaluate the encounters. Once an encounter meets a definition's criteria, the system tags that encounter with the service line, and removes it from further evaluation and tagging. This process prevents the system from counting an encounter more than once.

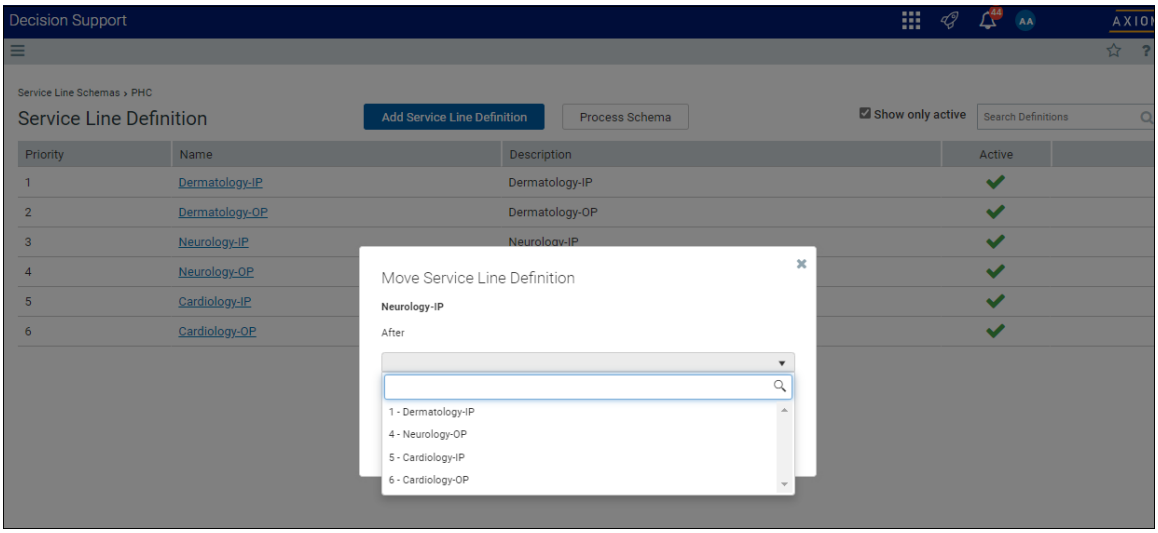


6. In the **Move Service Line Definition** dialog, from the **After** drop-down, select the location in which to move the definition, and click **OK**.

   TIP: Place the definitions in order from most to least important.

   For example, let's say there are six definitions. The definition currently in position 3 can be moved after positions 1, 4, 5, and 6. Positions 2 and 3 are not listed because the definition already resides after position 2 and exists as position 3.

   NOTE: If there are only two definitions in the list, you can only change the order by moving the definition in position 1 to position 2.



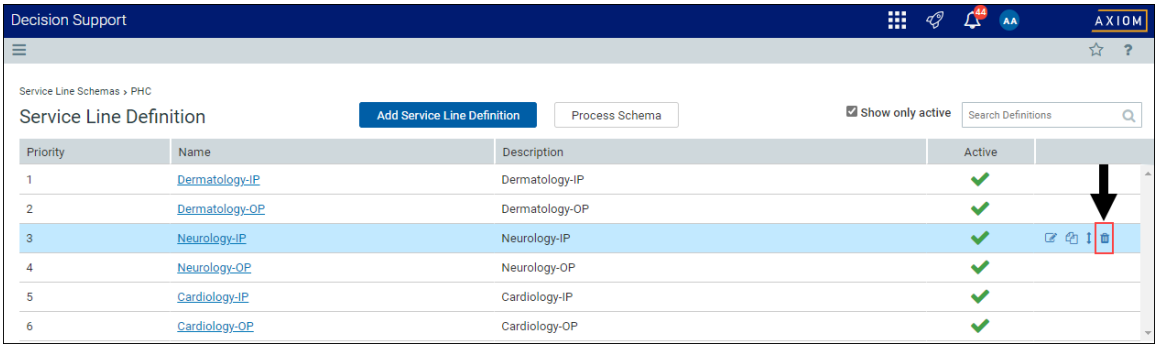
7. After making your changes, process the schema.

Deleting a definition

IMPORTANT: Deleting a definition removes all current and historical data. This action cannot be undone. If your organization imports schema definitions, make sure to also remove the definition from the imported file.

To delete a definition:

1. Open the service line schema.
2. Click the definition to highlight it, and click the trash can icon.



Processing service line schemas

This procedure walks you through the steps of processing service lines immediately so you can update your Axiom Intelligence reports with the latest data. The system also is set up to process service lines overnight as well using a Scheduler job.

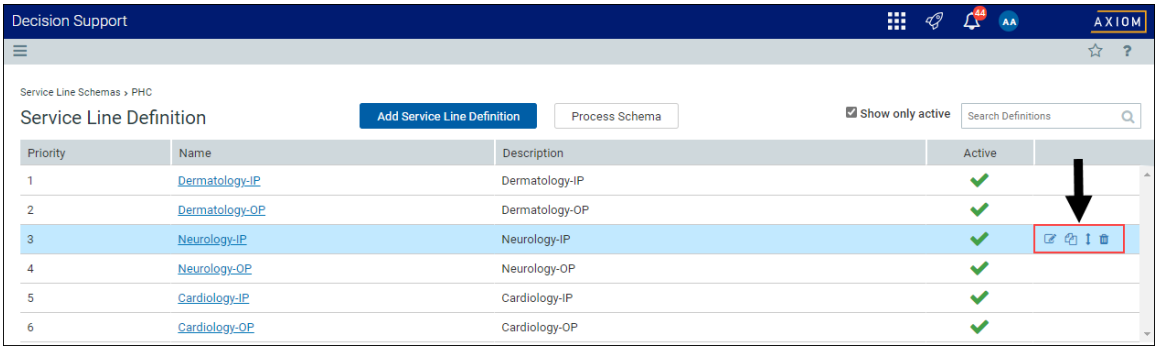
Service line schemas need to be processed under the following conditions:

- Adding a definition
- Editing a definition, including the filter
- Changing the definition order

NOTE: If your organization imports service lines from another application, you cannot process them because it is assumed that encounters are processed and tagged outside Axiom. For more information, see Implementing service lines.

To process service line schemas:

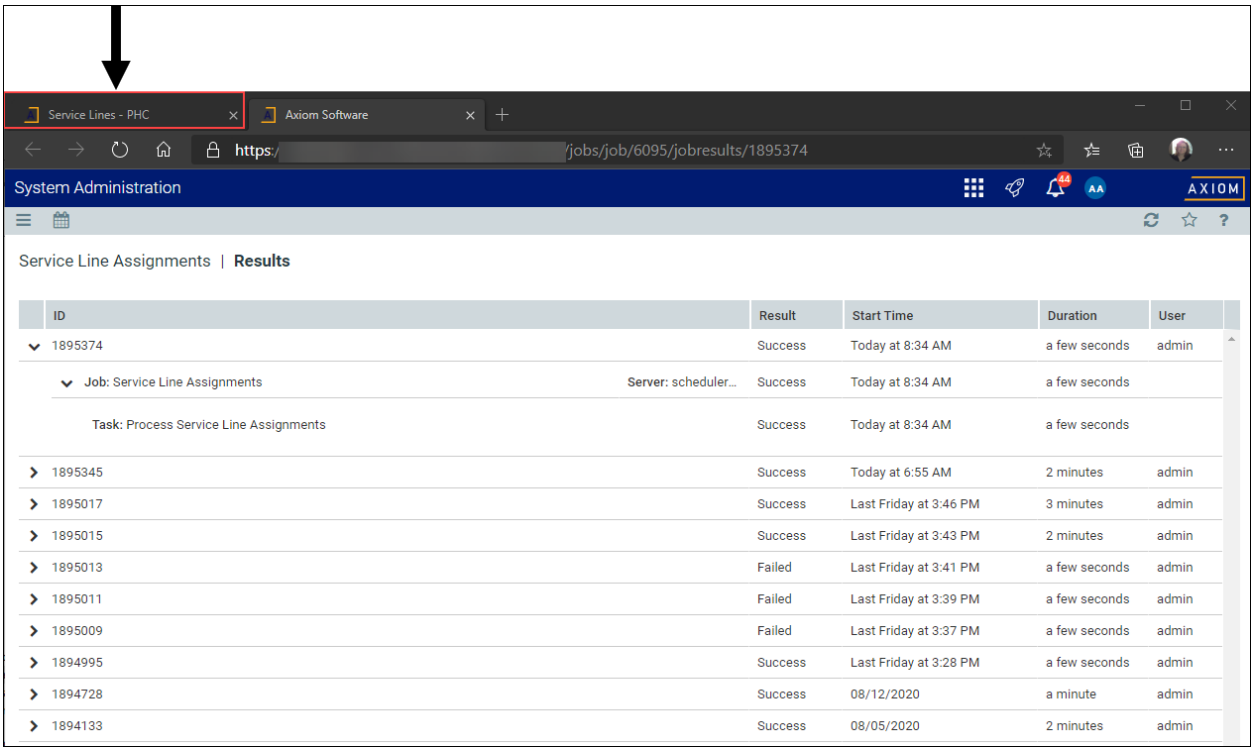
1. Open the schema.
2. Click the schema to highlight it, and click the notepad icon.



3. At the top of the page, click **Process Schema**.
4. At the **Process Schema Now** prompt, click **OK**.
5. At the confirmation prompt, click **OK**.

The **Service Line Assignments - Results** page opens as a separate browser tab to indicate the status of the processing job. To see an update on the job status, click the refresh button in your browser.

To navigate back to the Service Line Schema utility page, simply click the Service Lines tab in your browser.


Service Lines - PHC
Axiom Software
https:/
/jobs/job/6095/jobresults/1895374
System Administration
AXIOM
Service Line Assignments | Results
ID
Result
Start Time
Duration
User
1895374
Success
Today at 8:34 AM
a few seconds
admin
Job: Service Line Assignments
Server: scheduler...
Success
Today at 8:34 AM
a few seconds
Task: Process Service Line Assignments
Success
Today at 8:34 AM
a few seconds
1895345
Success
Today at 6:55 AM
2 minutes
admin
1895017
Success
Last Friday at 3:46 PM
3 minutes
admin
1895015
Success
Last Friday at 3:43 PM
2 minutes
admin
1895013
Failed
Last Friday at 3:41 PM
a few seconds
admin
1895011
Failed
Last Friday at 3:39 PM
a few seconds
admin
1895009
Failed
Last Friday at 3:37 PM
a few seconds
admin
1894995
Success
Last Friday at 3:28 PM
a few seconds
admin
1894728
Success
08/12/2020
a minute
admin
1894133
Success
08/05/2020
2 minutes
admin

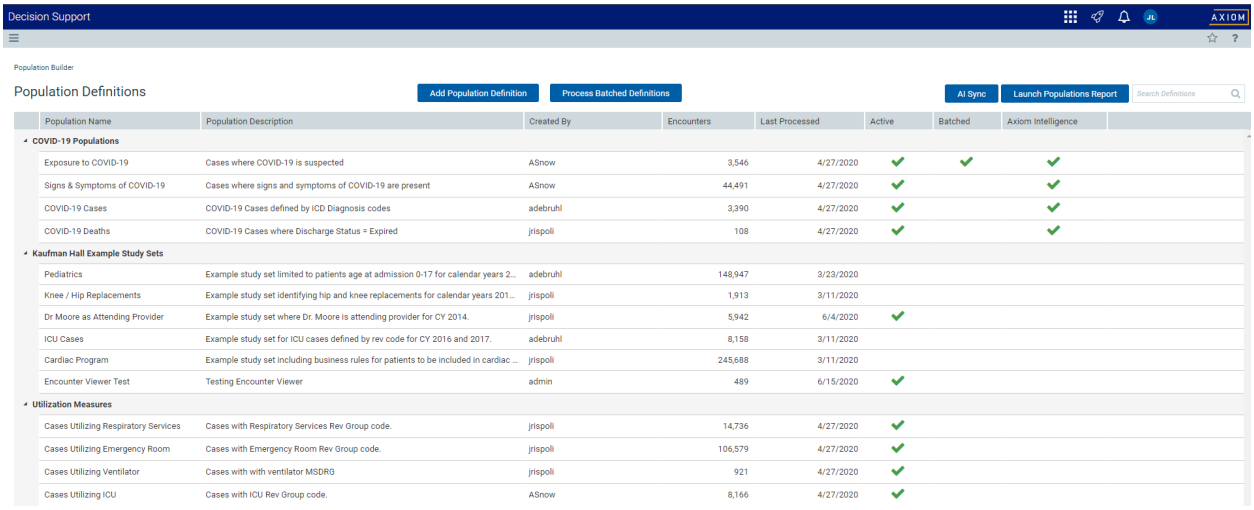
4

Managing population definitions

The Population Builder utility allows you to create and manage population definitions, including specifying criteria. The tagged encounters can then be pushed to Axiom Intelligence for reporting capability.

The Population Builder displays a home page with a list of the definitions used by your organization. From here, you can add, edit, archive, and delete them. You can also easily activate/deactivate and enable/disable Axiom Intelligence reporting for each definition as well as launch the Population Analysis report directly from the utility.

The list displays the definition name and description as well as who created it, the number of encounters tagged with the definition criteria, and when the definition was last processed. Check marks in the Active and Axiom Intelligence columns allow you to easily see which definitions are active for processing and pushed to Axiom Intelligence.



Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
COVID-19 Populations							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✔	✔	✔
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✔		✔
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✔		✔
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	✔		✔
Kaufman Hall Example Study Sets							
Pediatrics	Example study set limited to patients age at admission 0-17 for calendar years 2...	adebruhl	148,947	3/23/2020			
Knee / Hip Replacements	Example study set identifying hip and knee replacements for calendar years 201...	jrispoli	1,913	3/11/2020			
Dr Moore as Attending Provider	Example study set where Dr. Moore is attending provider for CY 2014.	jrispoli	5,942	6/4/2020	✔		
ICU Cases	Example study set for ICU cases defined by rev code for CY 2016 and 2017.	adebruhl	8,158	3/11/2020			
Cardiac Program	Example study set including business rules for patients to be included in cardiac ...	jrispoli	245,688	3/11/2020			
Encounter Viewer Test	Testing Encounter Viewer	admin	489	6/15/2020	✔		
Utilization Measures							
Cases Utilizing Respiratory Services	Cases with Respiratory Services Rev Group code.	jrispoli	14,736	4/27/2020	✔		
Cases Utilizing Emergency Room	Cases with Emergency Room Rev Group code.	jrispoli	106,579	4/27/2020	✔		
Cases Utilizing Ventilator	Cases with with ventilator MSDRG	jrispoli	921	4/27/2020	✔		
Cases Utilizing ICU	Cases with ICU Rev Group code.	ASnow	8,166	4/27/2020	✔		

COVID-19 patient population definitions

As part of the 2020.1 release, we included the following pre-defined population definitions specific to COVID-19:

- COVID-19 Cases
- COVID-19 Deaths

- Exposure to COVID-19
- Signs & Symptoms of COVID-19

These population definitions were used to create the COVID-19 Population and Utilization and Analysis Dashboard, but you can also reconfigure these definitions to meet your needs and/or use them to create and customize other Axiom Intelligence reports for your organization.

Searching for definitions

In the Search Definitions field, type information specific to the definition, including the name, description, and the last processed date. The table will filter the list based on the definitions that meet the search requirements.

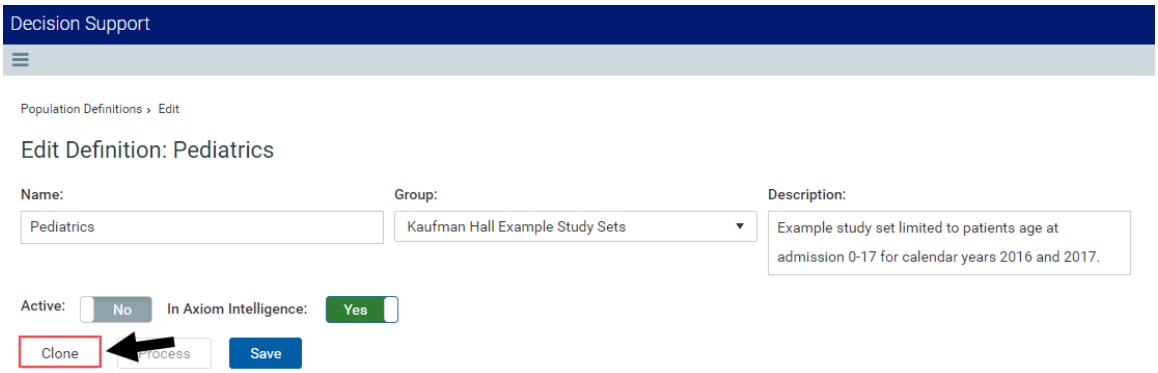
Adding, editing, or cloning population definitions

TIP: Instead of adding a new definition from scratch, you can clone an existing definition, and edit it.

To add, edit, or clone a population definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Do one of the following:
   - To add a definition, click **Add Population Definition** at the top of the page.
   - To edit or clone a definition, click the definition to highlight it, and click the notepad icon.

3. In the **Add/Edit Definition** screen, to clone a definition, click **Clone**.



4. When adding or editing a definition, complete the following options, and click **Save**:

> **NOTE:** The system requires you to save the definition before adding or editing definition criteria.

Option	Description
Name	Type the name for the definition.
Group	Select an existing group or type a new name used to group together definitions. This is an optional field. Examples might include Centers of Excellence, entity, etc. **NOTE:** This group name is only used to help group definitions on the definition list page. They are not used for reporting or any other purpose at this time.
Description	Type a description of the definition.
Active	• To activate the definition for processing, click the toggle to **Yes**. • To deactivate the definition so that it is not available for processing, click the toggle to **No**. **NOTE:** Definitions cannot be activated if they do not include a valid filter. Only active definitions can be processed.
In Axiom Intelligence	• To include the defined populations in Axiom Intelligence, click the toggle to **Yes**. • To exclude the defined populations from Axiom Intelligence, click the toggle to **No**. **NOTE:** Flagged definitions are sent to Axiom Intelligence by clicking **AI Sync** on the Population Definitions home page.

5. Click **Save**.

NOTE: You cannot add criteria until you first save the definition.

6. To add a criterion, click **+Add New Criteria**. To edit a criterion, highlight it, and click in the column cells. Complete the following fields.

Option	Description
Criteria Name	Type a name for the criteria.
Criteria Description	Type a description for the criteria.
Criteria Filter	Click the funnel icon to set up or select an existing filter using the Filter Wizard. **IMPORTANT:** The system processes each criterion only as an OR statement. To build criteria that includes AND criteria, use the Filter Wizard.

7. To delete a criterion, click the criteria to highlight it, and click the trash bin icon .
8. After making the criteria changes, click **Save**.
9. To process this definition individually, click **Process**. When the process job is complete, the date will update in the **Last Processed** column of the Population Definitions home page.

TIP: To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see Processing population definitions.

Deleting population definitions

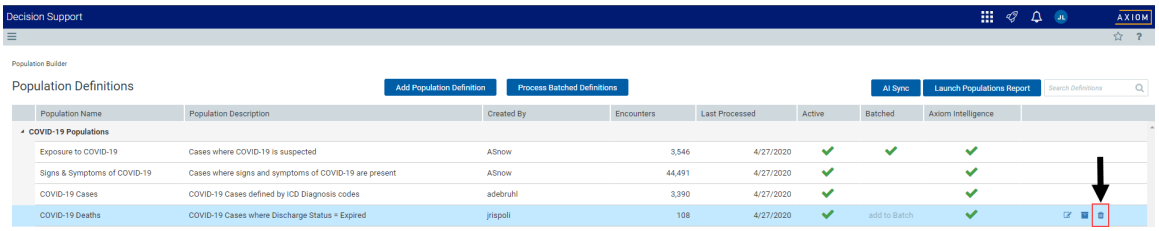
Deleting a definition removes all of the tagged encounters as well as the definition from the system.

TIP: We recommend only using this action for definitions that will never be used again in the future. For definitions that you want to keep but not use currently, we recommend archiving the definition instead. For more information, see Archiving population definitions.

IMPORTANT: You cannot undo this action.

To delete a population definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Click the definition to highlight it, and click the trash can icon.



3. Review the warning message prompt, and click **OK**.

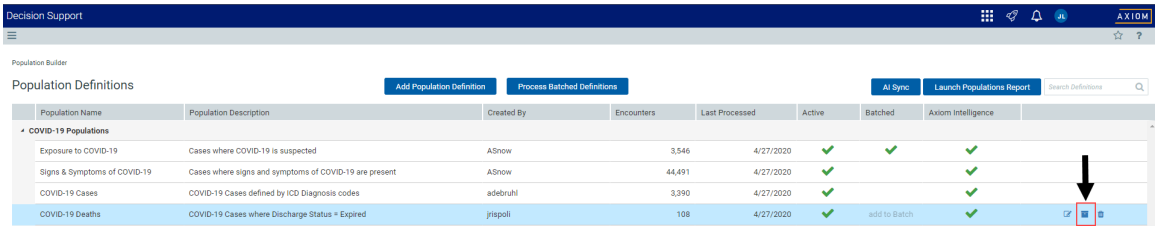
Archiving population definitions

Archiving allows you to keep the definition in the system while removing all the tagged encounters from the database, helping to decrease data bloat.

TIP: If this definition will never be used again in the future, you may want to consider deleting it entirely from the system. For more information, see Deleting population definitions.

To archive a population definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Click the definition to highlight it, and click the storage box icon.

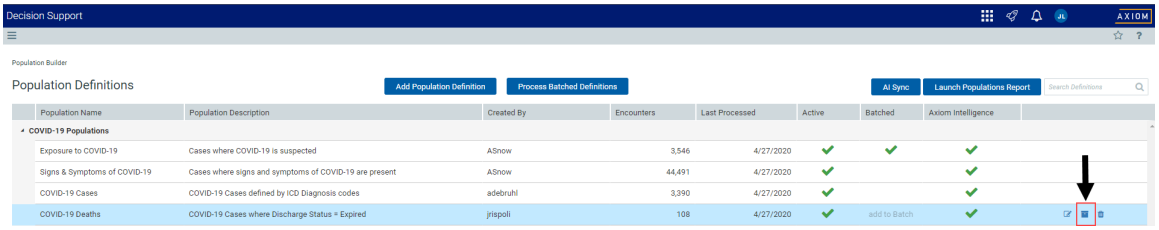


3. At the warning message prompt, click **OK**.

Reactivating an archived definition

To reactivate an archived definition:

1. Click the definition to highlight it, and click the notepad icon.



2. Click the **Active** toggle to **Yes**.

3. Optionally, to push the population definition to Axiom Intelligence, click the **In Axiom Intelligence** toggle to **Yes**.
4. Click **Save**.
5. To process the definition, click **Process**.

> **TIP:** To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see Processing population definitions.

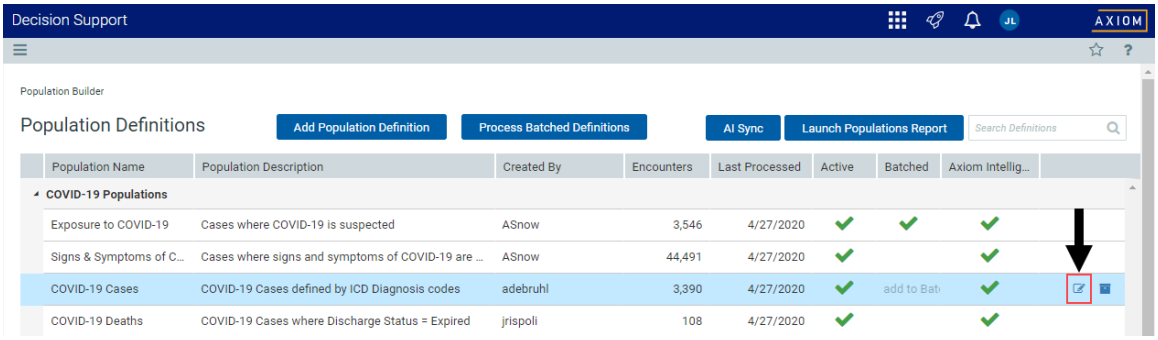
Processing population definitions

Before you can process a definition, it must be activated. Active definitions are indicated by a check mark in the Active column of the Population Definitions home page. You can also select multiple definitions for batch processing.

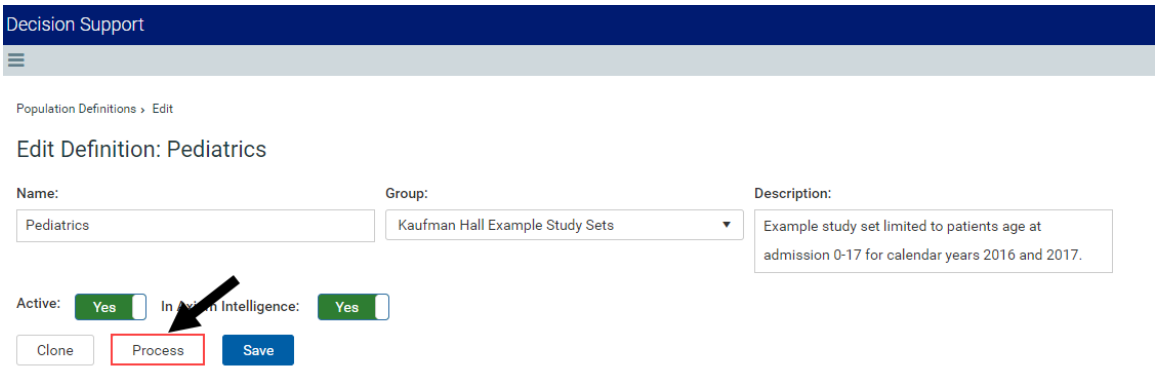
Process individual definitions

To process an individual definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. In the table, click the definition to highlight it, and click the notepad icon.



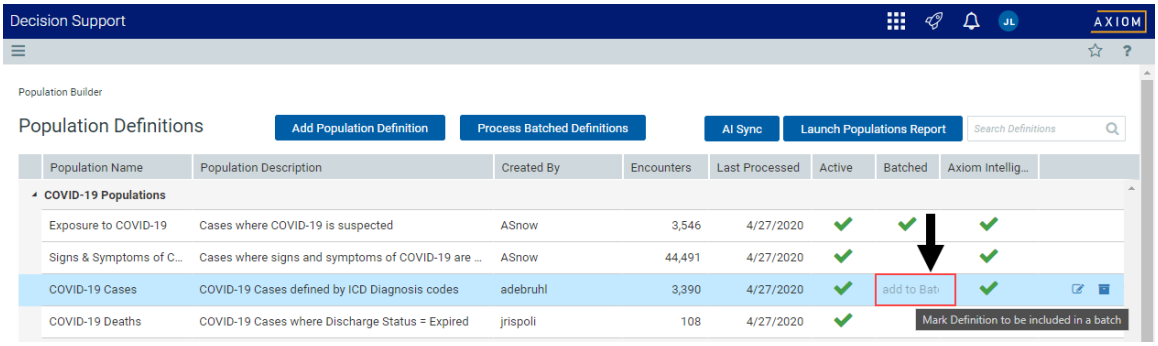
3. Click **Process**.



Batch process definitions

To batch process definitions:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. For each definition to include in the batch, click the **Batched** column to add a check mark. To remove a definition from the batch, click the check mark to remove it.



3. Above the definition table, click **Process Batched Definitions**.
4. In the **Scheduled Processing Settings** dialog, do one of the following, and click **OK**:
   - To run the batch process immediately, click **Run Now**.
   - To schedule the batch to run, click **Schedule**, and complete the dates, day of the week, and time fields.

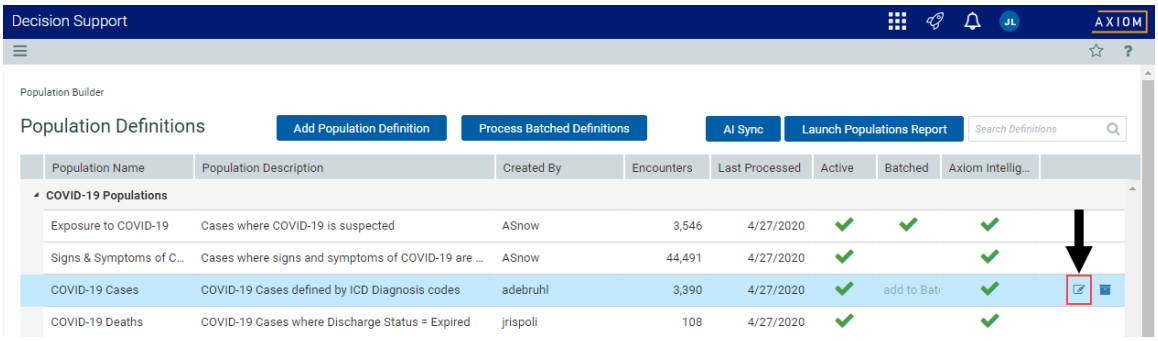
Including or excluding population definition data in Axiom Intelligence reports

From the Population Builder utility, you can determine the data from the population definitions to include in Axiom Definitions reports.

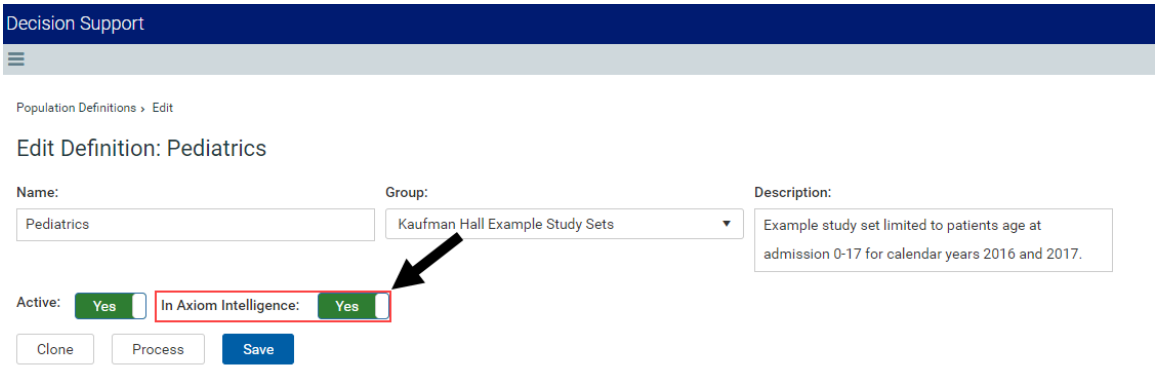
Individual definitions

To include or exclude an individual population definition data in Axiom Intelligence reports:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. In the list of definitions, click the definition to highlight it, and click the notepad icon.



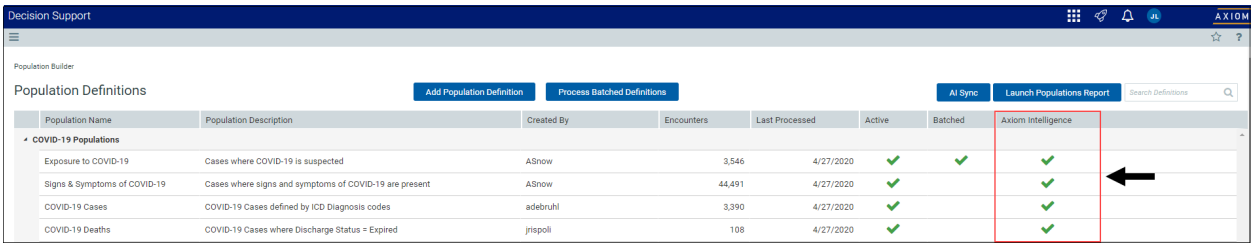
3. In the **Add/Edit Definition** screen, click the In Axiom Intelligence toggle to **Yes** to include it, or click **No** to exclude it.



Multiple definitions

To include or exclude multiple definition data in Axiom Intelligence reports:

In the Populations Definitions home page, for each definition, click the definition to highlight it, and then click the Axiom Intelligence column to add or remove the check mark.



5

Transforming data for reporting

You can manipulate data in the Axiom database for reporting purposes by using data transformation definitions. These definitions allow you to define how, when, and where to change values in the database using different calculation types with no SQL knowledge necessary. The results of calculations can then be stored in certain Axiom standard and custom fields. For example, you could create a definition that increases Medicare payments by 5% and stores the results in a new encounter table field.

Examples of types of definitions that you can create include:

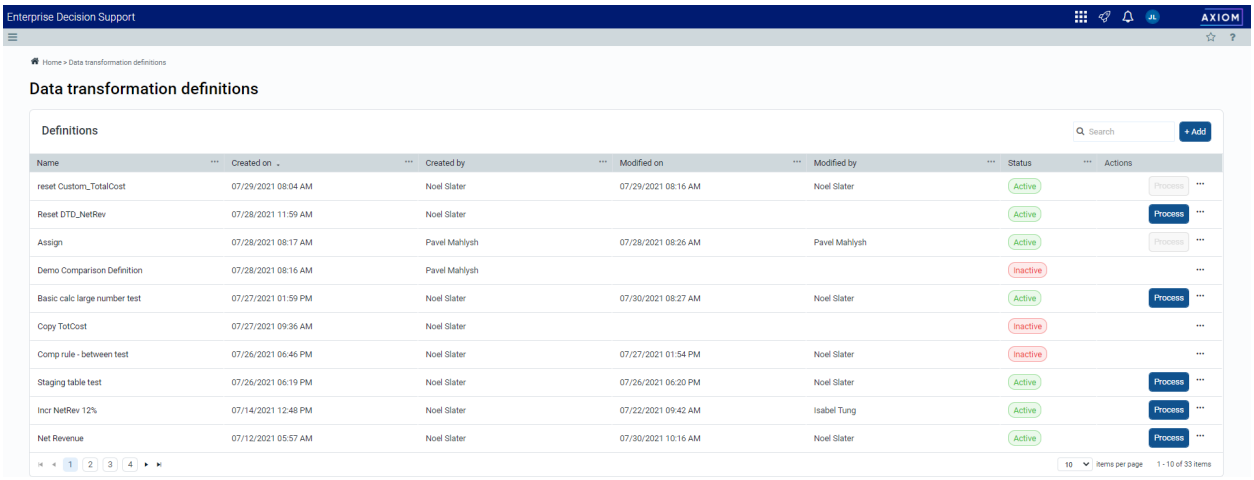
- Perform calculations on encounter data elements and store the results in Axiom fields.
- Assign a date, numeric, or text constant to a field.
- Identify outliers.
- Perform If-Then-Else comparisons.
- Create basic formulas using constants as well as standard and custom fields for inputs

NOTE: Only users assigned the Axiom EDS Rules Writer role profile can access this feature.

About definitions

A data transformation definition includes calculations that Axiom applies to tables in the database. .

The **Data transformation definitions** page displays a table with all definitions. From this page, you can add, edit, copy, or delete definitions as well as process them. To search for a definition, you can use the search box in the upper right corner of the page. To filter the results in the table, click the click the ellipsis (**...**) in any of the available headings. To add a definition or folder, click **+ Add** in the upper right corner of the page.



From the **Actions** column, click the ellipsis (**...**) to edit, copy, or delete a definition. You can also process a definition, but definitions must first be active.

Working with data transformation definitions

A data transformation definition is a mathematical formula that describes the data you want to use, how you want to use it, and where you want to store a result. When you create a definition, you choose a type, and Axiom prompts you to "fill in the blanks" by choosing:

- Calculation variables
- The table column fields to use in the calculation
- An operator
- A constant, if applicable
- Result variable
- The table column field in which to store the result

The following table lists the available definition types:

Type	Description
Assign Constant	Use to store a numeric, text, flag (Boolean), or date constant in an Axiom field. For example, you can store a benchmark or best practices length of stay for hip replacement surgery in an encounter custom field.
Basic Calculation	Use to calculate and store a value from Axiom numeric fields and constants. You may combine and group the fields and constants to form an expression using addition, subtraction, multiplication, and division operators.
Concatenate	Use to join Axiom fields and constants. You can use the constant as a delimiter.

Type	Description
Comparison	Use to create If Then Else formulas that compare Axiom fields to each other or to constants, and store a value based on whether the comparison is true or false.
Copy Field	Use to copy the value of one field to another field.

NOTE: A definitions inputs and results must be fields from within the same table.

Understanding inputs and results

Inputs

If there is a custom column in the table, you can use data from the following dimension tables in the Table Library > !Dimensions folder:

- ACCT
- CALDATE
- CDMCODE
- CPT
- DEPT
- ENTITY
- FINCLASS
- JOBCODE
- LOCATION
- PAYOR
- PAYTYPE

Results

You can store results in standard and custom columns in tables in the EDS folder except columns in custom tables.

You cannot store results in the following column types:

- Keys
- Pointers to key column on other tables
- Data that results from cost model processing (tables under CostModel and CostResults)
- CM$ tables
- Encounter total cost columns
- Columns, even custom, on any table in any folder other than EDS or dimensions

Important notes about transforming data

Keep in mind the following when using and processing definitions:

- All the fields (inputs and results) in a single definition must be from the same table. Axiom will not allow you to select a field from a different table.
- You must manage the processing order. If the results of one definition feed into the inputs of another definition, you must ensure the first definition completes successfully before processing the second one.
- When creating a custom column on a table to store results, we recommend that you:
    - Create only text, numeric, date, or flag (Boolean) types. The system will not stop you from creating an Integer or an Integer32 column, but numeric is our recommendation.
    - Do not set a default value on a custom column.

Adding, editing, or copying a data transformation definition

When adding or editing a definition name, note the following:

- Can include up to 80 characters.
- Are case-sensitive.
- Must have a unique name.

IMPORTANT: All the fields (inputs and results) in a single definition must be from the same table. Axiom will not allow you to select a field from a different table.

To add, edit, or copy a data transformation definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define data transformations**.

   NOTE: Only users assigned the Axiom EDS Rules Writer role profile can see and access this feature.

2. Do one of the following:
   - To add a definition, click **+ Add**.
   - To edit or copy a definition, in the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Edit** or **Copy**.
3. At the top of the page, type a name for the definition.

   NOTE: Although the forward slash is accepted, you should avoid it.

4. On the **Step 1 Select data definition type** page, complete the following fields:

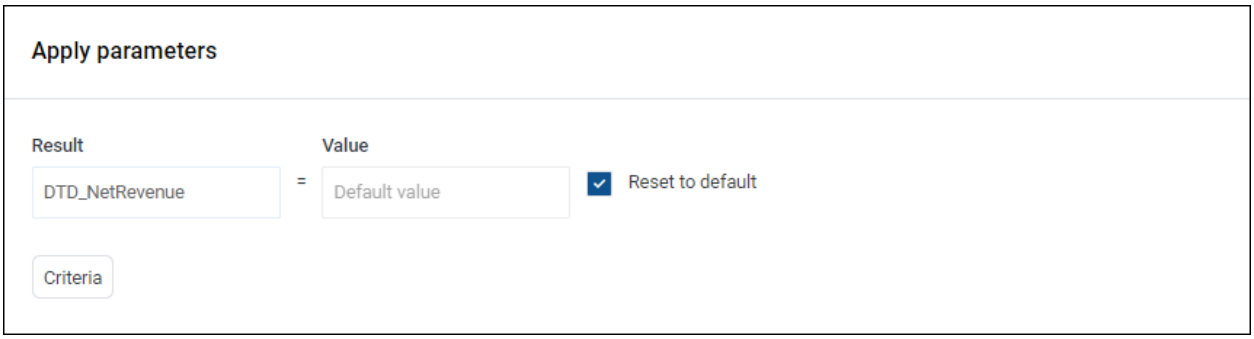
Field	Description
Type	Select one of the following data definition types: • **Assign Constant** - Use to store a numeric, text, flag (Boolean), or date constant in an Axiom field. For example, you can store a benchmark or best practices length of stay for hip replacement surgery in an encounter custom field. • **Basic Calculation** - Use to calculate and store a value from Axiom numeric fields and constants. You may combine and group the fields and constants to form an expression using addition, subtraction, multiplication, and division operators. • **Concatenate** - Use to join Axiom fields and constants. You can use the constant as a delimiter. • **Comparison** - Use to create If Then Else formulas that compare Axiom fields to each other or to constants, and store a value based on whether the comparison is true or false. • **Copy Field** - Use to copy the value of one field to another.

5. Click **Next**, or click **Step 2 Apply parameters** at the top of the page. The fields to complete in this section are determined by the definition type you selected in Step 1. Click the type listed below to complete the definition setup:

NOTE: A definition's inputs and results must be fields from within the same table.

- Assign Constant
- Basic Calculation
- Concatenate
- Comparison
- Copy Field

Assign Constant



6. Click **Result field**.

7. In the **Select field** dialog, do the following:
    a. From the **Table** drop-down, select the table in which to add, edit, or clear a value.

    NOTE: The dialog will only show those tables and fields that you are allowed to update.

    b. Select a column name by doing one of the following:
        - In the search box, type the part or all of the column name. Axiom will display columns that include the name.
        - Click the arrow next to the table name to display a tree structure of all the columns.
    c. Click **Apply**.
8. Do one of the following:
    - **Enter a value** - The value you enter in the **Value** field is determined by the table and field you select in the **Table** drop-down. For example, if the field is a date field (such as Encounter table > DischargeDate), then a date picker will display.

Value type	Description
Numeric	Type a positive or negative number with up to four decimal places.
Date/time	Select a date and time.
Text	Type a value. **NOTE:** If the value is large than the field, Axiom will truncate the text.
Boolean	Select **True** or **False**.

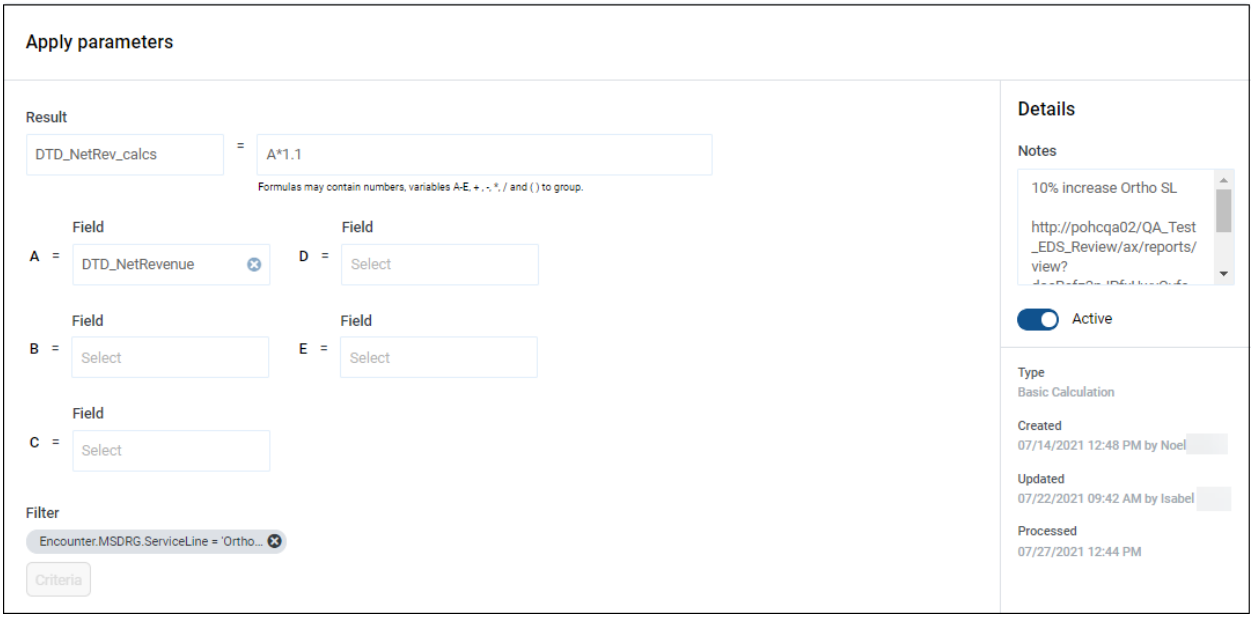
    - **Reset or clear the value** - Some fields in the database store default values. For these types of fields, you can replace the current value with the default value by selecting the **Reset to default** checkbox. If the Axiom field does not have a default value, then this option inserts a blank (null) value.
9. To identify the records in the database in which to apply the value, click **Criteria**. The Filter Wizard dialog displays, allowing you to define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.
10. In the **Details** section on the right side of the page, complete the following:
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.

NOTE: If the rule is selected as active, then Axiom automatically reviews the definition for any missing information or criteria, which are indicated with error messages. After resolving these issues and saving, the definition can be processed.

11. Click **Save**.
12. To process the definition now, click **Process**. Follow the instructions in Processing a data transformation definition.

NOTE: You can process the definition later from the **Data transformation definitions** page.

Basic Calculation



6. Click **Result field**.
7. In the **Select field** dialog, do the following:
    a. From the **Table** drop-down, select the table in which to store the value.

    NOTE: The dialog will only show those tables and fields that you are allowed to update. Only numeric fields are allowed for this definition type.

    b. Select a column name by doing one of the following:

    - In the search box, type the part or all of the column name. Axiom will display columns that include the name.
    - Click the arrow next to the table name to display a tree structure of all the columns.

c. Click **Apply**.

8. In the formula box, type a formula by using numbers, using the variables identified as A-E, or a combination of the two. Valid operators are:

Operator	Description
( )	Use for grouping definition For example, A+(B*(C-D))
+	Addition
-	Subtraction
*	Multiplication
/	Division

9. In **Fields A-E**, click the fields to select the values to use in the formula. In the **Select field** dialog, do the following:

   a. From the **Table** drop-down, select the table in which to store the calculated value.

   > **NOTE:** The dialog will only show those tables that you are allowed to update. You are not updating these fields, but simply using them as the inputs. Axiom shows numeric fields only.

   b. To select a column name, do one of the following:

      - In the search box, type the part or all of the column name. Axiom will display columns that include the name.
      - Click the arrow next to the table name to display a tree structure of all the columns.

   c. Click **Apply**.

10. To identify the records in the database in which to apply the value, click **Criteria**. The Filter Wizard dialog displays, allowing you to define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.

11. In the **Details** section on the right side of the page, complete the following:

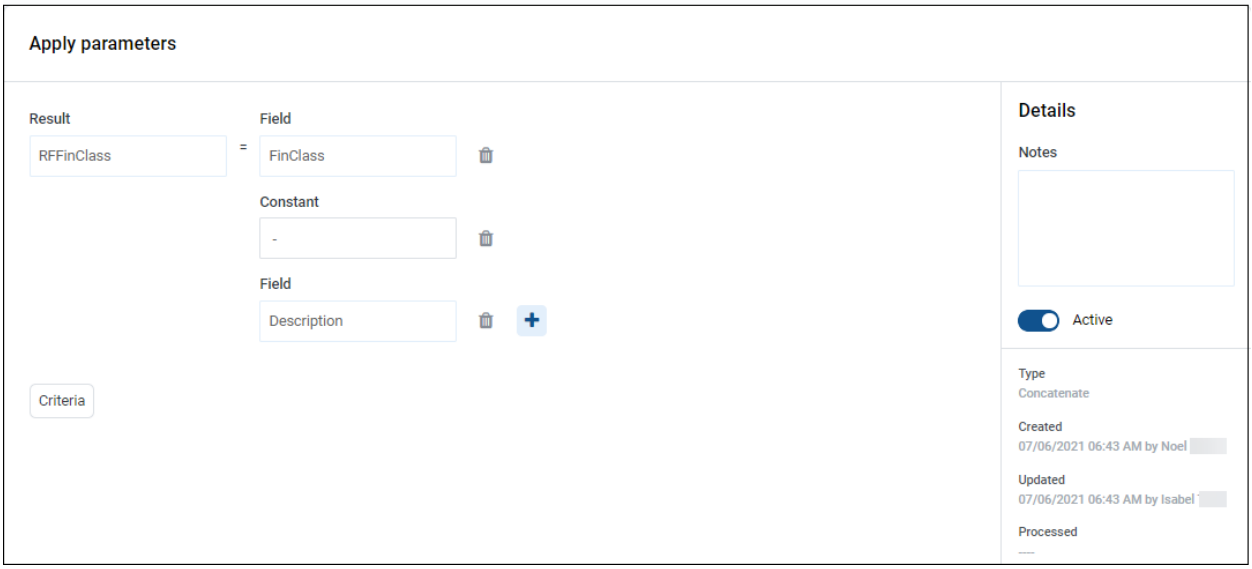
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.

12. Click **Save**.

13. To process the definition now, click **Process**. Follow the instructions in Processing a data transformation definition.

> **NOTE:** You can process the definition later from the **Data transformation definitions** page.

Concatenate



6. Click **Result field**.
7. In the **Select field** dialog, do the following:
    a. From the **Table** drop-down, select the table in which to store the value.

    > **NOTE:** The dialog will only show those tables/fields that you are allowed to update. Only text fields are allowed for this definition type.

    b. Select a column name by doing one of the following:
        - In the search box, type the part or all of the column name. Axiom will display columns that include the name.
        - Click the arrow next to the table name to display a tree structure of all the columns.
    c. Click **Apply**.
8. Click +, and select one of the following from the drop-down:
    - **Add constant** - Type a constant value of up to 25 characters, including spaces.
    - **Add field** - Select a field from the database by selecting the table where it resides.

9. As needed, continue to add constants and/or fields by clicking +.

   TIP: To remove a constant/fields, click the trash can icon.

10. To identify the records in the database in which to apply the value, click **Criteria**. The Filter Wizard dialog displays, allowing you to define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.

11. In the **Details** section on the right side of the page, complete the following:

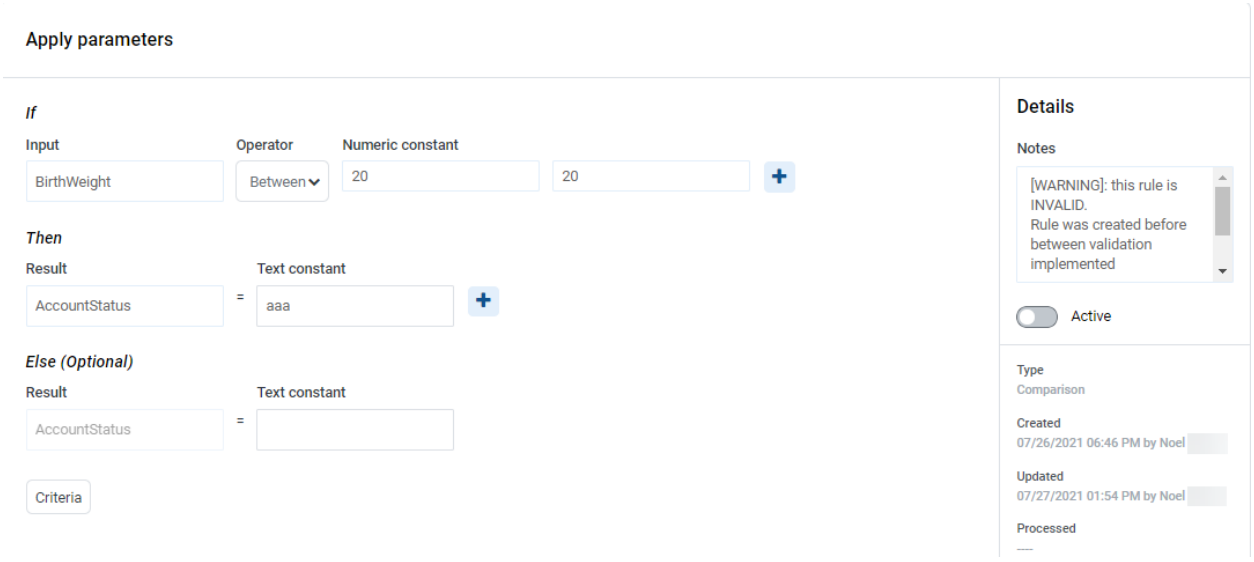
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.

12. Click **Save**.

13. To process the definition now, click **Process**. Follow the instructions in Processing a data transformation definition.

    NOTE: You can process the definition later from the **Data transformation definitions** page.

Comparison



6. In the **If** section, complete the following:

Field	Description
Input	In the **Select field** dialog, do the following: a. From the **Table** drop-down, select the table in which to store the value. **NOTE:** The dialog will only show those tables that you are allowed to update. b. Select a column name by doing one of the following: • In the search box, type the part or all of the column name. Axiom will display columns that include the name. • Click the arrow next to the table name to display a tree structure of all the columns. c. Click **Apply**.
Operator	Select one of the following: > Greater than >= Greater than or equal to < Less than <= Less than or equal to = Equal to <> Not equal to Between Only number or date values are available for comparison Like Only text values are available for comparison **TIP:** You can use % and _ (underscore) to represent any string of characters or any single character. For example, %Aspirin will find Baby Aspirin, Buffered Aspirin, etc.
Numeric constant	Enter a numeric, date, or text value, depending on the input field type you selected.

7. Add more If statements, as needed, by clicking +.

NOTE: Click + first to select if you are using a value from an existing field or entering a constant.

TIP: To remove a constant/fields, click the trash can icon.

8. In the **Then** section, complete the following:

Field	Description
Result	Select the table and column in which to store the value if the comparison is true
Text constant	Type the text value to add or edit to the field

9. Add more Then statements, as needed, by clicking +.

> **NOTE:** Click + first to select if you are using a value from an existing field or entering a constant.

10. In the **Else (Optional)** section, in the **Text constant** field, type the text value to add or edit to the field.

> **NOTE:** You cannot change the **Result field** here. Whatever result field you selected in the Then section is used here.

11. To identify the records in the database in which to apply the value, click **Criteria**. The Filter Wizard dialog displays, allowing you to define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.
12. In the **Details** section on the right side of the page, complete the following:
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.
13. Click **Save**.
14. To process the definition now, click **Process**. Follow the instructions in Processing a data transformation definition.

> **NOTE:** You can process the definition later from the **Data transformation definitions** page.

Copy Field

6. Click **Result field**.
7. In the **Select field** dialog, do the following:
    a. From the **Table** drop-down, select the table in which to copy the value.

    NOTE: The dialog will only show those tables/fields that you are allowed to update.

    b. Select a column name by doing one of the following:
        - In the search box, type the part or all of the column name. Axiom will display columns that include the name.
        - Click the arrow next to the table name to display a tree structure of all the columns.
    c. Click **Apply**.
8. Click **Input field**, and in the **Select field** dialog, select the table and column to copy the value.
9. To identify the records in the database in which to apply the value, click **Criteria**. The Filter Wizard dialog displays, allowing you to define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.
10. In the **Details** section on the right side of the page, complete the following:
    - **Notes**- (Optional) Type your own description to help you identify the definition.

- **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.

11. Click **Save**.
12. To process the definition now, click **Process**. Follow the instructions in Processing a data transformation definition.

> **NOTE:** You can process the definition later from the **Data transformation definitions** page.

Activating or deactivating a data transformation definition

Only activated rules can be processed.

To activate or deactivate a data transformation definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define data transformations**.
2. In the **Actions** column, click the ellipsis (**...**), and click **Edit**.
3. In the **Details** section on the right side of the page, click the **Active** toggle.
4. Click **Save**.
5. To process the definition now, click **Process**.

   NOTE: You can process the definition later from the **Data transformation definitions** page.

Deleting a data transformation definition

Deleting a definition does not delete data obtained as a result of processing the definition nor does it change the data back to its original value.

To delete a data transformation definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define data transformations**.
2. In the **Actions** column of the definition to delete, click the ellipsis (**...**), and click **Delete**.
3. At the **Delete?** prompt, click **Delete**.

Processing a data transformation definition

Processing a data transformation definition updates the database with the value changes you defined in the definition calculations. Only active rules can be processed.

IMPORTANT: While five different definitions can be processed together, Axiom determines the order in which they are processed. This may not be the same order in which they were clicked. We recommend that if you need to process definitions in a specific order (such as the results of one definition are used as an input in a subsequent definition), you must ensure that the first definition completes before the next one is processed.

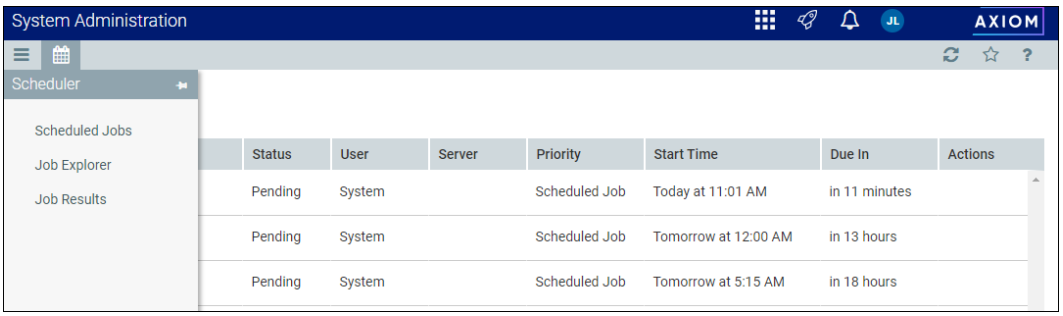
To process a data transformation definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define data transformations**.
2. In the **Actions** column for the definition to process, click **Process**.
3. In the upper right corner of the page, click **Process**.
4. If the definition uses the encounter table, the a **Process** dialog displays. Complete the following, and click **Process**:

Field	Description
Name	Displays the name of the definition, which cannot be edited from this dialog
Entity	Select one or more entities in which to process the definition.
From/To	To limit processing encounter data to a specific time frame, select a from and to date.
Admit date/Discharge date	Select whether to process encounters by admit or discharge date.

5. To view the process status of definitions, do the following:
   a. Click the Area menu in the Global Navigation Bar, and click **System Administration**.
   b. Click the menu icon in the left side of the Task Bar , and select **Scheduler**.
   c. From the Navigation panel, select **Tools > Scheduler**.
   d. Click the calendar icon to display the Scheduler panel, and then select **Job Results**. To refresh the list, click the Refresh icon in the Task Bar.

TIP: To keep the Scheduler panel open while you are working on the page, click the thump tack icon .



NOTE: For more information, see Viewing job results in the Web Client in the online help.

6

Defining encounters

In Axiom, you can define and gather encounters together to easily analyze populations so that your organization can address a wide variety of business questions or challenges. This allows you to look at a problem and identify the affected population. For example, you may want to evaluate the causes behind readmissions or find out what hip replacement patients are still experiencing joint pain more than three months after surgery.

By defining episodes and return population definitions in Axiom, you can gain insight across facilities, years, and patient care settings that are linked by a common ID with the flexibility to look at visits (and all of the associated visit data) for visits occurring before and after the index, anchor, or admission.

About episodes and returns

An episode is a series of medical encounters that address a specific medical condition or center around a specific set of medical services. Episodes have been used by organizations for some time, but until recently, they were of interest from a clinical or quality perspective. Episodes are now becoming more popular due to the potential of being a source of reimbursement.

Episodes are similar to and often synonymous with bundles, which is the process of bundling a set of services and paying one amount to allocate across providers. A bundled payment methodology involves combining the payments for a physician, hospital, and other health care provider services into a single bundled payment amount. This amount is calculated based on the expected costs of all items and services furnished to a beneficiary during an episode of care. Payment models that provide a single bundled payment to healthcare providers can motivate them to furnish services efficiently, to better coordinate care, and to improve the quality of care. Healthcare providers receiving a bundled payment may either realize a gain or loss, based on how successfully they manage resources and total costs throughout each episode of care. A bundled payment also creates an incentive for providers and suppliers to coordinate and deliver care more efficiently because a single bundled payment will often cover services furnished by various health care providers in multiple care delivery settings.

Episodes have a trigger event that are often (but not always) a pre-and/or a post-phase. Episodes and bundles often have very specific criteria with numerous inclusion and exclusion rules. These rules are generally interpreted to resemble the advanced filtering used to identify which encounters might be defined as having a triggering event and what encounters may be related to each other, thus defining the episode.

In Axiom, you can easily select patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition. This includes the ability to define rules and reuse them where appropriate, and then use them to define an episode or bundle.

By defining an episode, you create or select a data filter, which narrows the scope of the Encounter table to match events to the criteria, called the anchor. After further configuration of an optional pre-anchor and post-anchor, you can process the definition, which generates records in the database for reporting purposes.

A return is an episode when a patient who visited a clinic or doctor's office, or was admitted to a hospital and then discharged, returns again after some time for the same reasons.

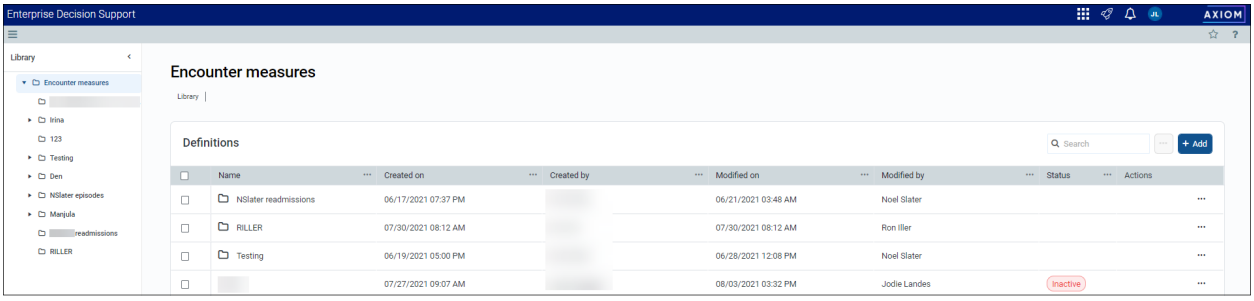
About encounter measure definitions

From the **Encounter measures** page, you can manage and process episode and return definitions. From this table, you can:

- View a list of all folders and definitions
- View the active status of definitions
- Add, edit, delete, or move folders
- Add, edit, delete, copy, or move definitions
- Process definitions

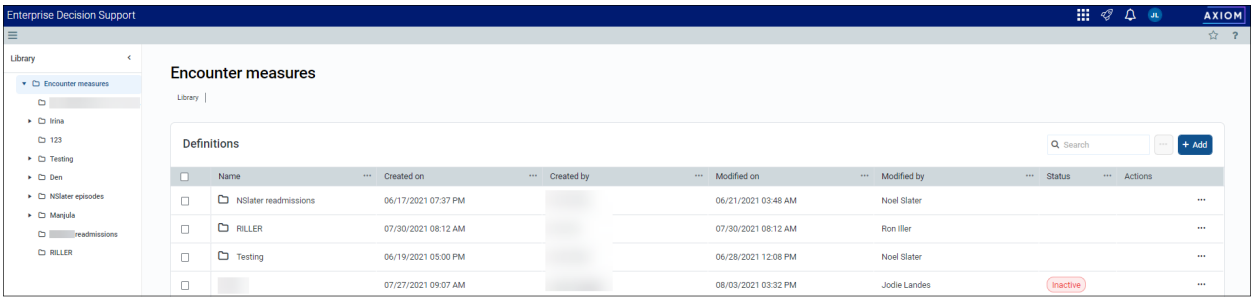
The **Library** side panel displays a hierarchical view of the folders. From this panel, you can easily navigate across the folders. To access the folder's content, click its name. The folder will open in a table format.

To search for a definition, you can use the search box in the upper right corner of the page. To filter the results in the table, click the ellipsis(**...**) in any of the available headings. To add a definition or folder, click **+ Add** in the upper right corner of the page.



Managing folders

In the definition table, you can create folders to organize multiple episode and readmission definitions in a way that makes sense to your organization. To filter the list, click the ellipsis (**...**) in any of the columns in which to filter. You can also search for a specific folder or definition by typing its name in the search box in the upper right corner of the page.



Accessing folders

From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter rules**.

Adding a folder

After creating a folder, it will display at the top of the table.

To add or edit a folder:

1. In the upper left corner of the page, click **+ Add**, and from the drop-down, select **Folder**.
2. In the **Add folder** dialog, type the folder name, and click **Add**.

> **NOTE:** The folder name must be unique.

Editing a folder name

To edit a folder name:

1. In the **Actions** column, in the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Edit**.
2. In the **Folder details** panel, change the folder's name.
3. Click **Save**.

Adding, editing, or deleting definitions in a folder

To add or edit definition in a folder:

1. In the **Name** column, click the folder name.
2. Do one of the following:
    - To add a definition, click **Add**, and from the drop-down select **Episode** or **Return**.
    - To edit a definition, click the ellipsis (**...**), and from the drop-down, select **Edit**.
3. Complete the definition by following the instructions in one of the following topics: Adding, editing, or cloning an episode definition or Adding, editing, or cloning a return definition

Moving a folder

Axiom allows you to move folders to organize the list the way it makes sense to your organization.

To move a folder

1. In the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Move**.
2. In the **Move** dialog, select a location, and click **Move**.

Deleting a folder

Folders that contain definitions cannot be deleted.

To delete a folder:

1. In the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Delete**.
2. At the confirmation prompt, click **OK**.

Adding, editing, or cloning an episode definition

Episodes are organized around anchors.

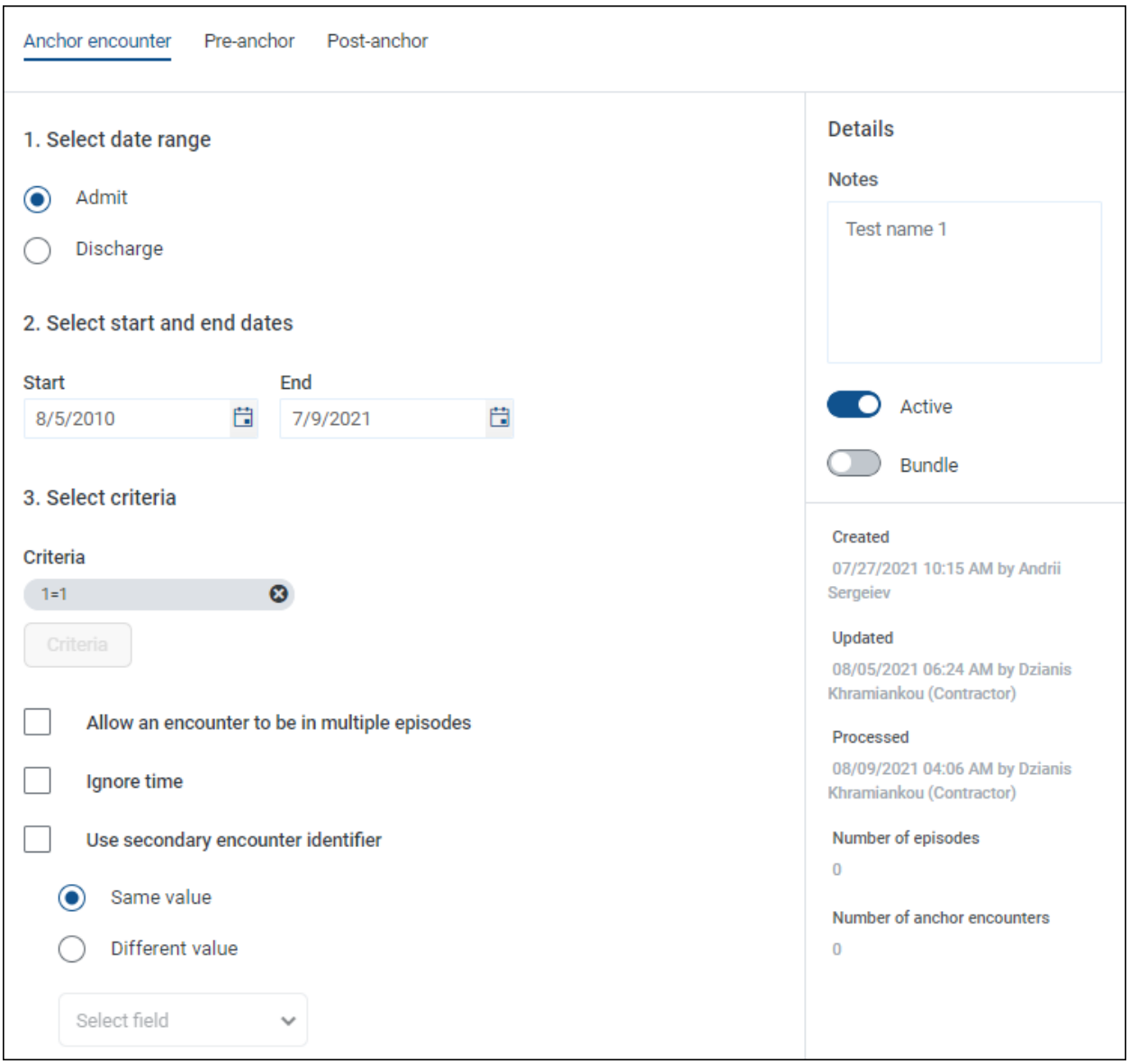
- **Anchor** - A key event in the patient's history that defines the activities related to the treatment. For example, childbirth, surgery, or doctor visit to address a specific issue.
- **Pre-anchor** - An activity that precedes the anchor event, usually related in preparation for the anchor event, such as preparing for surgery or childbirth.
- **Post-Anchor** - An activity that happens after the anchor event. For example, observation after surgery or a necessary check-up after childbirth.

NOTE: Not all the episodes include pre-anchor or post-anchor activities. For example, if a patient visits a doctor, recovers, and does not need an additional check-up, then this episode will not include either a pre-anchor or post-anchor.

To add or edit an episode definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter rules**.
2. To add, edit, or clone a definition in a folder, click the folder name.
3. Do one of the following:
    - To add a definition, click **+ Add**, and from the drop-down, select **Episode**.
    - To edit a definition, in the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Edit**.

Anchor encounter tab



4. At the top of the page, type a name for the definition.

   NOTE: Although the forward slash is accepted, you should avoid it.

5. In the **1. Select date range** section, select **Admit** or **Discharge**.
6. In the **2. Select start and end dates** section, select the start and end dates of the encounter.
7. In the **3. Select criteria** section, do any of the following:

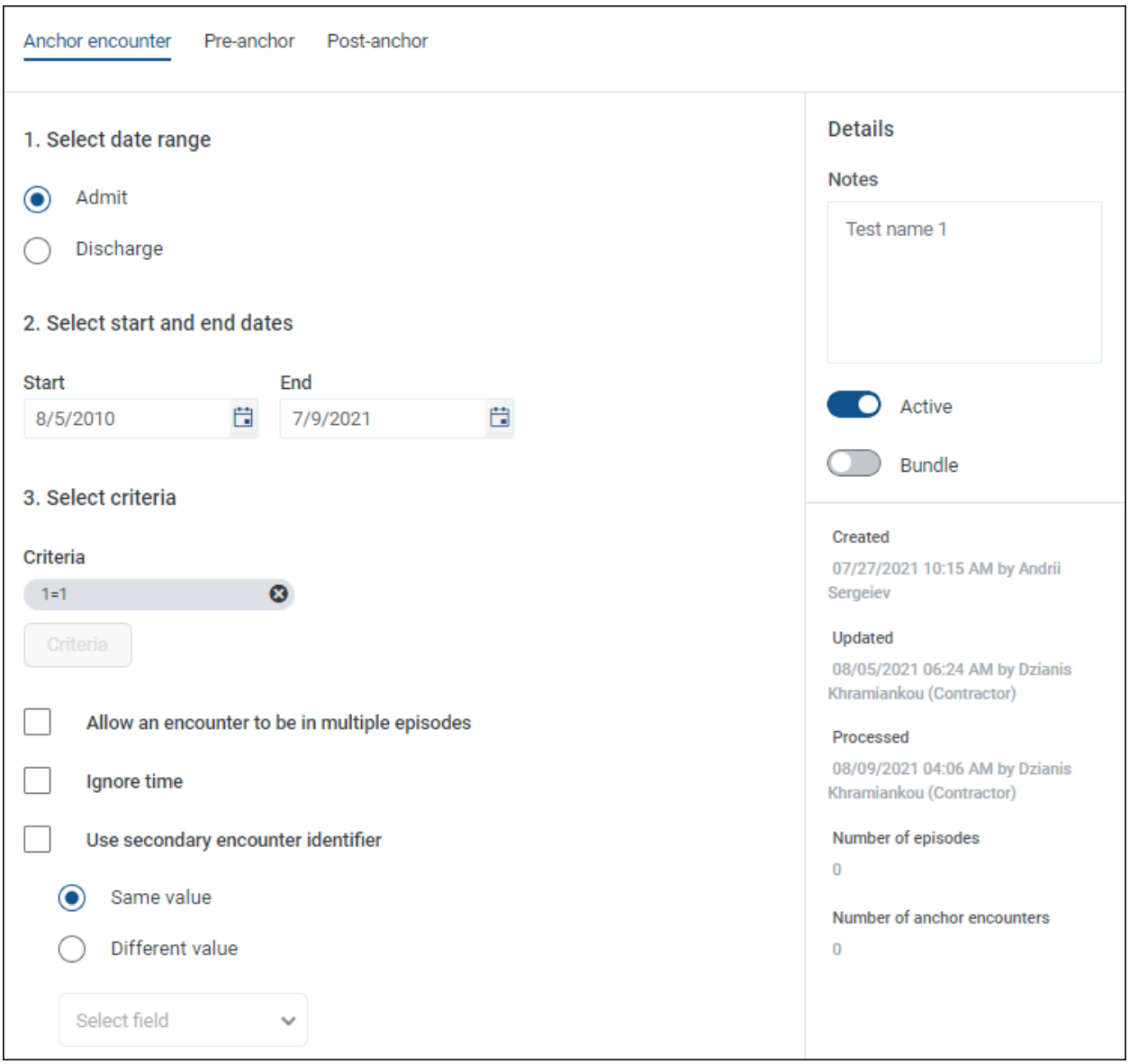
- To add a criterion, click **Criteria**. To identify the records in the database in which to identify the encounter, click **Criteria**. The Filter Wizard dialog displays, allowing you to select a specific attribute to define the record(s). For example, based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.
- To edit a criterion, click the existing filter name.
- To delete a criterion, click X next to the criterion name.

8. At the bottom of the page, select the following options, as needed:

Option	Description
Allow an encounter to be in multiple episodes	Select this option to obtain an encounter that occurs in more than one episode.
Ignore time	Select this option ignore the time periods of the episode.
Use secondary encounter identifier	If you do not select this option, by default, Axiom returns results that meet the filter criteria and groups them into episodes/returns based on patient ID only. To help narrow down the search, however, you can select the following: • If you want the results to contain only the encounters that belong to the same episodes, select **Same value**, For example, if you create an episode for heart attacks and choose a secondary identifier of 'Same DRG', any other kinds of encounters will be excluded from that episode. • If you want the results to contain pre- or post-anchors with different values than the anchor encounter in the selected field, select **Different value**. For example, if you select 'different ICD10 procedure code', Axiom will first find all of the encounters that meet the anchor criteria and will then review the episodes' to search for any pre- or post-/return encounters (based on patientID) that have different ICD10PCS codes from the anchor encounter.

9. Click **Next** at the bottom of the page, or click **Step 2 Pre-anchor** at the top of the page. Complete the steps for these tabs using the instructions in the next section below.

Pre-anchor and Post-anchor tabs



The **Pre-Anchor** and **Post-Anchor** tabs work similarly in that they allow you to define any pre- or post-anchor events for the definition.

To define the Pre-anchor and Post-anchor tabs:

10. In the **1. Select frequency** section, select one of the following:
    - To obtain only pre- or post-anchors that take place only for the first time, select **First time**.
    - To obtain pre- or post-anchors that take place every time before/after the anchor, select **Every time**.

- To obtain pre- or post-anchors that never take place, select **Never**.

11. In the **2. Select criteria** section, do any of the following:
    - To add a criterion to identify the pre- or post-anchor activity, click **Criteria**. For instructions, see Using the Filter Wizard.
    - To edit a criterion, click the existing filter name.
    - To delete a criterion, click X next to the criterion name.
12. In the **3. Define timeframe** section, complete the following:

Field	Description
Date type	Select **Admit** or **Discharge**.
Operator	Select **Less than** or **Less than or equal to**.
Value	Type a value.
Units	Select a unit type.
Date type	Select **Admit** or **Discharge**.

    For example, let's say that you need to find return episodes that occurred a week after the patient was discharged. In this case, you would you select the following:
    - **Date type** - Admit (a date when patients were readmitted)
    - **Operator** - Less than or equal to
    - **Value** - 7
    - **Units** - Days (this defines a week period)
    - **Date type** - Discharged

    Axiom will identify the episodes when a patient returned in a week or less after being discharged after the anchor encounter.
13. In the **Details** section on the right side of the page, complete the following:
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.
    - **Bundle** - Click the toggle to allow the episode to be grouped with other episodes as a bundle of services.
14. Click **Save**.
15. To process the definition now, click **Process**. Follow the instructions in Processing an episode or return definition.

NOTE: You can process the definition later from the **Encounter measures** main page.

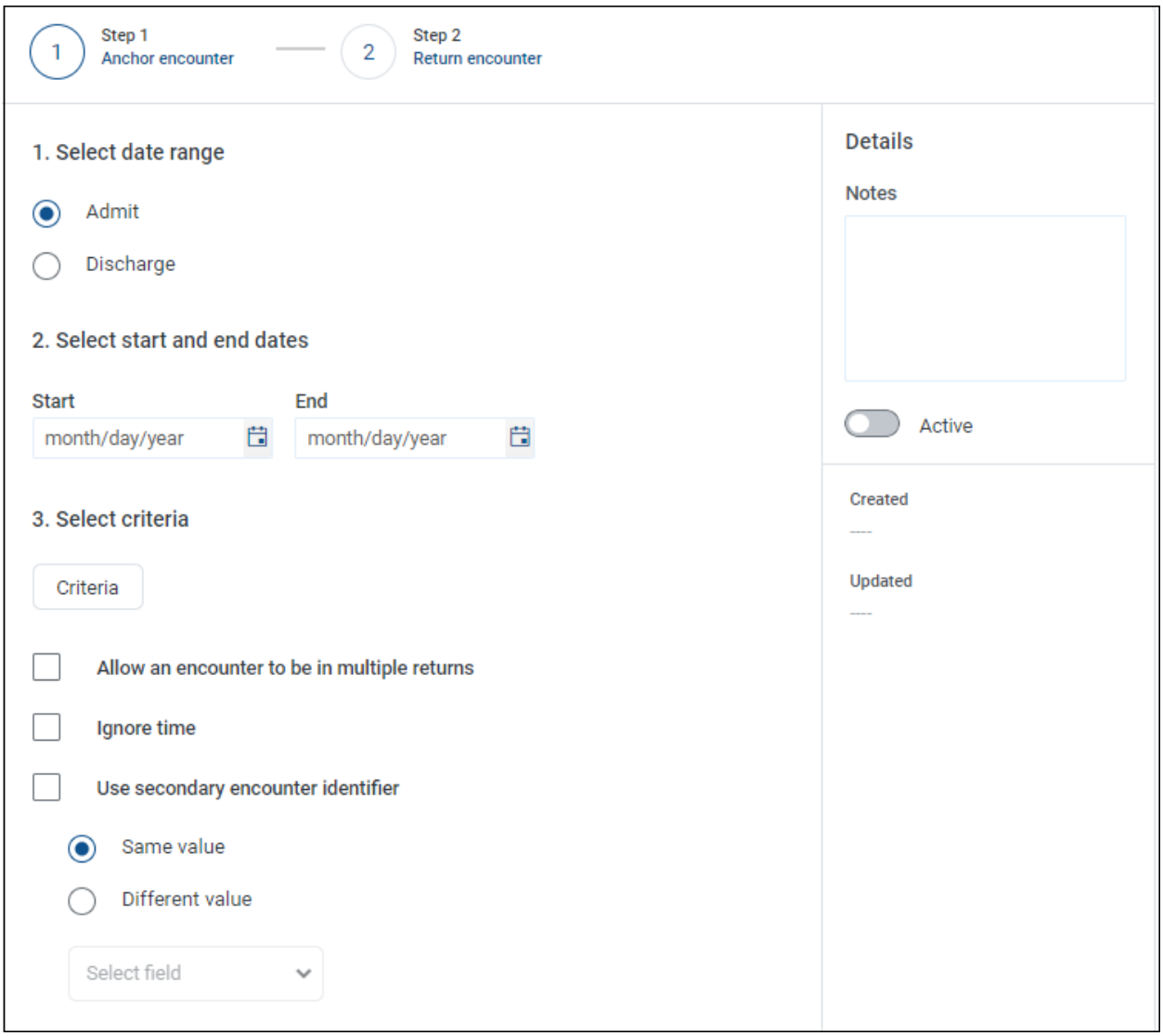
Adding, editing, or cloning a return definition

A return is an episode when a patient who visited a clinic or doctor's office, or was admitted to a hospital and then discharged, returns after some time for the same reasons.

To add, edit, or clone a return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter episodes**.
2. To add or edit a definition that is in a folder, click the folder name.
3. Do one of the following:
    - To add a definition, click **+ Add**, and from the drop-down, select **Return**.
    - To edit a definition, in the **Actions** column, click the ellipsis (**...**), and from the drop-down, select **Edit**.

Step 1 - Anchor encounter tab



4. At the top of the page, type a name for the definition.

   NOTE: Although the forward slash is accepted, you should avoid it.

5. In the **1. Select date range** section, select **Admit** or **Discharge**.
6. In the **2. Select start and end dates** section, select the start and end dates of the encounter.
7. In the **3. Select criteria** section, do any of the following:

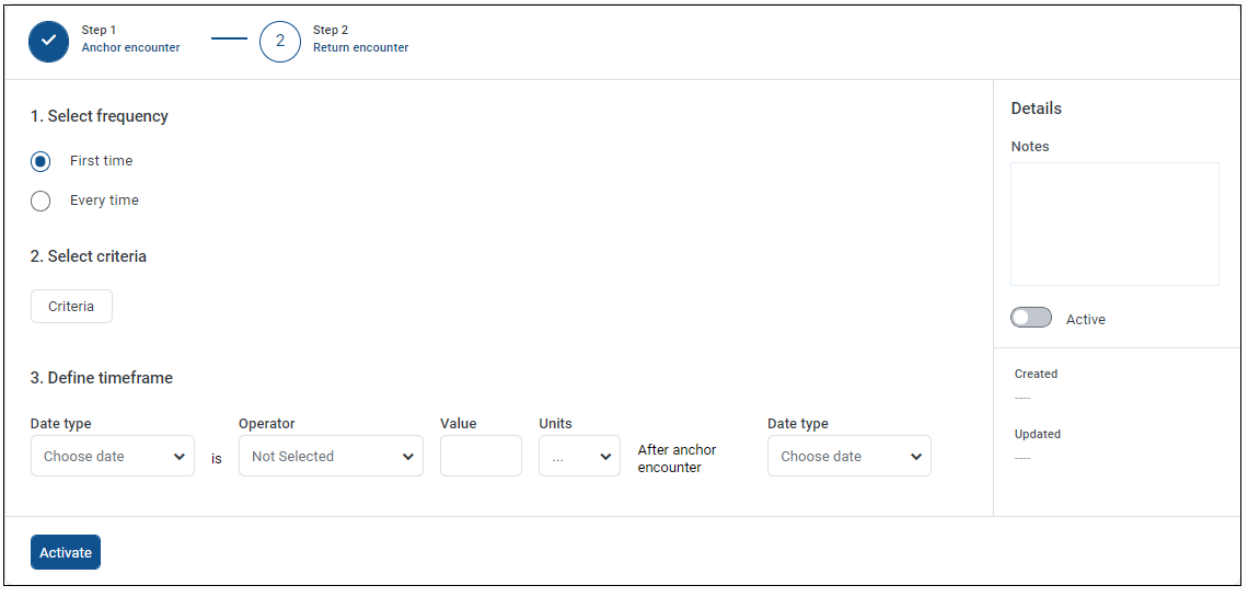
- To add a criterion, click **Criteria**. To identify the records in the database in which to identify the encounter, click **Criteria**. The Filter Wizard dialog displays, allowing you to select a specific attribute to define the record(s). For example, based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see Using the Filter Wizard.
- To edit a criterion, click the existing filter name.
- To delete a criterion, click X next to the criterion name.

8. At the bottom of the page, select the following options, as needed:

Option	Description
Allow an encounter to be in multiple returns	Select this option to obtain an encounter that occurs in more than one return.
Ignore time	Select this option ignore the time periods of the episode.
Use secondary encounter identifier	If you do not select this option, by default, Axiom returns results that meet the filter criteria and groups them into episodes/returns based on patient ID only. To help narrow down the search, however, you can select the following: • If you want the results to contain only the encounters that belong to the same episodes, select **Same value**, For example, if you create a definition for heart attacks and choose a secondary identifier of 'Same DRG', any other kinds of encounters will be excluded from that episode. • If you want the results to contain pre- or post-anchors with different values than the anchor encounter in the selected field, select **Different value**. For example, if you select 'different ICD10 procedure code', Axiom will first find all of the encounters that meet the anchor criteria and will then review the episodes' to search for any pre- or post-/return encounters (based on patientID) that have different ICD10PCS codes from the anchor encounter.

9. Click **Next** at the bottom of the page, or click **Step 2 Return encounter** at the top of the page. Complete the steps for this tab using the instructions in the next section below.

Step 2 - Return encounter tab



1. In the **1. Select frequency** section, select one of the following:
   - To obtain only pre- or post-anchors that take place only for the first time, select **First time**.
   - To obtain pre- or post-anchors that take place every time before/after the anchor, select **Every time**.
2. In the **2. Select criteria** section, do any of the following:
   - To add a criterion to identify the return activity, click **Criteria**. For instructions, see Using the Filter Wizard.
   - To edit a criterion, click the existing filter name.
   - To delete a criterion, click X next to the criterion name.
3. In the **3. Define timeframe** section, complete the following:

Field	Description
Date type	Select **Admit** or **Discharge**.
Operator	Select **Less than** or **Less than or equal to**.
Value	Type a value.
Units	Select a unit type.
Date type	Select **Admit** or **Discharge**.

For example, let's say that you need to find return episodes that occurred a week after the patient was discharged. In this case, you would you select the following:

- **Date type** - Admit (a date when patients were readmitted)
- **Operator** - Less than or equal to
- **Value** - 7
- **Units** - Days (this defines a week period)
- **Date type** - Discharged.

Axiom will identify the episodes when a patient returned in a week or less after being discharged after the anchor encounter.

4. In the **Details** section on the right side of the page, complete the following:
    - **Notes**- (Optional) Type your own description to help you identify the definition.
    - **Active** - Click the toggle to activate or deactivate the definition. Only active definitions can be processed.
5. Click **Save**.
6. To process the definition now, click **Process**. Follow the instructions in Processing an episode or return definition.

    NOTE: You can process the definition later from the **Encounter measures** main page.

Activating or deactivating an episode or return definition

Instead of deleting a definition, you can deactivate it so it cannot be processed. For instructions, see Deleting an episode or return definition. Add a note that deactivating definitions cannot be processed.

To activate or deactivate an episode or return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter rules**.
2. In the **Actions** column of the definition, click the ellipsis (**...**), and click **Edit**.
3. In the **Details** section on the right side of the page, click the **Active** toggle.
4. Click **Save**.
5. To process the definition now, click **Process**.

   NOTE: You can process the definition later from the **Encounter measures** page.

Deleting an episode or return definition

Instead of deleting a definition, you can deactivate so that it cannot be processed. For instructions, see Activating or deactivating an episode or return definition.

To delete an episode or return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter episodes**.
2. In the **Actions** column of the definition to delete, click the ellipsis (**...**), and click **Delete**.
3. At the **Delete?** prompt, click **Delete**.

Processing an episode or return definition

NOTE: Only active definitions can be processed.

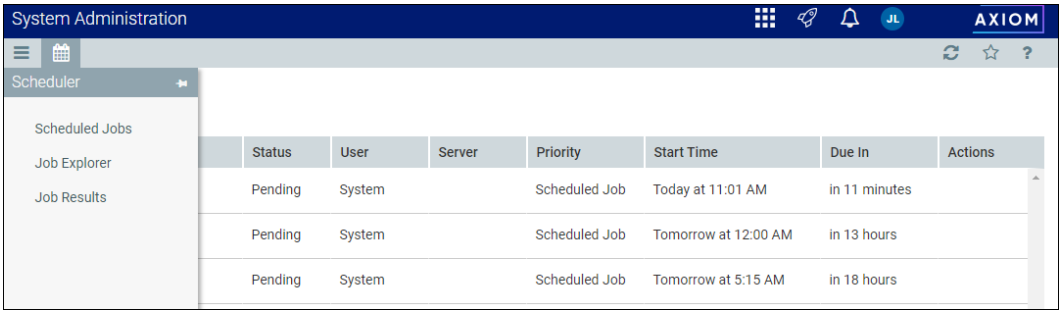
To process an episode or return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, click **Define encounter rules**.
2. In the **Actions** column for the definition to process, click **Process**.

   NOTE: A message displays at the top of the page that the definition will be processed as soon as possible.

3. To view the process status of definitions, do the following:
   a. Click the Area menu in the Global Navigation Bar, and click **System Administration**.
   b. Click the menu icon in the left side of the Task Bar , and select **Scheduler**.
   c. From the Navigation panel, select **Tools > Scheduler**.
   d. Click the calendar icon to display the Scheduler panel, and then select **Job Results**. To refresh the list, click the Refresh icon in the Task Bar.

      TIP: To keep the Scheduler panel open while you are working on the page, click the thump tack icon .



NOTE: For more information, see Viewing job results in the Web Client in the online help.

13

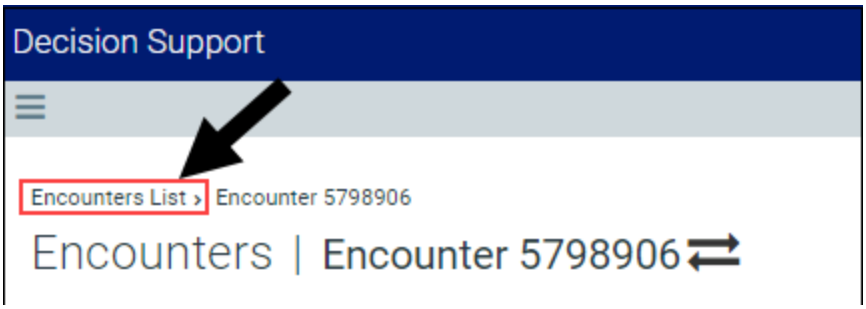
Viewing encounter details

The Encounter Viewer allows you to view the entire data set for a patient's encounters.

To view encounter details:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **View encounters**.
2. In the **Enter an encounter** dialog, type the encounter number, and click **OK**.

To navigate back to the encounter selector, click **Encounters List** in the breadcrumb at the top of the page.



Encounter records

The encounter record includes several tabs that contain encounter details organized into different areas so you can understand what occurred regarding a patient's visit.

Summary tab

Shows high-level overview information related to the encounter, including:

- Facility details
- Financial summary
- Admin/Discharge information
- Billing summary
- Cost category details

Groupings tab

Shows the service lines and population assignments associated with the encounter.

Coding tab

Shows codes related to the encounter, including:

- Encounter codes
- ICD Diagnosis
- ICD Procedures
- CPTs

Providers tab

Shows the list of providers associated with the encounter, including:

- Provider name
- Role
- Date assigned

Financial tab

Includes the following sub-tabs for two types of financial categories:

- **Payments & Adjustments** - Shows payment and/or adjustment detail information by account number. From the drop-down above the list, you can view all the payments and adjustments, payments only, or adjustments only.
- **Cost Details** - Shows cost information by department for items used in the encounter. To see more details about the item, click the link in the Department column.

Payors tab

Shows the primary, secondary, and tertiary insurance plans used for the encounter, including:

- Sequence
- Insurance plan name and group
- Subscriber information
- Authorization details
- COB details
- Coverage and non-coverage details

Surgeries tab

Shows a list of the provided surgical procedure details, including:

- Operation ID

- Procedure code and description
- CPT code and description
- Performing provider
- Surgery start and end time
- Surgery duration

Clinical tab

Shows the metrics specific to the encounter, including:

- Hospital acquired conditions
- Patient safety indicators
- Utilization
- Readmissions

7

Using the Filter Wizard

You can use or create your own filters to customize the data to view. The Filter Wizard walks you through the process of building complex limit query filters rather than having to construct them manually. You can create and save new filters for future use as well as use and edit existing filters.

Using an existing filter

To use an existing filter:

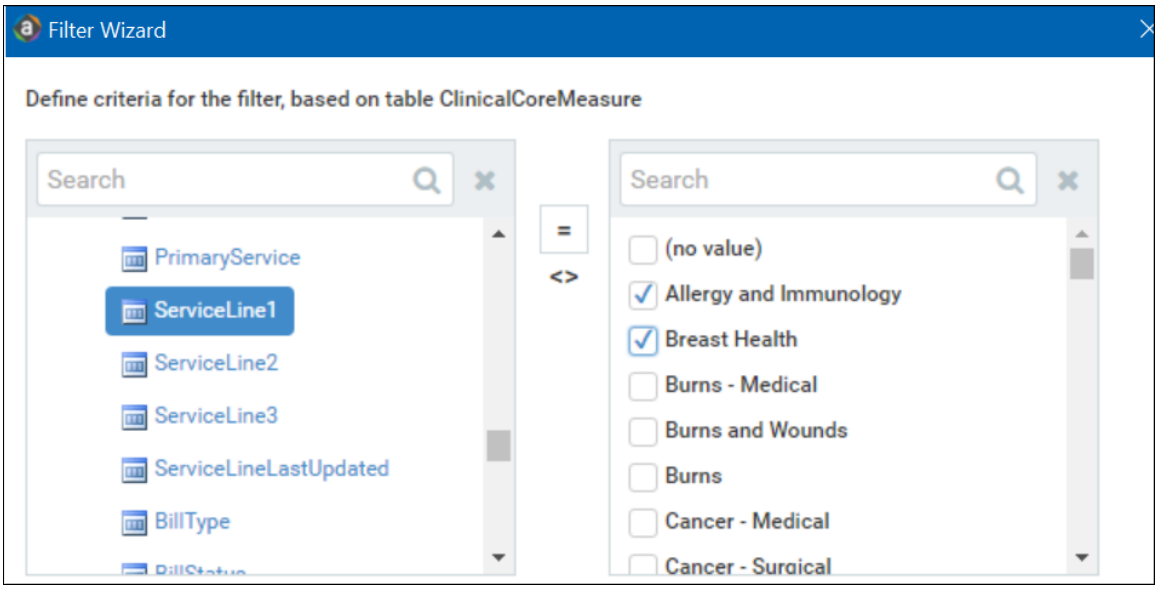
1. Next to the **Preview** field, click the folder icon.

2. In the **Filter Library** dialog, select the filter to use, and click **OK**.
3. In the **Filter Wizard** dialog, click **Apply**.
4. Click **OK**.

Creating a filter

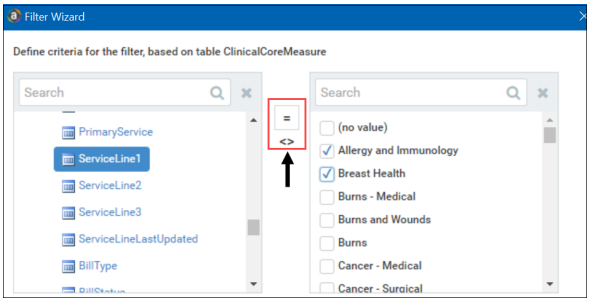
TIP: You can create a new filter from an existing filter by selecting it from the folder icon in the **Preview** field, and then follow these steps to make the appropriate changes. Make sure to give the filter a new name so that you do not overwrite the existing filter.

1. On the left side of the dialog, select the table column on which you want to base the filter. After you select a table column, the values in that column display in the right side of the dialog.



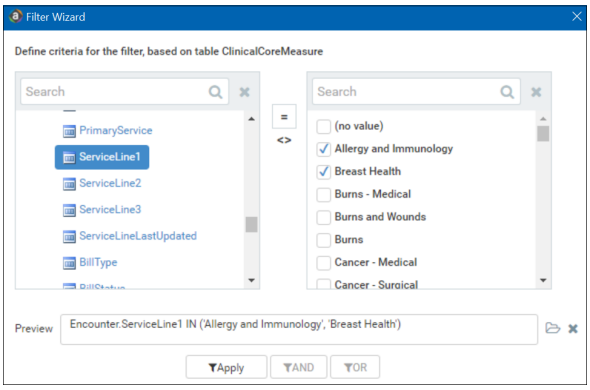
2. In the right side of the dialog, type or select the value on which to base the filter. You can type into the field above the list of values to filter the list or to specify a value. If one or more values are selected, then those items are used in the filter. Otherwise, whatever you type into the field is used by the filter.

3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than.



4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, edit your selections made above.

> **NOTE:** For instructions on writing filter syntax, see Filter criteria syntax.



5. Do one of the following:
    - If the filter criteria statement is finished, click **OK**. The Filter Wizard uses the statement in the Preview box (you do not have to click **Apply** in this case).
    - To create a compound filter, click **Apply** to move the current criteria statement into the **Filter** box. Then, repeat Steps a-d to create another criteria statement. When the next statement is complete, click **AND** or **OR** to join it to the prior statement.
6. In the **File name** field, type a name for the filter.
7. In the **Description** field, type a description of what the filter does.
8. Click **Save**.
9. In the Filter Wizard dialog, click **OK**.

Filter criteria syntax

Several areas of Axiom Enterprise Decision Support use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

```
Table.Column='Value'
```

- *Table* is the name of the database table.
- *Column* is the name of the column in the database table.
- *Value* is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

- To filter data by regions, the filter criteria statement might be: `DEPT.Region='North'`. This would limit data to only those departments that are assigned to region North in the Region column.

- To filter data by a single department, the filter criteria statement might be: `DEPT.Dept=100`. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

Operators

The criteria statement operator can be one of the following: =, >,<,<>,<=,>=. Greater than or less than statements can only be used with numeric values. For example:

```
ACCT.Acct>1000
```

SQL IN and LIKE syntax can also be used. For example:

```
DEPT.Region IN ('North','South')
```

Compound criteria statements

You can use `AND` and `OR` to combine multiple criteria statements. If you are creating long compound criteria statements with multiple ANDs or ORs, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR
ACCT.Acct=200)
```

NOTES:

- When filtering on multiple values in the same column, you must use OR to join the statements, not AND. In the example above, if the statement was instead `DEPT.Region='North' AND DEPT.Region='South'`, that statement would return no data because no single department belongs to both the North and South regions. When you use OR, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL IN syntax to create a compound statement for values in the same column. For example, the statement `DEPT.Region='North' OR DEPT.Region='South'` can also be written as `DEPT.Region IN ('North','South')`. The Filter Wizard uses IN syntax by default.

Using criteria statements in functions

If you are using a criteria statement in a function, such as GetData, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1","DEPT.Region='North'","GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

Referencing blank values in filters

If a string column contains a blank value, you may want to create a filter that includes or excludes records with these blank values. For SQL Server, the blank value is stored as an empty string. This empty string is indicated with empty quotation marks in the filter. For example: `ACCT.CMAssign=''` or `ACCT.CMAssign<>''`

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

`Dept.VP='O'Connor'`

Invalid. This construction does not work because Axiom Enterprise Decision Support reads it as Dept.VP='O' and then does not know what to do with the rest of the text.

`Dept.VP='O''Connor'`

Valid. The extra apostrophe tells Axiom Enterprise Decision Support that the apostrophe is part of the string value and is not the closing apostrophe.

NOTE: This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom Enterprise Decision Support will construct the appropriate syntax for you.

Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is `YYYY-MM-DDTHH:MM:SS` for DateTime and `YYYY-MM-DD` for Date.

If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.