

Release Notes

Axiom Rolling Forecasting
Version 2021.2

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple, which are slightly offset from each other.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2021.2 release of Axiom Rolling Forecasting. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

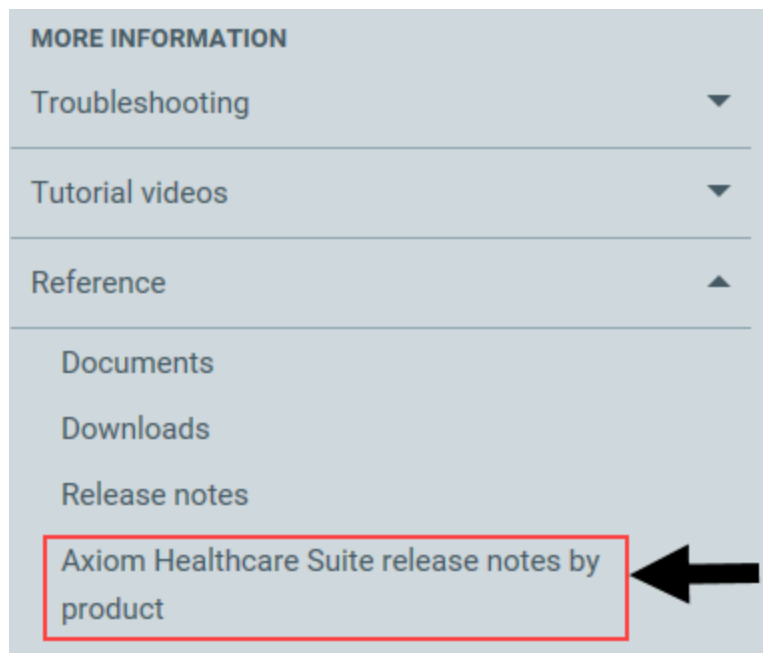
The purpose of these release notes is to provide you with the following:

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

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

► Accessing current and older release notes for Axiom Healthcare products

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



New features in 2021.2

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

[Configure refresh variables for selected reports](#)

This feature allows administrators to control which RFGGroup table columns are available for selection in the Refresh Variable dialog of certain reports. Administrators can also set up custom RFGGroup table columns and make those available for selection.

[New forecast methods available for IP_Census](#)

The IP_Census calculation method is generally used for forecasting at the entity level. This calculation method has been enhanced to provide more options for entity-level forecasting in the Revenue and Expenses sections of the plan file Forecast worksheet.

[Drill to details in the Month End Variance report](#)

You can now drill down to details on the Month End Variance report if your system is integrated with Axiom Performance Reporting. Drilling enables you to analyze the data at increasingly deeper levels to help you determine the cause of each variance for report items that have an associated drill. Drill icons indicate drillable data, making it easy to see where more detailed data is available.

Configure refresh variables for certain reports

► Why use this feature

Now administrators can control which RFGGroup table columns are available for selection in the Refresh Variable dialog of certain reports, thereby tailoring the selection list to better fit users' needs.

► How this feature works

What: When users open the Consolidated Summary or the EBIDA Summary report, one of the variables they must select from the Refresh Variables dialog is a data column from the RFGGroup table. After selecting the column, users can then select one or more entries from that column. Administrators can use the Grouping Columns for Refresh Variables feature to create a set of RFGGroup columns from which users can choose. Administrators can also set up custom RFGGroup table columns and make those available for selection.

Where: This change applies to the Visibility Options tab of the Configuration Utility, the Forecast tab of the plan file, and the Select RFGGroup Column options available in the Refresh Variable dialog for certain reports.

Who: Only Axiom Rolling Forecasting administrators can access the Configuration Utility. All users can access the reports affected by this feature.

How: In the Configuration Utility's **Visibility Options** tab, in the **Reports-Grouping Columns for Refresh Variables** section, click the drop-down and then select the RFGGroup columns to include and clear the check boxes for those RFGGroups to exclude. Click **OK** and then click **Save**.

Planning Configuration Global Save

GENERAL **VISIBILITY OPTIONS** **WORKDAY PERIODS**

Plan File Tab Visibility

Visible ☒ Forecast Plan

Visible ☒ Forecast Initiatives

Visible ☒ Forecast History

Forecast Plan Tab Summary Section Options

Visible ☒ Show EBIDA

Visible ☒ Show Adjusted EBIDA

Margin Label for Margin

Net Margin Label for Net Margin

Adjusted EBIDA Label for Adjusted EBIDA

Plan File Column Visibility

2018-07 Start Period

2023-06 End Period

Reports - Grouping Columns for Refresh Variables

Approver,Director,Division,Entity,Manager,RF... RGROUP Columns Used in Report Filters

Refresh Variables

Include Budget?

No

Select RFPeriod for Forecast

202006 Choose Value...

Select RFGROUP Column (optional)

RFGROUP

RFRollup

Division

Entity

RFPlanGroup

VP

Director

Manager

Approver

► Where to find more information

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

- “Reports - Grouping Columns for Refresh Variables” under “Visibility Options tab” in “Configuring planning”
- “Using the Consolidated Summary report”

New forecast methods for IP_Census

► Why use this feature

If your organization uses plan files at a level higher than RFGroups, you now have additional forecast methods to choose from when using the IP_Census calculation method to drive your revenue and expenses.

► How this feature works

What: The IP_Census calculation method is generally used for forecasting at the entity level. This calculation method has been enhanced to provide more options for entity-level forecasting in the Revenue and Expenses sections of the plan file Forecast worksheet. The following have been added for the listed calculation methods:

Calculation methods	New options
Patient Revenue	IP Admits\Discharge
Patient Revenue Net Per Unit	CMI Inpatient Admissions
Expense	IP Admits\Discharge
Salary	IP Admits\Discharges Adj
	CMI Inpatient Admissions

Where: This change applies to the statistics drop-downs in the Forecast Method column for the Patient Revenue section and the Expenses section of the Forecast worksheet in the plan file template.

Who: This feature is available to all users who have plan file access.

How: Open the desired plan file. In the **Patient Revenue** section **Expenses** section of the **Forecast** worksheet, select the desired forecast method. Save your work.

Forecast		Forecast Method	Fixed / Variable
EMC Imaging - Default For the Period Ending January 31, 2020		Payor	%
REVENUE			
Patient Revenue			
Inpatient Revenue			
IP Admits\Discharges		IP Admits\Discharges	
Driver Inflation Assumption		Key Outpatient Statistic	
Inflation Adjustment		Key Other Statistic	
Period Over Period Change		Total Key Statistic	
Revenue Adjustment		Days in Period	
Average Rate Per Unit		Work Days in Period	
Amount Adjustment - Quarterly		CMI Adjusted Admissions	
		CMI Inpatient Admissions	
		IP Admits\Discharges	

► Where to find more information

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

- “Forecast tab”
- “Rolling Forecasting calculation methods”

Drill to details in the Month End Variance report

► Why use this feature

You can now drill down to details on the Month End Variance report if your system is integrated with Axiom Performance Reporting. Drilling enables you to analyze the data at increasingly deeper levels to help you determine the cause of each variance for report items that have an associated drill. Drill icons indicate drillable data, making it easy to see where more detailed data is available.

► How this feature works

What: Easily drill from the Month End Variance report to details in Axiom Performance Reporting. The preconfigured drills enable you to view data from the department level all the way to revenue transaction detail, provided there is data at each level to support drilling.

Where: This change applies to the Month End Variance report available from the Admin and the Rolling Fcsting task panes.

Who: By default, all Axiom Rolling Forecasting users who can access the report can access the drilling feature.

How: Open the **Month End Variance** report and select the RFGGroup and view options, and then click **Apply**. On the report, locate the variance problem areas on the report and check if a drill is available for an item that you want to investigate. Line items with drills have a drill icon (🔍) at the beginning of the row. Click the drill icon to start drilling.

In the following example, arrows indicate a problem variance that has a drill.

Month-End Variance Explanation - Dec-2020												
RFCode	Description	Dec-2020 Actual	Nov-2020 3 Mth Avg	Variance	Variance %	3 Mth Avg Alert	Variance Explanation (500 character limit)	Rate	Volume	Efficiency	12 mo. Alert	Dec-2020 Actual
▼	Salary & Benefit Expenses	509,456	523,246	13,790	2.64%	🟢		553	20,874	(7,637)	🟢	3,141,934
🔍	E_Benefits_Fixed	13,170	(7,265)	(20,435)	(281.27%)	🔴		(20,251)	(290)	106	🟢	6,125
🔍	E_Benefits_FTE	26,184	30,969	4,785	15.45%	🟢		4,002	1,235	(452)	🔴	171,064
🔍	E_Benefits_Sal	34,759	36,484	1,725	4.73%	🟢		802	1,455	(332)	🔴	224,891
🔍	E_Salaries	347,641	361,431	13,791	3.82%	🟢		4,647	14,419	(5,275)	🔴	2,190,296
🔍	E_Salaries_Contract	87,703	101,627	13,924	13.70%	🟢		11,353	4,054	(1,483)	🔴	549,558
▼	Supply Expense	122,130	134,910	12,780	9.47%	🟢		7,397	5,382	-	🔴	934,001
🔍	E_Supplies_Medical	112,676	121,427	8,752	7.21%	🟢		3,908	4,844	-	🟢	831,665
🔍	E_Supplies_Other	9,455	13,482	4,028	29.87%	🟢		3,490	538	-	🟢	102,335

► Where to find more information

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

- “Using the Month End Variance report”

What to know before upgrading

IMPORTANT: You must apply the Axiom 2021.2 upgrade before applying any 2021.2 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.2 before the first product upgrade. Refer to the **Axiom 2021.2 Release Notes** and **Axiom Healthcare Suite 2021.2 Release Notes** for considerations before upgrading.

When upgrading to the 2021.2 version of Axiom Rolling Forecasting, keep in mind the following:

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

Preparing and scheduling upgrades

Summary of the upgrade process:

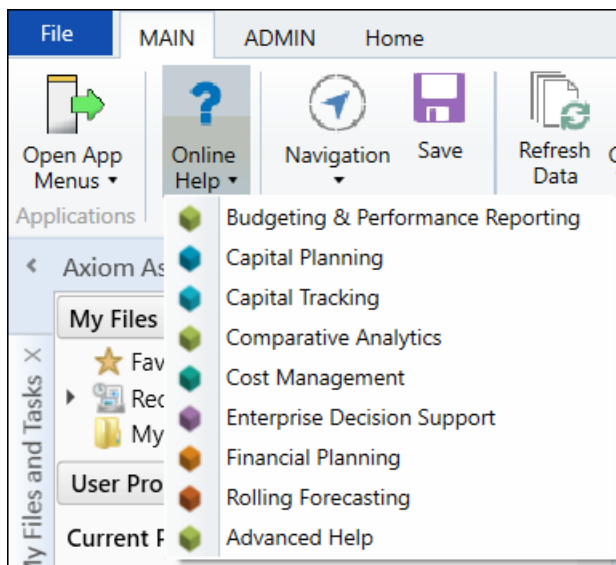
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom system administrator to contact support by creating a [support ticket](#) to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
 - Desired Axiom platform version.
 - Desired Axiom for Healthcare product and version.
 - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Getting help and training

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

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

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



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



► Syntellis Central

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

- Search help across all Axiom products
- Access tips, tricks, and best practices in our knowledge base

- Find training and certification content including on-demand, video, webinars, labs, and instructor-led courses
- Submit a support issue, find suggested content, and manage any outstanding issues directly with us
- Review open Software Service project status and details

Issues fixed in 2021.2

The following table lists the resolutions for issues addressed in 2021.2, released on July 6, 2021:

Deductions Calculator

Issue	Description
[T3] Case Number 00425919 - Outpatient Revenue History does not tie to plan files. [93899]	<p>Summary: On the Deductions tab of the Deductions Calculator, the outpatient revenue history does not balance with what is in the plan files because one of the formulas used in the Outpatient section is not referencing the correct column. This applies to all forecast columns for the Outpatient revenue section.</p> <p>Resolution: Corrected by updating the formula in the monthly references on the Outpatient Revenue line.</p>
[T3] Case Number 00424907 - Rolling Forecasting Deduction Model: the 3 Key Drivers (Admissions, Patient Days and Visits) once selected and saved are not coming back into the deduction model on refresh [93907]	<p>Summary: On the Deductions tab of the Deductions Calculator, when the three key drivers (Admissions, Patient Days, and Visits) are selected and saved, their settings are not reflected in the Deductions Calculator when it is refreshed. Instead, these settings must be selected each time for the driver to populate the Calculator. The Save tag does not appear to be working for the driver selections.</p> <p>Resolution: Corrected by removing the RFPlanGroup reference in Axiom Queries 21 and 22. The Sum By calculation does not include those fields but the queries were including them.</p>
(2021.2) RF Admins and Analysts are unable to save anything using the deductions calculator [94365]	<p>Summary: On the Deductions tab of the Deductions Calculator, users with the RF Admin and RF Analyst roles are unable to save changes made in the calculator despite having read and write access. Permissions to the associated data tables set at the subsystem level are preventing access.</p> <p>Resolution: Corrected by changing the Axiom Rolling Forecasting subsystem permissions in the Security Manager utility to allow for full read and write access.</p>

Issue	Description
[T3] Case Number 00430008 - RF 2.0 Deductions Calculator, issues with Default Forecast Method [95377]	<p>Summary: On the Deductions tab of the Deductions Calculator, when the forecast method for a line item is set to Default, the calculator is not updating based on the default setting because the formula in the forecast method is incorrect. The data is saving correctly but it is not returning to the calculator.</p> <p>Resolution: Corrected by updating the formula in the forecast method to not include the RFPlanGroup, and by moving the drop-down options in the Forecast Method column to the Data Selection drop-downs.</p>
[T3] Case Number 00430115 - FIF: PFB RF Deduction Model Bad Debt and Charity Forecast Formulas [95599]	<p>Summary: On the Deductions tab of the Deductions Calculator, the formulas in the forecast columns for Bad Debt/Charity are not working if, in the Deductions Model Configuration Utility, the Administrative Adjustments, Charity, and Bad Debt Setup items are set to IP/OP for a given RFPlanGroup.</p> <p>Resolution: Corrected by fixing the referencing in the Bad Debt, Charity, and Administrative Adjustments sections so that the formulas for the IP/OP are correct. Also adjusted part of the formula to avoid a circular reference.</p>
[T3] Case Number 00430139 - PFB RF Deductions Administrative Adjustment [95601]	<p>Summary: On the Deductions tab of the Deductions Calculator, the Administrative Adjustments calculation method in Axiom Query 14 is not loading the historical data because coding needed to bring in the historical data is missing from certain cells.</p> <p>Resolution: Corrected by updating the in-sheet calculation method for Administrative Adjustments, and by creating filters in affected cells so that historical data is brought into the Administrative Adjustments section.</p>
[T3] Case Number 00428167 - RF Deduction Calculator Summary Tab -- Charity/Bad Debt [96080]	<p>Summary: On the Summary tab of the Deductions Calculator, amounts for Charity and Bad Debt are resulting in reference (#REF!) errors.</p> <p>Resolution: Corrected by adding a Total section for charity and bade debt on the Deductions tab so that the summary tab reference can find the relevant row. Also corrected the logic on the Summary tab.</p>

Issue	Description
<p>[T3] Case Number 00430181 - RF Deduction Calculator - Hide Row Logic hiding the D_OPAdmin section [96411]</p>	<p>Summary: On the Deductions tab of the Deductions Calculator, the D_OPAdmin section (Outpatient Administrative Adjustment) rows are being hidden when the Administrative Adjustments section uses IP/OP instead of Total.</p> <p>Resolution: Corrected by updating the logic so that when the Administrative Adjustments section uses IP/OP instead of Total, the D_OPAdmin section rows are visible; when the Administrative Adjustments section uses Total, the Outpatient rows are hidden.</p>
<p>[T3] Case Number 00430120 - PFB RF Deduction Model Charity Forecast Formulas conditional formatting [96577]</p>	<p>Summary: On the Deductions tab of the Deductions Calculator, the forecast periods for the Bad Debt Total section are formatted to allow manual data entry when the section uses IP/OP instead of Total, which is incorrect; no manual input should be allowed when the section uses IP/OP.</p> <p>Resolution: Corrected by adding conditional formatting to the Bad Debt Total section to show a white background when the option is IP/OP so that manual entry is not possible.</p>
<p>RF2.0 RF Deductions Model - Historical Data needs to interface by RFPlanGroup, not RFGGroup [96758]</p>	<p>Summary: On the Deductions tab of the Deductions Calculator, historical data (actual/summarized) for the deductions sections is coming from the RFGGroup but should be coming from the RFPlanGroup.</p> <p>Resolution: Corrected the applicable Axiom queries to include the RFPlanGroup field in their formulas and added new queries to ensure that deductions calculated from the plan files are not counted twice.</p>
<p>RF Deductions changing historical calculations when selecting a forecast method [98316]</p>	<p>Summary: On the Deductions tab of the Deductions Calculator, when testing the forecast method of Last Month in the Data Selection drop-down of the Medicare Reimbursement section's Outpatient Medicare block, entering an override amount in one of the blue input cells causes the prior actuals to also change to the entered value after saving and refreshing the calculator. The actual periods are not input cells, so the forecast method of Default or Last Month should not apply. It appears that the formulas currently used are treating the actual cells as input cells and therefore adjusting the calculation.</p> <p>Resolution: Corrected by removing the check for forecast method from the formula used on the actual cells in the affected rows.</p>

Forecast – Expenses

Issue	Description
Salary Calc Method changes Variable FTE when Fixed FTE adjustment applied. [83737]	<p>Summary: In the Salary and Wages section of the Forecast worksheet, when a user needs to split an RFCode between a fixed FTE and a variable FTE, if the user makes a fixed FTE adjustment, it also changes the variable FTEs. This is happening because the formula for the Variable FTE is including Total Hours, which it should not.</p> <p>Resolution: Corrected by changing the formula to calculate the Variable FTE using only the Variable Hours instead of Total Hours.</p>
PFB-09521 - OTA Cost per Unit Calculation [86635]	<p>Summary: In the plan file Forecast worksheet, in the Expenses sections, the Cost Per Unit Including OTA line is not including the Volume OTA adjustment; instead, the formula is dividing by Key Statistic without including Volume OTA Adjustment because the formula is referencing the wrong row.</p> <p>Resolution: Corrected by updating the formulas in the applicable Expense and Salary rows.</p>
PFB-09523 - Fixed Salary not Dynamic with Fixed FTE OTA Adjustments [86639]	<p>Summary: Two issues:</p> <ol style="list-style-type: none"> 1. The OTA Salary Adjustment row heading does not indicate that this is a fixed amount. 2. In the plan file Forecast worksheet, when a user enters a Fixed FTE One Time Adjustment in the Salaries block, the adjusted amount is not being calculated into the Fixed Salaries including OTA row. <p>Resolution: Corrected the first issue by relabeling the row header to read "Fixed OTA Salary Adjustment." Corrected the second issue by updating the forecast column formulas to include the One Time Adjustment in the calculation.</p>

Issue	Description
PFB-09522 - FTE OTA Impact on Benefits (Based upon Rate per FTE or % Salaries) [86641]	<p>Summary: In the Forecast worksheet of the plan file template, data for One Time Adjustments for FTEs and for Salaries is not being automatically included in the Benefits blocks that are based on either FTEs or Salaries. Additionally, because of the way they are handled, Fixed OTA Salary adjustments and Fixed OTA FTE adjustments are not reflected in the salaries totals while Variable OTA adjustments are.</p> <p>Resolution: Corrected by adding calculations to the affected rows so that they find the Salary OTAs from the Salary calculation method. The subsequent calculations reference the Total, including the Salary One Time Adjustments line. Made a similar change for the FTE OTAs.</p>
[T3] RF Salary Quarterly FTE being computed incorrectly due to incorrect row reference [92781]	<p>Summary: In the plan file Forecast worksheet, in the Salaries section, for the quarterly actuals and forecast columns, the Total Fixed FTEs amount is incorrect because the formula is referencing the wrong row, resulting in the Fixed FTE Adjustments being counted twice.</p> <p>Resolution: Corrected by changing the formulas in the quarterly columns to use a weighted average in calculating the FTEs: use the weighted average of FTEs in a given period multiplied by the standard hours in the period = total hours in the period. The result is divided by the standard quarterly hours to get the FTEs.</p>
[T3] Salary w/ FTEs are being computed incorrectly because of Variable Productivity Adjustment is taken into account twice [92782]	<p>Summary: In the plan file Forecast worksheet, in the Salaries block, salaries with FTEs are calculating incorrectly because the Total Variable Hours already includes the Variable Productivity Adjustment, so it is being counted twice.</p> <p>Resolution: Corrected by changing the row label to “Variable FTEs Before Variable Prod Adjustments” to indicate that this is the Variable FTEs before any user adjustments are added. Also updated the formula in the first forecast month on that line to reflect the calculation before the user adjustment.</p>
Expense CML in month 2 & 3 of Forecast factored for calendar days [94324]	<p>Summary: In the Expense Calc Method Library and in months 2 and 3 of the Forecast quarters of the plan file Forecast worksheet, a calendar day factor is being applied inconsistently to expense calculations.</p> <p>Resolution: Corrected by removing the part of the calculation formula that contains the calendar day factor.</p>

Forecast – Revenue

Issue	Description
OTA in Patient Revenue CML does not affect Net Revenue. [83779]	<p>Summary: In the plan file Forecast worksheet, when a one-time adjustment (OTA) is used in the Patient Revenue calculation method, the OTA is expected to affect the final value in Net Patient Revenue but not affect the Reimbursement % so that it can be used in forecast periods. Currently, the value of Gross Revenue is being used before the OTA, which is causing the Net Patient Revenue for the current month that the OTA is used to be incorrect.</p> <p>Resolution: Corrected by changing the net revenue calculation method in the monthly forecast columns to reference the gross revenue plus the OTA instead of the gross revenue before OTA.</p>
[T3] RF Patient Revenue can result in \$0 rate per unit if cols FJ and FK don't have last month in calculation [92363]	<p>Summary: In the plan file Forecast worksheet's Patient Revenue section, when the forecast method is Last Month and the forecast period is not a quarter end, the Last Month calculation method is missing from the two monthly periods (columns FJ and FK) following the current actual period. This results in a \$0 rate per unit.</p> <p>Resolution: Corrected by adding a check for the Last Month to the calculation method formula for the affected period cells.</p>
RF-Other Revenue CML applies Variable calculation when Variable % set to zero. [92568]	<p>Summary: In the plan file Forecast worksheet's Other Revenue section, if the Fixed/Variable % is set to 0% for Variable Revenue, when a user enters a Revenue Adjustment in a forecast period, the correct 100% adjustment is applied to the Fixed Revenue line, but there is an additional calculation added to the Variable Revenue line.</p> <p>Resolution: Corrected by adjusting the Other Revenue calculation method for the Variable Rate row so that the % variable logic is applied in the forecast columns.</p>
RF - Net patient per unit does not include OTA for stats [92598]	<p>Summary: In the plan file Forecast worksheet's Other Patient Revenue block, the net amount for other patient revenue per unit is currently calculated by taking the net patient revenue after one-time adjustments are added and dividing that amount by the key statistic before one-time adjustments.</p> <p>Resolution: Corrected by updating the formula to add the Volume OTA to the denominator of the formula in the calculation method.</p>

Issue	Description
[T3] RF2.0 Deductions Calc Method Quarterly total % of Patient Revenue [92843]	<p>Summary: In the plan file Forecast worksheet's Other Deductions section, the Percent of Total Patient Revenue for the quarterly forecast period total is not calculating correctly. The calculation method formula is not consistent with the formulas in the other rows of the calculation method in the forecast Quarter total columns.</p> <p>Resolution: Corrected by updating the calculation method formula for the quarterly results in the forecast columns for the affected rows.</p>
[T3] PFB to Submit - RF Revenue Calc Method does not update Rev/Unit at Quarter Adj field. [93009]	<p>Summary: In the plan file Forecast worksheet, the Patient Revenue calculation method does not update the per unit amount when the user adjusts the amount in the current quarter because the parentheses in the formula are in the wrong place.</p> <p>Resolution: Corrected by updating the calculation method formula so that the closing parentheses in the formula are in the right place.</p>
[T3] Rolling Forecast Patient Revenue: The formula should be referencing row 263, the revenue with the one time adjustment included [93247]	<p>Summary: In the plan file Forecast worksheet's Patient Revenue section, the deduction calculation method needs to be updated to calculate based on the revenue amount with the one-time adjustments (OTA) included. Currently, the formula is referencing the total excluding the OTA row for the forecast periods.</p> <p>Resolution: Corrected by updating the Patient Revenue calculation method's deduction line to reference the total including OTA instead of the total excluding OTAs.</p>
[T3] Case Number 00424979 - Rolling Forecast Patient Revenue: Percentage deduction calculation needs to be updated to use the Patient Revenue with OTA [93898]	<p>Summary: In the plan file Forecast worksheet's Patient Revenue section, for patient revenue calculation methods that have deductions attached, the Percentage deduction calculation method needs to be updated to use the Patient Revenue with One Time Adjustments (OTA).</p> <p>Resolution: Corrected by adding a row that calculates based upon the total with OTA while preserving the prior calculation in the row that references the total. Also, see following related issue (Case Number 00436421) for additional adjustments that affect this issue.</p>

Issue	Description
[T3] Case Number 00426421 - Patient Revenue Calc Method: bringing in ONLY gross patient revenue without deductions, formula in row 21 of the calculation method will reverse out the patient revenue [93900]	<p>Summary: In the plan file Forecast worksheet's Patient Revenue section, when the user brings in only gross patient revenue without any deductions, the Patient Revenue calculation methods are reversing out the patient revenue.</p> <p>Resolution: Corrected by adjusting the Patient Revenue, Patient Revenue Net IP Census, and Patient Revenue Net Per Unit calculation methods used in the forecast periods so that if there are no deductions to calculate, then the net revenue equals the total revenue.</p>
[T3] Case Number 00429996 - RF Template needs fix for Bad Debt, Charity and Admin Adjustments [96409]	<p>Summary: In the plan file Forecast worksheet, a filter using the wrong payor code is preventing data from interfacing with the plan file when bringing in bad debt, charity, and administrative adjustments.</p> <p>Resolution: Corrected by updating the filter formula so that the correct payor code is used.</p>
[T3] Case Number 00430005 - Patient Revenue Calc method Per Unit Calculation errors [97126]	<p>Summary: In the plan file Forecast worksheet's Patient Revenue section, the Patient Revenue calculation method for the quarter Average Rate per Unit does not calculate correctly if the forecast method is changed from a 3-month average to a 6-, 9-, or 12-month average forecast method.</p> <p>Resolution: Corrected by adjusting the formula in the Average Rate per Unit line in the Patient Revenue calculation methods Patient Revenue, Patient Revenue Net IP Census, and Patient Revenue Net Per Unit.</p>

Forecast – Volume

Issue	Description
[T3] Case Number 00424779 - RF 2.0 Volume Calc Method, when selecting Global Only, it is negating the global growth showing a flat volume going forward [93144]	<p>Summary: In the plan file Forecast worksheet's Volume section, for Volume Calc Method 1, when Global Only is the selected forecast method, the global growth is not being included going forward, resulting in a flat volume forecast.</p> <p>Resolution: Corrected by adjusting the forecast method formulas in the forecast columns to account for the Global Only setting. This change removes the subtraction so that the global % is not canceled.</p>

Issue	Description
[T3] Case Number 00424788 - Rolling Forecast - Non Key Stats: not being driven by the global stats [93896]	<p>Summary: In the plan file Forecast worksheet's Volume section, non-key statistics are not being adjusted by the global driver growth rates because of a problem with the RFSUM field. For non-key statistics, the RFSUM is usually NA, so the lookup to the global driver is not found.</p> <p>Resolution: Corrected by adding three non-key statistic RFSUM codes (NonKeyIP, NonKeyOP, NonKeyOth) to be used in the lookup reference in the Volume calculation method.</p>

Miscellaneous

Issue	Description
Input Monthly Statistics - Manual override saves inapplicable Stat_Filter [82475]	<p>Summary: In the Input Monthly Statistics form, when a user performs a manual override, the inapplicable Stat_Filter is being saved to the RF_InputStatisticsFilter table instead of the qualified filter for non-Forecast tables. This impacts performance and calculations in the workbook.</p> <p>Resolution: Corrected by adding a new calculation method to refactor the logic so that the correct filter is saved.</p>
When Scenario is copied, Initiative tab does not return copied Initiative data [83756]	<p>Summary: The plan file Initiative worksheet does not return initiative data (does not display the initiative in the worksheet) if the Initiative was set up using the default scenario, saved, closed, and then that scenario was copied and the copy promoted to be the default scenario. The initiative data is copied to the RF Forecast table but is not being retrieved by the Axiom queries when the plan file is opened with the copied scenario selected.</p> <p>Resolution: Corrected by updating the Scheduler RunProcessScenarioJob with additional variables and by editing the code to process and return the data correctly.</p>
[T3] RF2.0 Initiatives: Unable to save initiatives due to RFMethod (RFCode Payor Initiative ID) character limit [92842]	<p>Summary: In the plan file Initiatives worksheet, initiatives are not saving if the code in the RFMethod field exceeds 50 characters.</p> <p>Resolution: Corrected by expanding the RFMethod field size from a 50-character limit to 150 characters.</p>

Issue	Description
[T3] Case Number 00425020 - RF Adjustments Table: save error due to code column width [93897]	<p>Summary: When adding calculation methods in the Adjustments driver, the user is getting a save error because the Description column in the RF_Adjustments table to which the Adjustments driver saves is limited to 50 characters.</p> <p>Resolution: Corrected by increasing the RF_Adjustments table's Description column to 150 characters.</p>
[T3] Case Number 00426866 - FTE Quarter Miscalculation: difference between the FTEs on the Summary Tab versus the Forecast tab FTE total [94437]	<p>Summary: On the plan file Summary worksheet, the total FTEs are different from the total FTEs listed on the Forecast worksheet. It appears that the Forecast tab is summing all the FTEs in its total, which is not how the total is calculated.</p> <p>Resolution: Corrected the Salary calculation method formula on the Forecast worksheet so that the quarterly columns on the Total FTE row result from dividing the Total Hours by the Standard FTE Hours.</p>
[T3] Case Number 00428584 - Comments are not word wrapping [94439]	<p>Summary: When users enter comments in the Forecast worksheet for a calculation method, the text in the Comments column does not wrap.</p> <p>Resolution: Corrected by adjusting the calculation methods' AutoFit Row Height setting.</p>
[T3] Case Number 00423246 - RF 2.0: RF_Forecast_2024 table populating when it shouldn't [93261]	<p>Summary: In the Planning Configuration utility's Visibility Options, when a user has specified the End Period as 2023 under Plan File Column Visibility, the RF_Forecast_2024 table is also populating with forecast data.</p> <p>Resolution: Corrected by adjusting the logic in the Forecast calculation method to save data to the RF_Forecast_YYYY tables based on the visibility settings in the Planning Configuration utility.</p>
RF Formatting in Windows client does not contain separating commas [98862]	<p>Summary: In the plan file Forecast worksheet of the Windows Client, when a user makes a manual adjustment, the cell format does not contain commas separating numbers with more than three digits. In the Excel Client, the commas are displayed.</p> <p>Resolution: Corrected by adjusting the relevant formulas in the Forecast calculation methods to provide formatting with commas.</p>
Balance Sheet & Cash Flow - Save error occurs in new install due to asset saving to non-default RFCODEs [99837]	<p>Summary: When a user with a new installation of Axiom Rolling Forecasting saves a change in the Balance Sheet and Cash Flow calculator, they receive an error because the calculator is attempting to save to RFCodes that are not included in the default installation.</p> <p>Resolution: Corrected by adjusting the code to reference the RFCodes used in the default product installation.</p>

Reports

Issue	Description
PFB-09516 - RF 2.0 Target Variance AQ5 limiting Key Stats [87249]	<p>Summary: In the Target Variance report, the filter in Axiom Query 5 is pulling key statistics from only certain RF Codes and is also defaulting to using Calendar Days for most RFGroups.</p> <p>Resolution: Corrected by adjusting the Axiom Query 5 data filter to use RFCode.Type IN ('KeyStat') instead of static lists.</p>
Consolidated Summary-refresh variables default on open should look to the RF_Forecast table and not RF_driver table [87466]	<p>Summary: In the Consolidated Summary report, when the refresh variable is opened and the default is used, it could result in an error if the default period was not a valid period in the Forecast table.</p> <p>Resolution: Corrected by updating the formula in the refresh variable so that it correctly references the RF_Config.PrevPeriod as a default selection.</p>
[T3] Rolling Forecasting Deduction Model: does not save back the quarterly totals; problematic with the RF Consolidated Summary as it is looking at the monthly columns and quarterly columns [93894]	<p>Summary: In the Consolidated Summary report, the monthly and quarterly columns are not populating from the RF_Forecast_YYYY tables after data is saved to the tables from the Deductions Calculator.</p> <p>Resolution: Corrected by adjusting the Axiom Queries that update the Consolidated Summary report with interfaced data to read from the correct data table fields, and also updated the Deductions Calculator to save quarter values.</p>
RF 2.0 - EBIDA and Consolidated Summary reports - Set Sheet Protection Off during snapshot [99382]	<p>Summary: In the Consolidated Summary and EBIDA Summary reports, when the Snapshot Workbook feature is used, users cannot resize columns in the Snapshot results.</p> <p>Resolution: Corrected by adjusting the Control Sheet protection setting for both reports to be Off during the snapshot feature.</p>

Issues fixed in 2021.2.1

The following table lists the resolutions for issues addressed in 2021.2.1, released on September 13, 2021:

Excel only

Issue	Description
(2021.2 Patch 1) [T3] Case Number 00439861 - RF 2.0 Salary Calc Method: Row 4. Variable Hours Per Unit [107834]	Summary: In the plan file Forecast worksheet template, in the Salaries section, the calculation method for Variable Hours Per Unit references the wrong cell. Resolution: Corrected by updating the calculation method code to reference the correct cell.