Release Notes

Axiom Financial Planning

Version 2021.1

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Version: 2021.1

Updated: 3/15/2021

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About the Release Notes

Syntellis is pleased to announce the 2021.1 release of Axiom Financial Planning. 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.

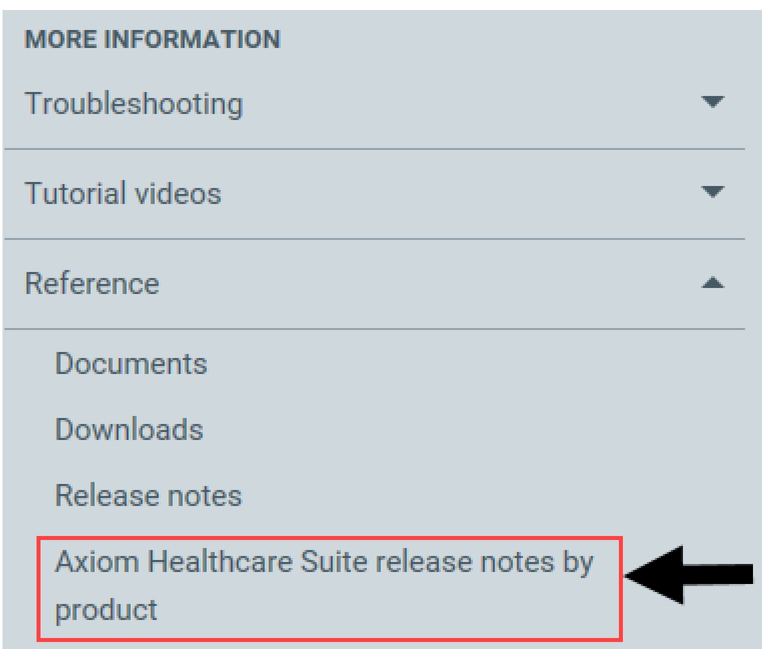
The purpose of these release notes is to provide you with the following:

- 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 Financial Planning online help. On the help home page, simply click the Release Notes link at the top of the page.

▶ Accessing current and older release notes for Axiom Healthcare products

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



New features in 2021.1

Axiom Financial Planning includes the following new feature in this release:

Updated Rating Agency Medians

The Rating Agency Medians have been updated with 2020 data as well as a new S&P AA+ category.

Create custom categories for grouping nodes

Administrators can now create up to two new custom categories for new nodes to use for reporting purposes.

Updated Rating Agency Medians

Why use this feature

The Rating Agency Medians have been updated with 2020 data as well as new S&P AA+ and Moodys Aa1 categories.

How this feature works

What: The system now includes 2020 updated data for the Rating Agency Medians and a new S&P AA+ and Moodys Aa1 category.

Where: If needed, modify the default rating to use for your organization by updating the Setup driver. New S&P AA+ and Moodys Aa1 categories have also been added to the list of agencies in the User Defined Credit Medians Input utility. The refresh variables have also been updated for the following reports:

- Financial Planning Dashboard
- Financial Statements report
- Financial Statements with Detail report
- Scenario Review report
- Model Assumptions report

Who: You must be assigned the Financial Planning admin or user role profile in the system.

How: There are multiple areas in the system where the medians have been updated. See the **Where** section above for details.

User Defined Credit Medians

KHA Health

		S&P Health System					
Credit Indices	User Defined	AA+	AA	AA-	A+	A	A-
Average Age of Plant	0.00	8.50	10.50	10.40	12.00	11.80	11.50
Average Length of Stay (days)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Capital Requirements	0	0	0	0	0	0	0
Capital Spending Ratio	0.0%	134.6%	153.8%	132.6%	122.4%	134.6%	133.5%
Cash Flow (Net Inc + Depr)	0	0	0	0	0	0	0
Cash to Debt (%)	0.0%	359.0%	283.1%	224.7%	164.1%	136.1%	100.9%
Compensation Ratio	0.0%	54.8%	58.0%	56.9%	55.3%	59.5%	66.0%

New S&P AA+ and Moodys AA1 medians have been added to the User Defined Credit Medians Input utility.

Where to find more information

The following topics in the online help have been updated or reference the updated medians:

- "Configuring the Setup driver file"
- "Configuring user-defined credit medians"
- "Using the Financial Planning Dashboard"
- "Running the Financial Statements report"
- "Running the Financial Statements with Detail report"
- "Running the Scenario Review report"
- "Running the Model Assumptions report"

Create custom categories for grouping nodes

Why use this feature

Administrators can now create up to two new custom categories for new nodes to use for reporting purposes. For example, you can add a primary group category for regions and a secondary group category for volume.

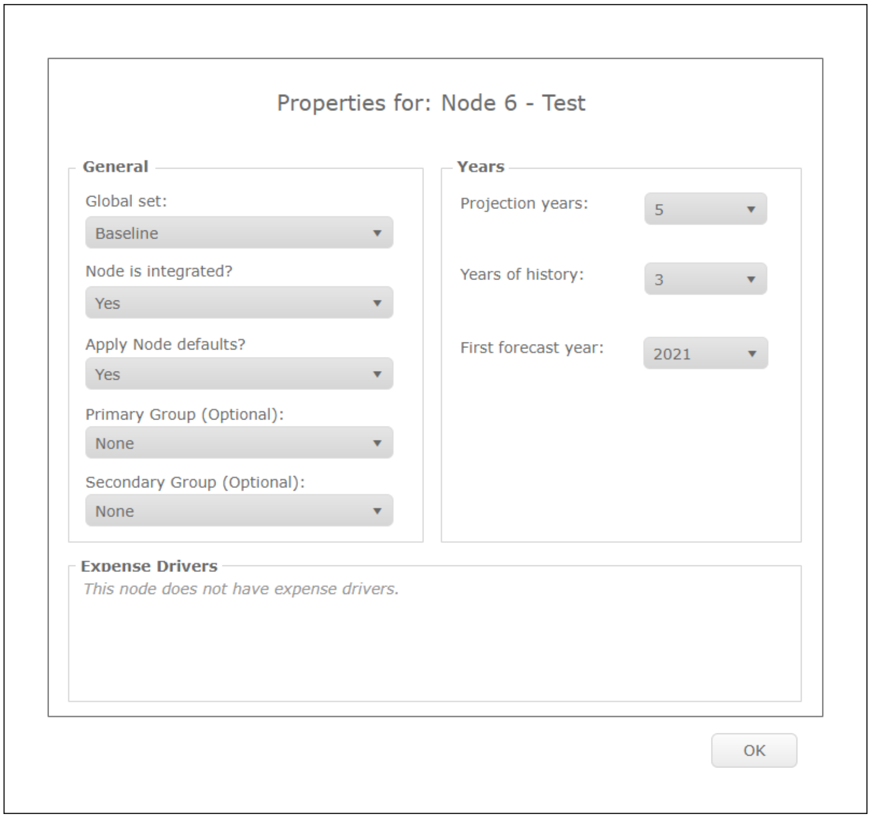
How this feature works

What: The Setup driver now includes the ability to create a custom primary and secondary custom category. When you add a new node, the Properties dialog includes the option for selecting a primary and secondary category. You can then use the Quick Filter in a report to filter by the categories.

Where: Financial Planning administrators can add the new categories using the Setup driver.

Who: You must be assigned the Financial Planning admin role profile in the system to create custom node categories.

How: To add the new categories, in the Setup driver, complete the Primary and Secondary Group Name along with the Choices fields. The options will then display in the Properties dialog of the new node. If these fields are not configured in the Setup driver, the options will not display.



The new custom primary group and secondary group drop-downs added to the General area of the node property dialog

Where to find more information

The following topics in the online help have been updated or reference the updated medians:

- "Configuring the Setup driver file"
- "Creating a node"

What to know before upgrading

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

When upgrading to the 2021.1 version of Axiom Financial Planning, keep in mind the following:

- Along with upgrading to Axiom 2021.1, you will also need to upgrade to Axiom Comparative Analytics 2021.1.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- Syntellis delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

Preparing and scheduling upgrades

Summary of the upgrade process:

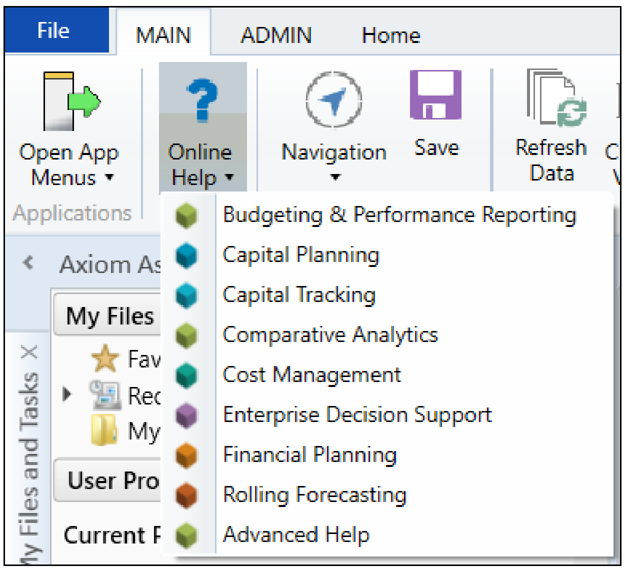
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation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

Getting help and training

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

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

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



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

Syntellis Central

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

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

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

Issues fixed in 2021.1

The following table lists the resolutions for issues addressed in 2021.1, released on April 12th, 2021:

Issue	Description
PFB-08339 - Payor 1 Outpatient Visits Percent by Payor formula overwritten in Rebuild Node [42113]	**Summary:** In the Acute template, the default percent formula is being overwritten for Payor 1 in the protected cells when the plan files are rebuilt. **Resolution:** Corrected by removing the Copy Values action code that executes on plan file rebuild.
PFB-09252 - Improve Functionality with FP Corporate Allocation Driver [57964]	**Summary:** When integrating allocation accounts from Management Reporting to Financial Planning, any manual allocations entered at the bottom section of the allocation driver populate in the top sections after the driver is refreshed. This results in duplicate entries and an error message the next time the user tries to save the driver. **Resolution:** Corrected by updating Axiom queries so that problem queries now execute as expected; added a check for duplication in the manual entry section; made other formatting fixes and code changes so that the driver works correctly.
Bad Debt and charity error by payor [58441]	**Summary:** In a new file group, when the user activates Bad Debt and Charity by payor, then builds a new Acute plan file and/or a new Physician plan file, if gross charges are 0, a division by zero error occurs. **Resolution:** Corrected by changing the formula for both Bad Debt and Charity, Acute and Physician templates, and the related calculation methods. Updated the formulas to account for when the denominator is 0.
PFB-09350 - FP code dimension utility missing field definition [66785]	**Summary:** The Code Dimension Update Utility (Update DIM - CODE) is missing “CODE.ActiveCode” from the field definition row in AQ6. This causes the utility to not return the Yes/No records for FTEs. **Resolution:** Corrected by adding the missing field definition.

Issue	Description
Transfer to FP integration issues with RF 1.0 [66991]	**Summary:** When transferring data from RF 1.0 to FP, the following issues can occur: • The time series is fixed, so it may return the wrong values. • The Start/End date is fixed and is used in ACCTVerification. It should change based on the FP file group and fiscal year. • The RF tables are fixed instead of being passed as variables to the import. • The RF balance sheet selection may try to use the wrong table. It needs to reference the Additional List values to ensure the selected table.column is correct. **Resolution:** Corrected by making adjustments in the Transfer to Financial Planning utility, the Transfer to Financial Planning job, and the Transfer from Rolling Forecasting - Quarterly import, so that time series data changes based on the FP file group and fiscal year, previously fixed data is passed as variables, and the Summary tab displays the correct data tables.