

Release Notes

Axiom Financial Planning
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 that has a blue-to-purple gradient. The frame is composed of two horizontal lines and two vertical lines, with the top and bottom lines being slightly longer than the side lines.

AXIOM

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Contents

About the Release Notes	4
New features in 2021.2	6
New utility updates expense drivers in existing nodes	7
New options for modeling bad debt and charity	9
New depreciation and amortization codes for templates	11
New option for balance sheet cash code calculation	13
New transfer option includes net assets with net income	15
What to know before upgrading	17
Preparing and scheduling upgrades	18
Getting help and training	19
Issues fixed in 2021.2	21
Issues fixed in 2021.2.1	22

About the Release Notes

Syntellis is pleased to announce the 2021.2 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 at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.

Release Notes ▲

Budgeting and Performance Reporting 2021.1

All Axiom products



What's new ▼

Getting Started ▼

BUDGET SETUP

Budget setup checklist ▼

New features in 2021.2

Axiom Financial Planning 2021.2 includes the following new features in this release:

[New utility updates expense drivers in existing nodes utility](#)

The Expense Driver Update Utility gives you an efficient way to update the selected expense drivers and their associated variable expense percentages in existing nodes without having to open and make changes to each node separately. Then, from the utility, you can automatically recalculate all of the affected nodes.

[New options for modeling bad debt and charity](#)

Previously, the bad debt and charity sections were calculated as a percentage of revenue. Now you have the option to model these as either a percentage of gross revenue or a percentage of net revenue, allowing for more precise modeling.

[New depreciation and amortization codes for templates](#)

Previously, there was only one place in plan file templates to account for depreciation and amortizations. Now, additional codes for depreciation/amortization and for allocated depreciation/amortization have been added to templates and default data.

[New option for balance sheet cash code calculation](#)

Administrators can change the cash code used as the calculation basis when forcing the balance sheet to balance. Previously, Board Designated Investments was the only available cash code, but now you have the option to use short-term investments.

[New transfer option includes net assets with net income](#)

Now when transferring data from Axiom Management Reporting or Axiom Rolling Forecasting to Axiom Financial Planning, you can include excess of revenue over expenses in net assets when selecting data options. This feature allows you to be consistent with imported data for any accounts that are set up to include net income with net assets on the balance sheet.

New utility updates expense drivers in existing nodes

► Why use this feature

The Expense Driver Update Utility gives you an efficient way to update the selected expense drivers and their associated variable expense percentages in existing nodes without having to open and make changes to each node separately. Then, from the utility, you can automatically recalculate all of the affected nodes.

► How this feature works

What: Easily change the selected expense driver and/or the variable expense percentage for a group of existing nodes by making changes in the utility. After saving changes, use the utility's recalculation feature to recalculate the nodes.

Where: This change applies to the Administrative Utilities section in the Fin Plan Admin task pane, and to the existing nodes modified by the utility.

Who: Only Axiom Financial Planning administrators can access and use the Expense Driver Update Utility.

How:

1. In the **Fin Plan Admin** task pane's **Administration** section, expand **Administrative Utilities**, and then double-click **Expense Driver Update Utility**.
2. In the **Refresh Variables** dialog, select the desired Model.
3. To narrow the number of nodes affected, select from the optional settings that display next.
4. Click **OK**.
5. In the utility, change the **Expense Driver** for all nodes or selected nodes in each expense category.
6. Save your changes.
7. To recalculate the nodes, double-click the **Double Click to Recalculate** blue bar near the top left of the utility.

Expense Driver Update Utility				
Model: Transfer to FP Testing - Transfer Testing				
Double Click to Recalculate		< < == NOTE: Perform changes then SAVE. Select "Double Click to Recalculate" to adjust affected Nodes.		
Node	Node Description	Code	Expense Driver	Variable Expense %
Acute Nodes				
Expense category		Salaries	Expense Driver for all Salaries >	Variable Expense % for all Salaries >
8 CPN_IncomeStatement	726101 - Routine Salaries		Patient Days	0.00%
11 MHS_Elim	726101 - Routine Salaries		Patient Days	0.00%
13 MHS_HomeHealth	726101 - Routine Salaries		Patient Days	0.00%
26 Exclude	726101 - Routine Salaries		Patient Days	0.00%
27 MHS_MedBldg	726101 - Routine Salaries		Patient Days	0.00%
28 MHS_MMC	726101 - Routine Salaries		Patient Days	0.00%
29 MHS_MNC	726101 - Routine Salaries		Patient Days	0.00%
30 MHS_RCHS	726101 - Routine Salaries		Patient Days	0.00%
		ProfessionalFees	Expense Driver for all ProfessionalFees >	Variable Expense % for all ProfessionalFees >
8 CPN_IncomeStatement	726301 - Professional Fees		Equiv Pt Days	0.00%
11 MHS_Elim	726301 - Professional Fees		Equiv Pt Days	0.00%
13 MHS_HomeHealth	726301 - Professional Fees		Equiv Pt Days	0.00%
26 Exclude	726301 - Professional Fees		Equiv Pt Days	0.00%
27 MHS_MedBldg	726301 - Professional Fees		Equiv Pt Days	0.00%
28 MHS_MMC	726301 - Professional Fees		Equiv Pt Days	0.00%
29 MHS_MNC	726301 - Professional Fees		Equiv Pt Days	0.00%
30 MHS_RCHS	726301 - Professional Fees		Equiv Pt Days	0.00%
		Supplies	Expense Driver for all Supplies >	Variable Expense % for all Supplies >
8 CPN_IncomeStatement	726401 - Medical Supplies		Equiv Pt Days	0.00%
11 MHS_Elim	726401 - Medical Supplies		Equiv Pt Days	0.00%
13 MHS_HomeHealth	726401 - Medical Supplies		Equiv Pt Days	0.00%

► Where to find more information

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

- "Updating expense drivers for existing nodes"

New options for modeling bad debt and charity

► Why use this feature

Previously, the bad debt and charity sections were calculated as a percentage of revenue. Now you have the option to model these as either a percentage of gross revenue or a percentage of net revenue, allowing for more precise modeling.

► How this feature works

What: In the Global Assumptions driver, select to model Bad Debt as a percentage of Net Revenue or Gross Revenue, and then select settings for Charity. After saving the driver, the changes will affect all new nodes created. To propagate the change to existing nodes, recalculate the nodes.

Where: This change applies to nodes and the Global Assumptions driver.

Who: Only Axiom Financial Planning administrators can make changes to the Global Assumptions driver.

How: In the **Fin Plan Admin** task pane under **Financial Plan Assumptions**, open the **Setup** driver. From the drop-down for **Bad Debt calculated as % of**, select the desired option. Then, make a selection from the **Charity calculated as % of** drop-down. In the **Main** ribbon tab, click **Save**. Regenerate the plan files if needed.

Global Assumptions	
Copy data from previous year file group?	No
Institution Name	
Plan Description	Financial Plan
Current Operating Year (Base Year)	2019
Leap Year Used in Balance Sheet and Statistics Calculations	NO
Include Allocations	NO (Set to YES to Use CorpAllocation Driver to Allocate Values to Nodes)
Discount rate for NPV	10.0% < <Default - overrides can be performed in each global set
Data being loaded for Deductions	Allowances (Data entry for Reimbursement or Contractual Allowances)
Bad Debt by Payor	YES (Data Entry for Bad Debt by Payor)
Bad Debt calculated as % of	Net Revenue (Bad Debt will be calculated as a % of selected Revenue option)
Charity by Payor	NO (Data Entry for Charity by Payor)
Charity calculated as % of	Gross Revenue (Charity will be calculated as a % of selected Revenue option)

► Where to find more information

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

- "Configuring the Setup driver"

New depreciation and amortization codes for templates

► Why use this feature

Previously, there was only one place in plan file templates to account for depreciation and amortizations. Now, additional codes for depreciation/amortization and for allocated depreciation/amortization have been added to templates and default data.

► How this feature works

What: New depreciation rows and allocation depreciation rows have been added to the Acute, Physician, Health Plan, Research, and Initiative templates, along with new associated calculation method inserts. The new codes include nine depreciation/amortization codes (726606 to 726615), and nine allocated depreciation/amortization codes (726681 to 726689).

Where: This change applies to the depreciation and amortization codes in the Update Code Dimension utility, the Transfer to Financial Planning utility, the Acute, Physician, Health Plan, Research, and Initiative templates, the CorpAllocation driver, and Manage Node Default Data utility, relevant code tables and to various reports.

Who: All Axiom Financial Planning users who can access plan files can add these codes to depreciation and allocated depreciation sections of plan file balance sheets. Some utilities where these codes are used are accessible by administrators only.

How: Open a node based on one of the templates that has the new codes. Add data to the Other Depreciation section as needed. Save the node.

Global Set =			
Model:		2018	2019
1/2 Year Depreciation			
Depreciation Expense Analysis			
Base Depreciation		0	
Drop off due to Asset Disposal pct			
New Asset - Depreciation (1/2 Year Convention)			
New Asset - Drop off due to Full Depreciation			
Net New Asset - Depreciation Expense		0	
Depreciation Adjustment		0	
Other Depreciation		0	
Allocated - Other Depreciation			
Allocated Other Depreciation 1		0	
Total Depreciation (this node)		0	
(reclass to) - Non Operating Depreciation		0	
Depreciation accounted for on other nodes		0	
New Capital Additions (Select Add Detail for additional Capital Additions)			
Equipment (132003)			Note:

New option for balance sheet cash code calculation

► Why use this feature

Administrators can change the cash code used as the calculation basis when forcing the balance sheet to balance. Previously, Board Designated Investments was the only available cash code, but now you have the option to use short-term investments.

► How this feature works

What: Easily change the cash code in the Global Assumptions driver, ideally before creating plan files. However, if you change the code and want the change to affect existing plan files, recalculate the existing plan files. This feature affects all plan files that have a balance sheet.

Where: This change applies to the **Balance Cash to** line in the Global Assumptions driver, and affects the how balance sheet nodes are calculated.

Who: Only Axiom Financial Planning administrators can access the Global Assumptions driver and make changes to it.

How: In the **Fin Plan Admin** task pane under **Financial Plan Assumptions**, open the **Setup** driver. From the drop-down for **Balance Cash to**, select the desired option. In the **Main** ribbon tab, click **Save**. Regenerate the plan files.

Global Assumptions	
Copy data from previous year file group?	No
Institution Name	
Plan Description	Financial Plan
Current Operating Year (Base Year)	2019
Leap Year Used in Balance Sheet and Statistics Calculations	NO
Include Allocations	NO
Discount rate for NPV	10.0% < Default - overrides can be performed in each global set
Data being loaded for Deductions	Allowances (Data entry for Reimbursement or Contractual Allowances)
Bad Debt by Payor	NO (Data Entry for Bad Debt by Payor)
Bad Debt calculated as % of	Gross Revenue (Bad Debt will be calculated as a % of selected Revenue option)
Charity by Payor	NO (Data Entry for Charity by Payor)
Charity calculated as % of	Gross Revenue (Charity will be calculated as a % of selected Revenue option)
Balance Cash to	Investments - Short Term (Select which cash code used to balance)
Display Headers in Nodes	NO
Display Notes Tab in Nodes	NO
Update Historical Data when opening plan files	YES
Default Rating Agency Median for Reports	Moodys A1 (To create user defined values open the Medians table and add values)
Default Forecast Years Displayed for Reports	5

► Where to find more information

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

- “Configuring the Setup driver”

New transfer option includes net assets with net income

► Why use this feature

Now when transferring data from Axiom Management Reporting or Axiom Rolling Forecasting to Axiom Financial Planning, you can include excess of revenue over expenses in net assets when selecting data options. This feature allows you to be consistent with imported data for any accounts that are set up to include net income with net assets on the balance sheet.

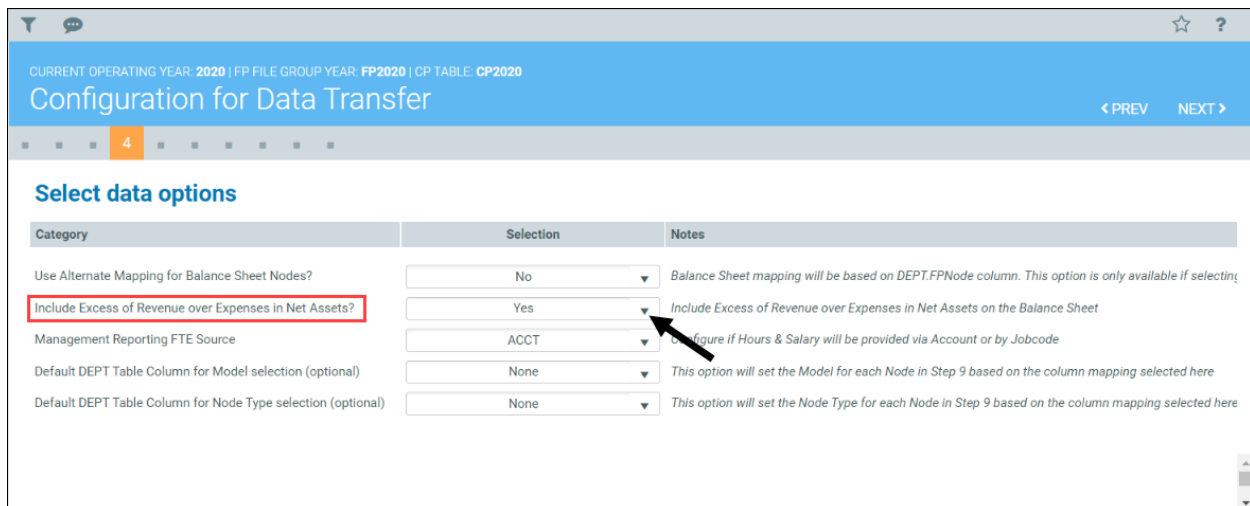
► How this feature works

What: Easily select to include or not to include net income with net assets on the balance sheet for nodes when configuring data in the Transfer to Financial Planning utility.

Where: This change applies to the Transfer to Financial Planning utility located in the Admin task pane in the Integration section.

Who: Only Axiom Financial Planning administrators can access this utility.

How: From the Admin task pane, open the Transfer to Financial Planning utility. Work your way through the utility making selections. At the **Select data options** page, from the **Include Excess of Revenue over Expenses in Net Assets?** drop-down, select **Yes** to include net income with net assets on the balance sheet, or leave the setting at **No** (default).



Category	Selection	Notes
Use Alternate Mapping for Balance Sheet Nodes?	No	Balance Sheet mapping will be based on DEPT.FPNode column. This option is only available if selecting
Include Excess of Revenue over Expenses in Net Assets?	Yes	Include Excess of Revenue over Expenses in Net Assets on the Balance Sheet
Management Reporting FTE Source	ACCT	Configure if Hours & Salary will be provided via Account or by Jobcode
Default DEPT Table Column for Model selection (optional)	None	This option will set the Model for each Node in Step 9 based on the column mapping selected here
Default DEPT Table Column for Node Type selection (optional)	None	This option will set the Node Type for each Node in Step 9 based on the column mapping selected here

► Where to find more information

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

- "Step 4: Select data options" from "Select years, sources, and data"

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 Financial Planning, keep in mind the following:

- Along with upgrading to Axiom 2021.2, you will also need to upgrade to Axiom Comparative Analytics 2021.2.
- 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:

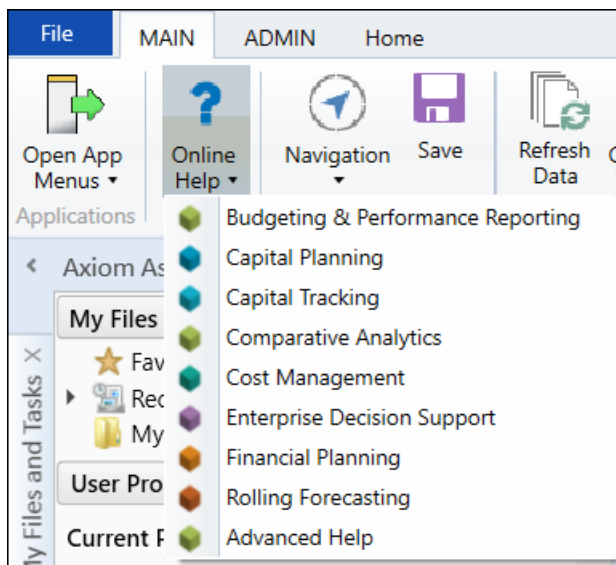
1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom system administrator to contact support by creating a [support ticket](#) to schedule an installation 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 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 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:

Issue	Description
PFB-07772 - Payor details are not carried over if Historical Year is not 3 [37084]	<p>Summary: When users roll forward to the next year after saving changes to payors other than Medicare and Medicaid, and then build nodes using the Build Nodes from Imported History option, additional payors are zeroed out if Historical Years is set to any value other than 3.</p> <p>Resolution: Corrected by updating the code so that the copy year action codes are dynamically kept on when Scheduler opens the file and saves through the scheduled job.</p>
PFB-09152 - Codes Missing from Transfer to Financial Planning Utility [53861]	<p>Summary: In the Transfer to Financial Planning utility, when a user tries to use codes 10827305 and 726603 to map depreciation, the codes are not available.</p> <p>Resolution: Corrected by adding the missing codes to the Depreciation section of the Dimension Update Utility's Code Update Report, various templates and calculation methods, and the Transfer to Financial Planning utility.</p>

Issues fixed in 2021.2.1

The following table lists the resolutions for issues addressed in 2021.2, released on September 13, 2021:

Issue	Description
(2021.2) Update DIM - CODE utility multiplying conversion factors [106798]	<p>Summary: During integration, the wrong value is being used as the conversion factor. An Axiom Query is combining all data for a code instead of simply returning the first value as expected, so for codes with multiple payors, the AQ is multiplying the values and then saving them to the ACCT_FPCode table.</p> <p>Resolution: Corrected by updating the code to remove errors, and by cleaning up any “bad” data that may have been inadvertently saved.</p>
Transfer to FP - JobCode Data Calculations import fails (2021.2 patch 1) [110095]	<p>Summary: In the Transfer to Financial Planning utility, if the user selects Jobcode as their Management Reporting FTE source in Step 4 of the utility, the JobCodeSummary Calculations task in the Transfer to Financial Planning job fails. The issue is caused by some code errors and a reference to an old variable that is no longer used.</p> <p>Resolution: Corrected by updating the code to correct the errors and to reference the correct variable.</p>