Release Notes

Axiom Healthcare Suite
Version 2021.2

AXIOM

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Contents

About the release notes

Syntellis is pleased to announce the 2021.2 release of the Axiom Healthcare Suite. 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

This document provides the list of changes to shared areas of the Axiom Healthcare Suite products, which includes:

- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product also has their own separate release notes that provide additional details on features and fixes specific to that product.

IMPORTANT: Prior to upgrading, make sure to review the **Axiom 2021.2 Release Notes** as well as the release notes for each product licensed by your organization.

New features summary

This section includes a description of the enhancements included in each product of the Axiom Healthcare Suite. Click the following links to navigate to a specific product section:

- Axiom Budgeting and Performance Reporting
- Axiom Capital Planning and Capital Tracking
- Axiom Clinical Analytics
- Axiom Comparative Analytics
- Axiom Contract Management
- Axiom Enterprise Decision Support
- Axiom Financial Planning
- Axiom Rolling Forecasting
- ***NEW!*** Axiom Service Line Planning
- Axiom Strategy Management
- Axiom Treasury Cash Management

Axiom Budgeting and Performance Reporting

Axiom Budgeting and Performance Reporting includes the following new feature in this release:

Configurable FTE scale

Easily configure Full Time Equivalent salary scale(s) based on your organization's unique needs. In addition to the standard 2080 and 2086 options, you can now configure FTE scales based on hours worked per day, week, month, or year.

Configurable FTE scale

▶ Why use this feature

You can now configure custom FTE scales used in the planning and reporting for your organization.

▶ How this feature works

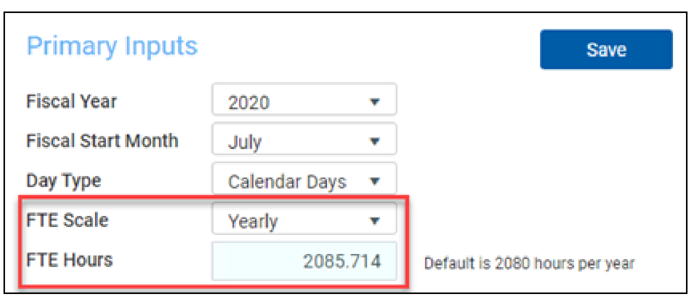
What: The Year Period table now allows administrators to configure custom FTE hours for an FTE scale.

Where: There are two primary locations where this feature is controlled.

- Axiom Management Reporting - Mgmt Admin task pane > Data Maintenance > Update Year and Period Tables
- Axiom Budgeting - Bud Admin task pane > 02 Budget Labor Config driver > Global Setup section

Who: Users must be assigned the Budgeting and Performance Reporting Admin role.

How: In the Year Period table, enter custom hours in the FTE Hours field. The custom FTE scale becomes the Default selection in the Global Setup section of the Budget Labor Configuration driver.



Example of the custom FTE hours input by scale type in the Year Period tab

Where to find more information

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

- "Setting year and period"
- "Budget Labor Configuration"

Axiom Clinical Analytics

No new features or enhancements were included in this release.

Axiom Comparative Analytics

Enhancements in this release include:

On-premise file export of dimensions and data tables

Provides users with on-premise installations of Axiom products the ability to schedule a job to export data to the Comparative Analytics cloud for analysis.

On-premise file export of dimensions and data tables

▶ Why use this feature

Axiom users with on-premise installations can now export budgeting and reporting data to the Comparative Analytics cloud through a scheduled job to get the comparable data they need to improve their business.

▶ Where to find more information

Contact your Axiom account manager for assistance.

Axiom Contract Management

Enhancements in this release include:

New field required when assigning schedules to provisions

If your organization has contracts that use APCs or eAPGs to calculate outpatient claims, when assigning a schedule to a provision, you will first need to select an organization from the Schedule dialog because in the 3M cloud, schedules are stored separately by entity (organization).

New Save buttons added to contract dialogs

Sometimes when you are working in a contract dialog that has multiple tabs you need to make changes to more than one tab. Before, when you made a change and clicked Save, the dialog automatically closed. Now you have the option to keep the dialog open after saving so you can continue to work in the other tabs.

3M April 15 2021 Quarterly Release

Each quarter, 3M provides an update to the 3M GPS Grouper software integrated into Axiom Contract Management. This update includes grouping, pricing, and regulatory updates to the APC and State-specific eAPG groupers.

New field required when assigning schedules to provisions

▶ Why use this feature

If your organization has contracts that use APCs or eAPGs to calculate outpatient claims, when assigning a schedule to a provision, you will first need to select an organization from the Schedule dialog because in the 3M cloud, schedules are stored separately by entity (organization).

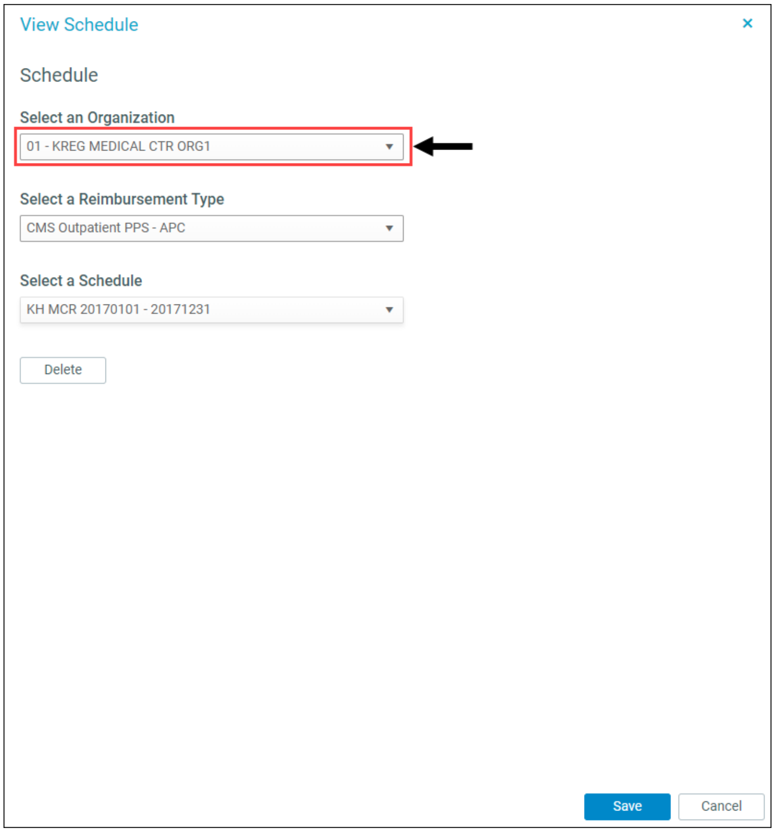
▶ How this feature works

What: 3M is requiring that all Syntellis clients that use Axiom Contract Management who use 3M's Group and Price service move to 3M's cloud environment by November 19, 2021. To accommodate this change, we have programmed the Group and Price Cloud Service (GPCS) into release versions 2021.1 (a patch) and 2021.2. We have also added a field that allows you to select the entity associated with the schedules before selecting a schedule.

Where: This change applies to assigning schedules to contract provisions for contracts with APC or eAPG calculated outpatient claims.

Who: All Axiom Contract Management administrators and others who can create and edit contracts.

How: To assign a schedule to a provision, navigate to the provision, and then, in the **Schedule** column for the provision, click the Edit icon (). In the **View Schedule** dialog, select the organization, the reimbursement type, and then the schedule. Click **Save**.



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:

- "Assign a schedule to a provision"

New Save buttons added to contract dialogs

Why use this feature

Sometimes when you are working in a contract dialog that has multiple tabs, you need to make changes to more than one tab. Before, when you made a change and clicked Save, the dialog automatically closed. Now you have the option to keep the dialog open after saving so you can continue to work in the other tabs. If you do not need to make additional changes, you can use the Save and Close button.

▶ How this feature works

What: In contract dialogs that have more than one tab, after making a change in one tab, when you click Save to save your changes, the dialog now stays open so you can keep working. If you do not need to make additional changes, click the Save and Close button to save and then close the dialog.

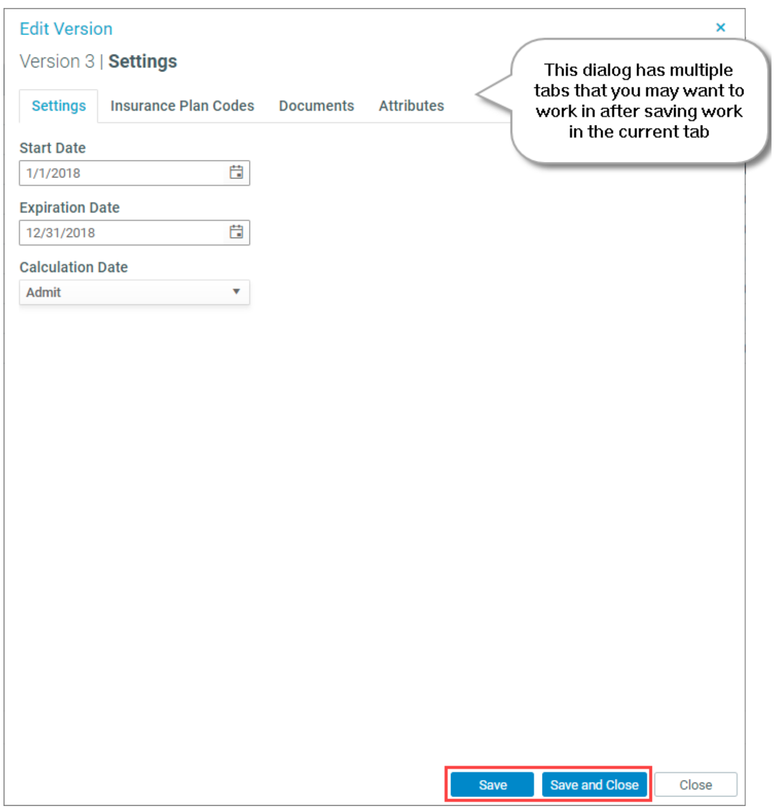
Where: This change applies to contract dialogs where you need to have the option to save but keep the dialog open, or save and close the dialog.

Who: This feature applies to administrators working in contract dialogs.

How:

1. Open a contract dialog with multiple tabs.
2. Make changes in one of the tabs, and then click the **Save** button.

   The dialog remains open so you can select and work in another tab.
3. When finished working in the dialog, click **Save and Close**.



3M April 15 2021 Quarterly Release

Why use this feature

Each quarter, 3M provides an update to the 3M GPS Grouper software integrated into Axiom Contract Management. This update includes grouping, pricing, and regulatory updates to the APC and State-specific eAPG groupers. These updates are necessary for clients to get the latest software and regulatory changes for accurately grouping and pricing APC and eAPG claims.

How this feature works

What: On a quarterly basis, 3M releases product Service Packs containing updates to its Group and Price service software. Syntellis maintains Medicare contracts for many clients, and partners with 3M to handle APC and eAPG calculations and to keep current with all regulatory changes that occur.

Where: The Group and Price menu in the Claims tab of Axiom Contract Management, and Group and Price jobs in the Axiom Scheduler.

Who: Axiom Contract Management administrators who create contracts with the CMS Outpatient calculation basis on a clause or term; users with the Scheduler role who are able to run the group and price routine; general users reviewing results and working with applicable claims.

How: The Development team creates the update from the quarterly download. Client Success updates the clients' schedules and customer contracts to the required Medicare changes. The client picks up available schedules for any new contract updates between quarters.

Axiom Capital Planning and Capital Tracking

Enhancements in this release include:

Project Ranking report updated to web form

You can now enter your personal manager or executive ranking values in a form-based system.

Updated project header information

You can now view the total amount requested for a project and the name of the person who created the project at any time for easy reference in the plan file header.

Delete additional sheets from Threshold (pro forma) projects

You can now delete any additional sheet(s) and all accompanying data from pro forma, but not the original sheet.

Extend modeling up to 100 years

You can now add up 100 years to the total project life to extend financial modeling into perpetuity.

Warning displays when project total is zero

You will now see a warning message when you save a capital project with a total requested amount of $0.00.

Project Ranking report updated to web form

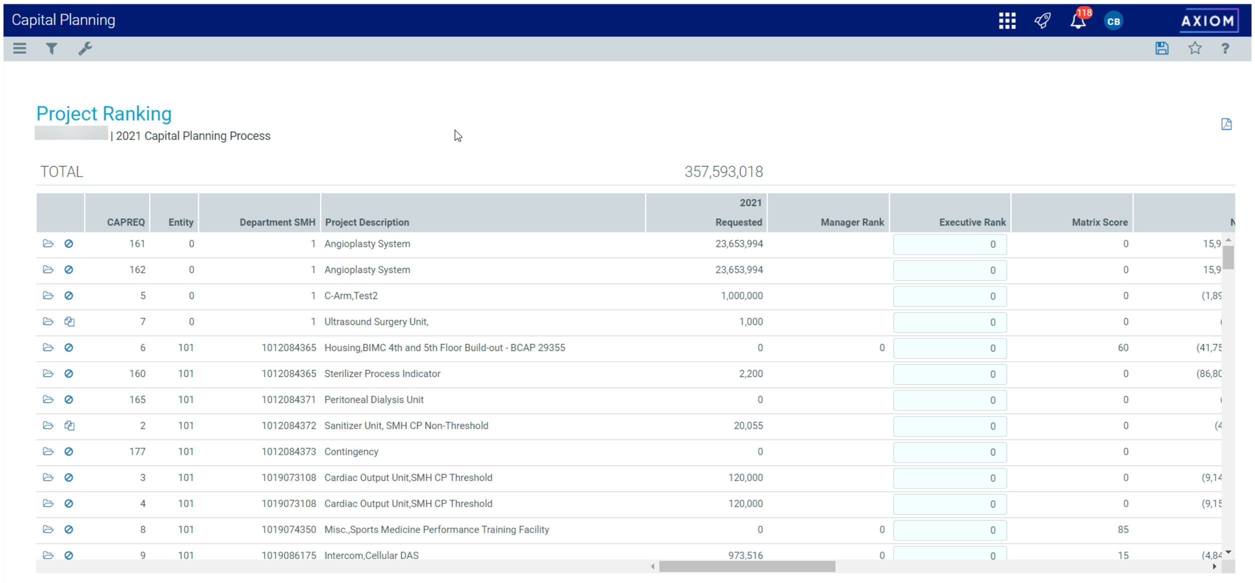
The Project Ranking report has been converted to a web form for ease of viewing and usability.

▶ About this enhancement

Where: From the **Capital Planning** home page, click **Project Ranking Report**.

Who: Users must be assigned the Capital Planning/Capital Tracking Admin role profile in the system.

How: The feature works the same as in prior versions. You now have the option to add more questions. The Executive Rank column is only visible if the user is in the Capital Planning Approver or Capital Tracking Approver role, respectively.



Example of the new web version of the Project Ranking report

Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning online help:

- "Ranking capital projects"

Updated project header information

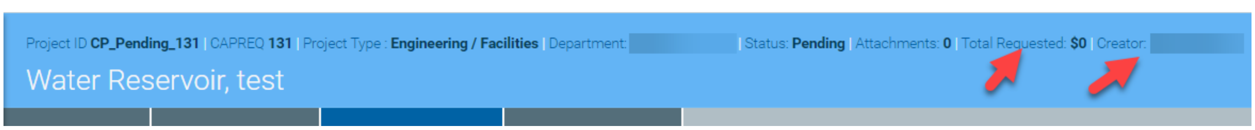
The capital project header now includes information on the total amount requested and project requestor name.

About this enhancement

Where: From the **Capital Planning** home page, click **Project Ranking Report**.

Who: Any user with Axiom Planning and/or Axiom Tracking role profiles.

How: When opening a capital project, the header for the project displays the Total Requested and Creator fields. For purchase requests, the header shows the Total Purchase Request.



Example of the updated project header information

Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning or Capital Tracking online help:

- "Creating or modifying a capital project"
- "Creating a purchase request"

Delete additional sheets from Threshold (pro forma) projects

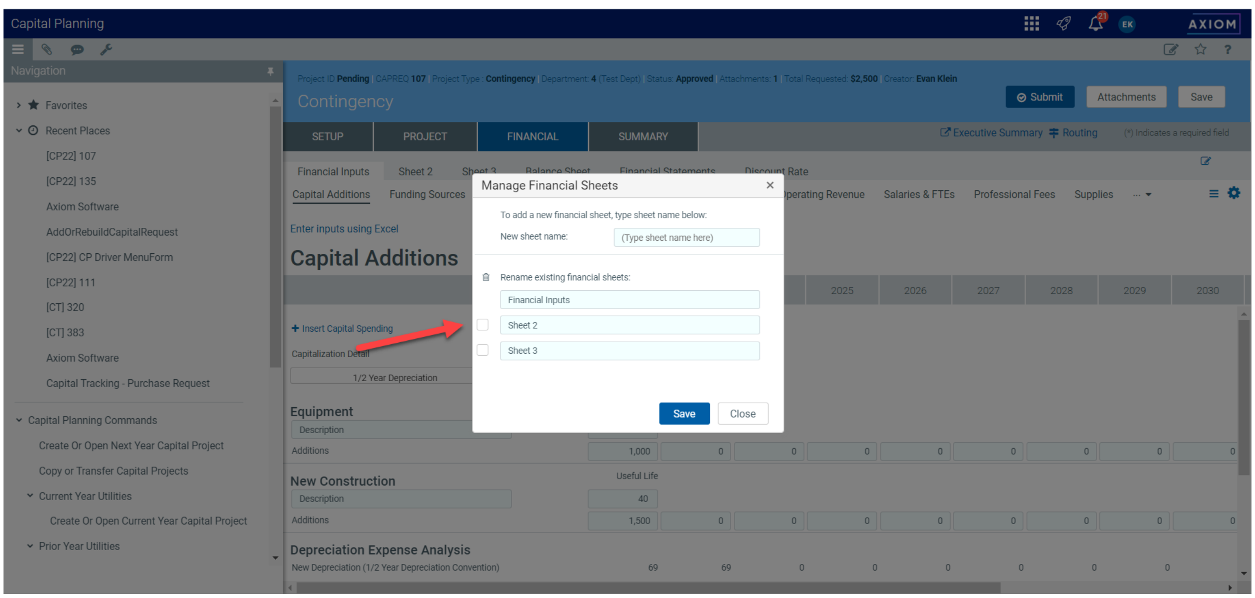
Users can delete additional sheets added to a pro forma project but not the original sheet itself.

About this enhancement

Where: Open any Threshold project that includes sheets that have been added to the project.

Who: Any user with Axiom Planning Admin role profiles.

How: When opening a capital project, click the notepad icon in the upper left corner of the page. In the **Manage Financial Sheets** dialog, select the check box next to the sheets to delete, and click **Save**.



The system displays the list of additional sheets, which a user can select for deletion

Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning or Capital Tracking online help:

- "Deleting sheets from a Threshold (pro forma) project"

Extend modeling up to 100 years

In the Financial > Financial Statements tab, the Total Project Life of NPV has been updated to allow users to add up to 100 years to the total project life to mimic perpetuity.

▶ About this enhancement

Where: Open a Threshold project.

Who: Any user with Axiom Planning role profiles.

How: The feature works the same as in prior versions. You now have the option to add up to 100 years for a project, this allows for near perpetuity while retaining the ability to add capital in future years.

> **NOTE:** System displays an error when entering more than 100 years in the **Total Project Life for NPV** field.

▶ Where to find more information

For more information and instructions, see the following topic in the Axiom Capital Planning online help:

- "Creating data for Threshold (pro forma) projects"
- "Entering performance tracking measures in a Threshold project"

Warning displays when project total is zero

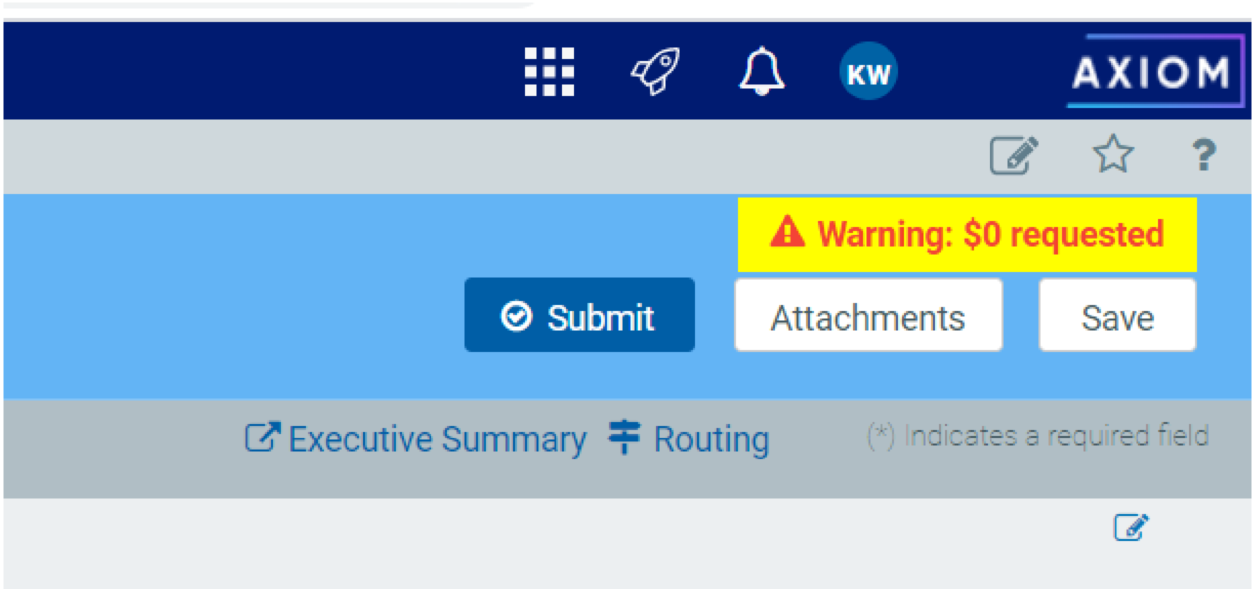
Axiom now displays a warning when a project has a total value of zero so that users a reminded to enter a value before submitting the project.

▶ About this enhancement

Where: Open a project.

Who: Any user with Axiom Planning role profiles.

How: The warning displays in the upper left corner of the page.



Warning displays above Attachments and Save buttons.

Axiom Enterprise Decision Support

Directed workflow for cost modeling

Axiom Enterprise Decision Support now includes a directed workflow structure that walks a user through the process of creating and processing a cost model. This ensures that users complete the set up in the correct order and without missing steps. It also simplifies the costing process and ensures that it is successful. Behind the scenes, a new data model allows versioning of tables and cost model management, while on the user interface side, we have made improvements to the look-and-feel and usability of the process steps.

Create what-if cost models

You can now create a what-if cost model and use it to compare to your production models.

Run interim costing for a current fiscal year

You can now run interim costing for a current cost model on a recurring basis. For example, your organization may run a cost process monthly during the current fiscal year when only certain periods close so that the debits and credits used to calculate the cost comes from the same time period.

Transform data for reporting

Axiom is a database of information that you may want to change to help you create reports that are meaningful and specific to your organization. You can take existing data and alter it to get the information that you need. You manipulate Axiom data 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. The results of calculations can then be stored in certain Axiom fields, and then used for reporting.

Define encounters for analysis

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.

Cost Comparison dashboard

The Cost Comparison dashboard provides comprehensive profitability by service line, physician, case type, and payor mix to quantify volumes, cost, revenue, contribution margin, and net income by service line and physician. With this dashboard, you can Identify specific opportunities for cost reduction.

COVID Impact dashboard

COVID Impact is a collection of dashboards with Axiom Intelligence visualizations that enable users to analyze how COVID-19 is affecting their institutions, from both cost and utilization aspects. In addition, information about COVID patients include demographic and geographic information, details of treatments for each patient encounter, and payor information. The data presented can help the institution analyze their current handling of COVID encounters and provide data for planning.

Physician Variations dashboard

Physician Variations is a collection of dashboards with visualizations that allow users to analyze variations in care and costs for physicians and service lines. Using these dashboards, both efficiencies and costs are compared across the institution.

Service Line dashboard

The Service Line dashboard provides comprehensive profitability by service line, physician, case type, and payor mix to quantify volumes, cost, revenue, contribution margin, and net income by service line and physician.

Volumes and Financials dashboard

Volumes and Financials provide details for all encounters, including encounters and costs, trends, net incomes, and inpatient mortality.

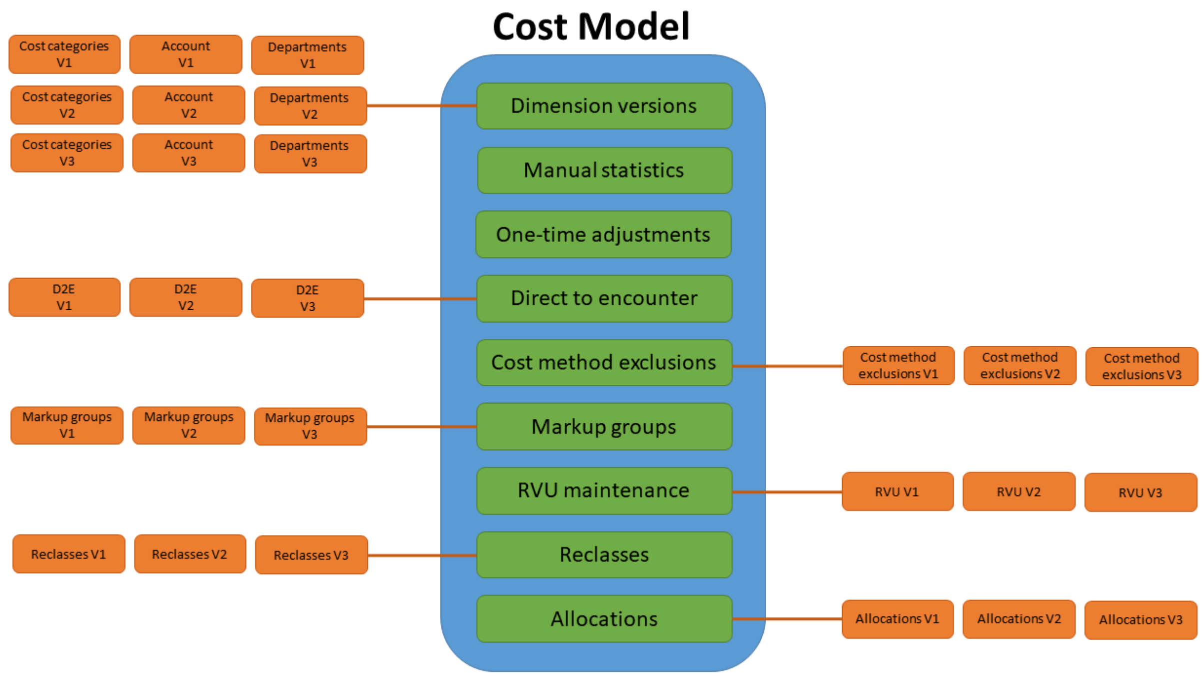
Directed workflow for cost modeling

▶ Why use this feature

Axiom Enterprise Decision Support now includes a directed workflow structure that walks a user through the process of creating and processing a cost model. This ensures that users complete the set up in the correct order and without missing steps. It also simplifies the costing process and ensures that it is successful. Behind the scenes, a new data model allows versioning of tables and cost model management, while on the user interface side, we have made improvements to the look-and-feel and usability of the process steps.

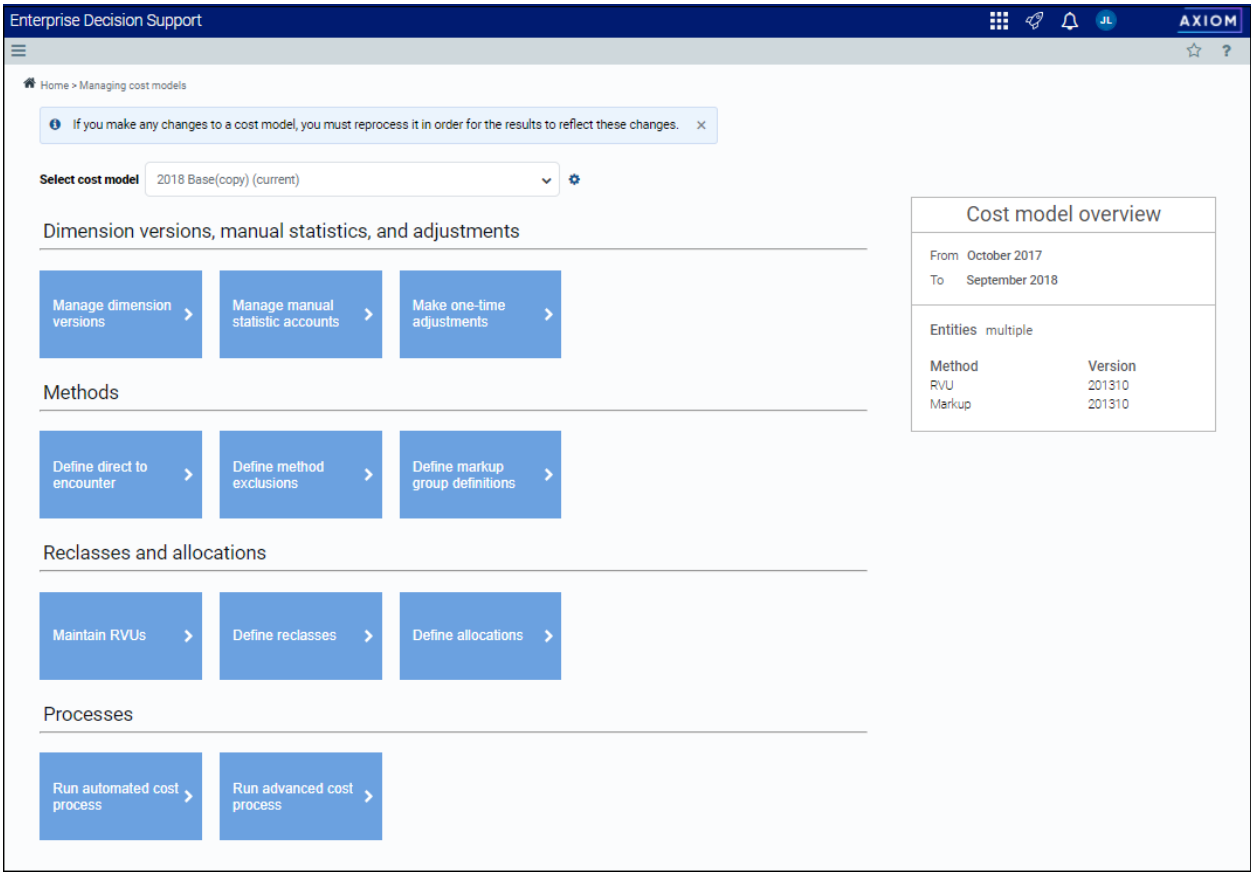
▶ How this feature works

What: In Axiom, a cost model is comprised of a series of configuration areas that you can easily modify to process costs as requirements and conditions change. A new data model allows cost models to be versioned, so that you can create multiple cost models, as needed, to support various real-time or planning scenarios. Most of these configuration areas are made up of individual tables, from which you can create multiple versions. You can swap these table versions in and out of the cost models to meet your needs. You can also create multiple cost models to meet your different costing needs, for example creating models for regions, hospitals, or fiscal quarters.



You can create and implement different versions of tables used in the cost model

The updated cost model home page directs you through the entire process of configuring or modifying a cost model from left to right, starting with **Manage dimension versions** and ending with **Define allocations**. After you have set up a cost model, you can process it fully or select different options within the process to run.



Manage the entire cost model configuration process from one location.

Where: From the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model** or **Create a cost model**.

Who: Users assigned the EDS User or the EDS Admin role profile.

How: In the cost model home page, complete the following configuration options.

Dimension versions, manual statistics, and adjustments

- **Manage dimension versions** - Create versions of the cost categories, accounts, and departments dimensions, which includes data records used by Axiom when processing the cost model. You can also configure variability exceptions for each dimension.
- **Manage manual statistic accounts** - Define values by department for existing statistic accounts in addition to adding statistic accounts for departments.
- **Make one-time adjustments** - Modify account balances for a given department by changing one-time adjustments.

Methods

- **Define direct to encounter** - Create "pseudo" cost items to add to departments for costing those items or services normally not charged to the patient.
- **Define method exclusions** - Set up exclusions so certain cost items are not included as part of cost processing.
- **Define markup groups definitions** - Configure markups of cost items by cost item type or by pricing tier.

Reclasses and allocations

- **Maintain RVUs** - Add or edit the RVUs assigned to cost items within a department and entity.
- **Define reclasses** - Set up reclassification rules to specify moving dollars from one general ledger location to another during the costing process.
- **Define allocations** - Set up allocation rules and run order to move overhead expenses from support departments to revenue-producing departments during the costing process.

Processes

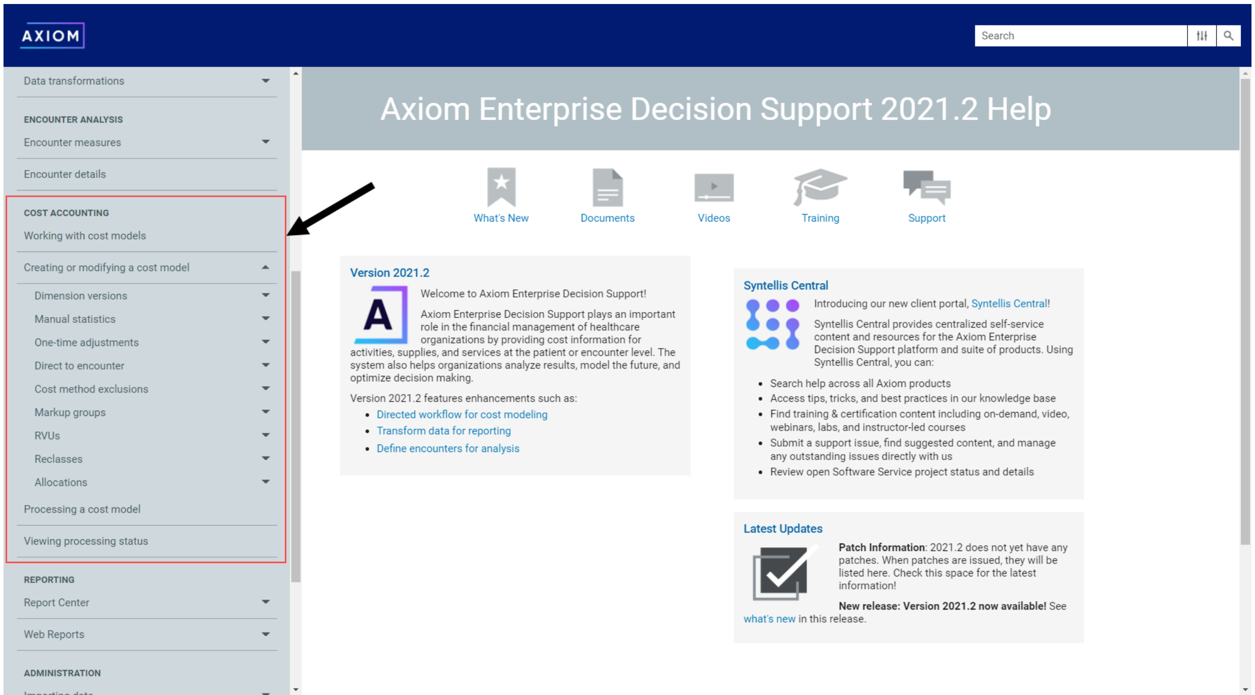
- **Run automated cost process** - Run the entire costing process from beginning to end.
- **Run advanced cost process** - Select only specific parts of the process to run.

TIP: To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

Where to find more information

Due to the number of changes in the cost accounting feature, we recommend that you download and review the Axiom Enterprise Decision Support - Cost Management Guide.pdf or review the topics in the Cost Accounting area of the online help:

NOTE: The content in the PDF and in the online help is the same. The PDF simply provides a convenient way to review the help content outside of the product or to use for training purposes, as needed.



Create what-if cost models

▶ Why use this feature

You can now create a what-if cost model and use it to compare to your production or "live" models.

▶ How this feature works

What: As part of creating or modifying a cost model, you can now enable or disable Axiom from summarizing the costs to the encounter level. If you disable summarization, you are in essence creating a what-if version of the model. You can then use the model to construct scenarios in which to compare to your production or "live" models. At any time, you can enable the summarization function—changing the what-if model to a production model—and vice versa.

Where: From the Enterprise Decision Support home page, in the **Cost accounting** section, click **Create a cost model** or **Modify a cost model**.

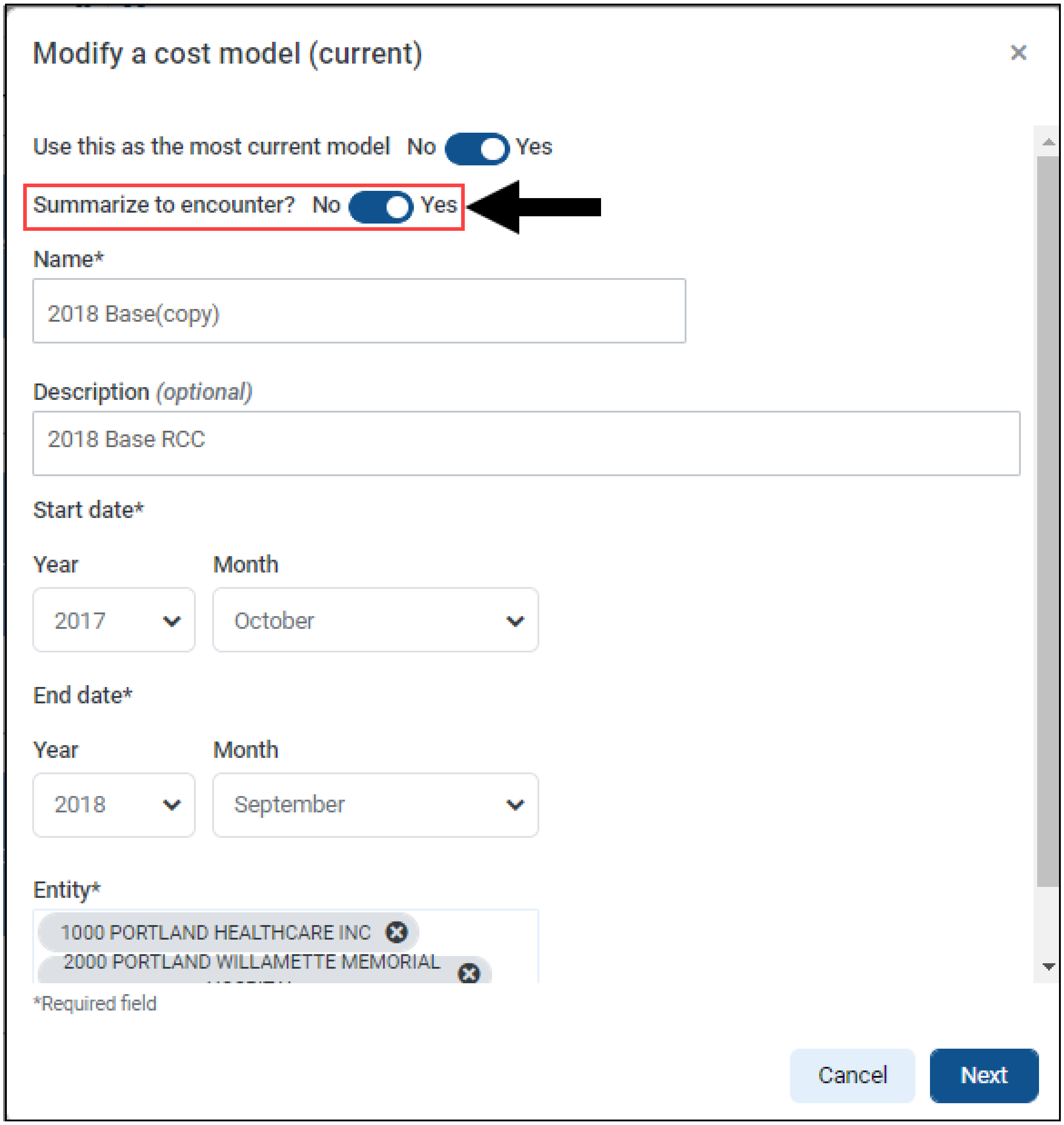
Who: Users assigned the EDS User role profile.

How: Create a model or select the model from the **Select cost model** drop-down at the top of the cost model page. In the **Create/Modify a cost model** dialog, do one of the following:

- To designate the model as a production or "live" model, sum up the cost model results to the encounter level by clicking the toggle to **Yes**.

> **NOTE:** Axiom will not allow you to select an overlapping model based on entity and cost period.

- To designate the model as a what-if model that you can use to compare different modeling scenarios against production or "live" models, click the toggle to **No**.



The toggle gives you the control to enable or disable the system from summarizing the costs to the encounter level

Where to find more information

For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Creating or modifying a cost model"

Processing a current cost model for closed periods

Why use this feature

You can now process cost models for a closed period. For example, your organization may run a cost process monthly during the current fiscal year when only certain periods close so that the debits and credits used to calculate the cost comes from the same time period.

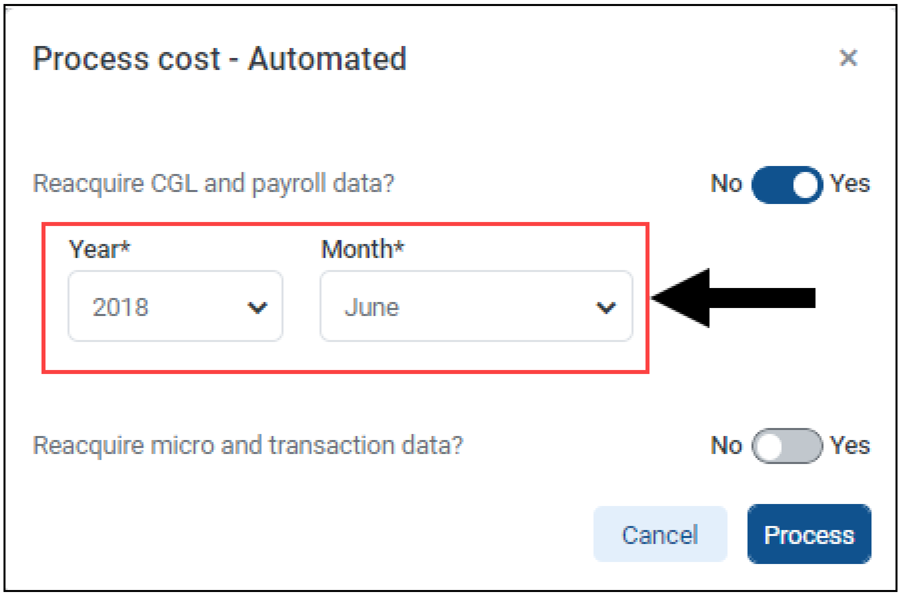
How this feature works

What: When processing a current cost model, you can set the cost period end date so that Axiom acquires the last closed CGL and payroll data. This date must be within the model dates prior to the current period and include at least one period. For example, if a model has a January 1st start date and the current month is June, then the only months Axiom displays will be January through May.

Where: From the Enterprise Decision Support home page, in the **Cost accounting** section, click **Modify a cost model**.

Who: Users assigned the EDS User role profile.

How: Select the model from the **Select cost model** drop-down at the top of the cost model page. Under the **Processes** section, click **Run automated cost process**. To acquire the most recently closed CGL and payroll data, click the toggle to **Yes**, and from the **Year** and **Month** drop-downs, select the end date in which the CGL and payroll data were closed.



When processing a model within a model year, the processing dialog includes Year and Month drop-downs so that you can select the end date of the last closed month of CGL and payroll data to acquire and use in the model

Where to find more information

For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Processing a cost model"

Transform data for reporting

Why use this feature

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.

Examples 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

How this feature works

What: You manipulate Axiom data 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. The results of calculations can then be stored in certain Axiom fields, and then used for reporting.

A data transformation definition is simply a mathematical formula that you configure 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

Types of data transformation calculations that you can perform include:

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	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	Join Axiom fields and constants. You can use the constant as a delimiter.
Comparison	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	Copy the value of one field to another field.

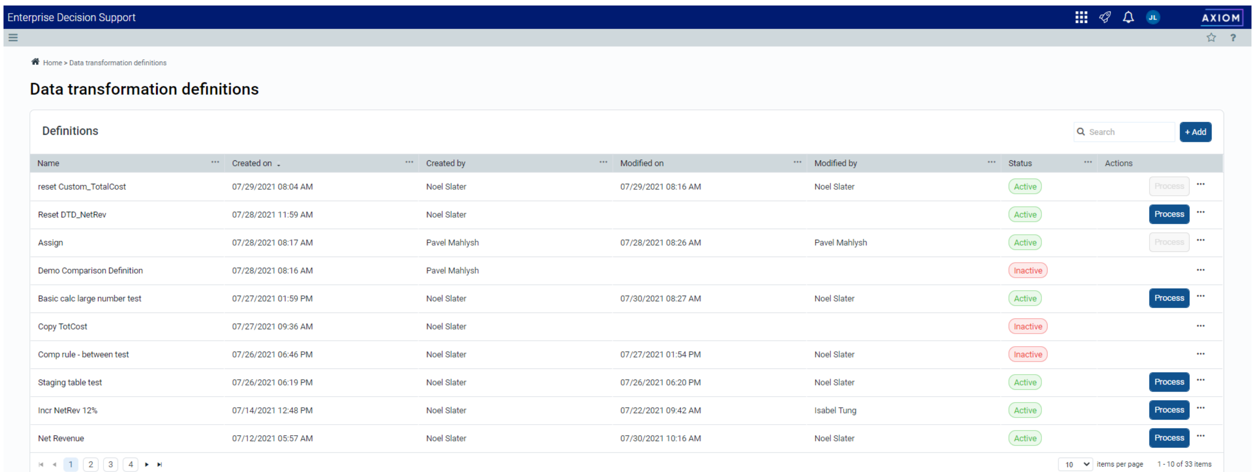
Where: From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define data transformations**.

> **NOTE:** This feature only displays to those with the Axiom EDS Rules Writer role profile.

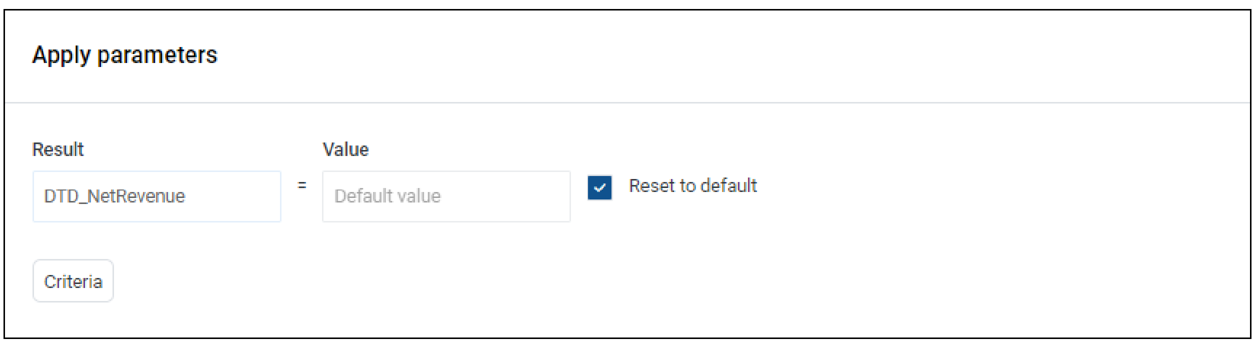
Who: Users assigned the EDS Rules Writer role profile.

How: Add a definition by clicking **+Add**. Edit, copy, or delete a definition by clicking the ellipsis (**...**) in the **Actions** column. Configure the definition by naming it and selecting the type of data transformation you want to apply. The definition prompts you with different entry fields, depending on the type of calculation you want to perform. After you are done and activate the definition, you can process it.

TIP: To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.



Manage the definitions from one page.



Definition configuration is determined by the type of data transformation you want to set up.

Where to find more information

For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Transforming data for reporting"
  - "Adding, editing, or copying a data transformation definition"
  - "Activating or deactivating a data transformation definition"
  - "Deleting a data transformation definition"
  - "Processing a data transformation definition"

Define encounters for analysis

▶ Why use this feature

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.

▶ How this feature works

What: 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.

The definition allows you to configure the following:

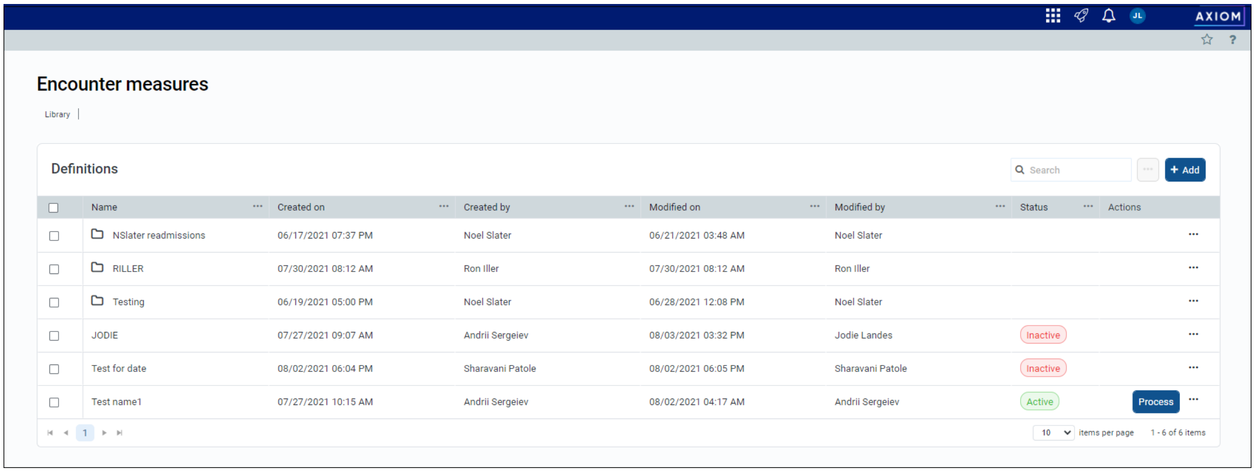
- The date range in which the encounter(s) occurred
- The frequency and timeframe for when pre-anchor(s) and post-anchor(s) occured

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

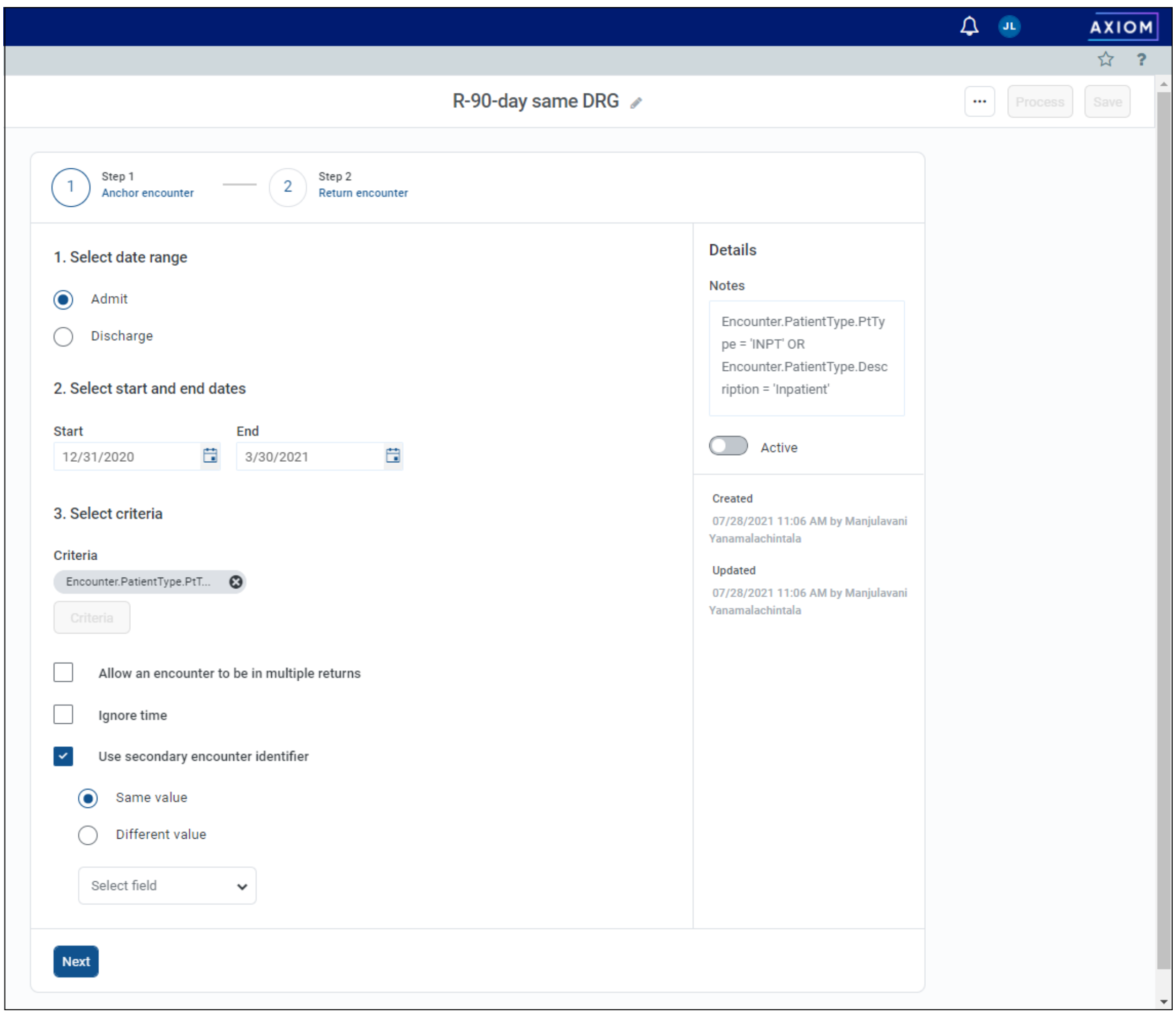
Who: Users assigned the EDS User role profile.

How: Add a definition by clicking **+Add**, and selecting either Episode or Return definition type. 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.

> **TIP:** To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.



Manage the definitions from one page.



The definition page clearly indicates the criteria needed and allows you to add notes to provide a description of the definition

▶ Where to find more information

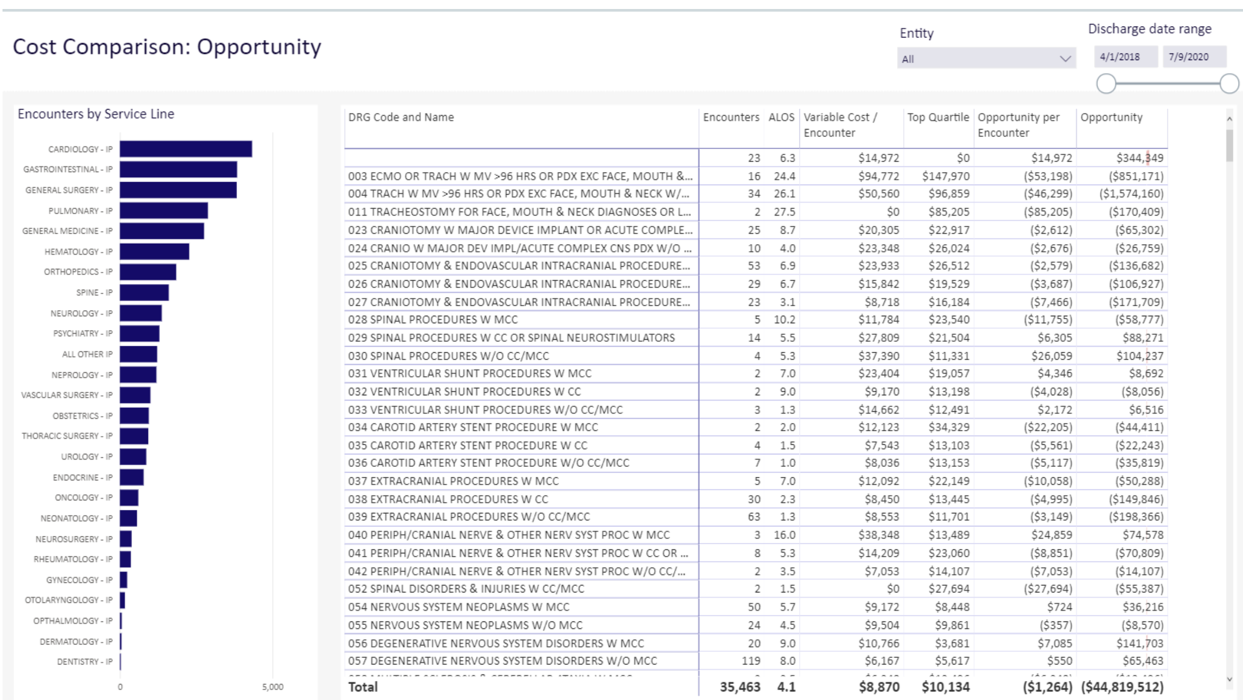
For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Defining encounters"
    - "Managing folders"
    - "Adding, editing, or cloning an episode definition"
    - "Adding, editing, or cloning a return definition"
    - "Activating or deactivating an episode or return definition"
    - "Deleting an episode or return definition"
    - "Processing an episode or return definition"

Cost Comparison dashboard

▶ Why use this feature

The Cost Comparison dashboard provides comprehensive profitability by service line, physician, case type, and payor mix to quantify volumes, cost, revenue, contribution margin, and net income by service line and physician. With this dashboard, you can Identify specific opportunities for cost reduction.



How this feature works

What: You view a dashboard and use slicers and built-in dashboard tools to select the exact entities, service lines, date ranges, and other data elements to select the precise data you want to work with.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**. From the Intelligence Center, click **Enterprise Decision Support**, then click **Standard Dashboards**, then **Cost Comparison Dashboard**

Who: Users assigned the EDS User role profile.

How: Use slicers and other dashboard tools to specify the entities, service lines, and other data types to view the needed subset of the data on each dashboard.

> **TIP:** To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

Where to find more information

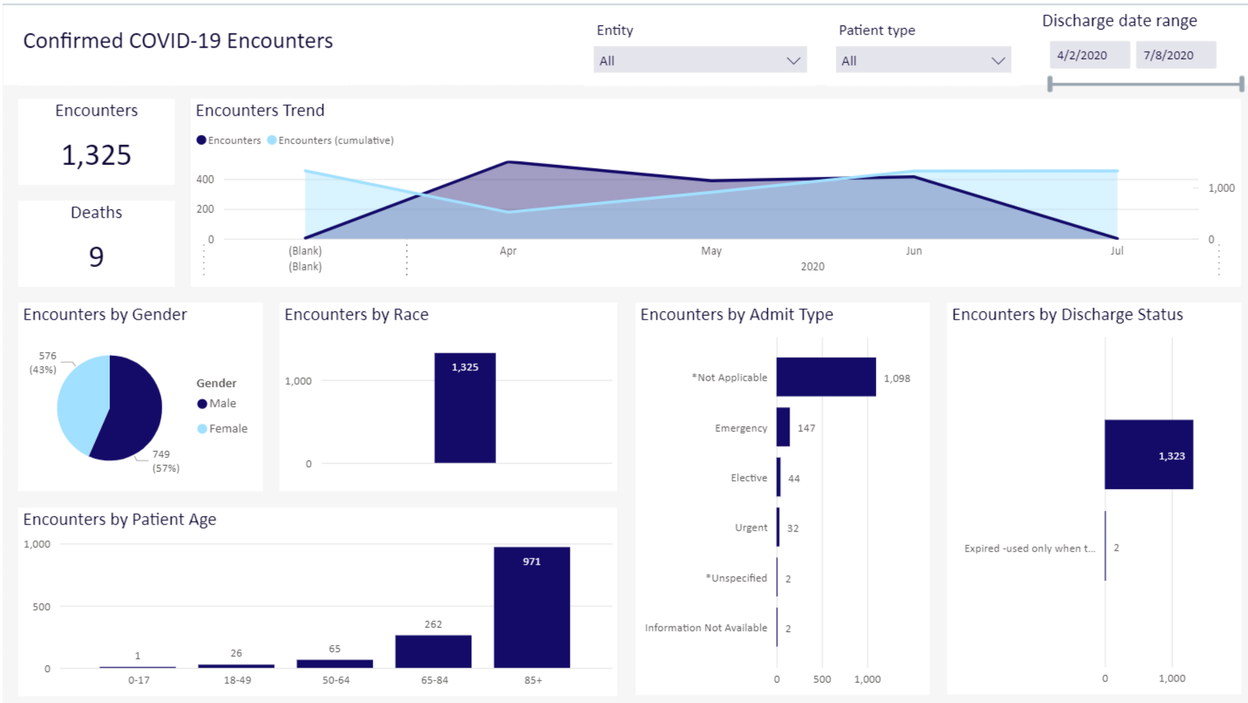
For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Dashboards"
    - "Dashboard reports"
    - "Dashboard tools"
- "Cost Comparison dashboard"

COVID Impact dashboard

Why use this feature

COVID Impact is a collection of reports with Axiom Intelligence visualizations that enable users to analyze how COVID-19 is affecting their institutions, from both cost and utilization aspects. In addition, information about COVID patients include demographic and geographic information, details of treatments for each patient encounter, and payor information. The data presented can help the institution analyze their current handling of COVID encounters and provide data for planning.



The reports are:

- Confirmed COVID-19 Encounters, which provides patient demographic information and shows encounter trends over time.
- COVID-19 Geography, which provides an interactive map of the United States showing the locations and relative size of COVID encounters. Users can view data by state, county, or ZIP code, aiding in the identification of COVID clusters.
- Utilization, which examines encounters by total cost range, cost per case by specialty groups, and usage and costs. Costs are broken down by individual items used by the institution for its COVID encounters.
- Encounter Detail, which lists all COVID encounters with a high-level summary and links to view the full encounter detail for the individual patient. Encounter details include summary of their stay, demographics, groupings the patient belongs to, ICD codes and description for all diagnoses, all providers who treated the patient, financial details, payor types, and surgeries.
- Financials, which shows costs for DRGs, net income by financial class, and costs per encounter.

How this feature works

What: You view a dashboard and use slicers and built-in dashboard tools to select the exact entities, service lines, date ranges, and other data elements to select the precise data you want to work with.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**. From the Intelligence Center, click **Enterprise Decision Support**, then click **Standard Dashboards**, then **COVID Impact**

Who: Users assigned the EDS User role profile.

How: Use slicers and other dashboard tools to specify the entities, service lines, and other data types to view the needed subset of the data on each dashboard.

> **TIP:** To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

▶ Where to find more information

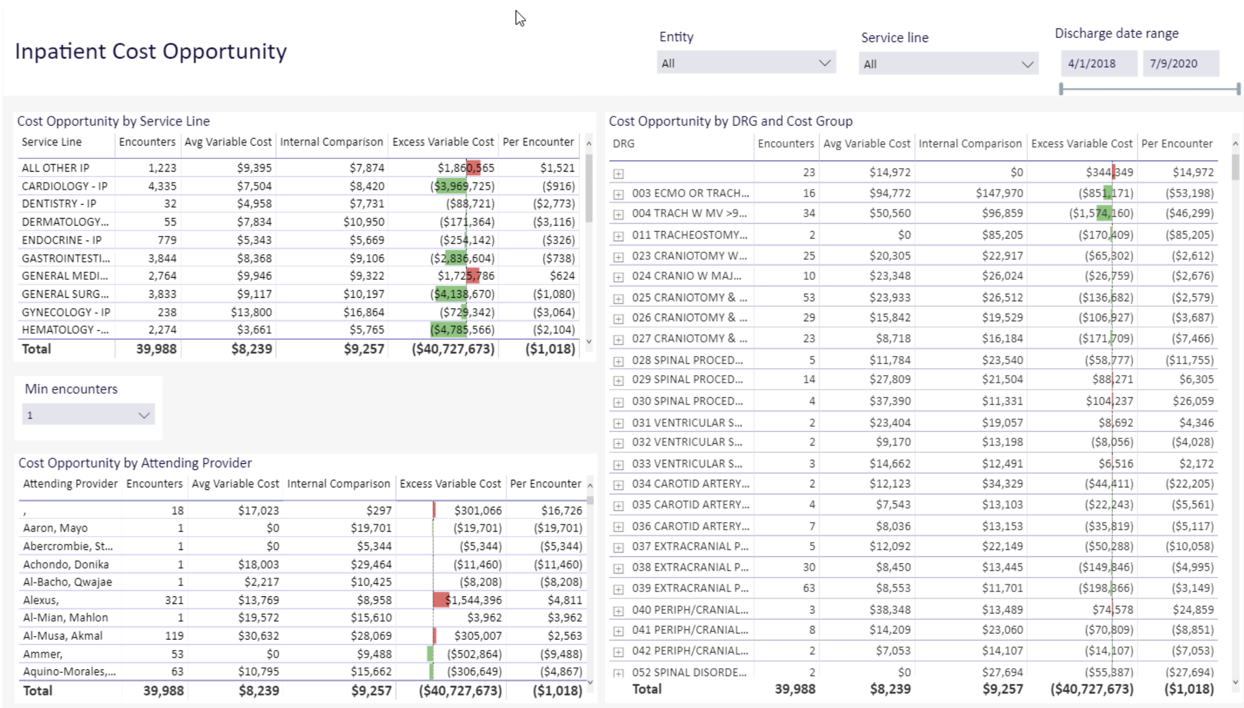
For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Dashboards"
  - "Dashboard reports"
  - "Dashboard tools"
- COVID Impact dashboard"
  - "Confirmed COVID-19 Encounters"
  - "COVID-19 Geography"
  - "Utilization"
  - "Encounter Detail"
  - "Financials"

Physician Variations dashboard

▶ Why use this feature

Physician Variations is a collection of reports with Axiom Intelligence visualizations that allow users to analyze variations in care and costs for physicians and service lines. Using these reports, both efficiencies and costs are compared across the institution.



The reports are:

- Inpatient Cost Opportunity, which visualizes cost opportunities by service line, by attending provider, and by DRG and cost group
- Inpatient Length of Stay Opportunity, which visualizes opportunities as excess days by attending provider and by DRG
- Inpatient Contribution Margin, which visualizes the contribution margin by attending provider. by payor mix, and by DRG
- Inpatient Encounter Selection, which analyzes cost opportunities in service lines by DRG, by principal diagnosis, and by principal procedure. It also analyzes cost opportunities for attending physicians

How this feature works

What: You view a dashboard and use slicers and built-in dashboard tools to select the exact entities, service lines, date ranges, and other data elements to select the precise data you want to work with.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**. From the Intelligence Center, click **Enterprise Decision Support**, then click **Standard Dashboards**, then **Physician Variations**

Who: Users assigned the EDS User role profile.

How: Use slicers and other dashboard tools to specify the entities, service lines, and other data types to view the needed subset of the data on each dashboard.

> **TIP:** To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

▶ Where to find more information

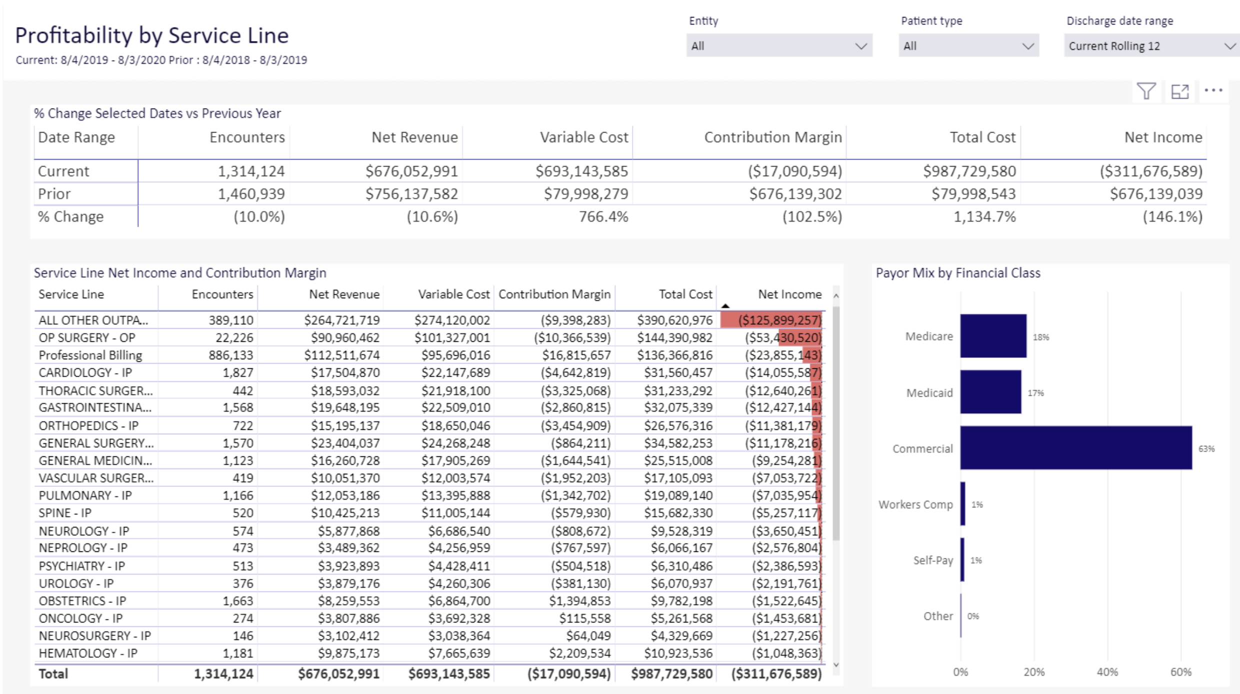
For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- "Dashboards"
  - "Dashboard reports"
  - "Dashboard tools"
- "Physician Variations dashboard"
  - "Inpatient Cost Opportunity"
  - "Inpatient Length of Stay Opportunity"
  - "Inpatient Contribution Margin"
  - "Inpatient Encounter Selection"

Service Line dashboard

▶ Why use this feature

The Service Line dashboard provides comprehensive profitability by service line, physician, case type, and payor mix to quantify volumes, cost, revenue, contribution margin, and net income by service line and physician.



Profitability by Service Line

Current: 8/4/2019 - 8/3/2020 Prior : 8/4/2018 - 8/3/2019

Entity: All | Patient type: All | Discharge date range: Current Rolling 12

% Change Selected Dates vs Previous Year

Date Range	Encounters	Net Revenue	Variable Cost	Contribution Margin	Total Cost	Net Income
Current	1,314,124	$676,052,991	$693,143,585	($17,090,594)	$987,729,580	($311,676,589)
Prior	1,460,939	$756,137,582	$79,998,279	$676,139,302	$79,998,543	$676,139,039
% Change	(10.0%)	(10.6%)	766.4%	(102.5%)	1,134.7%	(146.1%)

Service Line Net Income and Contribution Margin

Service Line	Encounters	Net Revenue	Variable Cost	Contribution Margin	Total Cost	Net Income
ALL OTHER OUTPA...	389,110	$264,721,719	$274,120,002	($9,398,283)	$390,620,976	($125,899,257)
OP SURGERY - OP	22,226	$90,960,462	$101,327,001	($10,366,539)	$144,390,982	($53,430,520)
Professional Billing	886,133	$112,511,674	$95,696,016	$16,815,657	$136,366,816	($23,855,143)
CARDIOLOGY - IP	1,827	$17,504,870	$22,147,689	($4,642,819)	$31,560,457	($14,055,587)
THORACIC SURGER...	442	$18,593,032	$21,918,100	($3,325,068)	$31,233,292	($12,640,261)
GASTROINTESTINA...	1,568	$19,648,195	$22,509,010	($2,860,815)	$32,075,339	($12,427,144)
ORTHOPEDICS - IP	722	$15,195,137	$18,650,046	($3,454,909)	$26,576,316	($11,381,179)
GENERAL SURGERY...	1,570	$23,404,037	$24,268,248	($864,211)	$34,582,253	($11,178,216)
GENERAL MEDICIN...	1,123	$16,260,728	$17,905,269	($1,644,541)	$25,515,008	($9,254,281)
VASCULAR SURGER...	419	$10,051,370	$12,003,574	($1,952,203)	$17,105,093	($7,053,722)
PULMONARY - IP	1,166	$12,053,186	$13,395,888	($1,342,702)	$19,089,140	($7,035,954)
SPINE - IP	520	$10,425,213	$11,005,144	($579,930)	$15,682,330	($5,257,117)
NEUROLOGY - IP	574	$5,877,868	$6,686,540	($808,672)	$9,528,319	($3,650,451)
NEPROLOGY - IP	473	$3,489,362	$4,256,959	($767,597)	$6,066,167	($2,576,804)
PSYCHIATRY - IP	513	$3,923,893	$4,428,411	($504,518)	$6,310,486	($2,386,593)
UROLOGY - IP	376	$3,879,176	$4,260,306	($381,130)	$6,070,937	($2,191,761)
OBSTETRICS - IP	1,663	$8,259,553	$6,864,700	$1,394,853	$9,782,198	($1,522,645)
ONCOLOGY - IP	274	$3,807,886	$3,692,328	$115,558	$5,261,568	($1,453,681)
NEUROSURGERY - IP	146	$3,102,412	$3,038,364	$64,049	$4,329,669	($1,227,256)
HEMATOLOGY - IP	1,181	$9,875,173	$7,665,639	$2,209,534	$10,923,536	($1,048,363)
Total	**1,314,124**	**$676,052,991**	**$693,143,585**	**($17,090,594)**	**$987,729,580**	**($311,676,589)**

The reports are:

- Profitability by Service Line
- Profitability Trends
- Service Line Summary
- Provider Net Income
- Service Line Opportunity -- Inpatient

How this feature works

What: You view a dashboard and use slicers and built-in dashboard tools to select the exact entities, service lines, date ranges, and other data elements to select the precise data you want to work with.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**. From the Intelligence Center, click **Enterprise Decision Support**, then click **Standard Dashboards**, and then **Service Line**.

Who: Users assigned the EDS User role profile.

How: Before you can use the Service Line Dashboard, you must first set the current period in Axiom Decision Support. In the dashboard, use slicers and other dashboard tools to specify the entities, service lines, and other data types to view the needed subset of the data on each dashboard.

TIP: To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

Where to find more information

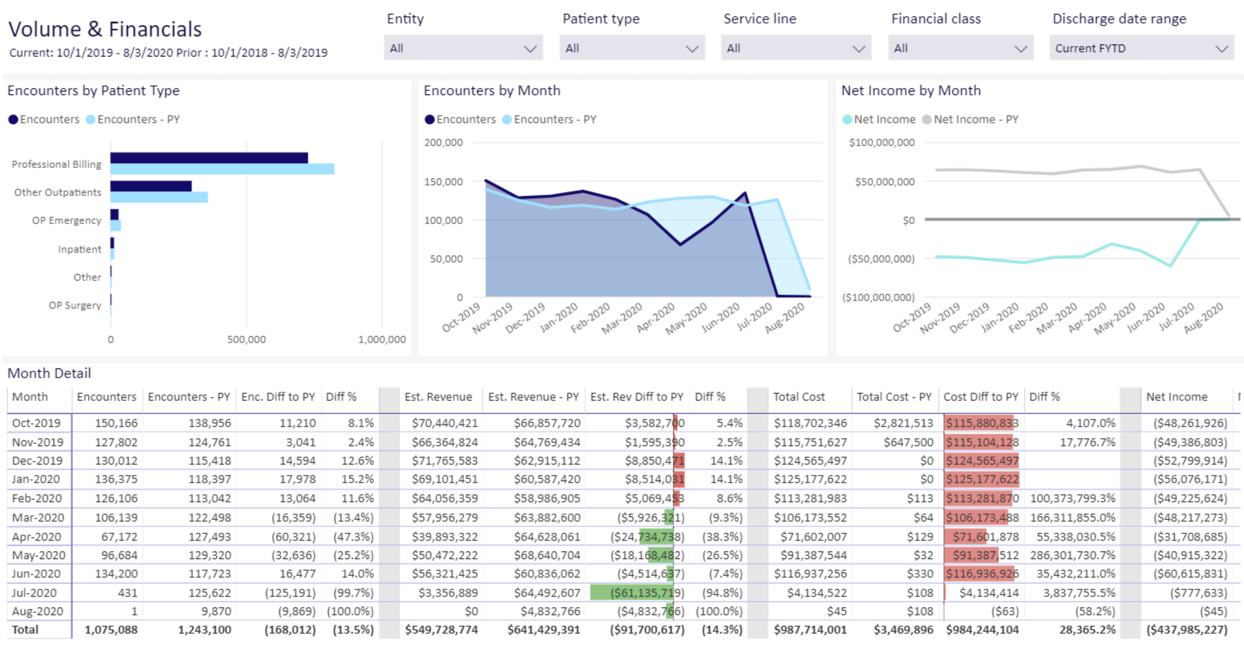
For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- Dashboards
  - "Dashboard reports"
  - "Dashboard tools"
- "Service Line dashboard"
  - "Configuring the Service Line Dashboard"
  - "Using the Service Line Analytics Dashboard"

Volumes and Financials dashboard

Why use this feature

Volumes and Financials provide details for all encounters, including encounters and costs, trends, net incomes, and inpatient mortality.



The reports are:

- Volumes & Financials: This report shows encounters and the associated costs on a monthly basis, and net incomes. It compares the current year encounters with the previous year for the same month.
- Trends: This report has three trend views. First is a list of all the months in the date range you selected, with the number of encounter, estimated revenue, total cost, and net income. Next is a graph of the number of encounters over your date range. Net Income Trend shows net incomes using a base line of $0, giving you a quick view of positive and negative net income over your date range.
- Provider Detail: First, this report shows percentages of encounters by the financial class. Next is a table of providers with their encounters, costs, and net income. Totals for all provides is also provided.

  > **TIP:** For easier viewing, click once in a row you want to review to dim the other rows in the table.

- Provider Net Income: You can view volume and net income in a bubble chart. Use splicers to customize the view, such as by service line or financial class. You can use multiple selections in splicer drop-down menus.
- Inpatient Mortality: This report lets you view mortality for inpatients in several ways. First, the mortality rate is shown in a graph by the month over your chose date range. Next, table lists counts for encounters and death within those encounters and the mortality rate: the data may be viewed by attending provider, DRG, provider specialty or service line. Finally, a chart shows deaths by standard age ranges.
- Net Income: Income, both positive and negative, is shown on a cumulative chart over your selected date range.

▶ How this feature works

What: You view a dashboard and use slicers and built-in dashboard tools to select the exact entities, length of stay, date ranges, and other data elements to select the precise data you want to work with.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**. From the Intelligence Center, click **Enterprise Decision Support**, then click **Standard Dashboards**, then **Volumes and Financials**.

Who: Users assigned the EDS User role profile.

How: Use slicers and other dashboard tools to specify the entities, service lines, and other data types to view the needed subset of the data on each dashboard.

> **TIP:** To use this feature, we recommend that you read all of the associated online help topics listed in the "Where to find more information" section below.

Where to find more information

For more information and instructions, see the following topic in the Axiom Enterprise Decision Support online help:

- Dashboards
  - "Dashboard reports"
  - "Dashboard tools"
- Volumes and Financials dashboard
  - "Volume & Financials"
  - "Trends"
  - "Provider Detail"
  - "Provider Net Income"
  - "Inpatient Mortality"
  - "Net Income"

Axiom Financial Planning

Enhancements in this release include:

New utility updates expense drivers in existing nodes

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

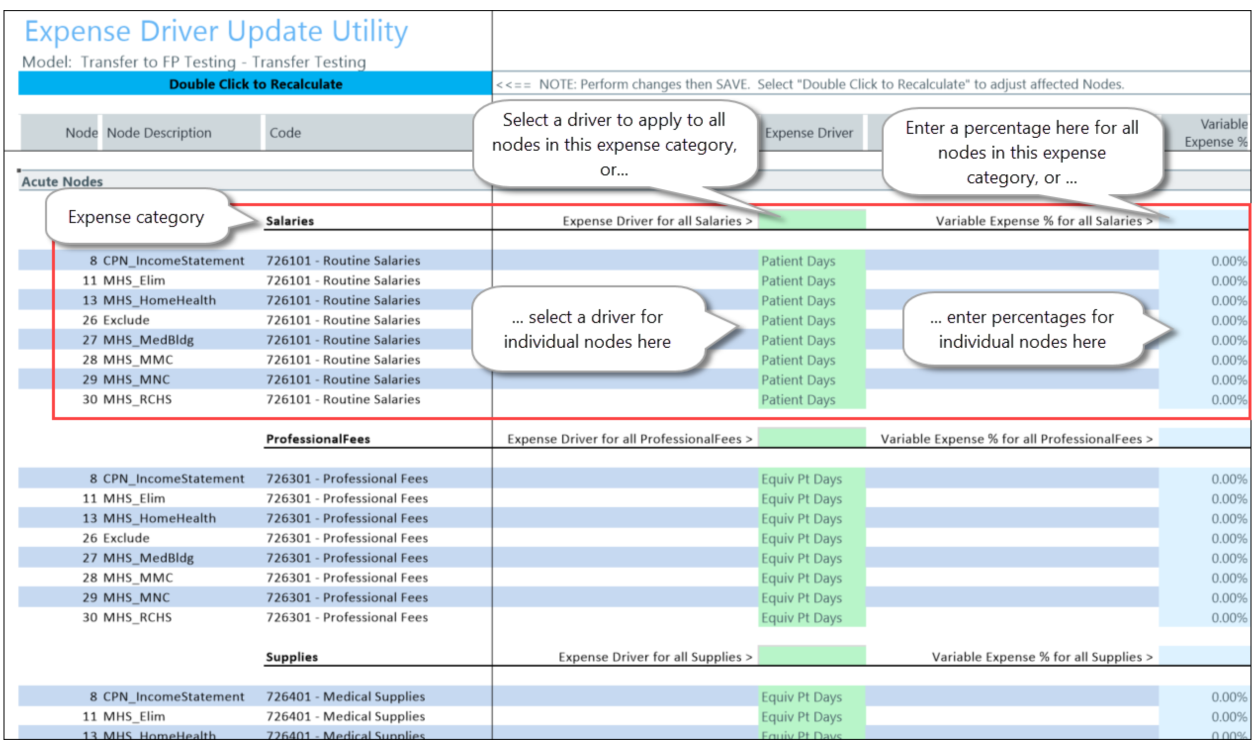
What: Easily change the selected expense driver and/or the variable expense percentage for a group of existing nodes by making changes in the utility. After saving changes, use the utility's recalculation feature to recalculate the nodes.

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.



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.

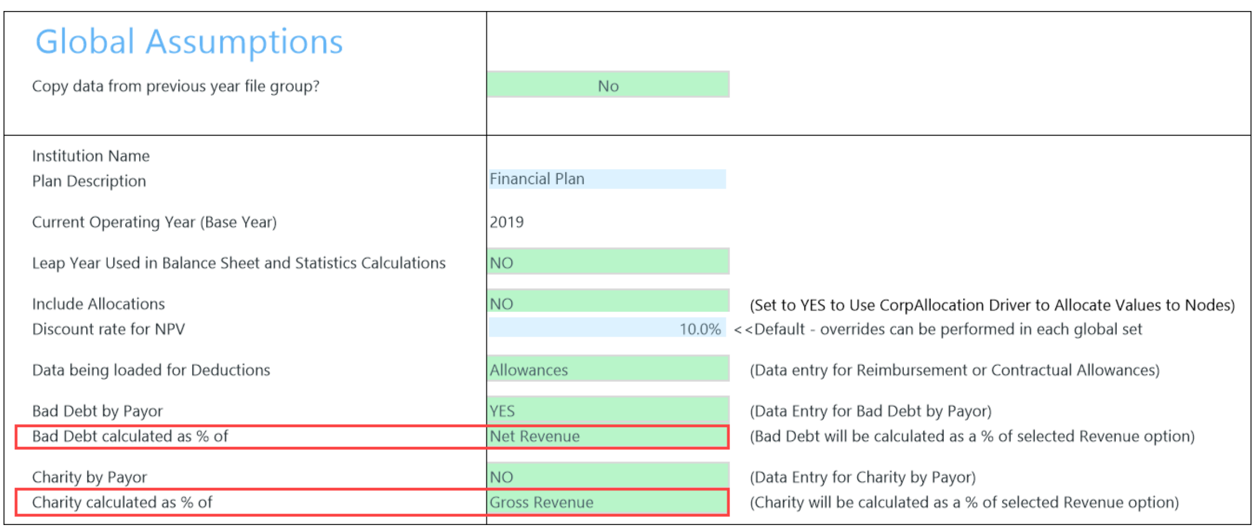
How this feature works

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.

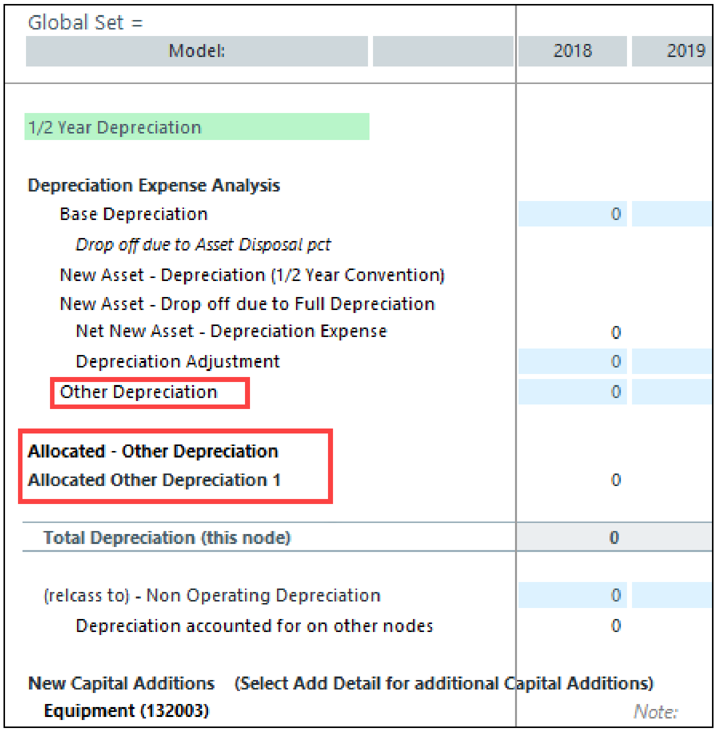
How this feature works

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.



▶ Where to find more information

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

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.

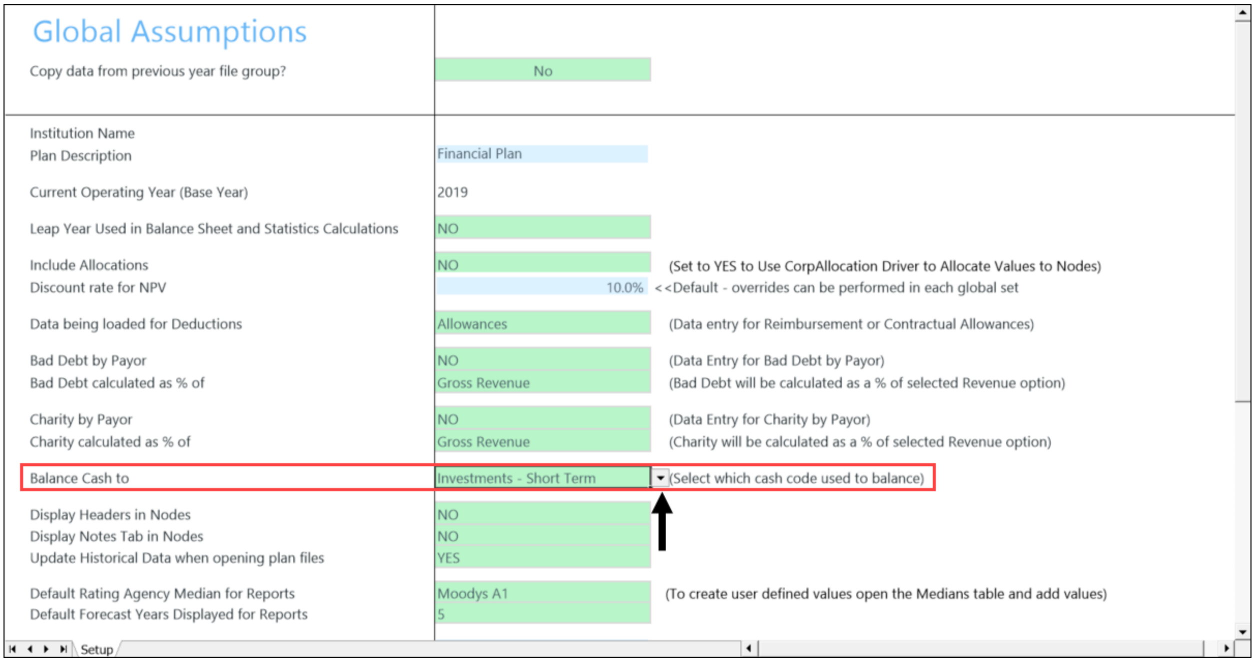
▶ How this feature works

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.



▶ 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.

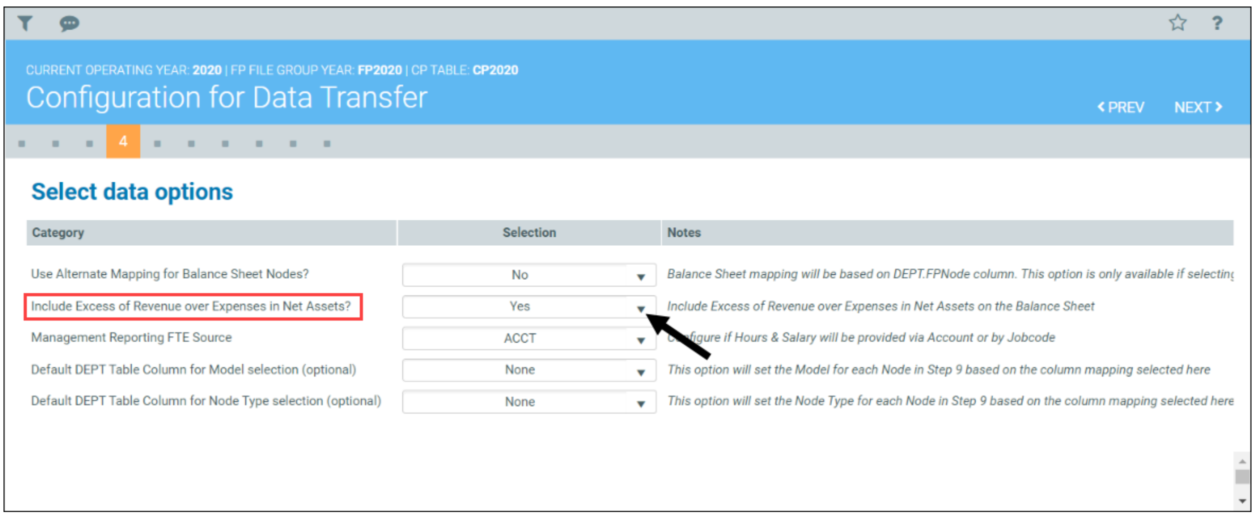
How this feature works

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).



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"

Axiom Rolling Forecasting

Enhancements in this release include:

Configure refresh variables for certain reports

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

New forecast methods 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 RFGroup table columns are available for selection in the Refresh Variable dialog of certain reports, thereby tailoring the selection list to better fit users' needs.

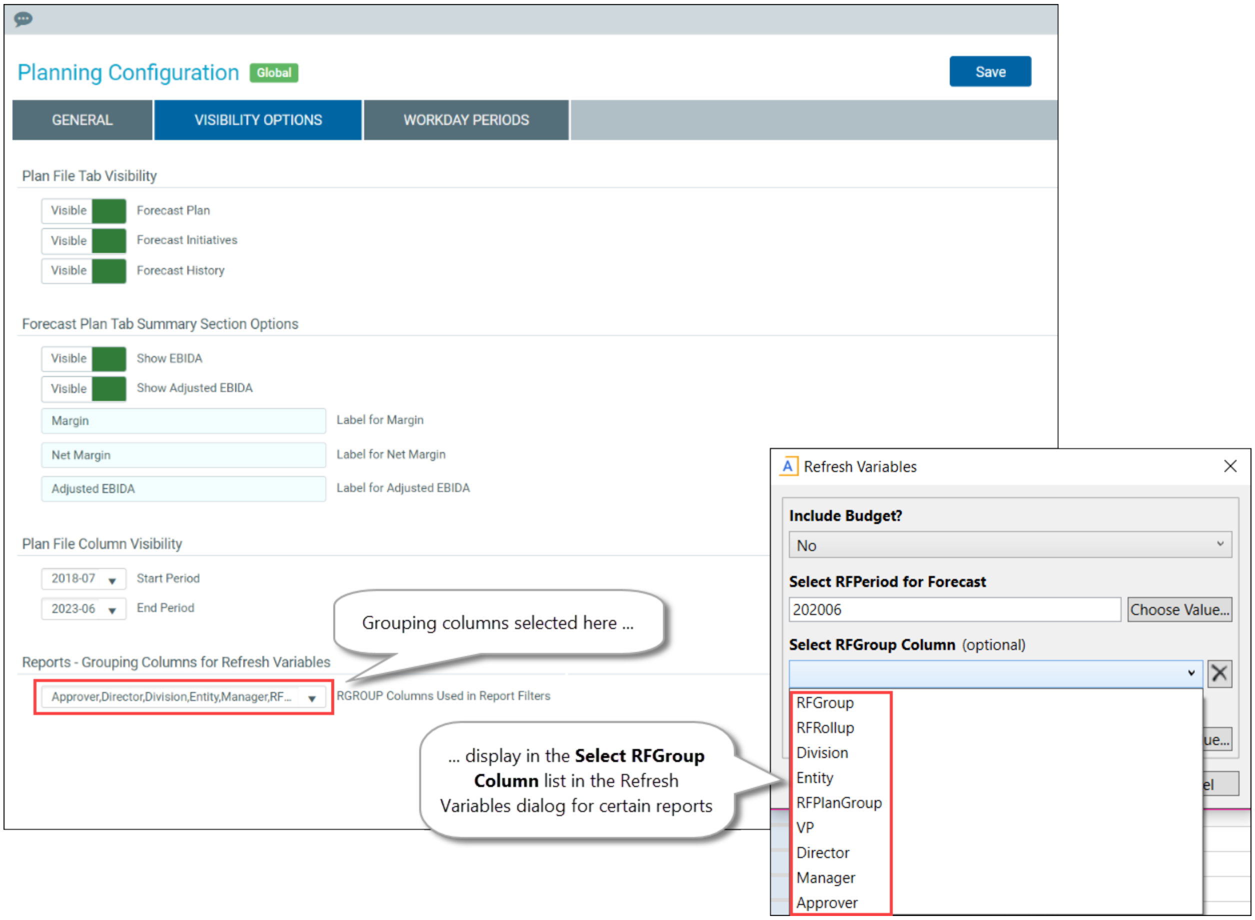
▶ How this feature works

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 RFGroup 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 RFGroup columns from which users can choose. Administrators can also set up custom RFGroup 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 RFGroup Column options available in the Refresh Variable dialog for certain reports.

Who: Only Axiom Healthcare Suite 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 RFGroup columns to include and clear the check boxes for those RFGroups to exclude. Click **OK** and then click **Save**.



▶ 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

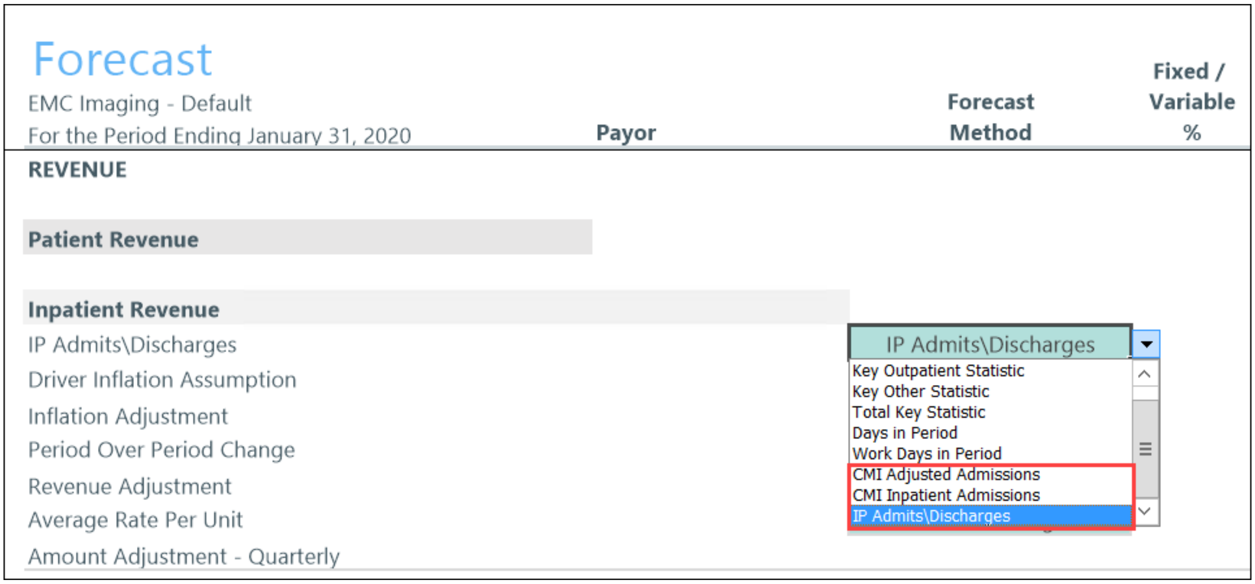
What: The IP_Census calculation method is generally used for forecasting at the entity level. This calculation method has been enhanced to provide more options for entity-level forecasting in the Revenue and Expenses sections of the plan file Forecast worksheet. The following have been added for the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



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

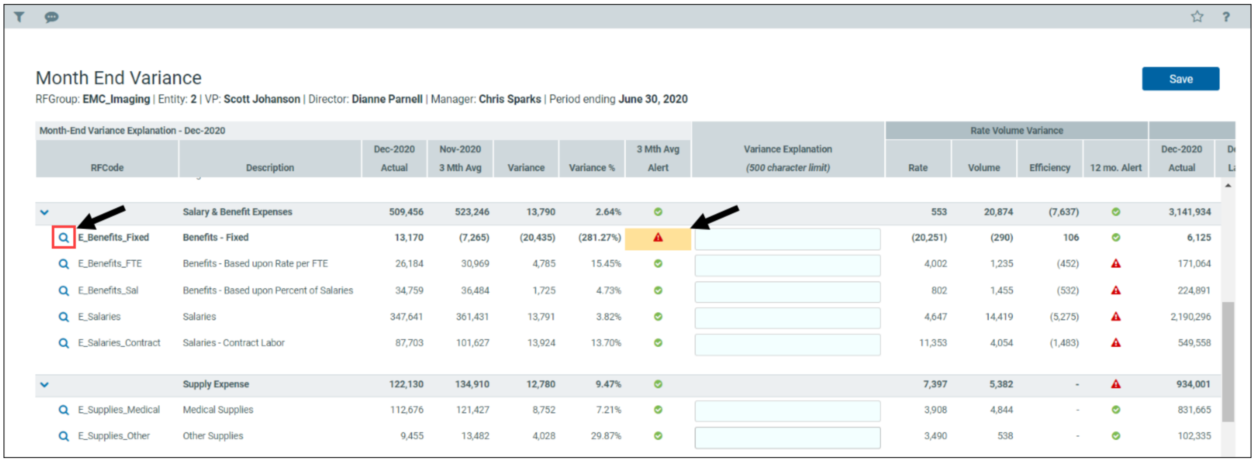
What: Easily drill from the Month End Variance report to details in Axiom Performance Reporting. The preconfigured drills enable you to view data from the department level all the way to revenue transaction detail, provided there is data at each level to support drilling.

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 RFGroup 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

RFGroup: **EMC_Imaging** | Entity: **2** | VP: **Scott Johanson** | Director: **Dianne Parnell** | Manager: **Chris Sparks** | Period ending **June 30, 2020**

Save

Month-End Variance Explanation - Dec-2020								Rate Volume Variance				
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	**Benefits - Fixed**	**13,170**	**(7,265)**	**(20,435)**	**(281.27%)**			**(20,251)**	**(290)**	**106**		**6,125**
E_Benefits_FTE	Benefits - Based upon Rate per FTE	26,184	30,969	4,785	15.45%			4,002	1,235	(452)		171,064
E_Benefits_Sal	Benefits - Based upon Percent of Salaries	34,759	36,484	1,725	4.73%			802	1,455	(532)		224,891
E_Salaries	Salaries	347,641	361,431	13,791	3.82%			4,647	14,419	(5,275)		2,190,296
E_Salaries_Contract	Salaries - Contract Labor	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	Medical Supplies	112,676	121,427	8,752	7.21%			3,908	4,844	-		831,665
E_Supplies_Other	Other Supplies	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"

Axiom Service Line Planning

Axiom Service Line Planning is a new application that

Axiom Strategy Management

Enhancements in this release include the following:

New utility converts displayed user IDs to full names

The Update User ID to Full Name utility enables administrators to convert user names displayed as user IDs in Initiative lists to full user names, making it easier to determine which person performed what activity on an Initiative. This only applies to user names added to your system before the 2021.2 release; names added starting with 2021.2 are automatically displayed as full names. The utility needs to be run only once.

New utility converts displayed user IDs to full names

Why use this feature

The Update User ID to Full Name utility enables administrators to convert user names displayed as user IDs in Initiative lists to full user names, making it easier to determine which person performed what activity on an Initiative. This only applies to user names added to your system before the 2021.2 release; names added starting with 2021.2 are automatically displayed as full names.

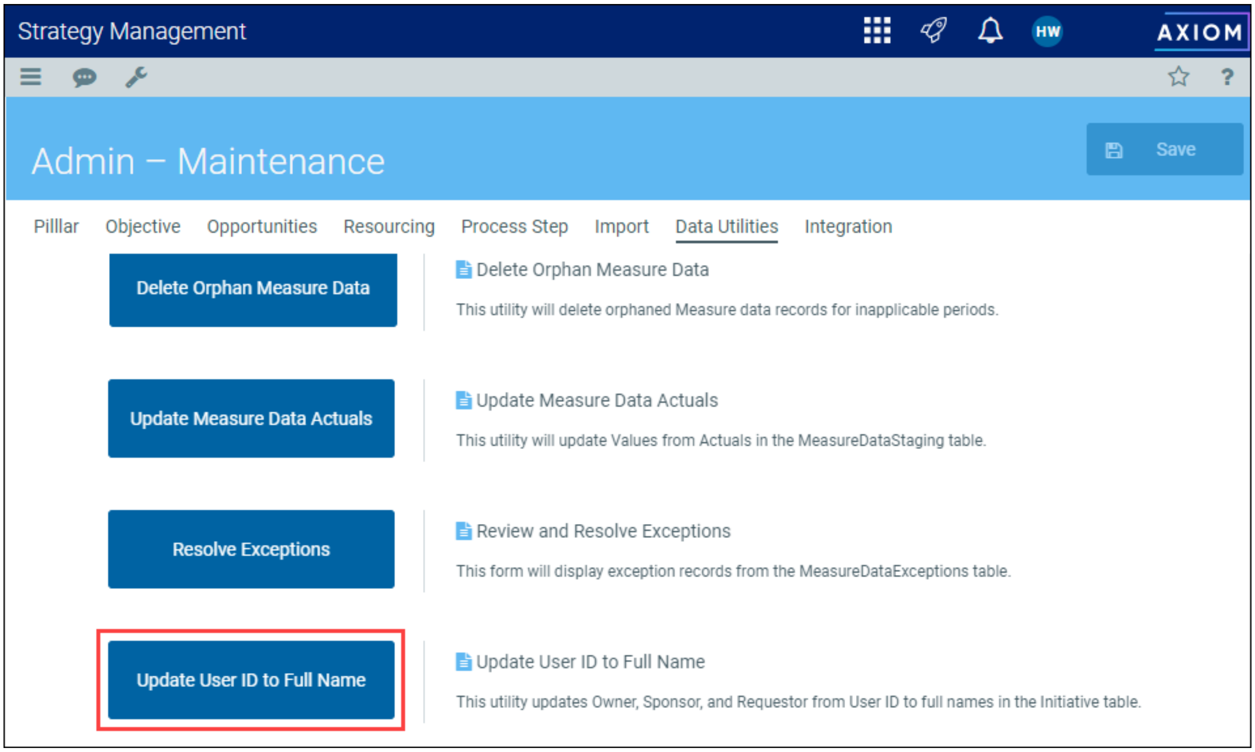
How this feature works

To update user IDs displayed in Initiative lists on Axiom Strategy Management pages, the administrator runs the Update User ID to Full Name utility located under the Data Utilities tab on the Maintenance page. The utility replaces the ID name abbreviations with users' first and last names. You only need to run this utility once.

Where: This change applies to user names displayed in Initiative lists on the Dashboard, Perspectives, Objectives, and Initiatives pages.

Who: Only Axiom Healthcare Suite administrators can use this utility.

How: From the admin **Maintenance** page, under **Data Utilities**, click the **Update User ID to Full Name** button.



Where to find more information

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

- "Convert displayed user IDs to full names"

Axiom Treasury Cash Management

No new features or enhancements were included in this release.

What to know before upgrading

IMPORTANT: Refer to the respective release notes of each Axiom Healthcare Suite product licensed by your organization for product-specific considerations before upgrading. **You must apply the Axiom 2021.2 upgrade before applying any 2021.2 product upgrades.** The Axiom Software upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom Software 2021.2 before the first product upgrade.

When upgrading to Axiom Healthcare Suite 2021.2, keep in mind the following:

- Each product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- Suite-upgraded components are included in all product upgrades.
- KHA 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 KHA delivered report that was moved to a new location will automatically move back to its original location.
- KHA product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not 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.

Upgrade considerations

The following table describes upgrade considerations that your product administrator should review to determine the appropriate course of action:

Product	Considerations
Axiom Software Platform	Upgrade. Each product is backwards compatible, so staying on the latest platform version has many benefits with no risk.
Axiom Budget Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Capital Planning and Capital Tracking	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. Upgrade Axiom Capital Tracking at the same time as Axiom Capital Planning.
Axiom Clinical Analytics	There are no required upgrade considerations with this release.
Axiom Comparative Analytics	There are no required upgrade considerations with this release.
Axiom Contract Management	Contact your Syntellis Implementation Consultant to schedule an installation.
Axiom Cost Management	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Enterprise Decision Support	Contact your Syntellis Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.
Axiom Financial Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Performance Reporting and Productivity	Upgrade if you are not in an active Budget planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded.
Axiom Rolling Forecasting	This is a new product install and not an upgrade to the existing Axiom Quarterly Rolling Forecast model. Contact your Syntellis representative for more information.

Product	Considerations
Axiom Service Line Planning	This is a new product install. Contact your Syntellis representative for more information.
Axiom Strategy Management	There are no required upgrade considerations with this release.
Axiom Treasury Cash Management	This is a new product install. Contact your Syntellis representative for more information.

Preparing for 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.

Issues fixed in 2021.2

No client-facing issues were addressed specific to the Healthcare Suite in this release. Consult the release notes for each of the Axiom Healthcare products for a list of addressed issues.

Issues fixed in 2021.2.1

No client-facing issues were addressed specific to the Healthcare Suite in this release. Consult the release notes for each of the Axiom Healthcare products for a list of addressed issues.