Release Notes

Axiom Enterprise Decision Support

Version 2021.3

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Version: 2021.3

Updated: 11/5/2021

Contents

About the release notes

Syntellis is pleased to announce the 2021.3 release of Axiom Enterprise Decision Support. 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 Enterprise Decision Support online help.

New features in 2021.3

Styling and design enhancements

Several pages throughout the application have been updated and modernized. No functionality has been affected, though some options may have moved on the page.

Selected cost model stored

The last cost model you selected is now stored by Enterprise Decision Support. It will be remembered when you log back into EDS and when you navigate between the EDS home page and the **Manage cost models** page.

Summarize to encounter validation

When creating or modifying a cost model with summarize to encounter enabled, EDS now validates that the cost model has not already been summarized to encounter in an overlapping time period to avoid costing items more than once.

Deleting cost models via scheduler

Cost models and their associated tables can now be deleted via the scheduler in the desktop client.

Cost item descriptions in RVU maintenance page

Tooltips now appear to show the cost item description when you hover over the Cost item field on the RVU maintenance page.

Variability exception page enhancements

The variability exception page is now better at handling large amounts of data.

Reporting on encounter data from Cost Detail Total Costs (CDTC) table

You can now create a report on encounter data via the CDTC table in the web based report writer.

Add custom columns to any encounter staging table

Costing admins can now add custom columns to all staging tables.

Reporting on service lines using service line groups

Users are able to build a web or Excel report that utilizes service line groups and can drill down from the groups to the individual service line level.

Styling and design enhancements

Why use this feature

Numerous pages throughout Enterprise Decision Support have been updated with styling and design enhancements for a better user experience.

How this feature works

What: Pages throughout the application have received style and design updates. No functionality has been removed or changed, though some options may have moved on the page.

Where: Pages in the following areas have received updates:

- Core dimensions
- Encounter dimensions
- Reference dimensions
- Data management
- Define encounter rules
- Cost accounting
- Configure system

Who: All EDS users.

Selected cost model stored

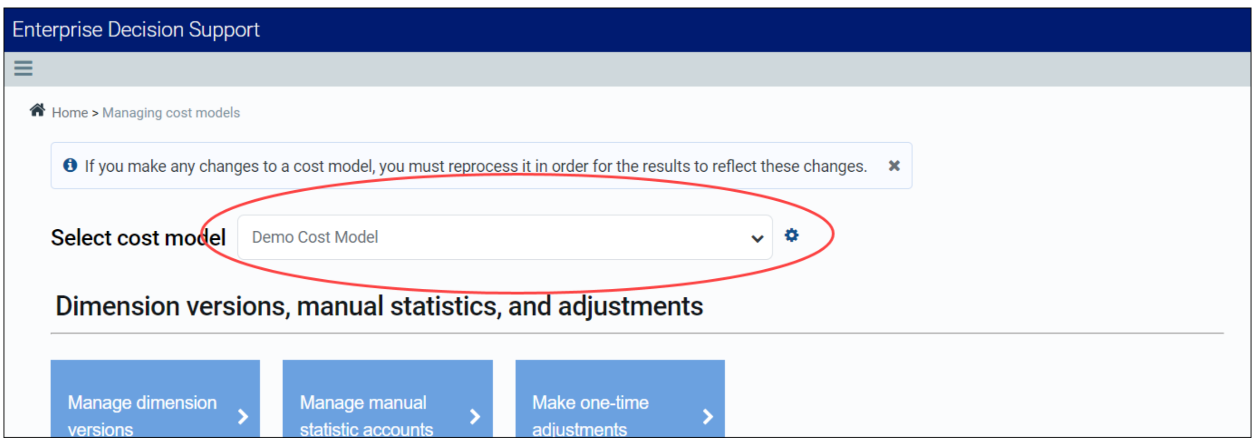
▶ Why use this feature

The last cost model selected in Enterprise Decision Support will be automatically selected the next time you log into the system or when you go to the **Manage cost models** page, saving you time and effort. In the event that you wish to modify the cost model or work with a different one, you can change it easily from the **Manage cost models** page.

▶ How this feature works

What: The last cost model selected is now stored when logging out of EDS and when navigating between EDS home and the **Manage cost models** page so there is no need to select it again.

Where: From the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model**. The last cost model selected is shown in the **Select cost model** dropdown at the top of the page.



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

How: You can select a different cost model or modify the current cost model from the **Managing cost models** page:

- To select a different cost model while on the **Managing cost models** page, click the **Select cost model** dropdown and choose it from the list.
- To modify the selected cost model while on the **Managing cost models** page, click the gear icon to the right of the **Select cost model** dropdown.

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:

- "Working with cost models"

Summarize to encounter validation

Why use this feature

To help prevent costing errors when you summarize to encounter a cost model, Enterprise Decision Support will confirm that the cost model has not already been summarized to encounter for an overlapping time period.

How this feature works

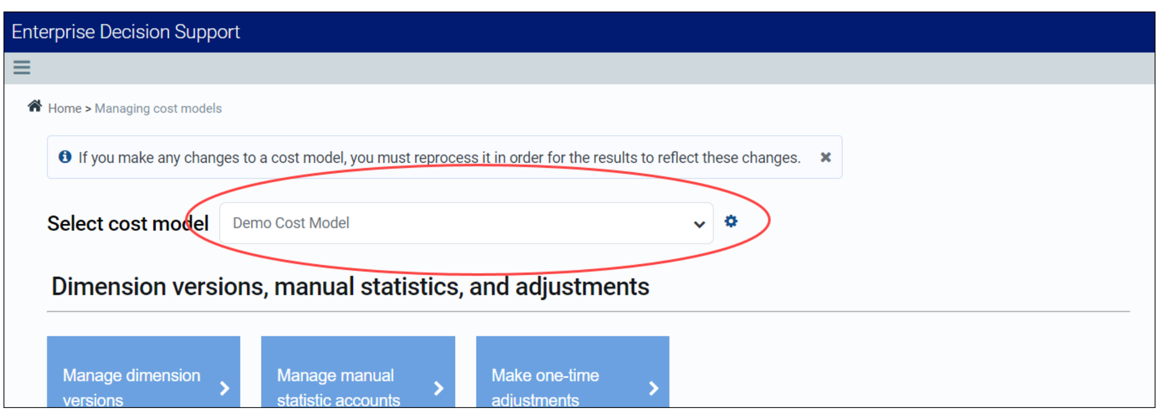
What: When creating or modifying a cost model with summarize to encounter enabled, EDS now validates that the cost model has not already been summarized to encounter in an overlapping time period to avoid costing items more than once.

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: The summarize to encounter validation happens automatically when creating a new cost model or modifying an existing one:

- To create a new cost model, from the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Create a cost model**.
- To modify an existing cost model, from the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model**, then click the gear icon to the right of the **Select cost model** dropdown.



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:

- "Creating or modifying a cost model"

Deleting cost models via scheduler

Why use this feature

Sometimes it becomes necessary to delete a cost model and its associated tables. This can now be done via the scheduler in the desktop client.

How this feature works

What: Cost models and their associated tables can now be deleted via the scheduler in the desktop client.

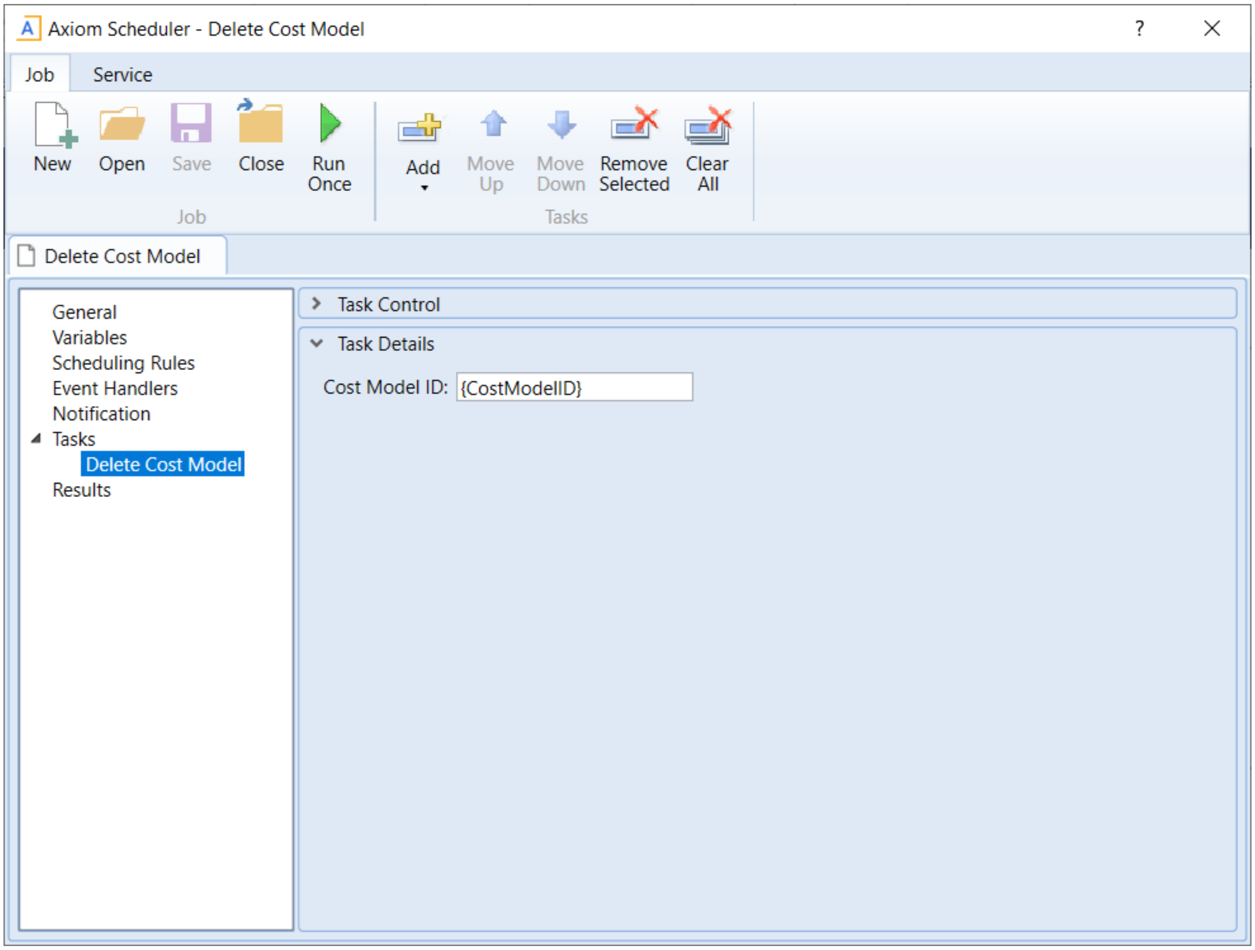
Where: Axiom Scheduler in the desktop client.

Who: Users assigned EDS Admin role profile.

How: Open the desktop client and do the following:

1. Navigate to **Scheduler Jobs Library** > **EDS** > **Costing Calculations** and double-click **Delete Cost Model**.
2. In the **Delete Cost Model** dialog that appears, click **Variables** on the left to find the Cost Model ID for the cost model to be deleted.
3. Click **Tasks**, select **Delete Cost Model** and under **Task Details**, enter the **Cost Model ID**.
4. Click **Run Once** and the associated cost model record and the associated cost model tables are deleted.

> **NOTE:** Cost models that have been Summarized To Encounter cannot be deleted.



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:

- "Scheduler"

Cost item descriptions in RVU maintenance page

Why use this feature

To better understand a cost item shown on the RVU maintenance page, you can hover the mouse over its name in the Cost Item column to bring up a tooltip displaying its full description.

How this feature works

What: Tooltips now appear to show the cost item description when you hover over the Cost item field on the RVU Maintenance page.

Where: From the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model**. In the **Reclasses and allocations** section, click **Maintain RVUs**.

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

How: From the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model**. In the **Reclasses and allocations** section, click **Maintain RVUs**. Click the filter icon and select filter criteria, then hover the mouse pointer over any of the items in the Cost Item column to see the tooltip.

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:

- "Adding or editing an RVU"

Variability exception page enhancements

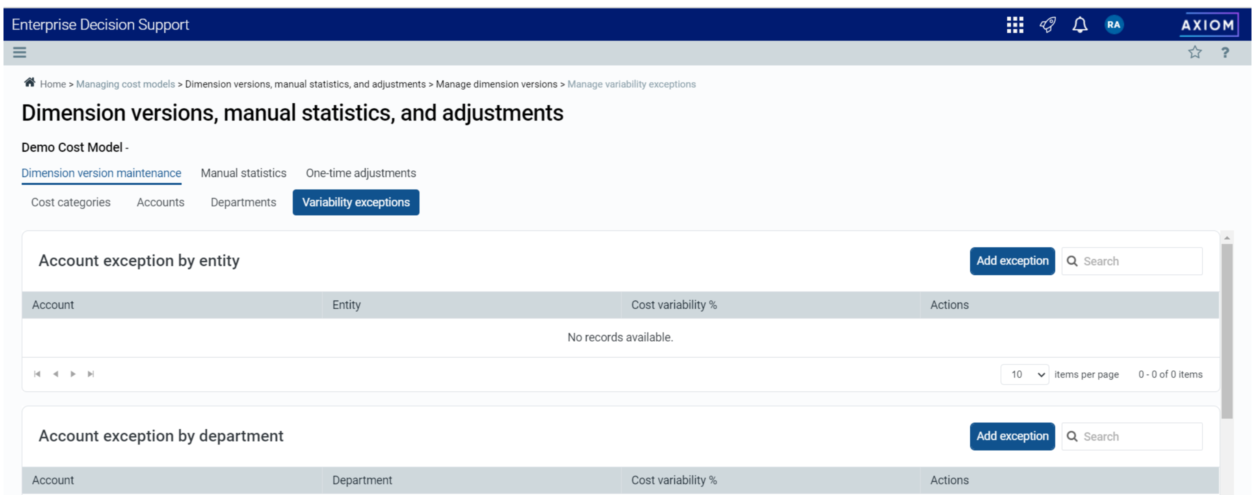
▶ Why use this feature

The variability exception page in Enterprise Decision Support has been improved to better process large amounts of data. Users processing large numbers of exceptions should notice a significant decrease in the amount of time it takes to run those exceptions. As part of this improvement, exceptions on the variability exception page are now grouped by type.

▶ How this feature works

What: The variability exception page is now better at handling large amounts of data.

Where: From the Enterprise Decision Support home page, in the **Cost Accounting** section, click **Modify a cost model**. In the **Dimension versions, manual statistics, and adjustments** section, click **Manage dimension versions** and click the **Variability exceptions** tab.



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

▶ 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:

- "Configuring variability exceptions"

Reporting on encounter data from Cost Detail Total Costs (CDTC) table

Why use this feature

Being able to report on Encounter data via the Cost Detail Total Costs (CDTC) table allows for better reporting on the total fixed/variable/direct/indirect costs by department.

How this feature works

What: Users are able to build web reports that utilize encounter IDs from the CDTC table.

Where: From the Enterprise Decision Support home page, in the **Reporting** section, click **Intelligence Center**.

Who: Users assigned the EDS Admin role profile or who have the Create Web Reports security permission

How: From the Intelligence Center, click **+ Create**, select **Create web report**, then select an encounter table as the data context. The CostDetailTotalCosts table is available as a related table.

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 Report Builder"
- "Creating new web reports"

Add custom columns to any encounter staging table

Why use this feature

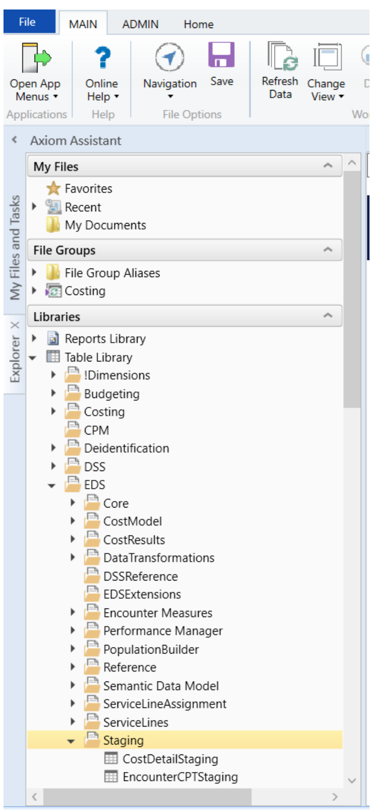
The ability to add custom columns to Enterprise Decision Support tables is an important aspect of data management for many users. By adding custom columns, users are able to capture and manage data outside the default structures of the Axiom tables.

How this feature works

What: Costing Admins are now able to add custom columns to all encounter staging tables. The following tables now accept custom columns:

- EncounterCPTStaging
- EncounterDiagnosisStaging
- EncounterPaymentStaging

Where: From the desktop client, select the **Main** tab, then click **Navigation** and select **Explorer**. Go to **Table Library** > **EDS** to find the staging tables.



Who: Users assigned the EDS Admin role profile.

How: From the desktop client, select the **Main** tab, then click **Navigation** and select **Explorer**. Under **Table Library**, go to **EDS** > **Staging**, then right-click the desired table and select **Edit table structure**. Columns can be added on the **Columns** tab of the **Edit Table** dialog that appears.

▶ 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:

- "Managing Tables"

Reporting on service lines using service line groups

Why use this feature

The ability to report on service line groups lets you generate more useful encounter reports tailored to your specific needs.

How this feature works

What: Users are able to build reports that utilize service line groups and can drill down from the groups to the individual service line level.

Where: From the Enterprise Decision Support home page, in the Reporting section, click Intelligence Center.

Who: Users assigned the EDS Admin role profile or who have the Create Web Reports security permission

How: From the Intelligence Center, click + Create and select Create web report. Choose an encounter table as the data context. Service line group schemas are available as rows, columns, and filters, as appropriate for the kind of report being created.

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 Report Builder"
- "Creating new web reports"

What to do know before upgrading

IMPORTANT: You must apply the Axiom 2021.3 upgrade before applying any 2021.3 Axiom product upgrades. Axiom upgrades are backwards compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2021.3 *before* the first product upgrade. Refer to the **Axiom 2021.3 Release Notes** and **Axiom Healthcare Suite 2021.3 Release Notes** for considerations before upgrading.

When upgrading to the 2021.3 version of Axiom Enterprise Decision Support, keep in mind the following:

- This product upgrade contains updated templates, calculation methods, driver files, and remediated defects.
- Syntellis delivered reports may be removed or 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 by the client will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Process definitions will not be replaced. Process Manager will not currently work with the new system tables and web-based pages and utilities. Consequently, please plan on reviewing and potentially revising any Cost Accounting Process Definitions depending on the scope and what tasks have been created and are in use.
- Security roles and sub-systems will be reset to their configured settings for the Axiom defined roles. All security exceptions you may have made at the individual user level 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. For example, Process Manager defined processes for Cost Accounting will need to be modified by Client Success and has limitations with accessing web-based tasks.

Preparing for and scheduling upgrades

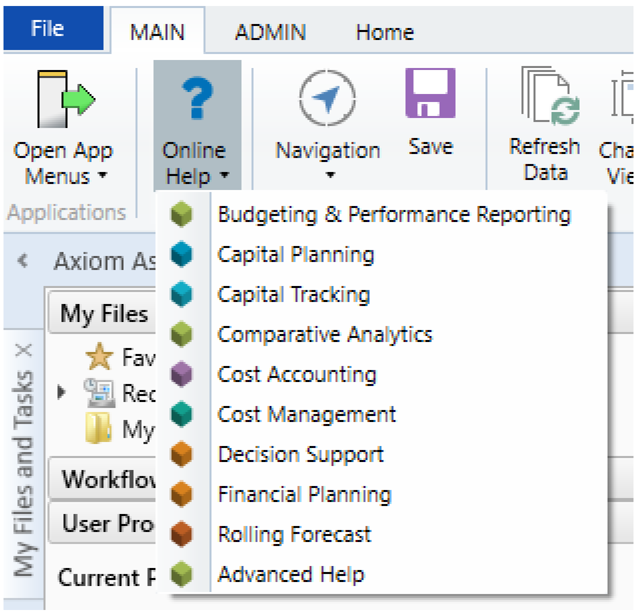
Summary of the upgrade process:

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 System Administrator to contact support@syntellis.com to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
    - Desired Axiom Software 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 Software 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:

- **Online help** - From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window. The online help will only open for products you are licensed to use.



- **Contextual help** - Form/web-enabled features 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. For more detailed information, open Axiom Help by clicking **Open Help** at the top of the contextual help dialog.

Syntellis Central

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

- Search help across all Axiom products
- Access tips, tricks, and best practices in our knowledge base
- Find training & certification content including on-demand, video, webinars, labs, and instructor-led courses

- Submit a support issue, find suggested content, and manage any outstanding issues directly with us
- Review open Software Service project status and details

Issues resolved in 2021.3

Several improvements and enhancements were added in 2021.3, but no client-facing issues were included.

Technical considerations

No technical considerations or instructions needed for this release.