

## Release Notes

Axiom Healthcare Suite  
Version 2021.3

The logo for AXIOM, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border that is slightly offset from the text, creating a subtle frame effect.

**AXIOM**

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Version: 2021.3

Updated: 2/14/2022

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# About the release notes

Syntellis is pleased to announce the 2021.3 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 2021.3 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](#)
- [Axiom Service Line Planning](#)
- [Axiom Strategy Management](#)
- [Axiom Treasury Cash Management](#)

## Axiom Budgeting and Performance Reporting

No new features or enhancements were included in this release.

## Axiom Clinical Analytics

No new features or enhancements were included in this release.

## Axiom Comparative Analytics

No new features or enhancements were included in this release.

# Axiom Contract Management

Enhancements in this release include:

## [New report provides Expected Payment details](#)

Until now, calculation detail has existed in the payment vouchers, with no easy way to get a more encompassing view into how various services generate revenue for a given contract. The Calculation Detail report solves this problem by enabling you to tag the services to include in the report. Users who analyze contract terms can use this report to help them understand the different services and reimbursements that generate revenue.

## [Model claim charge adjustments by Facility Code](#)

The Facility Code adjustment type enables you to adjust procedure charges by the type of bill code, which is a combination of facility, patient type (inpatient or outpatient), and frequency. Previously, you were limited to adjusting the entire contract or by revenue code, which could be too broad, or by line item code, which could be too narrow.

## [Adjust CMS Outpatient calc basis rate by revenue code](#)

The Revenue Code adjustment type enables you to adjust your post-grouper custom pricing for the CMS Outpatient calculation based on the revenue codes that come in on claims. The revenue code option allows you to adjust rates at a more summarized level than line item code.

## [3M July 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 report provides Expected Payment details

### ▶ Why use this feature

Until now, calculation detail has existed in the payment vouchers, with no easy way to get a more encompassing view into how various services generate revenue for a given contract. The Calculation Detail report solves this problem by enabling you to tag the services to include in the report. Users who analyze contract terms can use this report to help them understand the different services and reimbursements that generate revenue.

### ▶ How this feature works

**What:** You configure a special reporting attribute, Reporting Category, to contain service labels that reflect the services to be included in the Calculation Detail report. Next, you use the labels to tag clauses and terms that have these services. After recalculating the claims on a contract, you run the report. In addition to some standard columns, the report includes a column for each service label. The report includes such information as estimated payment, total expected contractual, total charges, and so on.

**Where:** This change applies to the Reports menu in the main menu header, to the Attributes page available from the Admin menu in the main menu header, and to the list of available attributes in the Attributes tab on Edit Clause and Edit Term dialogs.

**Who:** Only Axiom Contract Management administrators can configure the Reporting Category attribute for use with the Calculation Detail report. Only users with the Admin role may assign/remove Reporting Category attribute tags to clauses and terms. No user role can delete the Reporting Category attribute from the system.

### **How:**

1. From the **Admin** menu, select **Manage Attributes**.
2. In the list of **Attributes**, locate the **Reporting Category** attribute and then click the Edit icon ().
3. On the **Edit Attribute** page, click **Library**.
4. In the **Edit Library** dialog, create the attribute labels with which to tag clauses and terms for your contracts. Click **Save and Close**.
5. In each clause/term to be included in the Calculation Details report for a given contract, add the desired attribute tag from the **Reporting Category** library attribute.
6. Recalculate the claims associated with the contract to which you applied the attributes.
7. From the **Reports** menu, select **Calculation Detail**.

8. On the **Calculation Detail** page, select the simulation the contract is in, then select the contract, and then select the **Discharge** start and end dates.
9. Click **Get Report**. After processing, the report downloads.

▶ Where to find more information

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

- “Using the Calculation Detail report”
- “Set up the Reporting Category library attribute”
- “Set up the Calculation Detail report”
- “Run the Calculation Detail report”

## Model claim charge adjustments by Facility Code

### ▶ Why use this feature

Now you have an additional option when simulating charge adjustments: Facility Code. Previously, you were limited to adjusting the entire contract or by revenue code, which could be too broad, or by line item code, which could be too narrow. Facility Code equates to type of bill, which means you can adjust procedure charges by the Type of Bill code, which is a combination of facility, patient type (inpatient or outpatient), and frequency.

### ▶ How this feature works

**What:** The Facility Code charge adjustment type allows you to adjust charges by type of bill. When you specify adjustments by facility code, the adjustment applies to each claim in the selected simulation that has charges for that type of bill. You can specify adjustments for as many facility codes as you need.

**Where:** This change applies to the Charge Adjustments feature available from the Claims menu.

**Who:** Only Axiom Contract Management administrators can simulate charge adjustments. Analysts and other users can view the adjustments but not change or delete them.

**How:** From the **Claims** menu, select **Charge Adjustments**. On the **Charge Adjustments** page, select the desired simulation (cannot be Live), and then select the **Adjust By** option **Facility Code**. Click **Add New Record** to add a row to the table, and then select the **Type of Bill**, and then in the **Adjustment** field, enter the adjustment amount as a decimal value. Click **Save Changes**. Add additional codes as needed.

### ▶ Where to find more information

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

- "Model adjustments to claim charges"
- "Edit or delete a charge adjustment"
- "About Type of Bill (bill types)"

## Adjust CMS Outpatient calc basis rate by revenue code

### ▶ Why use this feature

When setting up post grouper custom pricing for commercial APC plans, you can now adjust rates for the CMS Outpatient calculation by revenue code. Previously, you were limited to adjusting this calculation by an overall percentage, by APC code, or by APC status indicator, all of which could be too broad; or by line item code, which could be too narrow. The revenue code option allows you to adjust rates at a more summarized level than line item code.

### ▶ How this feature works

**What:** The Revenue Code adjustment type enables you to adjust your post-grouper custom pricing for the CMS Outpatient calculation based on the revenue codes that come in on claims. You set this up on a commercial contract's clause or term that uses the CMS Outpatient calc basis for APCs.

**Where:** This change applies to commercial contracts with the CMS Outpatient calc basis on a clause or term requiring rate adjustments based on revenue code.

**Who:** Only Axiom Contract Management administrators can create and manage CMS Outpatient rate adjustments. Analysts and other users can view the adjustments but not change or delete them.

**How:** Navigate to an APC clause with a CMS Outpatient calc basis that needs rate adjustments. In the **Rates** column for the for the clause, click the Edit icon (). In the **Adjustments** tab of the **Edit Rates** dialog, in the **Adjust By** row, select **Revenue Code**. In the **Files** tab, select the file of rate adjustments and then upload and map them. In the **Import** tab, select the file type and then attach the file. You can then view the results in the **Adjustments** tab, as shown in the following example:

**Edit Rates** ×

Clause 5 | **Adjustments** CMS Outpatient

**Adjustments** | Import | Files

Adjust By:  No Adjustment  Overall Percentage  APC Status Indicator  APC  Revenue Code  Line Item Code

Revenue Code	Description	Adjustment
0250	Pharmacy - General	1.010000
0251	Pharmacy - Generic	1.010000
0252	Pharmacy - Non-Generic	1.010000
0253	Pharmacy - Takeout Drugs	1.010000
0254	Pharmacy - Diag/Limit	1.010000
0255	Pharmacy - Rad/Limit	1.010000
0256	Pharmacy - Experimental	1.010000
0257	Pharmacy - Non - Rx	1.010000
0258	Pharmacy - Iv Solution	1.010000
0259	Pharmacy - Other	1.010000
0260	Iv Therapy - General	1.010000
0261	Iv Therapy - Infusion Pump	1.010000
0262	Iv Therapy - Pharmacy Service	1.010000
0263	Iv Therapy - Drg/Supply Delivery	1.010000
0264	Iv Therapy - Supplies	1.010000
0269	Iv Therapy - Other	1.010000
0270	Med/Surg - General	1.010000

1 - 100 of 408 items

Close

▶ Where to find more information

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

- "Adjust rates for a CMS Outpatient calculation"
- "Set up post-grouper custom pricing"

## 3M July 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:

[Legacy CT Utility to populate driver data to new reference tables](#)

Introducing easier links to the driver tables from the identity table to simplify reporting.

## Working with Reports

Reports are spreadsheets designed to help review and analyze your organization's financial data. Axiom Capital Tracking reports include the following report types:

- **Project Tracking** – Used to view capital project details. For more information, see "Tracking Capital Projects" in the online help.
- **Approval** - Used to view the approval status of capital projects and purchase requests.
- **Retrospective Project Review** - Used to view retrospective statuses and updates.

Reports pull data from the database and in some cases allow the user to input data and save it back to the database. However, unlike plan files, reports are not associated with a particular file group or capital budget year. The same report can be used to view data for any capital budget year, or to compare data across multiple budget years. Reports can even incorporate data from other Axiom Healthcare Suite products, provided you have the necessary security permissions.

**NOTE:** You no longer need to use getdatas to populate the new tables in Capital Tracking to report on plan file attributes like picklists, class, Vendor, template, etc. For more information, see "Report Center" in the online help.

# Axiom Enterprise Decision Support

Enhancements in this release include:

## [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

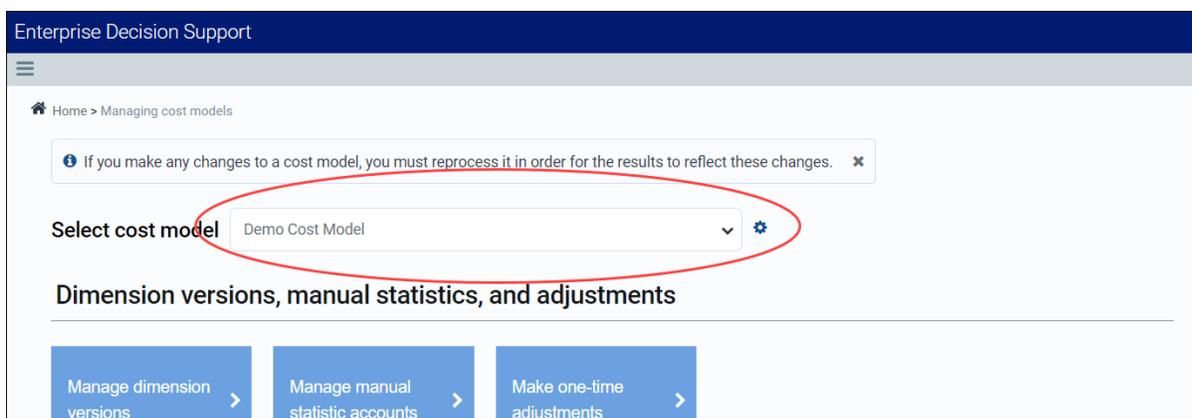
### ▶ Why use this feature

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 Enterprise Decision Support 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

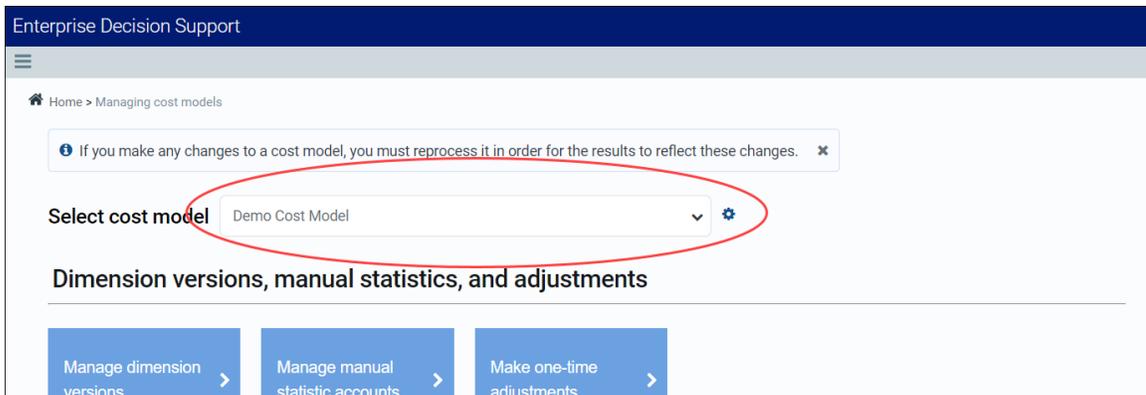
**What:** When creating or modifying a cost model with summarize to encounter enabled, EDS now validates that the cost model has not already been summarized to encounter in an overlapping time period to avoid costing items more than once.

**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 Enterprise Decision Support 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.

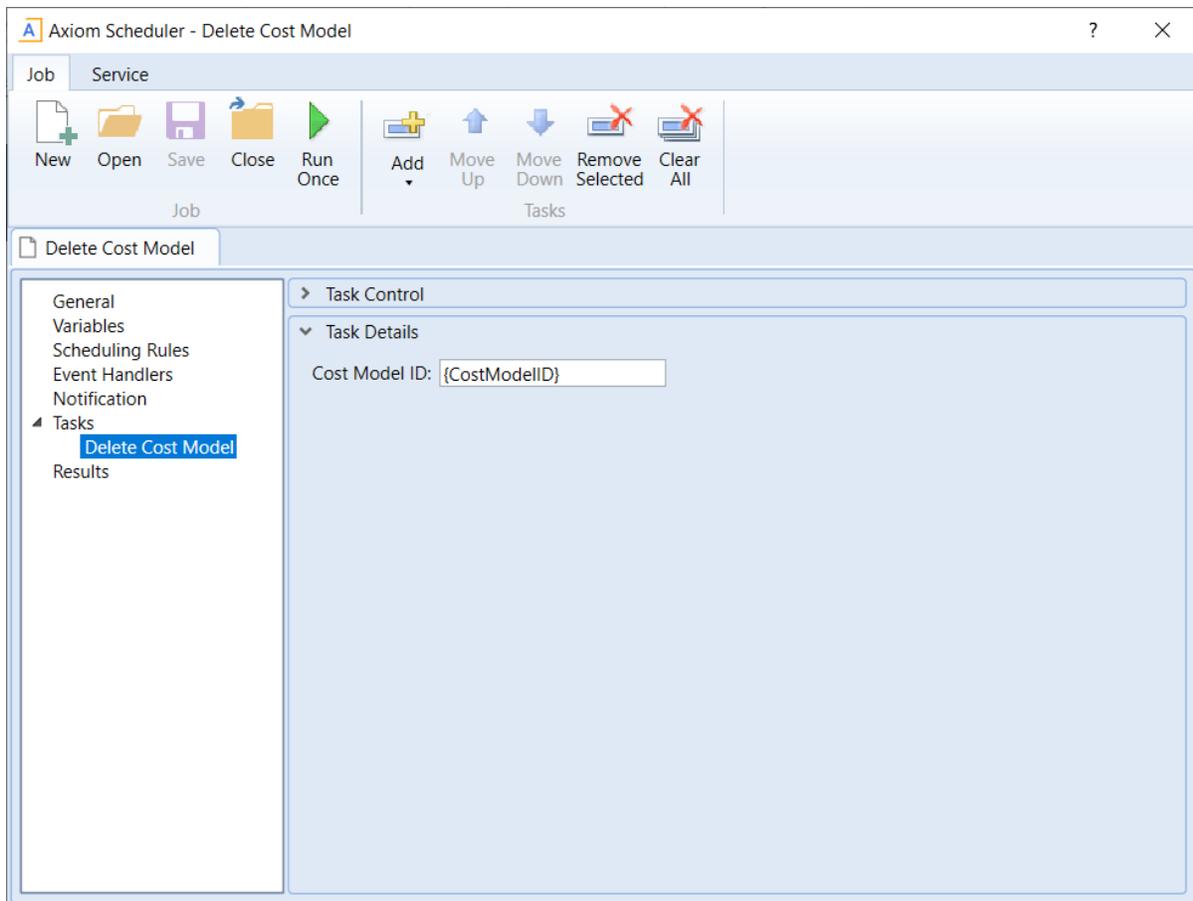
**Where:** Axiom Scheduler in the desktop client.

**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 Axiom desktop 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 Enterprise Decision Support 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 increase 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.

Enterprise Decision Support

Home > Managing cost models > Dimension versions, manual statistics, and adjustments > Manage dimension versions > Manage variability exceptions

### Dimension versions, manual statistics, and adjustments

Demo Cost Model -

[Dimension version maintenance](#) [Manual statistics](#) [One-time adjustments](#)

[Cost categories](#) [Accounts](#) [Departments](#) [Variability exceptions](#)

Account exception by entity

Add exception Search

Account	Entity	Cost variability %	Actions
No records available.			

10 Items per page 0 - 0 of 0 items

Account exception by department

Add exception Search

Account	Department	Cost variability %	Actions
---------	------------	--------------------	---------

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

### ▶ Where to find more information

The following topics in the Enterprise Decision Support 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 Enterprise Decision Support 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

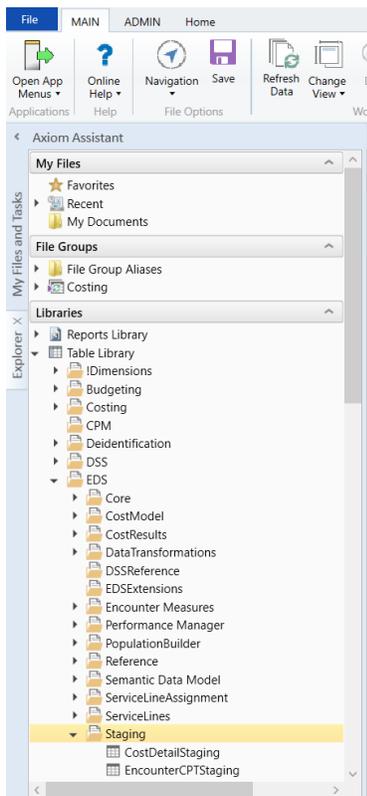
The ability to add custom columns to Enterprise Decision Support tables is an important aspect of data management for many users. By adding custom columns, users are able to capture and manage data outside the default structures of the Axiom tables.

### ► 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 Enterprise Decision Support 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 Enterprise Decision Support online help have been added or updated with information and instructions for using this feature:

- "Using the Report Builder"
- "Creating new web reports"

# Axiom Financial Planning

No new features or enhancements were included in this release.

# Axiom Rolling Forecasting

Enhancements in this release include:

## [New on-demand multi-pass file processing for the Deductions Calculator](#)

Process the Deductions Calculator automatically using multi-pass whenever you need to. Instead of waiting to complete all plan file processes before processing the Deductions Calculator or opening the calculator and calculating one file group at a time, you can process automatically using the new Scheduler job RF Deductions Model - File Processing. This feature saves processing time and makes it easier for you to get a sense of net revenue earlier in the forecasting process because you can process on demand.

## [Use No Forecast calc method for legacy RFCodes](#)

If you have legacy RF Codes that have history and you want to include those codes in your forecast reports but without calculating them, you can assign them the No Forecast calc method.

## [New alternative Volume calc method](#)

The Per Unit Volume calc method provides an alternative way to calculate volume that eliminates the risk of unintended exponential growth in volume calculations. Instead of calculating on a change in a percentage of the whole, the new calc method is based on unit rates.

Miscellaneous report updates:

- **EBIDA Summary report** – A new dimension setup requirement: For the a given month or quarter of actuals, in order for the Margin amount and EBIDA % amount to match the amounts in the corresponding month or quarter in the plan file Summary worksheet, the fields in the ForecastStdLine column of the RFCODE data table must contain a calc method instead of “NA.” For details, see “Setting up dimensions for current-year forecasting” in the online help.
- **Target Variance report** – Three new updates:
  - We reorganized the Target Variance report, giving it a cleaner layout so that it is easier to review; it is now similar to the Consolidated Summary report.
  - We have added a non operational revenue section to the end of the report.
  - In the report, if multiple codes are used for a section, a down caret icon (∨) displays to the left of the row title. To expand the hidden row, double-click the caret.

- **Manager Dashboard** – The Executive Overview tab does not display data if there is no prior forecast period to compare current data to, and the Data Display Options setting in the Rolling Forecasting Manager Dashboard Settings utility is set to Period instead of YTD data. If there are less than two forecast periods that contain data (includes the current period), then the following message displays: “This dashboard will become active when you have at least two periods of data to compare.”

## New on-demand multi-pass file processing for the Deductions Calculator

### ▶ Why use this feature

You can now process the Deductions Calculator automatically using multi-pass whenever you need. Instead of waiting to complete all plan file processes before processing the Deductions Calculator, or opening the calculator and calculating one file group at a time, you can process automatically using the new Scheduler job RF Deductions Model - File Processing. This feature saves processing time and makes it easier for you to get a sense of net revenue earlier in the forecasting process because you can process on demand.

### ▶ How this feature works

**What:** We have enabled file processing in the Deductions Calculator, added a new column to the RFGROUP dimension table that stores your RFGroup processing selections, and added a new Scheduler job that processes the calculator using multi-pass. Before using the calculator, you, as the administrator, select which RFGroups to process by creating a special deductions RFGroup and assigning it to RFGroups to include in your process job.

**Where:** This change applies to the Deductions Calculator, the RFGROUP dimension table, and the Scheduler.

**Who:** Only Axiom Rolling Forecasting administrators and analysts who have full Scheduler access can configure the RF Deductions Model - File Processing job. Administrators and analysts must also have full access to the Deductions Calculator and to the plan file groups to be processed, and the related RFPlanGroups.

**How:** Open the RFGROUP dimension table: **Libraries > Table Library > !Dimensions > RFGROUP**. In the RFGROUP column, create a deductions RFGroup. In the **DeductionsMapping** column, on the same row in which you created the deductions RFGroup, type the name of the deductions RFGroup. Then, also in the DeductionsMapping column, for each RFGroup to include as an input source in your processing job, enter the name of the deductions RFGroup you created. The deductions RFGroup will be your output source. For RFGroups that you do not want to include, in the DeductionsMapping column, leave the default (NA). Save the table. Next, open the Deductions Calculator and select the deductions RFGroup you created and assigned to RFGroups, and then select a scenario. In the Axiom Assistant pane, click the File Processing tab. In the File Processing tab, make any needed selections and then process the file.

Data Type	String	String	String	String	String	String	String	String
String Length	50	50	50	50	50	50	50	50
Description	Rolling Forecast Group	Financial Planning Node	Financial Planning Code	Dim Group for Calc Method Assignment	Deductions Group Mapping	KHA Budget Map	KHA DIM Group for Current Month	
Delete Row	RFGROUP	FPNode	FPCode	CMDimGrp	DeductionsMapping	KHABgtMaj	KHACMDimGr	PlanType
EHS_BalanceSheet	Exclude		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EHS_Exclude	Exclude		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EHS_Property	EHS		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
ELM_Exclude	ELM		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EMA_Exclude	EMA		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EMC_BalanceSheet	EMC		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EMC_Cardiac	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Clinics	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_CriticalCare	EMC		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EMC_Deductions	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Emergency	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Exclude	EMC		ForecastStdLine	NA	NA	RFStdLine	Hospitals_Clinics	
EMC_Geriatric	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_HomeHealth	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Imaging	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Laboratory	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Nursing	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_NutritionSvcs	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Oncology	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Overhead	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Pharmacy	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Pulmonary	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Rehab	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Support	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Surgery	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_Therapy	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	
EMC_WomenService	EMC		ForecastStdLine	EMC_Deductions	NA	RFStdLine	Hospitals_Clinics	

Deductions RFGroup

RFGroups excluded from processing have "NA"

Deductions RFGroup "EMC\_Deductions" applied to RFGroups

Example of RFGROUP dimension table with a configured deductions RFGroup

► Where to find more information

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

- "Saving data to the database"
- "About the Deductions Calculator"
- "Axiom Rolling Forecasting 2021.3 Deductions Calculator Guide"

## New No Forecast calc method

### ▶ Why use this feature

If you have legacy RFCodes attached to historical data that you still want to include in your forecast reports but that you do not want included in your forecast column results, you can assign the calculation method No Forecast to those legacy RFCodes.

### ▶ How this feature works

**What:** The No Forecast calc method prevents any forecast entry or forecast calculation for the RFCodes that use it. When applied to legacy RFCodes in the RFCODE table, the actuals data is brought into the forecast reports but is not calculated on in the Forecast columns. Instead, zeros display for any forecast results. The No Forecast calc method can also be inserted directly into the Forecast worksheet.

**Where:** The calc method is used in the RFCODE table and the plan file Forecast worksheet. This calc method can be used in any Forecast worksheet block except the IP Census statistics section.

**NOTE:** Calc method changes made in the Forecast worksheet override those made in the RFCODE table.

**Who:** Users need to have calc method insert permissions, plus read and write access to the plan files. Only RF administrators can make changes in the RFCODE table.

**How:** To change the calc method to No Forecast for a legacy RFCode for all plan files that use it, in the RFCODE data table, in the **ForecastStdLine** column for the legacy RFCODE row, double-click in the cell, and then from the **Choose Value** dialog, select **No Forecast**. Save the data table. To view changes in the Forecast worksheet, reprocess the plan files.

To use the calc method for a single plan file, insert or change the calc method in the Forecast worksheet.

Forecast			Fixed / Variable %	FY 2020 Jul - Sep Actual	FY 2020 Oct - Dec Actual	FY 2020 Jan Actual	FY 2020 Feb Forecast	FY 2020 Mar Forecast	FY 2020 Jan - Mar Projected	FY 2020 Apr Forecast	FY 2020 May Forecast	FY 2020 Jun Forecast	FY 2020 Apr - Jun Forecast	FY 2020 Jul Forecast
EMC Women Service - Default For the Period Ending January 31, 2020	Payor	Forecast Method		2,595,443	2,779,804	1,485,362	1,076,648	1,129,304	3,371,114	1,116,726	1,127,520	1,111,148	3,355,394	
Net Inpatient Revenue						1,023,962	733,424	800,343	2,557,730	753,383	803,635	721,903	2,278,920	
Prior Forecast														
Outpatient Revenue	Medicare			375,478	373,127	119,574	0	0	119,574	0	0	0	0	0

*Example of No Forecast calc method used for Outpatient Revenue. The forecast columns display zeros.*

### ▶ Where to find more information

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

- “Change a calculation method on the Forecast worksheet”

- “Insert a calc method in the Forecast worksheet”

## New alternative Volume calc method

### ▶ Why use this feature

The Volume calc method uses a Period over Period percent change, which can lead to unintended exponential growth when used in some situations. Instead of calculating on a change in a percentage of the whole, the new Per Unit Volume calc method is based on unit rates, which allows you to enter volume adjustments in the plan file Forecast worksheet without resulting in exponential growth in revenue or other variable items driven by this volume.

### ▶ How this feature works

**What:** The Per Unit Volume calc method provides an alternative way to calculate volume that eliminates the risk of unintended exponential growth in volume calculations. This new calc method has been added to the calc method library.

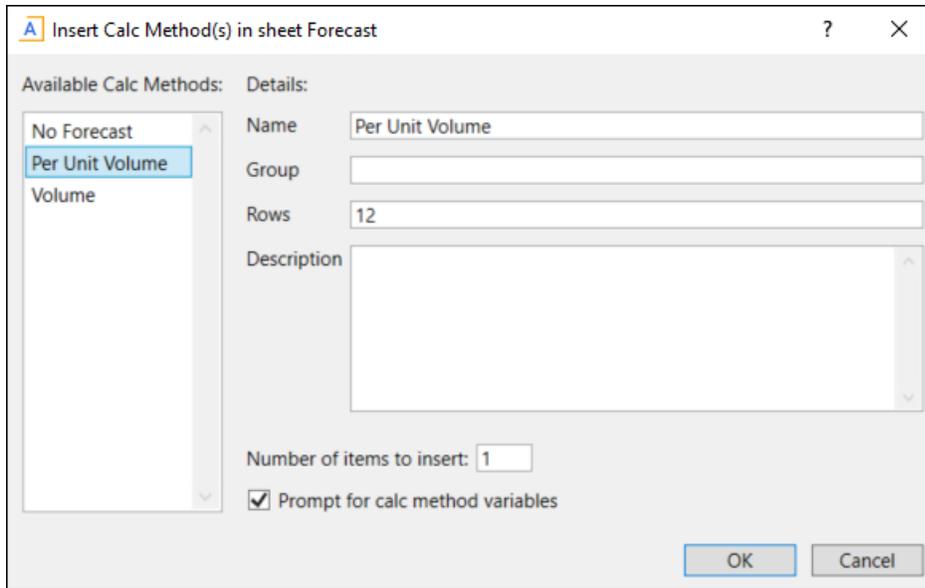
**Where:** The Per Unit Volume calc method is used in the RFCODE table and the Volume section of the plan file Forecast worksheet.

**NOTE:** Calc method changes made in the Forecast worksheet override those made in the RFCODE table.

**Who:** Users need to have calc method insert permissions, plus read and write access to the plan files. Only RF administrators can make changes in the RFCODE table.

**How:** To change the calc method to Per Unit Volume for a Volume RFCODE for all plan files that use it, in the **RFCODE** data table, in the **ForecastStdLine** column for the RFCODE row, double-click in the cell, and then from the **Choose Value** dialog, select **Per Unit Volume**. Save the data table. To view changes in the Forecast worksheet, reprocess the plan files.

To use the calc method for a single plan file, insert or change the calc method in the Forecast worksheet.



► Where to find more information

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

- “Change a calc method on the Forecast worksheet”
- “Insert a calc method in the Forecast worksheet”

## Axiom Service Line Planning

No new features or enhancements were included in this release.

## Axiom Strategy Management

No new features or enhancements were included in this release.

# Axiom Treasury Cash Management

Enhancements in this release include:

## [Automated Imports for APM, BFM, and CFWF](#)

Jobs have been added to the Axiom scheduler for automated imports of APM, BFM, and CFWF files. Import paths and other configuration options are still set up in the web client.

## [New "Bank" Filter for Bank Fee Management Report](#)

The Bank Fee Management report can now be filtered by banks. By default, all banks will be selected, but when one or more banks are selected in the filter, only data relating to those banks will be shown on both the Summary and Detail views.

## [New file type for APM Change Vendor Import](#)

The APM Vendor import now uses the XLSX file format. The CSV format is no longer valid.

## [Update to APM Vendor/Transaction import](#)

Users running the APM Vendor/Transaction import can now import vendors or transactions or both, as desired. The import no longer requires you to provide files for both in order to run.

## [Fields removed from multiple imports](#)

Several unnecessary fields have been removed from the CFWC, APM, and BFM import tables.

## Automated Imports for APM, BFM, and CFWC

### ► Why use this feature

Automating data imports into the APM, BFM, and CFWC modules saves you time and effort by reducing the need to manually import the data.

### ► How this feature works

**What:** After setting up the paths to APM, BFM, and CFWC import files on their respective data management pages, you can configure preloaded jobs in the Axiom Scheduler to automate data imports into Axiom Healthcare Suite. Once set up, the imports will happen on the schedule you have set; all you need to do is replace the import files on your network when new versions are available.

**Where:** This change applies to the Axiom Scheduler as well as the APM, BFM, and CFWC data management pages.

**How:** Open **Manage <module> Data and Processes** from the home page, then go to the **Imports** tab and configure the import settings found there. Afterward, open the **Axiom Scheduler** for the associated **Automated <module> Data Integration** utility, then go to the **Scheduling Rules** tab and set up an import schedule.

The screenshot displays the Axiom Scheduler interface. At the top, there is a header for 'C1 - MASTER FILES | Manage APM data and processes' with tabs for IMPORTS, PAYMENT TYPE, VENDOR TYPE, EXCLUSION TERM LIST, and EXCLUSION ADJUSTMENTS. The 'IMPORTS' tab is active, showing input fields for 'Import Path - APM Transactions:' and 'Import Path - APM Vendor:', along with 'Save changes' and 'Save and run' buttons.

Below this is the Axiom Scheduler window. The left pane shows a tree view of 'My Files and Tasks' with 'Automated APM Data Integration' selected. The right pane shows the 'Scheduling Rules' configuration for 'Automated APM Data Integration'. The 'Scheduling Rules' tab is active, showing a table with columns for 'Active', 'Starting On', 'Ending On', 'Day Of Week', 'Hours', and 'Minutes'. A red arrow points from the 'Scheduling Rules' tab in the left pane to the 'Scheduling Rules' tab in the right pane.

▶ Where to find more information

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

- Manage APM data and processes
- Manage BFM data and processes
- Manage CFWC data and processes
- Axiom Scheduler

## New "Bank" Filter for Bank Fee Management Report

### ▶ Why use this feature

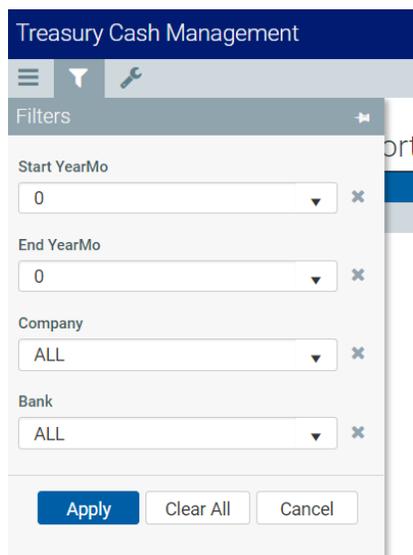
Filtering the Bank Fee Management (BFM) report by bank allows you to process the report for one or more banks. Only data related to the specified banks will be shown on the Summary and Detail views.

### ▶ How this feature works

**What:** A new filter for banks has been added to the Bank Fee Management (BFM) report, allowing for that report to focus on data from one or more banks.

**Where:** This change applies to the BFM report.

**How:** Open **Launch BFM Report** from the home page and click the **Filters** icon .



The screenshot shows the 'Treasury Cash Management' interface with a 'Filters' dialog box open. The dialog box contains four filter fields: 'Start YearMo' with a dropdown set to '0', 'End YearMo' with a dropdown set to '0', 'Company' with a dropdown set to 'ALL', and 'Bank' with a dropdown set to 'ALL'. Each field has a small 'x' icon to its right. At the bottom of the dialog box are three buttons: 'Apply' (highlighted in blue), 'Clear All', and 'Cancel'.

### ▶ Where to find more information

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

- Bank Fee Management report

## New file type for APM Change Vendor Import

### ▶ Why use this feature

Limitations with the CSV file format necessitated an update to the more flexible XLSX format for the APM Change Vendor import. CSV files are no longer valid with this import. Otherwise, no functionality has changed.

### ▶ Where to find more information

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

- Manage APM data and processes

## Update to APM Vendor/Transaction import

### ▶ Why use this feature

You can now use the APM Vendor/Transaction import for either vendors or transactions, or both. It is no longer necessary to import both at the same time.

### ▶ How this feature works

**What:** If an import path is provided for either Vendor or Transaction, but not the other, the APM Vendor/Transaction import will proceed, skipping the import not provided.

**Where:** This change applies to the Manage APM data and processes page.

**How:** Open **Manage APM Data and Processes** from the home page, then go to the **Imports** tab. Enter the network path to either the APM Vendor file, the APM Transactions file, or both.

### ▶ Where to find more information

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

- Manage APM data and processes

# 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 2021.3 upgrade before applying any 2021.3 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 2021.3 before the first product upgrade.

When upgrading to Axiom Healthcare Suite 2021.3, 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.
- Syntellis delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- 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.
- Shared tables might have their columns reordered or have new columns added to them.

# 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 2021.3

The following table lists the resolutions for issues addressed in 2021.3, released on February 21, 2022:

## Excel and Web systems

Issue	Description
[T3] Case Number 00419169 - Process Workbook Cost Mgmt R1.xlsx task in the KH_Update job fails [104149]	<p><b>Summary:</b> Some default records delivered during new product installations contain invalid lookup values that could cause installation errors requiring manual intervention.</p> <p><b>Resolution:</b> Corrected by updating the affected defaults in the affected Dimension tables:</p> <ul style="list-style-type: none"><li>• Paytype.CM_PlanCode column in the Paytype table – default value is NA</li><li>• Dept.CM_BMarkStatus and Dept.CM_CombineStat in the Dept. table – default value is No</li><li>• Swapped sheet order for Cost Management R1</li><li>• Updated the Dept_KHABgTemplate.xlsx so that deletions are conditional</li></ul>