

# **Data Management Guide**

Axiom Enterprise Decision

Support

Version 2022.1

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.

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# Working with Axiom Enterprise Decision Support

Axiom Enterprise Decision Support is a web-based application that allows you to manage your costing process and run reports to help your organization make decisions.

When you log into Axiom and launch the application, the Axiom Enterprise Decision Support home page displays a series of card buttons that open utilities, reports, and other functions. Cards can include multiple levels, depending on the number of tasks to complete. A breadcrumb link at the top of the page informs you of where you are in the system. You can use these links to move through the system quickly and easily.

To view instructions on using the Axiom interface, see [Axiom basics](#).

The home page groups includes the following areas:

## ▶ Data control

### Define data sources

Configure where Axiom acquires the data used when processing cost models.

### Maintain data

Manage core financial dimension data for your organization, which is used by the Axiom system for the costing process and reporting purposes.

## ▶ Data enhancement and refinement

### Define service lines

Create, manage, and process the tagging of encounters with service lines for reporting purposes.

### Define populations

Create and manage population definitions, including specifying criteria. The tagged encounters can then be pushed to Axiom Intelligence for reporting capability.

## Define episodes

Identify patients and encounters for an episode of care or a bundled payment analysis. You can then comb through large amounts of data and reference lists to find the desired filters when building an episode definition.

## View encounters

View details regarding a patient encounter to help you understand overall reporting results.

## ▶ Cost accounting

### Modify and create a cost model

Creating, manage, and processing cost models using a series of grouped utilities and functions specifically for cost model configuration.

## ▶ Reporting

### Report Center

View any reports that you have access to in the Axiom Reports Library—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports.

## ▶ Administration

### Configure security

Assign users to subsystems and roles. This feature provides a browser-based, easy-to-use interface for managing role and subsystem assignments.

### View job status

View the status of jobs currently processing or the results of all processed jobs.

# Defining data sources

The purpose of this page is to configure where Axiom acquires the data used when processing cost models.

**NOTE:** The acquisition of data does not happen until you cost models are processed. For more information, see "Processing cost models" in the online help.

Payroll data is often required to help provide a greater level of detail for costing purposes than is stored in the general ledger. Payroll dollars interface directly to the general ledger, but the amount of detail needed for financial reporting is often at a higher level than that desired for cost accounting purposes. The payroll data is used as a basis or statistic to reclass general ledger accounts into more granular categories.

**To define data sources:**

1. From the Enterprise Decision Support home page, in the **Data control** section, click **Define data sources**.
2. Complete the following:

**NOTE:** In most cases, these settings are configured and any custom imports set up for you by the Syntellis Implementation Consultant. Once they are configured, you will likely not need to change them.

Option	Description
<b>Where will the GL data come from?</b>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>• To use your organization's general ledger data imported into the Axiom actual table, select <b>Summarize from the Axiom actual table</b>.</li> <li>• To use data imported using a custom import, select <b>Use the following custom import</b>, and click <b>Browse</b> . Select the import, and click <b>OK</b>.</li> </ul>
<b>Will you load payroll detail to use for labor distributions?</b>	<p>a. Do one of the following:</p> <ul style="list-style-type: none"> <li>• To use your organization's imported payroll data, click the toggle to <b>Yes</b>. <b>TIP:</b> Using your imported payroll data will allow better distributions based on actuals.</li> <li>• To use the payroll data from your general ledger, click the toggle to <b>No</b>.</li> </ul> <p>b. If you selected Yes above, do one of the following:</p> <ul style="list-style-type: none"> <li>• To use your organization's payroll data imported into the Axiom actual table, select <b>Summarize from the Axiom actual table</b>.</li> <li>• To use data imported using a custom import, select <b>Use the following custom import</b>, and click <b>Browse</b> . Select the import, and click <b>OK</b>.</li> </ul>

Option	Description
How will you compute cost item volumes?	<p><b>NOTE:</b> Volumes include length of stay, labs pulled, etc.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"><li>• To use data from the cost detail table, select <b>Summarize from the Axiom cost detail table</b>.</li><li>• To use data imported using a custom import, select <b>Use the following custom import</b>, and click <b>Browse</b> . Select the import, and click <b>OK</b>.</li></ul>

3. Click **Save**.

# Maintaining dimension data

Dimensions are the key index fields for the tables in the Axiom database. For cost accounting, there are three types of dimensions: core, encounter, and reference. The core dimensions store generic data and options used throughout most Axiom products. The encounter dimensions store information specific to the services provided by your organization. The reference dimensions are specific to cost accounting.

## Working with core dimensions

Core dimensions let you maintain the following core financial data for your organization and used by the Axiom system for the costing process and reporting:

Dimension	Description
<a href="#">Accounts</a>	The records for each account in the general ledger of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and statistics.
<a href="#">Cost categories</a>	The cost category and represents a grouping of accounts in the general ledger used to perform the costing process.
<a href="#">Cost items</a>	The cost object to which costs are allocated during the unit cost calculation processes for all methods.
<a href="#">Departments</a>	The records for each department within an organization.
<a href="#">Entities</a>	The basic information about the entities supported by the Axiom and can determine for some products which entities to include in processing of data.
<a href="#">Job codes</a>	The records for all of the job codes within your organization.
<a href="#">Pay types</a>	The records for all possible categories of compensation that an employee might receive.

### Accounts dimension

This dimension contains records for each account in the general ledger of your organization. This includes accounts that can be found on the balance sheet, income statement, hours, and

statistics. During the cost model set up process, any manual statistic accounts added by a user are automatically added to the core Account dimension as well with a type of Statistic. . For more information, see "Managing manual statistics" in the online help.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system database. For more information, see [Editing dimensions using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Accounts**.

This page can only display up to a maximum of 10,000 records.

### ▶ Filtering records

**To filter records:**

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.

3. Select **Apply**.

### ▶ Adding or editing an account

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

**To add or edit an account**

1. In the table, do any of the following:
  - To add an account, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an account, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows any new accounts in order by the **ACCT** column.

### ▶ Deleting an account

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To delete an account

1. Find the account to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

The account row is removed from the table.

### ▶ Column descriptions

This section provides descriptions for each column in the table.

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

#### Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**ACCT** - The Axiom Software account number. This can be the combination of the prime account and sub account if that is how your general ledger system is set up.

**Description** - The account description from the general ledger.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Other

**NOTE:** Most of the columns in this section are Axiom standard columns and categories used by other Axiom products. These columns cannot be added or edited.

**Credit** - Used during the interface process to reverse the signs so values are stored in a positive condition in the database. Select one of the following valid entries:

- dr
- C
- NA

Normally, revenue and liabilities are C, and all others are dr.

**RptMap** - Used to group accounts. Valid entries include any account numbers in the ACCT column. The system automatically copies the information in the ACCT column to this column during installation.

**Statement** - Used to identify the financial statement category. Select one of the following valid entries:

- NA
- Statistic
- KeyStat
- Hours
- IS

**Type** - Used to identify the major Financial Statement category. Select one of the following valid entries:

- NA
- Statistic
- KeyStat
- Hours
- Revenue
- Deduction
- Expense

**FS Summary** - Used to identify summary-level Financial Statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name. For example, R\_PatientRev or E\_Salaries.

**FS Detail** - Used to identify line-item financial statement categories. For the naming convention, use the first letter of the type category with an underscore and then the category name.

**FS Payor** - A variation of FSDetail used if GL accounts have payor categories; used for Budgeting Deductions models. If this is not used, match to FSDetail. Categories can be added or edited. The default value is a blank.

## Cost categories dimension

This dimension defines the cost category and represents a grouping of accounts in the general ledger used to perform the costing process. The cost category is the lowest level of detail at which costs are calculated for unit costs. They are stored for the calculated variable and fixed amounts.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Cost categories**.

This page can only display up to a maximum of 10,000 records.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a cost category

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To edit a cost category

1. In the table, do any of the following:
  - To add a cost category, select + **Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a cost category, to open cell(s) for changes, select the edit icon  in the **Actions** column.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table will show any new cost categories in order by the **CostCatID** column.

### ▶ Deleting a cost category

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To delete a cost category

1. Find the cost category to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

### Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**CostCatID** - Axiom ID assigned to the cost category.

**Name** - Name of the cost category.

**Description** - Full description of the cost category.

### Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

**ReportGroup** - Grouping of cost categories for reporting purposes.

**ReportDetail** - Detail expense assignment for reporting. This should either be at the FSDetail level or highly correlated. Some FSDetail accounts can be grouped for costing purposes and may not have a corresponding cost category, for example, EX\_Uilities may be grouped into OtherExpenses.

**EHRCostCat** - Cost category used by the EHR Extract. This field is used in grouping cost categories for input into an EHR system.

## Cost items dimension

This dimension defines the cost object to which costs are allocated during the unit cost calculation processes for all methods. It can be a chargeable activity or item, thus the foreign key reference to CDM codes, but it can also be a non-chargeable item. The cost item can also be created during a Direct to Encounter costing process, whereby the encounters can be assigned cost items based on business rules.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Cost items**.

### ▶ Adding or editing a cost item

#### To add or edit a cost item

1. Do one of the following:
  - To add a cost item, select **Add Row**. The new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a cost item, in the **Actions** column for the existing cost item, select the notepad icon  .
2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. After you save, the table will show any new cost items in order by the **Cost item ID column**.

### ▶ Deleting a cost item

#### To delete a cost item

1. In the **Actions** column for the existing cost item, select the trash can icon .
2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**Cost item ID** - Axiom ID associated with the cost item.

**Cost item** - Unique alphanumeric code associated with the cost item.

**Description** - Detailed description for the cost item.

**Department** - Default department for the cost item.

**NOTE:** If a cost item is used across multiple departments, you must set it up for each department.

**CDM code** - Reference to the CDM code potentially associated to the cost item, if not set to the default.

**Revenue code** - UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

**CPT** - CPT code associated with a chargeable cost item in an institutional or professional setting.

**Type** - Client-controlled Type indicator helpful in filtering cost items of particular nature or category. This can be used to indicate different cost treatment in the costing process.

**HCPCS ID** - HCPCS code associated with a chargeable cost item in an institutional or professional setting.

**Create date** - Date the cost item was created.

## Departments dimension

This dimension contains records for each department within an organization. For example, radiology, emergency, finance, and so on. This dimension table is the core dimension table that all department dimension versions are based upon. For more information on how versions work, see "Working with dimension versions" in the online help.

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Departments**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding, editing, or deleting a department

To manage departments in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing dimension versions using a spreadsheet](#).

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

## Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**DEPT** - Axiom Software department number, which is formed by combining the entity and cost center.

**Description** - Department description. The naming convention is entity abbreviation with department description. For example, MHS Operating Room.

**NOTE:** For closed departments, add three asterisks to the beginning of the description. For example, MHS \*\*\* Operating Room. Descriptions should not be in all capital letters.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Other

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

**Entity** - Axiom entity code. The description lookup table is in the ENTITY dimension table. This should be the Business Unit, and match the first three to four characters of the department number.

**CostCenter** - Cost center portion of the department number. You can use this for comparative reporting across entities, such as comparing the cost per unit of all operating rooms across your health system.

**RptMap** - Consolidates departments for reporting.

**VP** - Vice President responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

**Director** - Director responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

**Manager** - Manager responsible for the department. Use the naming convention of FirstName LastName. This information is primarily used for rollup reporting.

**Division** - Division for rollup reporting, which is defined by your organization. You can use this information to consolidate types of departments together for reporting. For example, you can use the word Radiology to combine all radiology departments across all entities.

**KeyStatDesc** - Identifies the description of the primary statistic for each department.

## Entities dimension

This dimension provides basic information about the entities supported by the Axiom and can determine for some products which entities to include in processing of data.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

## ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Entities**.

The page can only display up to a maximum of 10,000 records.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing an entity

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

### To add or edit an entity

1. In the table, do any of the following:
  - To add an entity, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an entity, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** Columns that are grayed out cannot be edited.

- To undo your changes, select the left arrow icon .
  - To redo your changes, select the right arrow icon .
2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
  3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, select the save icon  in the **Actions** column to save them.

4. When you finish making changes, select **Save**. After you save, the table will any new entities in order by the **ENTITY** column.

### ▶ Deleting an entity

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To delete an entity

1. Find the entity to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

### ▶ Column descriptions

This section provides description for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

#### Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**ENTITY** - Primary key for the table using an integer data format.

**Description** - Long entry description for the entity.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

#### Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

**Abbrev** - Standard abbreviation for the entity.

#### Other

**Beds** - Bed size of the entity.

## Job codes dimension

This dimension includes records for all of the job codes within your organization. Each job code represents a job position or role within the organization.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Job codes**.

The page can only show up to a maximum of 10,000 records.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a job code

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To edit a job code

1. In the table, do any of the following:
  - To add a job code, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a job code, to open cell(s) for changes, select the edit icon  in the **Actions** column.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows any new job codes in order by the **JOBCODE** column.

### ▶ Deleting a job code

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To delete a job code

1. Find the job code to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

### ▶ Column descriptions

The following section describes the areas and columns in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

## Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique, and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**JOBCODE** - Axiom Software job code. This entry must be an alphanumeric field so that, during the import process, a J is prepended to all job codes to ensure they are alphanumeric.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters

- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =

**Description** - Job code description from the payroll system.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

**Variable** - Determines whether the job code is a fixed or variable cost.

## Other

**JobClass** - Major job classes of individual job codes. You can use this to apply salary increases for specific groups. Commonly used entries include the following:

- Management
- Physician
- Professional
- Technical
- RN
- LPN
- Assistant
- Support
- Other
- Clerical
- Contract

**GLClass** - Used to identify the GL class each job code is assigned to for budget and reporting salary-mapping purposes. The exception-mapping table is located in the GLPayrollMapping table. If mapping payroll by job code or pay type is not an option, this mapping table allows for special exceptions for payroll mapping.

## Pay types dimension

This dimension includes records for all of the possible categories of compensation that an employee might receive. For example, regular pay, paid time off, sick pay, incentive pay, and so on.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

## ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Core dimensions > Pay types**.

The page can only show up to a maximum of 10,000 records.

## ▶ Filtering records

### To filter records

1. Click the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a pay type

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

### To add or edit a pay type

1. In the table, do any of the following:
  - To add a pay type, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a pay type, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows any new pay types in order by the **PAYTYPE** column.

## ▶ Deleting a pay type

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

### To delete a pay type

1. Find the pay type to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

### Keys

Every table in the database must have at least one key column. Key columns define unique records of data in the table. If a table has one key column, then each value in that key column must be unique and defines a unique record in the table. If a table has multiple key columns, then each combination of values in those key columns defines a unique record in the table.

**PAYTYPE** - Axiom Software pay type. This must be an alphanumeric field, so that during the import process, a P is prepended to all pay types to ensure they are alphanumeric.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \ / < > : ? | \* ' \"
- Begins with + - =

**Description** - Identifies the pay type description from the payroll system. Be as explicit as possible, avoid abbreviations, and use layman's terms.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

### Cost

These columns are specific to the set up and maintenance of Axiom Enterprise Decision Support.

**CostVariable** - Determines whether the pay type is a fixed or variable cost.

## Other

**PaySummary** - Used in reporting to identify major pay categories. Select one of the valid entries:

- Prod
- NonProd
- Other
- Stat
- NA

**PayDetail** - Used in reporting to identify detail pay categories. Select one of the valid entries:

- Contract
- NA
- NonProd
- Other
- Overtime
- Regular
- Stat

**FTE** - Indicates whether to include hours in FTE calculations. Select one of the valid entries:

- To assign to pay types to count for FTE calculations such as Regular, Overtime, Education, PTO, Jury Duty, Bereavement, Sick, and so on, select **Yes**.
- To assign to pay types to not count for FTE calculations such as Differentials, Call Pay (not callback), Bonus, Benefits, and so on, select **No**.
- To assign to your productivity stat pay types, select **Stat**.
- If none of the above scenarios apply, select **NA**.

## Working with encounter dimensions

Encounter dimensions let you maintain the following encounter and transaction-related records and codes:

Dimension	Description
<a href="#">Ages</a>	The ages of the patients during the loaded encounter.
<a href="#">Bill types</a>	The bill types for the primary insurance claim upon final bill drop for the encounter.
<a href="#">Discharge statuses</a>	The discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter.

Dimension	Description
Financial classes	The insurance plans grouped into financial classes for the primary insurance claim.
Insurance plans	The insurance plan of the subscriber or guarantor for the loaded patient encounter.
Locations	The physical locations that have been billed within the organization and is used for monthly reporting and provider-level budgeting.
Patient types	The type of patient for the loaded encounter.
Places of Service codes	The Place of Service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.
Point of Origin codes	The source of the patient admission and/or how the patient was presented to the provider for the loaded encounter.
Providers	The providers within the organization.
Services	The services of the patient during the encounter course of care.
Sexes	The sex of the patient during the loaded encounter.
Stations	The nursing station of a patient when first admitted to a facility as well as the station from which the discharge occurred for the loaded encounter.
Transaction codes	Captures the transaction codes for payments and adjustments stored in the Enc_Payments table for the loaded encounter.

## Ages dimension

This dimension captures the age of the patient during the loaded encounter. The codes and descriptions used here will generally match your organization's source systems and data standards, however, conversions may be warranted to improve analysis and reporting.

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Ages**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using

the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.

### 3. Select **Apply**.

#### ▶ Adding, editing, or deleting an age

To manage ages in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

#### ▶ Column descriptions

This section provides descriptions for each column in the Ages dimension table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**AgeID** - The Axiom ID associated with the age.

**Age** - A five-character string value entered as an abbreviation. Examples include the following:

- N for newborn, delivered on-premise
- 3\_H, for a newborn delivered and admitted
- 1\_D for one day old
- 4\_M for a four month old
- 25 for a twenty five year old

## Bill types dimension

This dimension captures the bill type for the primary insurance claim upon final bill drop for the encounter. Codes and descriptions will generally match your organization's source systems and data standards. Bill types may also comply with regulatory requirements in some cases, for example, CMS Medicare claims.

#### ▶ Accessing the Bill Type dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Bill types**.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding, editing, or deleting a bill type

To add, edit, or delete bill types in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

**BillTypeID** - Axiom ID associated with the bill type.

**BillType** - Bill type code that represents the primary insurance claim for the encounter. This must be an alphanumeric field.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =.

**Description** - Description of the bill type.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Discharge statuses dimension

This dimension captures the discharge disposition of a patient admission and/or how the patient left the provider facility for the loaded encounter. Codes and descriptions generally match your organization's source systems and data standards. Discharge status codes and descriptions may also comply with regulatory requirements in some cases, for example, CMS Medicare claim.

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Discharge statuses**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding, editing, and deleting a discharge status

To manage discharge statuses in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

### ▶ Column descriptions

This section provides descriptions for each column in the Discharge Status dimension table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**DischargeStatusID** - Axiom ID associated with the discharge status.

**DischargeStatus** - Code used to identify the discharge disposition status of a patient. This must be an alphanumeric field.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =.

**Description** - Description for the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Financial classes dimension

This dimension groups insurance plans into financial classes for the primary insurance claim. Codes and descriptions will generally match your organization's source systems and data standards. This dimension is shared with other Axiom Healthcare solutions.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Financial classes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a financial class

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To add or edit financial classes

1. In the table, do any of the following:

- To add a financial class, select + **Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a financial class, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** Columns that are grayed out cannot be edited.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, select the save icon  in the **Actions** column to save them.
4. When you finish making changes, select **Save**. After you save, the table shows any new financial classes in order by the **FinClass** column.

#### ▶ Deleting a financial class

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

##### To delete a financial class

1. Find the financial class to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

#### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**FinClass** - Financial class code. This must be an alpha code so that an F is prefixed during the import process.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters

- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =

**Description** - The description for the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Insurance plans dimension

This dimension captures the insurance plan of the subscriber or guarantor for the loaded patient encounter. Codes and descriptions will generally match your organization's source systems and data standards. This table also includes insurance plans grouped into payors and financial classes.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Insurance plans**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing an insurance plan

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To add or edit an insurance plan code

1. In the table, do one of the following:

- To add an insurance plan, select + **Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an insurance plan, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table will sort any new financial classes in order by the **INSPALNID** column.

#### ▶ Deleting an insurance plan

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

##### To delete an insurance plan

1. Find the insurance plan to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

#### ▶ Column descriptions

This section provides descriptions for each column in the Insurance Plans dimension table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**INSPALNID** - Axiom ID associated with the insurance plan.

**INSPLAN** - Code used to for the insurance plan.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters

- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =

**Description** - Long name of the insurance plan.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**ENTITY** - Entity associated with the insurance plan.

**FinClass** - Financial class code.

**Payor** - Code associated with the insurance plan payor.

**PlanCode** - Plan associated with the insurance plan code.

## Locations dimension

This dimension stores all of the physical locations that have been billed within the organization, and is used for monthly reporting and provider-level budgeting.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Locations**.

### ▶ Filtering records

**To filter records**

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a location

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

### To add or edit a location

1. In the table, do any of the following:

- To add a location, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a location, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows the new row in order by the **LOCATION** column.

## ▶ Deleting a location

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

### To delete a location

1. Find the location to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**LOCATION** - Code used to represent the location. This must be an alpha code, so an L is prefixed during the import process. Default should be used as the Location code if this dimension is not being used.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =

**Description** - Describes the location associated with the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**LocationEntity** - Entity location code used to identify the physical location of the department (entity).

**TIP:** The entity location code is different from the entity code, which is associated with a financial department. For example, departments on a hospital campus may have different entity codes but share the same entity location code because they reside in the same physical area.

## Patient types dimension

This dimension is used to capture the type of patient for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Patient types**.

### ▶ Filtering records

**To filter records**

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to show by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter

statements, you can enter the statement syntax directly in the Filter box.

### 3. Select **Apply**.

#### ▶ Adding or editing a patient type

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

##### To add or edit a patient type

#### 1. In the table, do any of the following:

- To add a patient type, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a patient type, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

#### 2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.

#### 3. To cancel the changes made, select the cancel icon in the **Actions** column. Otherwise, to save them, select the save icon in the **Actions** column.

#### 4. When you finish making changes, select **Save**. After you save, the table will show the new row in order by the **PTTYPEID** column.

#### ▶ Deleting a patient type

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

##### To delete a patient type

1. Find the patient type to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

#### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**PTTYPEID** - Axiom ID associated with the patient type.

**PtType** - Most detailed patient type referenced in the encounter data.

**Description** - Description of the patient type.

**P1Type** - Inpatient and Outpatient high-level patient type for summary reporting.

**P2Type** - Inpatient and Outpatient as well as some other higher types of patients for reporting.

**EDSPtType** - Identifying all patient types into four categories - IP, OP, PB, NA.

## Places of Service codes dimension

This dimension stores the Place of Service (POS) codes, which are standard industry accepted codes that indicate where the services were rendered.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Places of Services codes**.

### ▶ Filtering records

**To filter records**

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a Place of Service code

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

### To add or edit a Place of Service code

1. Review and/or make selections for the following columns:

- To add a code, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a code, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows the new row in order by the **PlaceOfServiceID** column.

## ▶ Deleting a Place of Service code

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

### To delete a Place of Service code

1. Find the place of service to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**PlaceOfServiceID** - Axiom ID associated with the place of service.

**PlaceOfService** - Code used to indicate where the service was rendered.

**Description** - Long form description of where the service took place.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Point of Origin codes dimension

This dimension is used to capture the source of the patient admission and/or how the patient was presented to the provider for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards. Point of Origin codes and descriptions may also comply with regulatory requirements in some cases, for example, CMS Medicare claims.

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Point of Origin codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding, editing, or deleting a Point of Origin code

To manage Point of Origin codes in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**PointOfOriginID** - Axiom ID associated with the patient admission source.

**PointOfOrigin** - Code for the source of the patient admission.

**Description** - Description or name of the source location.

## Providers dimension

This dimension is used to store all of the providers within the organization that provide patient care.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Providers**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a provider

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To add or edit a provider

1. In the table, do any of the following:

- To add an account, select + **Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a provider, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows the new row in order by the **Provider** column.

#### ▶ Deleting a provider

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

##### To delete a provider

1. Find the insurance plan to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

#### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**Provider** - Provider ID used in Axiom Budgeting and Performance Reporting. Must be an alpha code, so a D is prefixed during the import process.

**Description** - Identifies the provider description to use for budgeting and reporting.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**Identity** - Additional identification number assigned to the provider, such as an employee ID.

**CostProvider** - Provider to be costed under, such as nurse practitioners who perform their services under a doctor (the provider).

**MedicalGroup** - Practice or medical group name in which the provider offers their services.

**First\_Name** - First name of the provider.

**Last\_Name** - Last name of the provider.

**Middle\_Name** - Middle name of the provider.

**NPI** - National Provider ID assigned to the provider.

**Type** - Used for reporting to define the provider type such as MD, NP, PA, and so on.

**HomeDeptNo** - Provider's home department number.

**Specialty** - Used for reporting to define the type of specialty.

**EMPIId** - Employee ID used to match billing data to payroll.

**Active** - Determines if the provider is active. Valid entries include the following:

- Yes
- No

## Services dimension

This dimension is used to capture the services of the patient during the encounter course of care. The codes and descriptions here may match your organization's source systems and data standards, but they can also be created to meet specific analysis and reporting needs.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

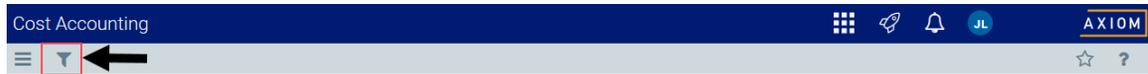
### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Services**.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to show by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a service

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

### To add or edit a service

1. In the table, do any of the following:
  - To add a service, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a service, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows the new row in order by the **ServicesID** column.

## ▶ Deleting a service

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

### To delete a service

1. Find the service to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**ServiceID** - Axiom ID associated with the service.

**Services** - Code the represents the service for the patient.

The system will not let you save the table if an entry includes one or more of the following:

- More than the maximum allowed characters
- Contains one of these characters: \\ / < > : ? | \* ' \"
- Begins with + - =

**Description** - Description for the service.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**DSSPtType** - Patient type used to determine how those patients should display in reports. Valid options include the following:

- IP
- OP
- PB (Professionally Billed Encounters)
- NA

## Sexes dimension

This dimension captures the sex of the patient during the loaded encounter. The codes and descriptions will generally match your organization's source systems and data standards.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Sexes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding a sex code

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To add a sex code

1. In the table, do any of the following:
  - To add a sex, select **+ Add Row**. The new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table shows the new row in order by the **SexID** column.

### ▶ Deleting a sex code

Due to the large number of records that this table can contain, you might need to use the Filter function described above to find the desired records.

#### To delete a sex code

1. Find the insurance plan to be deleted, and select the delete icon  in the **Actions** column.
2. At the **Confirm Delete** prompt, select **OK**.
3. When you finish making changes, select **Save**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**SexID** - Axiom ID associated with the sex of the patient.

**SEX** - Code for the sex of the patient.

## Stations dimension

This dimension captures the nursing station of a patient when first admitted to a facility, as well as the station from which the discharge occurred for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards.

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Encounter dimensions > Stations**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.

### 3. Select **Apply**.

#### ▶ Adding, editing, or deleting a station

To manage stations in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

#### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**StationID** - Axiom ID associated with the nursing station.

**Station** - Code assigned to the nursing station.

**Description** - Description for the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Transaction codes dimension

This dimension captures the transaction codes for payments and adjustments stored in the Enc\_Payments table for the loaded encounter. Codes and descriptions will generally match your organization's source systems and data standards. You can also use this table to group transaction codes into transaction types.

#### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, Select **Maintain data > Encounter dimensions > Transaction codes**.

#### ▶ Filtering records

To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

▶ Adding, editing, or deleting a transaction code

To manage transaction codes in this dimension, you must download the table to make your changes, and then upload the table to load the changes into the Axiom database. For instructions, see [Editing a dimension using a spreadsheet](#).

▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**TransactionCodeID** - Axiom ID associated with the transaction code.

**TransactionCode** - Financial class code. This must be an alpha code so that an F is prefixed during the import process.

**Description** - Description for the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**LongDescription** - Longer description or comments about the transaction code.

**TransactionType** - Type of transaction code. Lets you group individual transaction codes into types.

## Working with reference dimensions

Reference dimensions let you maintain the following cost-related data for processing costs:

Dimension	Description
<a href="#">APR DRGs</a>	The APR DRGs for your organization, which are commonly implemented as part of the coding and billing process.

Dimension	Description
CDM codes	The charge codes within an organization used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.
CPT codes	The CPT codes that have been billed within the organization.
HCPCS codes	The HCPCS codes used within your organization as level 3 CPT codes that provide further detail as to the services, procedures, or supplies that were used in the course of care.
ICD diagnosis codes	The International Classification of Diseases (ICD) diagnosis information, which is referred to by a number of tables in the system.
ICD procedure codes	The clinical procedures performed for the patient in the course of care for the encounter being loaded.
MDC codes	The Major Diagnostic Categories (MDC) are universally defined and apply to DRGs, MDC values, and descriptions, which will generally match your organization's source systems and data standards.
Modifiers	The additional standard codes used to further identify services or supplies used in the course of patient care.
MS DRGs	The MS DRGs for hospital acute care providers, which generally match industry standards or your organization's source systems and data standards.
Reporting DRGs	A combination or determination of the primary DRGs used for reporting purposes.
Revenue codes	The revenue codes used by your organization.

## CDM codes dimension

This dimension includes the charge codes within an organization. The charge codes are used to track gross revenue and statistics at an inpatient (IP) and outpatient (OP) level.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

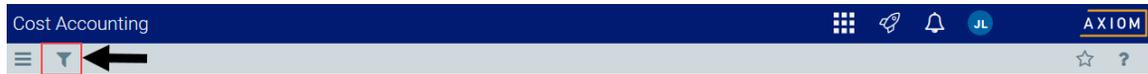
### ► Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > CDM codes**.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a CDM code

### To add or edit a CDM code

1. Do one of the following:
  - To add a CDM code, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a CDM code, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. Any new records will appear in the table in order by the **CDM code** column.

## ▶ Deleting a CDM code

### To delete a CDM code

1. In the **Actions** column for the existing CDM code, select the trash can icon .
2. At the confirmation prompt, select **OK**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**CDM code** - Charge codes used within your organization. This must be an alphanumeric field so that during the import process, a C is appended to all CDM codes to ensure they are alphanumeric.

**Description** - Identifies the CDM code description. Try to be as explicit as possible, avoid abbreviations, and use layman's terms.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## CPT codes dimension

This dimension contains the CPT codes that have been billed within the organization.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > CPT codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a CPT code

#### To add or edit a CPT code

1. Do one of the following:
  - To add a CPT code, select **Add Row**. The new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a CPT code, in the **Actions** column, select the notepad icon .
2. Complete the columns by referring to the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. Any new records will appear in the table in order by the **CPT** column.

### ▶ Deleting a CPT code

**To delete a CPT code:**

1. In the **Actions** column for the existing CPT code, select the trash can icon .
2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**CPT** - CPT code. This must be an alpha code, so a C is prefixed during the import process.

**Description** - CPT description used for budgeting and reporting.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## DRGs

### APR DRGs dimension

This dimension manages the APR DRGs for your organization, which are commonly implemented as part of the coding and billing process. These values will generally match industry standards or your organization's source systems and data standards.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

## ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > DRGs > APR DRGs**.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing an APR DRG

### To add or edit an APR DRG

1. Do one of the following:
  - To add an APR DRG, select **Add Row**. The new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an APR DRG, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **APR DRG ID** column.

## ▶ Deleting an APR DRG

### To delete an APR DRG

1. In the **Actions** column for the existing APR DRG, click the trash can icon .
2. At the confirmation prompt, click **OK**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. Contact your Syntellis Implementation Consultant or Syntellis Support if you need help with these columns.

**APR DRG ID** - Axiom ID assigned to the APR DRG.

**APRDRG** - Value for the All Patient Refined DRG.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

**Service line** - APR service line. These are not the Axiom Enterprise Decision Support service lines.

**Description** - Description for the APR DRG.

**Effective From date** - Date the APR DRG became effective.

**Effective To date** - Date the APR DRG is effective to.

### MDC codes dimension

This dimension places a DRG into a higher level category. Major Diagnostic Categories (MDC) are universally defined and apply to DRGs, MDC values, and descriptions, which will generally match your organization's source systems and data standards.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > DRGs > MDC codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.

### 3. Select **Apply**.

#### ▶ Adding or editing an MDC code

##### To add or edit an MDC code

1. Do one of the following:
  - To add an MDC code, select **Add Row**. The new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an MDC code, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **MDC ID** column.

#### ▶ Deleting an MDC code

##### To delete an MDC code

1. In the **Actions** column for the existing MDC code, select the trash can icon .
2. At the confirmation prompt, select **OK**.

#### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**MDC ID** - Axiom ID assigned to the MDC code.

**MDC** - Code for the MDC.

**Description** - Description of MDC to be used for reporting purposes. You can enter up to 50 characters in this field.

**Long description** - Longer description or comments about the code.

**Report description** - Enter a description to be used for reporting.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## MS DRGs dimension

This dimension manages the MS DRGs for hospital acute care providers. Codes and descriptions will generally match industry standards or your organization's source systems and data standards.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > DRGs > MS DRGs**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing an MS DRG

#### To add or edit an MS DRG

1. Do one of the following:
  - To add an MS DRG, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an MS DRG, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.

3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **MSDRG ID** column.

### ▶ Deleting an MS DRG

#### To delete an MS DRG

1. In the **Actions** column for the existing MS DRG, select the trash can icon .
2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**MSDRG ID** - Axiom ID assigned to the MS DRG.

**MSDRG** - Value for the MS DRG.

**Description** - Description for the value.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

### Reporting DRGs dimension

This dimension combines or determines the primary DRGs used for reporting purposes. In some cases, multiple DRGs may be assigned to an inpatient or in others only certain DRGs may be assigned, for example, MS DRGs are assigned to Medicare encounters and APR DRGs are assigned to Medicaid encounters. This reference table lets you combine or determine which DRG to use within a single reference table. These values will generally match one of the DRG reference values.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

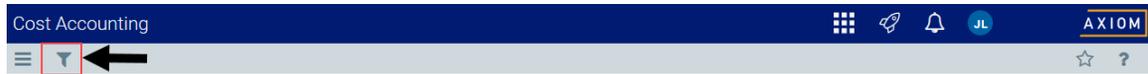
### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > DRGs > Reporting DRGs**.

## ▶ Filtering records

### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing a reporting DRG

### To add or edit a reporting DRG

1. Do one of the following:
  - To add a reporting DRG, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a reporting DRG, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **Reporting DRG ID** column.

## ▶ Deleting a reporting DRG

### To delete a reporting DRG

1. In the **Actions** column for the existing reporting DRG, select the trash can icon  .
2. At the confirmation prompt, select **OK**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**Reporting DRG ID** - Axiom ID assigned to the reporting DRG.

**Reporting DRG** - Value for the reporting DRG.

**Description** - Description for the reporting DRG.

## HCPCS codes dimension

This dimension includes the HCPCS codes used within your organization as level 3 CPT codes that provide further detail as to the services, procedures, or supplies that were used in the course of care.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > HCPCS codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing an HCPCS code

#### To add or edit an HCPCS code

1. Do one of the following:
  - To add an HCPCS code, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an HCPCS code, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
  3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **HCPCS ID** column.

### ▶ Deleting an HCPCS code

#### To delete an HCPCS code

1. In the **Actions** column for the existing HCPCS code, select the trash can icon  .
2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**HCPCS ID** - Axiom ID assigned to the HCPCS code.

**HCPCS** - HCPCS code, which can be unique to states, payors, and so on.

**Description** - Long form description of the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## ICDs

### ICD diagnosis codes dimension

This dimension includes the International Classification of Diseases (ICD) diagnosis information, which is referred to by a number of tables in the system. This information is used primarily used with cost detail, which may refer to up to five standard ICDDIAG fields and more if needed in COSTDETAIL.Custom.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

## ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > ICDs > ICD diagnosis codes**.

## ▶ Filtering records

### To filter records

1. Click the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the **Filter Wizard**. To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing an ICD diagnosis code

### To add or edit an ICD diagnosis code

1. Do one of the following:
  - To add an ICD diagnosis code, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an ICD diagnosis code, in the **Actions** column, select the notepad icon  .
2. Complete the columns by referring to the following "Column descriptions" section.
3. When you finish making changes, select **Save**. Any new records appear in the table in order by an **ICD Diagnosis ID** column.

## ▶ Deleting an ICD diagnosis code

### To delete an ICD diagnosis code

1. In the **Actions** column for the existing ICD diagnosis code, select the trash can icon  .
2. At the confirmation prompt, select **OK**.

## ▶ Column descriptions

This section provides descriptions for each column in the ICD Diagnosis Codes dimension table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**ICD Diagnosis ID** - Axiom ID assigned to the code.

**ICDDIAG** - Code for the ICD diagnosis identification.

**Description** - Description for the code (20-character limit).

**Report description** - Description to be used for reporting purposes.

### ICD procedure codes dimension

This dimension captures the clinical procedures performed for the patient in the course of care for the encounter being loaded. These procedures are referenced by the Encounter and Enc\_Proc tables.

**NOTE:** These procedure codes are specific to the International Classification of Diseases (ICD) procedure codes, and do not include CPT or HPCPS procedure codes.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > ICDs > ICD procedure codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to appear by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

## ▶ Adding or editing an ICD procedure code

### To add or edit an ICD procedure code

#### 1. Do one of the following:

- To add an ICD procedure code, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit an ICD procedure code, in the **Actions** column, select the notepad icon .

#### 2. Complete the columns by referring to the following "Column descriptions" section.

#### 3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **ICD Procedure ID** column.

## ▶ Deleting an ICD procedure code

### To delete an ICD procedure code

1. In the **Actions** column for the existing ICD procedure code, select the trash can icon .
2. At the confirmation prompt, select **OK**.

## ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**ICD Procedure ID** - Axiom ID assigned to the code.

**ICDProc** - Code used for the ICD procedure.

**Description** - Long entry description for the code.

**Report description** - Description to be used for reporting purposes.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Modifiers dimension

This dimension includes the additional standard codes used to further identify services or supplies used in the course of patient care. This includes modifying the CPT or the HCPCS. For example, a procedure done multiple times, will have a modifier of 51. This may mean that there is a discount in reimbursement, but also perhaps a reduction in the cost of the item.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > Modifiers**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to display by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a modifier

Due to the large number of records that this table can contain, you might need to use the Filter function previously described to find the desired records.

#### To add or edit a modifier

1. Do one of the following:
  - To add a modifier, select **+ Add Row**. A new row appears at the top of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a modifier, select the edit icon  in the **Actions** column to open cell(s) for changes.

**NOTE:** You cannot edit columns that are grayed out.

2. Complete the columns, as needed. A description of each column is located in the following "Column descriptions" section.
3. To cancel the changes made, select the cancel icon  in the **Actions** column. Otherwise, to save them, select the save icon  in the **Actions** column.
4. When you finish making changes, select **Save**. After you save, the table will sort any new financial classes in order by the **INSPALNID** column.

### ▶ Deleting a modifier

#### To delete a modifier

1. In the **Actions** column for the existing modifier, select the trash can icon .
2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in table:

**NOTE:** The table may show some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**MODIFIERID** - Axiom ID assigned to the modifier.

**MODIFIER** - Additional status codes used to identify services and supplies.

**Description** - Long form description of the code.

**TIP:** To help make reports more readable, we recommend that you do not use all capital letters in the description content.

## Revenue codes dimension

This dimension includes the revenue codes used by your organization.

**TIP:** You can manage your dimension tables by downloading them in spreadsheet form so that you can make larger changes more easily. You can then upload the spreadsheet with the changes back into the system. For more information, see [Editing a dimension using a spreadsheet](#).

### ▶ Accessing the dimension

From the Enterprise Decision Support home page, in the **Data control** section, select **Maintain data > Reference dimensions > Revenue codes**.

### ▶ Filtering records

#### To filter records

1. Select the funnel  icon in the upper left corner of the page.



2. In the **Filter** box, you can narrow down the records to show by selecting or creating a filter using the [Filter Wizard](#). To access the Filter Wizard, select  **Edit**. If you are familiar with writing filter statements, you can enter the statement syntax directly in the Filter box.
3. Select **Apply**.

### ▶ Adding or editing a revenue code

#### To add or edit a revenue code

1. Do one of the following:
  - To add a revenue code, select **Add Row**. A new row appears at the bottom of the table.

**IMPORTANT:** If you add a new record that already exists in the table, the system will overwrite the original column values with your new entries when you save your changes. We recommend that you review your entries before saving any changes.

- To edit a revenue code, in the **Actions** column, select the notepad icon .
2. Complete the columns by referring to the following "Column descriptions" section.
3. When you finish making changes, select **Save**. Any new records appear in the table in order by the **Revenue code ID** column.

### ▶ Deleting a revenue code

#### To delete a revenue code

1. In the **Actions** column for the existing revenue code, select the trash can icon .

2. At the confirmation prompt, select **OK**.

### ▶ Column descriptions

This section provides descriptions for each column in the table:

**NOTE:** The table may display some columns that are related to other Syntellis products, or have been created specifically for your organization. If you need help with these columns, contact your Syntellis Implementation Consultant or Syntellis Support.

**Revenue code ID** - Axiom ID assigned to the revenue code.

**Description** - Description for the code.

**REVCODE** - UB revenue code associated with a chargeable cost item in an institutional setting where UB billing is supported.

**EHR cost group** - Cost group set up in your organization's EHR system, which may or may not match the Axiom cost categories. This field is used in grouping cost categories after data is imported into the EHR system.

## Editing dimensions using a spreadsheet

You can edit dimension values with a spreadsheet instead of using the web page user interface. The dimension data that you can download as an Excel file includes all of the data that is currently available in the dimension editor on the web.

Deleting dimensions in the downloaded spreadsheet does not remove the dimension from the system. In fact, if you have a large amount of data in the spreadsheet and to help improve performance, we recommend that you remove all the unchanged rows from the downloaded file before uploading.

Pay special attention to the following before using this feature:

- DO NOT rename the file name or the worksheets in this file.
- DO NOT add columns, change column names, or change sheet tab names.
- Ensure that there are no duplicate records.
- General formatting is applied to all numbers downloaded in the spreadsheet that you will need to correct before uploading. For instructions, see [Spreadsheet formatting](#).
- All required columns must be completed for each record before uploading.
- Use caution when entering data into the spreadsheet. Neither the spreadsheet nor the system validates the data upon upload.

- Deleting records in the spreadsheet does not remove them from the system.

**TIP:** If you have a large amount of data in the spreadsheet and to help improve performance, we recommend that you remove all the unchanged rows from the downloaded file before uploading.

- If the spreadsheet includes a lot of data, it may take several minutes for the upload to complete before the system shows a confirmation message.

#### To edit dimensions using a spreadsheet

1. [Open a dimension](#), and on the upper right-hand side of the page, do one of the following:
  - To add or edit records to an existing dimension table, select **Download table**.
  - To add records by starting with an empty spreadsheet template, select **Download template**.
2. Open the spreadsheet, or save the spreadsheet to a location first, and then open it.
3. Add a new dimension by adding a row, or edit the column information for an existing dimension. If adding new dimension rows, see [Spreadsheet formatting](#).
4. After making your changes, save the spreadsheet.
5. In the dimension editor page for the spreadsheet to upload, select **Upload table**.
6. The **Review uploaded table changes** prompt displays information regarding the number of changes made, and the number of rows updated and/or added. Select **OK**.
7. The system displays the row(s) where changes occurred and/or new rows added in the **Confirm Uploaded Data** page. Do one of the following:
  - If the information is correct and you are ready to commit the changes to the system database, select **Confirm Upload**.

**IMPORTANT:** This action will save ALL of the CHANGED dimension rows that you upload, not just the rows that display within the web editor confirmation page. For example, if you upload 20,000 rows of changes and set the filter (while in confirm mode) to the max 10,000 records, you will only be viewing half of the changes that will be saved on Confirm.

- To correct the spreadsheet and/or make further changes, select **Cancel Upload**. Repeat the upload process starting with step 4.
8. At the confirmation prompt, select **OK**.

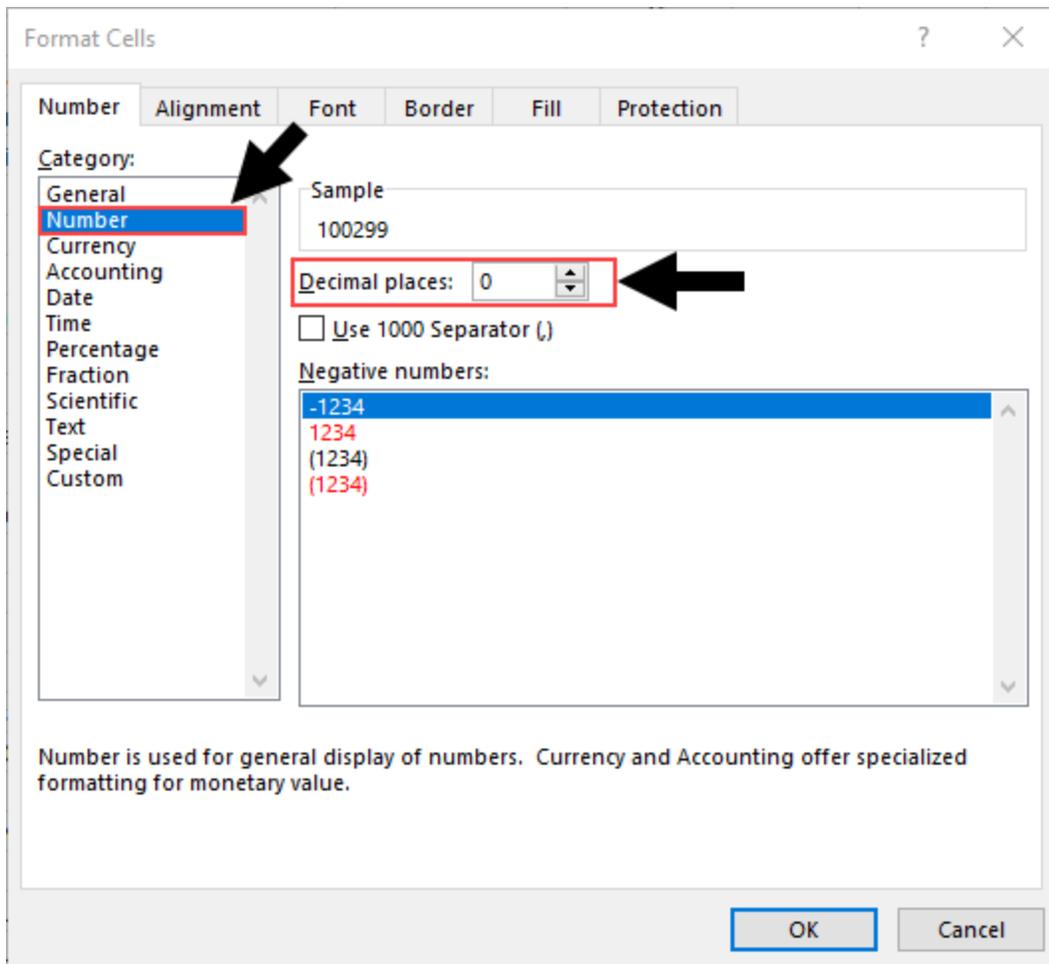
► Spreadsheet formatting

When downloading the dimensions values, they may appear in the spreadsheet with General formatting. This is indicated by the green tick mark in the left corner in some cells—specifically number-based cells.

	A	B	C	D	E
1	ENTITY	Description	Abbrev	Costing	Beds
2	0	Unassigned/Not Applicable	NA	0	0
3	1			1	0
4	4			0	0
5	9			1	0
6	1000			1	0
7	1100			0	0
8	1200			0	0
9	2000			1	0
10	2100			0	0

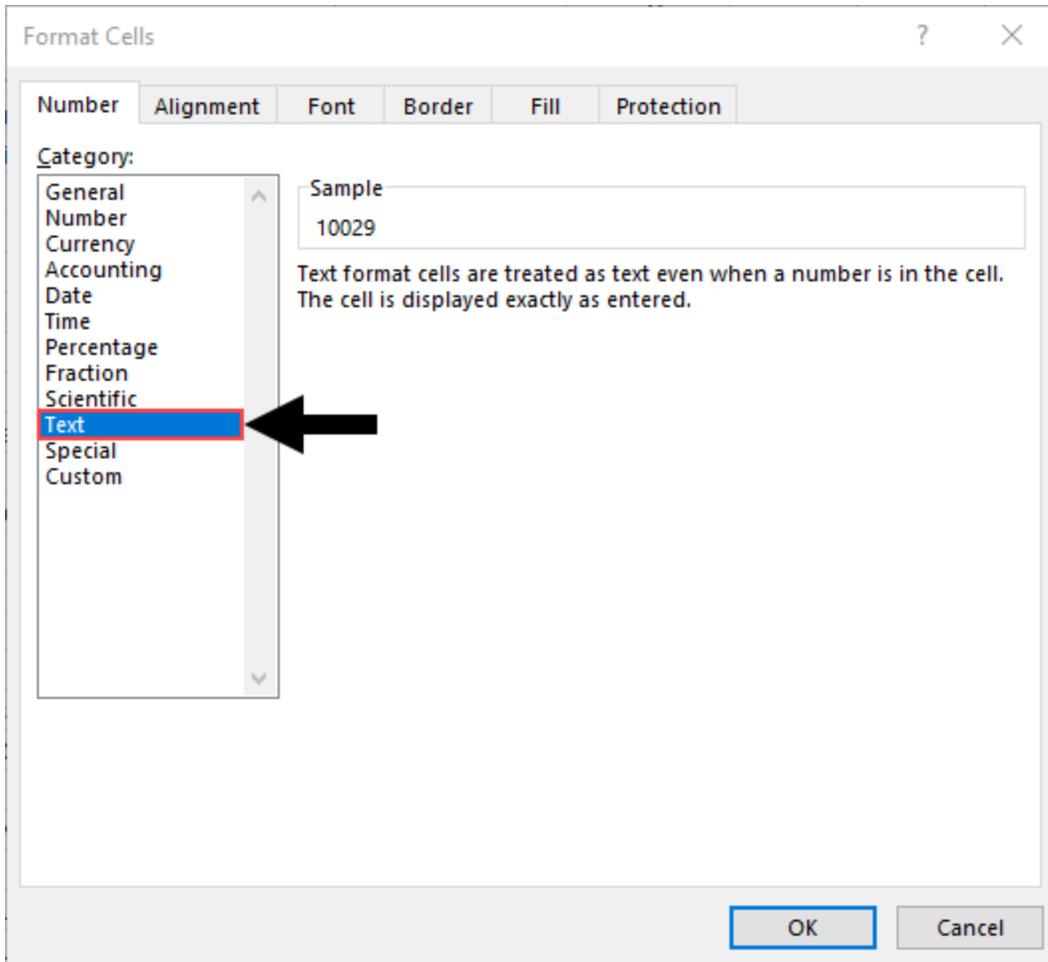
Large numbers

If you add new dimension rows that include large numbers, reformat them so they properly add to the database on return to the system by changing the number formatting to **Number** and the **Decimal places** field to zero.

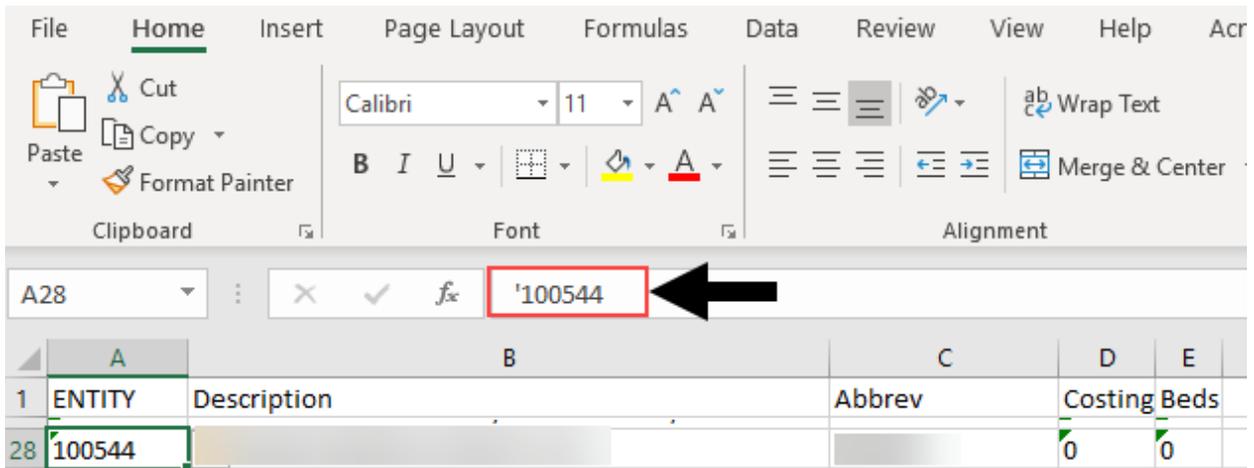


Leading zeroes

For numbers that include leading zeroes, change the formatting to Text.



You can also simply add a single quote in front of the zero (this quote mark is not included in the data when it is uploaded).



## Formulas

You can include formulas in the spreadsheet, and the system will only import the results into the database.

# Working with service lines

The Service Line Schemas utility allows you to create, manage, and process the tagging of encounters with service lines for reporting purposes quickly and easily. You can create up to eight schemas with an unlimited number of service line definitions. Definitions allow you to specify which encounters to evaluate and tag.

#	Name	Description	Type	No. of Servic...	Active
1 ★	PHC	PHC	Axiom	1	✓

When configuring a schema, you can also create an unlimited number of groups that give you the flexibility to organize encounters in different ways. Let's say your organization has a Center of Excellence. You can create a group for this and add values that addresses each center, such as Neurosciences, Cardiology, Cancer, etc. You can then create reports using these different groups.

**TIP:** This feature is optional, but if you plan on using groups, we recommend that you plan out your groups first, and then apply them starting with the first schema you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.

**Configure Schema** [?] [X]

Summary **Groups**

**Group 1**

Group 2

Group 3

Group 4

Group 5

Group 6

Group 7

Group 8

Group 9

Group 10

+ Add Group

**Group 1 Name:**

Center of Excellence

**Group 1 Values:**

Name	Service Lines
Neurosciences	1
Heart Center	0
Neonatology	0
Cancer	1
Other	0

+ Add Values

**Save** **Cancel**

When you process a schema, the Axiom system evaluates each encounter against the definition criteria in an order that you define. When an encounter meets the criteria, the system removes it from further evaluation and tags it in the Axiom database with the service line so that it is not counted more than once.

## Managing service line schemas

The Service Line Schemas utility allows you to configure, manage, and process up to eight schemas. For each schema, you can add, clone, edit, delete, and order definitions.

For details on how the Service Line Schema utility works, see [Working with service lines](#).

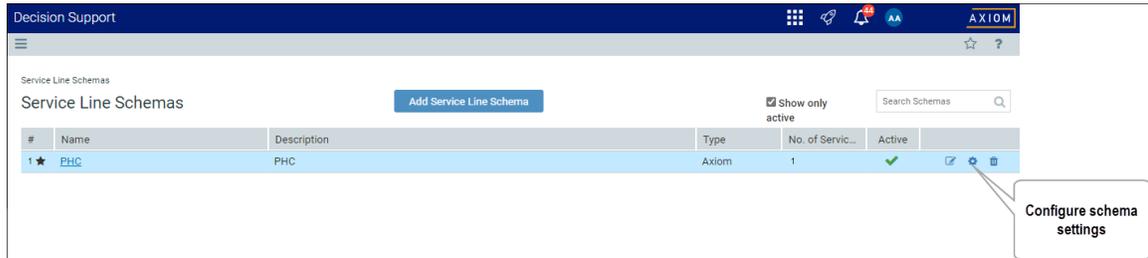
### ▶ Accessing service line schemas

From the Enterprise Decision Support home page, in the **Data enhancement & refinement** section, click **Define service lines**.

► Adding or editing a service line schema configuration

To add or edit a service line schema configuration:

1. Do one of the following:
  - To add a schema, click **Add Service Line Schema** at the top of the page.
  - To edit the configuration of a schema, click the schema to highlight it, and click the cog wheel icon.



2. In the **Configure Schema** dialog, complete the following fields in the **Summary** tab:

**NOTE:** If your organization imports schemas from outside the Axiom system, some of the options in this dialog may not be available.

Option	Description
<b>Name</b>	Type a name for the schema.  <b>IMPORTANT:</b> If service lines are imported, any name changes will also need to be made to the import map so that the data correctly loads the next time it is loaded into the system. For more information, see <a href="#">Implementing service lines</a> .
<b>Description</b>	Type a description of the schema.
<b>Type</b>	Do one of the following: <ul style="list-style-type: none"> <li>• If you are importing the schema, click <b>Client Imported</b>. For more information, see <a href="#">Implementing service lines</a>.</li> <li>• To set up, manage, and process the schemas and service line definitions in Axiom, click <b>Axiom</b>.</li> </ul>

Option	Description
<b>Active</b>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>To include the schema when processing schemas, click the toggle to <b>On</b>.</li> <li>To exclude the schema when processing schemas, click the toggle to <b>Off</b>.</li> </ul> <p><b>IMPORTANT:</b> If you exclude the schema from processing, the data related to this schema will not be available in Axiom Intelligence reporting.</p>
<b>Schema #</b>	<p>Select the available number to assign the schema.</p> <p><b>NOTE:</b> The drop-down list defaults to the next available number, but you can select any available number in the list. The number does not correspond to any kind of processing order. The system only allows up to eight schemas, so if all the available slots are full, the number will be grayed out.</p>
<b>Mark as Primary Reporting Schema</b>	<p>Click the check box to identify this as the main reporting schema used for Axiom Intelligence reports.</p> <p><b>NOTE:</b> You can point any Axiom Intelligence report to any of schema listed in Axiom Enterprise Decision Support. However, using this check box provides a quick and easy way to switch schemas without having to manually configure it in Axiom Intelligence.</p> <p><b>TIP:</b> On the Service Line Schema home page, a star icon in the # column identifies the primary reporting schema.</p>

3. In the **Groups** tab, do the following:

**TIP:** This feature is optional, but if you plan on using groups, we recommend that you plan your groups first, and then apply them starting with the first schema and corresponding service lines definitions you create. Otherwise, if you wait until your schema creation process is complete, you will need to revisit each schema and service line definition to add the groups.

- a. To add one or more groups, click + **Add Group**. You can add up to 10 groups.
- b. In the **Group Name** field, type a name for the group. Do not use spaces or special characters (such as hyphens, periods, brackets, etc).
- c. In the **Group Values** section, to add one or more values, click + **Add Values**.
- d. In the **Name** column, type a name of the value.
- e. To delete a value, if needed, click the trash can icon next to the value.

4. After making additions or edits, click **Save**.

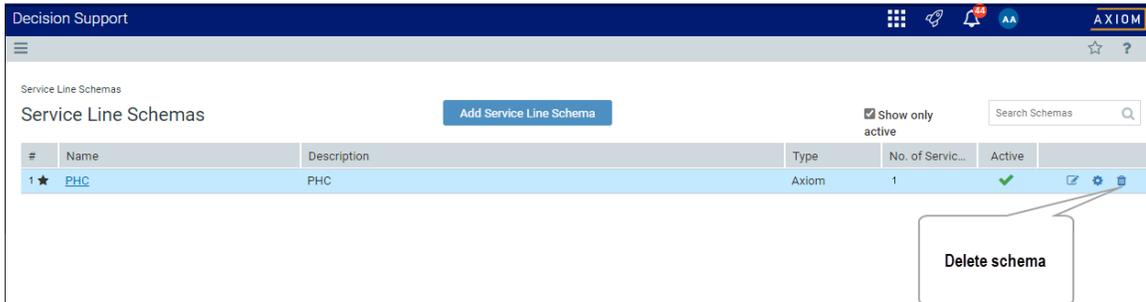
5. Add or edit service line definitions.
6. Process the schemas.

▶ Deleting a service line schema

**IMPORTANT:** Deleting a schema deletes all associated service line definitions and groups as well as current and historical data. This action cannot be undone.

**To delete a service line schema:**

1. Click the schema to highlight it, and click the trash can icon.



2. Review the warning prompt.
3. To continue with the deletion process, click **OK**.

## Implementing service lines

Before you begin setting up service lines, you need to decide how you want to add, manage, and process them. You can choose one of the following options:

- **Axiom rule-based service lines** - You add, manage, and process schemas and definitions all within Axiom, which runs each encounter through a series of filters to determine what encounters to assign to a service line. You can create up to eight service line schemas that include an unlimited number of service line definitions. You order the definitions the way you want the system to evaluate each encounter. Each night, the system automatically processes and tags each encounter using a job in Axiom Scheduler. You can also activate or deactivate definitions, as needed. For example, let's say you want to add a new service line at the beginning of the fiscal year. You can add the new service line definition at any time but keep it inactive until you are ready to use it.
- **Client imported service lines** - If your organization uses a third-party application to define service lines—such as Sg2, Truven Health Analytics, or even your own host system—you can import them directly into Axiom without needing to create an entire set of service line rules from scratch. This allows you to continue managing and processing service lines outside the Axiom system, and simply import them with the help of a job in Axiom Scheduler.

**NOTE:** Once you choose a method on how to manage and process schemas, you should continue to use that method. Do not mix methods.

### ► Importing third-party service lines

This section walks you through the best practice for importing third-party service lines into Axiom. You should first familiarize yourself with Axiom's import and scheduling capabilities before completing these steps.

**TIP:** During the implementation process, your Syntellis Implementation Consultant can help you complete these steps. If you need help after implementation, [create a support case](#) with Syntellis Support.

#### To import service lines:

1. In the Service Line Schemas utility, [create the schemas](#) and [service lines](#) to be imported.
2. Create an import to map the data from your raw data file that includes the encounters and service lines to the `\Axiom\Table Library\DSS\Service Line Builder\Enc_ServiceLineStaging` table. For instructions on creating an import, see "Importing external source data" in the online help.

**NOTE:** Only users assigned both the DSS Admin and the CostDSS Import Admin role profiles can complete steps 2 and 3 in this procedure.

3. Create a Scheduler job to run the `\Axiom\Imports Library\DSS\Import Enc_Serviceline from staging` import to move the data from the `Enc_ServiceLineStaging` table to the `Enc_ServiceLine` table. For instructions, see "Scheduler job setup" in the online help.

If the service lines happen to be imported before creating them in Axiom (as described in step 1 above), the system will still create the schemas for you. Axiom makes these easy to identify by displaying them as **\*\*\*\*\*Schema Created From Client Import\*\*\*\*\*** in the Service Line Schemas utility. You will simply need to update the schema or service line definition by doing the following:

- Update the name.

**IMPORTANT:** Use caution when changing the name since it maps to the schema or service line with the same name in the imported file. If you change the name, you will also need to change it in the mapping of the imported file so that the data loads correctly.

- Type a description of the schema or service line.
- Activate the schema or service line when ready to push data to Axiom Intelligence for reporting (schemas or service lines imported in this way are automatically set to inactive).
- Identify a schema as the main reporting schema used for Axiom Intelligence reports, if applicable.

- The encounter filters do not display in the service line definitions nor can you process schemas because it is assumed that encounters have already been processed and tagged outside the Axiom system. Importing just provides a way to get this information into the Axiom database for reporting purposes.

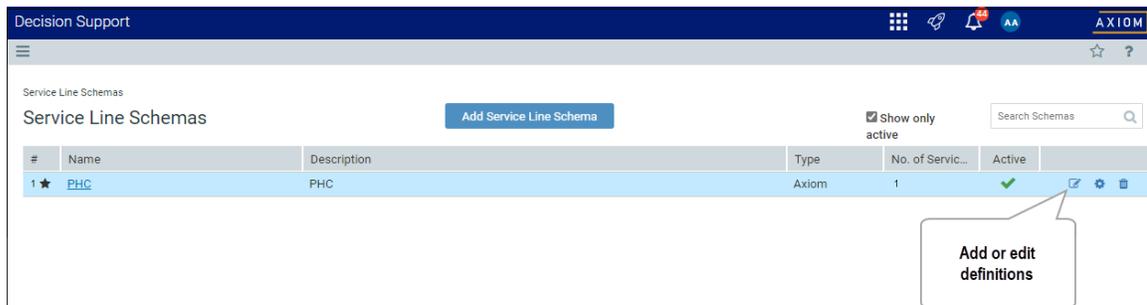
## Managing service line definitions

Schemas are comprised of one or more service line definitions. The system uses these definitions to identify the encounters to evaluate and tag with the specified service line. You can create an unlimited number of definitions for a schema. For details on how the Service Line Schema utility works, see [Working with service lines](#).

### ▶ Accessing definitions

To access definitions:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define service lines**.
2. In the list of schemas, click the schema to highlight it, and click the notepad icon.



### ▶ Adding or editing definitions

To add or edit definitions:

1. [Open the service line schema](#).
2. Do any of the following:
  - To add a definition, click **Add Service Line Definition** at the top of the page.
  - To clone a definition, click the definition to highlight it, and click the double page icon.
  - To edit a definition, click the definition to highlight it, and click the notepad icon.

Priority	Name	Description	Active	
1	<a href="#">Dermatology-IP</a>	Dermatology-IP	✓	
2	<a href="#">Dermatology-OP</a>	Dermatology-OP	✓	
3	<a href="#">Neurology-IP</a>	Neurology-IP	✓	<span>✎</span> <span>↻</span> <span>🗑️</span>
4	<a href="#">Neurology-OP</a>	Neurology-OP	✓	
5	<a href="#">Cardiology-IP</a>	Cardiology-IP	✓	
6	<a href="#">Cardiology-OP</a>	Cardiology-OP	✓	

3. In the **Service Line Assignment** page, complete the following fields:

Option	Description
<b>Name</b>	Type a name for the definition.  <b>IMPORTANT:</b> If service lines are imported, any name changes will also need to be made to the import map so that the data correctly loads the next time it is loaded into the system. For more information, see <a href="#">Implementing service lines</a> .
<b>Description</b>	Type a description of the definition.
<b>Type</b>	Indicates if the schema was imported or created in Axiom. This field is not editable and is set at the <a href="#">schema configuration</a> .
<b>Active</b>	Do one of the following: <ul style="list-style-type: none"> <li>To include the definition when processing the schema, click the toggle to <b>On</b>.</li> <li>To exclude the definition when processing the schemas, click the toggle to <b>Off</b>.</li> </ul> <b>IMPORTANT:</b> If you exclude the definition from processing, the information will not be available in Axiom Intelligence reporting.

Option	Description
<b>Filters</b>	<p>Use the <a href="#">Filter Wizard</a> to define the encounters for the system to evaluate for service line tagging. For instructions on writing filter syntax, see <a href="#">Filter criteria syntax</a>.</p> <p><b>TIP:</b> The system only evaluates encounter data, so by default, the system evaluates all of the data in the Encounter table. Because of this, the Filter Wizard defaults to the Encounter table. However, you can limit processing scope with a filter that points to other subsets of tables that include encounter IDs. For example, if you have a diagnostic table that includes the encounter sequence, you can narrow down the filter to that diagnostic, and the system will only process those encounters.</p> <p><b>NOTE:</b> If service lines are imported, the filter option does not display because it is assumed that encounters are processed and tagged outside the Axiom system in the service line application used by your organization. For more information, see <a href="#">Implementing service lines</a>.</p>
<b>Group Mapping</b>	<p>If applicable, select the group to associate the definition. For example, let's say your organization creates a group named Neurology. Any definitions created for neurology across schemas can be included in the Neurology group.</p> <p><b>TIP:</b> Groups are an optional feature that provide a flexible way for your organization to group encounters, such as Centers of Excellence (Neurology, Dermatology, Cancer, Cardiology, and so on). Groups are set up at the schema configuration level. For more information, see <a href="#">Adding or editing a service line schema configuration</a>.</p>

4. Click **Save**.
5. Click the definition in the list to highlight it, and click the double arrow icon. Place the definition in the order in which you want the system to evaluate and tag encounters.

Ordering definitions instructs the system how to evaluate the encounters. Once an encounter meets a definition's criteria, the system tags that encounter with the service line, and removes it from further evaluation and tagging. This process prevents the system from counting an encounter more than once.

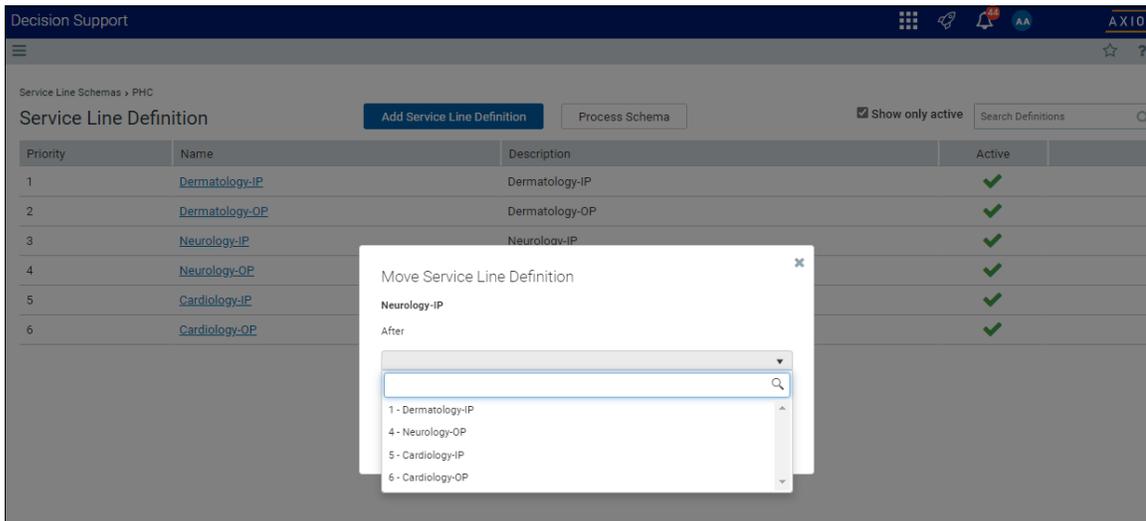
Priority	Name	Description	Active	
1	<a href="#">Dermatology-IP</a>	Dermatology-IP	✓	
2	<a href="#">Dermatology-OP</a>	Dermatology-OP	✓	
3	<a href="#">Neurology-IP</a>	Neurology-IP	✓	
4	<a href="#">Neurology-OP</a>	Neurology-OP	✓	
5	<a href="#">Cardiology-IP</a>	Cardiology-IP	✓	
6	<a href="#">Cardiology-OP</a>	Cardiology-OP	✓	

- In the **Move Service Line Definition** dialog, from the **After** drop-down, select the location in which to move the definition, and click **OK**.

**TIP:** Place the definitions in order from most to least important.

For example, let's say there are six definitions. The definition currently in position 3 can be moved after positions 1, 4, 5, and 6. Positions 2 and 3 are not listed because the definition already resides after position 2 and exists as position 3.

**NOTE:** If there are only two definitions in the list, you can only change the order by moving the definition in position 1 to position 2.



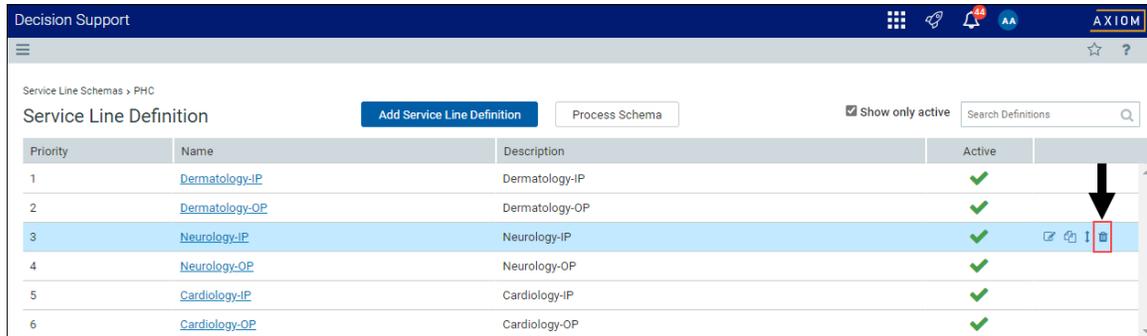
- After making your changes, [process the schema](#).

### ▶ Deleting a definition

**IMPORTANT:** Deleting a definition removes all current and historical data. This action cannot be undone. If your organization imports schema definitions, make sure to also remove the definition from the imported file.

To delete a definition:

1. [Open the service line schema.](#)
2. Click the definition to highlight it, and click the trash can icon.



Priority	Name	Description	Active	
1	<a href="#">Dermatology-IP</a>	Dermatology-IP	✓	
2	<a href="#">Dermatology-OP</a>	Dermatology-OP	✓	
3	<a href="#">Neurology-IP</a>	Neurology-IP	✓	
4	<a href="#">Neurology-OP</a>	Neurology-OP	✓	
5	<a href="#">Cardiology-IP</a>	Cardiology-IP	✓	
6	<a href="#">Cardiology-OP</a>	Cardiology-OP	✓	

## Processing service line schemas

This procedure walks you through the steps of processing service lines immediately so you can update your Axiom Intelligence reports with the latest data. The system also is set up to process service lines overnight as well using a Scheduler job.

Service line schemas need to be processed under the following conditions:

- Adding a definition
- Editing a definition, including the filter
- Changing the definition order

**NOTE:** If your organization imports service lines from another application, you cannot process them because it is assumed that encounters are processed and tagged outside Axiom. For more information, see [Implementing service lines](#).

To process service line schemas:

1. [Open the schema.](#)
2. Click the schema to highlight it, and click the notepad icon.

Priority	Name	Description	Active
1	<a href="#">Dermatology-IP</a>	Dermatology-IP	✓
2	<a href="#">Dermatology-OP</a>	Dermatology-OP	✓
3	<a href="#">Neurology-IP</a>	Neurology-IP	✓
4	<a href="#">Neurology-OP</a>	Neurology-OP	✓
5	<a href="#">Cardiology-IP</a>	Cardiology-IP	✓
6	<a href="#">Cardiology-OP</a>	Cardiology-OP	✓

3. At the top of the page, click **Process Schema**.
4. At the **Process Schema Now** prompt, click **OK**.
5. At the confirmation prompt, click **OK**.

The **Service Line Assignments - Results** page opens as a separate browser tab to indicate the status of the processing job. To see an update on the job status, click the refresh button in your browser.

To navigate back to the Service Line Schema utility page, simply click the Service Lines tab in your browser.

ID	Result	Start Time	Duration	User
1895374	Success	Today at 8:34 AM	a few seconds	admin
Job: Service Line Assignments Server: scheduler... Success Today at 8:34 AM a few seconds				
Task: Process Service Line Assignments Success Today at 8:34 AM a few seconds				
1895345	Success	Today at 6:55 AM	2 minutes	admin
1895017	Success	Last Friday at 3:46 PM	3 minutes	admin
1895015	Success	Last Friday at 3:43 PM	2 minutes	admin
1895013	Failed	Last Friday at 3:41 PM	a few seconds	admin
1895011	Failed	Last Friday at 3:39 PM	a few seconds	admin
1895009	Failed	Last Friday at 3:37 PM	a few seconds	admin
1894995	Success	Last Friday at 3:28 PM	a few seconds	admin
1894728	Success	08/12/2020	a minute	admin
1894133	Success	08/05/2020	2 minutes	admin



# Managing population definitions

The Population Builder utility allows you to create and manage population definitions, including specifying criteria. The tagged encounters can then be pushed to Axiom Intelligence for reporting capability.

The Population Builder displays a home page with a list of the definitions used by your organization. From here, you can add, edit, archive, and delete them. You can also easily activate/deactivate and enable/disable Axiom Intelligence reporting for each definition as well as launch the Population Analysis report directly from the utility.

The list displays the definition name and description as well as who created it, the number of encounters tagged with the definition criteria, and when the definition was last processed. Check marks in the Active and Axiom Intelligence columns allow you to easily see which definitions are active for processing and pushed to Axiom Intelligence.

The screenshot shows the 'Population Builder' interface with a table of population definitions. The table has columns for Population Name, Population Description, Created By, Encounters, Last Processed, Active, Batched, and Axiom Intelligence. There are three main sections: COVID-19 Populations, Kaufman Hall Example Study Sets, and Utilization Measures.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓		✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓		✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrjpoll	108	4/27/2020	✓		✓
<b>Kaufman Hall Example Study Sets</b>							
Pediatrics	Example study set limited to patients age at admission 0-17 for calendar years 2...	adebruhl	148,947	3/23/2020			
Knee / Hip Replacements	Example study set identifying hip and knee replacements for calendar years 201...	jrjpoll	1,913	3/11/2020			
Dr Moore as Attending Provider	Example study set where Dr. Moore is attending provider for CY 2014.	jrjpoll	5,942	6/4/2020	✓		
ICU Cases	Example study set for ICU cases defined by rev code for CY 2016 and 2017.	adebruhl	8,158	3/11/2020			
Cardiac Program	Example study set including business rules for patients to be included in cardiac ...	jrjpoll	245,688	3/11/2020			
Encounter Viewer Test	Testing Encounter Viewer	admin	489	6/15/2020	✓		
<b>Utilization Measures</b>							
Cases Utilizing Respiratory Services	Cases with Respiratory Services Rev Group code.	jrjpoll	14,736	4/27/2020	✓		
Cases Utilizing Emergency Room	Cases with Emergency Room Rev Group code.	jrjpoll	106,579	4/27/2020	✓		
Cases Utilizing Ventilator	Cases with with ventilator MSDRG	jrjpoll	921	4/27/2020	✓		
Cases Utilizing ICU	Cases with ICU Rev Group code.	ASnow	8,166	4/27/2020	✓		

## ► COVID-19 patient population definitions

As part of the 2020.1 release, we included the following pre-defined population definitions specific to COVID-19:

- COVID-19 Cases
- COVID-19 Deaths

- Exposure to COVID-19
- Signs & Symptoms of COVID-19

These population definitions were used to create the COVID-19 Population and Utilization and Analysis Dashboard, but you can also reconfigure these definitions to meet your needs and/or use them to create and customize other Axiom Intelligence reports for your organization.

► Searching for definitions

In the Search Definitions field, type information specific to the definition, including the name, description, and the last processed date. The table will filter the list based on the definitions that meet the search requirements.

## Adding, editing, or cloning population definitions

**TIP:** Instead of adding a new definition from scratch, you can clone an existing definition, and edit it.

To add, edit, or clone a population definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Do one of the following:
  - To add a definition, click **Add Population Definition** at the top of the page.
  - To edit or clone a definition, click the definition to highlight it, and click the notepad icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓	✓	✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhi	3,390	4/27/2020	✓	✓	✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jitpolli	108	4/27/2020	✓	add to Batch	✓

3. In the **Add/Edit Definition** screen, to clone a definition, click **Clone**.

Decision Support

Population Definitions > Edit

### Edit Definition: Pediatrics

Name:  Group:  Description:

Active:  No In Axiom Intelligence:  Yes

4. When adding or editing a definition, complete the following options, and click **Save**:

**NOTE:** The system requires you to save the definition before adding or editing definition criteria.

Option	Description
<b>Name</b>	Type the name for the definition.
<b>Group</b>	<p>Select an existing group or type a new name used to group together definitions. This is an optional field. Examples might include Centers of Excellence, entity, etc.</p> <p><b>NOTE:</b> This group name is only used to help group definitions on the definition list page. They are not used for reporting or any other purpose at this time.</p>
<b>Description</b>	Type a description of the definition.
<b>Active</b>	<ul style="list-style-type: none"> <li>To activate the definition for processing, click the toggle to <b>Yes</b>.</li> <li>To deactivate the definition so that it is not available for processing, click the toggle to <b>No</b>.</li> </ul> <p><b>NOTE:</b> Definitions cannot be activated if they do not include a valid filter. Only active definitions can be processed.</p>
<b>In Axiom Intelligence</b>	<ul style="list-style-type: none"> <li>To include the defined populations in Axiom Intelligence, click the toggle to <b>Yes</b>.</li> <li>To exclude the defined populations from Axiom Intelligence, click the toggle to <b>No</b>.</li> </ul> <p><b>NOTE:</b> Flagged definitions are <a href="#">sent to Axiom Intelligence</a> by clicking <b>AI Sync</b> on the Population Definitions home page.</p>

5. Click **Save**.

**NOTE:** You cannot add criteria until you first save the definition.

6. To add a criterion, click **+Add New Criteria**. To edit a criterion, highlight it, and click in the column cells. Complete the following fields.

Option	Description
<b>Criteria Name</b>	Type a name for the criteria.
<b>Criteria Description</b>	Type a description for the criteria.
<b>Criteria Filter</b>	Click the funnel icon  to set up or select an existing filter using the <a href="#">Filter Wizard</a> .  <b>IMPORTANT:</b> The system processes each criterion only as an OR statement. To build criteria that includes AND criteria, use the Filter Wizard.

7. To delete a criterion, click the criteria to highlight it, and click the trash bin icon .
8. After making the criteria changes, click **Save**.
9. To process this definition individually, click **Process**. When the process job is complete, the date will update in the **Last Processed** column of the Population Definitions home page.

**TIP:** To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see [Processing population definitions](#).

## Deleting population definitions

Deleting a definition removes all of the tagged encounters as well as the definition from the system.

**TIP:** We recommend only using this action for definitions that will never be used again in the future. For definitions that you want to keep but not use currently, we recommend archiving the definition instead. For more information, see [Archiving population definitions](#).

**IMPORTANT:** You cannot undo this action.

**To delete a population definition:**

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Click the definition to highlight it, and click the trash can icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓	✓	✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓	✓	✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrspoli	108	4/27/2020	✓	add to Batch	✓

3. Review the warning message prompt, and click **OK**.

## Archiving population definitions

Archiving allows you to keep the definition in the system while removing all the tagged encounters from the database, helping to decrease data bloat.

**TIP:** If this definition will never be used again in the future, you may want to consider deleting it entirely from the system. For more information, see [Deleting population definitions](#).

To archive a population definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. Click the definition to highlight it, and click the storage box icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓	✓	✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓	✓	✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrspoli	108	4/27/2020	✓	add to Batch	✓

3. At the warning message prompt, click **OK**.

### ▶ Reactivating an archived definition

To reactivate an archived definition:

1. Click the definition to highlight it, and click the notepad icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓	✓	✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓	✓	✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrspoli	108	4/27/2020	✓	add to Batch	✓

2. Click the **Active** toggle to **Yes**.

3. Optionally, to push the population definition to Axiom Intelligence, click the **In Axiom Intelligence** toggle to **Yes**.
4. Click **Save**.
5. To process the definition, click **Process**.

**TIP:** To process multiple definitions at the same time, on the Population Definitions home page, click the **Batched** column for each definition, and then click **Process Batched Definitions**. For more information, see [Processing population definitions](#).

## Processing population definitions

Before you can process a definition, it must be activated. Active definitions are indicated by a check mark in the Active column of the Population Definitions home page. You can also select multiple definitions for batch processing.

### ► Process individual definitions

To process an individual definition:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. In the table, click the definition to highlight it, and click the notepad icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intellig...
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of C...	Cases where signs and symptoms of COVID-19 are ...	ASnow	44,491	4/27/2020	✓		✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓	add to Bat...	✓ 
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	✓		✓

3. Click **Process**.

Decision Support

Population Definitions > Edit

### Edit Definition: Pediatrics

Name:  Group:  Description:

Active:  In Axiom Intelligence:

## ▶ Batch process definitions

To batch process definitions:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **Define populations**.
2. For each definition to include in the batch, click the **Batched** column to add a check mark. To remove a definition from the batch, click the check mark to remove it.

Decision Support

Population Builder

Population Definitions

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intellig...
<b>COVID-19 Populations</b>							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Signs & Symptoms of C...	Cases where signs and symptoms of COVID-19 are ...	ASnow	44,491	4/27/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	<input checked="" type="checkbox"/>	<input type="button" value="add to Batch"/>	<input checked="" type="checkbox"/>
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoli	108	4/27/2020	<input checked="" type="checkbox"/>	<input type="button" value="Mark Definition to be included in a batch"/>	

3. Above the definition table, click **Process Batched Definitions**.
4. In the **Scheduled Processing Settings** dialog, do one of the following, and click **OK**:
  - To run the batch process immediately, click **Run Now**.
  - To schedule the batch to run, click **Schedule**, and complete the dates, day of the week, and time fields.

## Including or excluding population definition data in Axiom Intelligence reports

From the Population Builder utility, you can determine the data from the population definitions to include in Axiom Definitions reports.

## ► Individual definitions

To include or exclude an individual population definition data in Axiom Intelligence reports:

1. From the Enterprise Decision Support home page, in the Data enhancement and refinement section, click **Define populations**.
2. In the list of definitions, click the definition to highlight it, and click the notepad icon.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intellig...
COVID-19 Populations							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of C...	Cases where signs and symptoms of COVID-19 are ...	ASnow	44,491	4/27/2020	✓		✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓	add to Bat...	✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoll	108	4/27/2020	✓		✓

3. In the **Add/Edit Definition** screen, click the In Axiom Intelligence toggle to **Yes** to include it, or click **No** to exclude it.

Decision Support

Population Definitions > Edit

### Edit Definition: Pediatrics

Name: Pediatrics      Group: Kaufman Hall Example Study Sets      Description: Example study set limited to patients age at admission 0-17 for calendar years 2016 and 2017.

Active:  Yes      **In Axiom Intelligence:  Yes**

Clone    Process    Save

## ► Multiple definitions

To include or exclude multiple definition data in Axiom Intelligence reports:

In the Populations Definitions home page, for each definition, click the definition to highlight it, and then click the Axiom Intelligence column to add or remove the check mark.

Population Name	Population Description	Created By	Encounters	Last Processed	Active	Batched	Axiom Intelligence
COVID-19 Populations							
Exposure to COVID-19	Cases where COVID-19 is suspected	ASnow	3,546	4/27/2020	✓	✓	✓
Signs & Symptoms of COVID-19	Cases where signs and symptoms of COVID-19 are present	ASnow	44,491	4/27/2020	✓		✓
COVID-19 Cases	COVID-19 Cases defined by ICD Diagnosis codes	adebruhl	3,390	4/27/2020	✓		✓
COVID-19 Deaths	COVID-19 Cases where Discharge Status = Expired	jrispoll	108	4/27/2020	✓		✓

# Transform data for reporting

You can manipulate data in the Axiom database for reporting purposes by using data transformation definitions. These definitions let you 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. For example, you could create a definition that increases Medicare payments by 5%, and stores the results in a new encounter table field.

Examples of types of definitions that you can create 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, and standard and custom fields for inputs

**NOTE:** Only users assigned the Axiom [EDS Rules Writer role profile](#) can access this feature.

## ► About definitions

A data transformation definition includes calculations that Axiom applies to tables in the database.

The **Data transformation definitions** page displays a table with all definitions. From this page, you can add, edit, copy, or delete definitions, as well as process them. 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, select the ellipsis (...) in any of the available headings. To add a definition or folder, select **+ Add** in the upper right corner of the page.

Enterprise Decision Support

Home » Data transformation definitions

### Data transformation definitions

Name	Created on	Created by	Modified on	Modified by	Status	Actions
reset Custom_TotalCost	07/29/2021 08:04 AM	Noel Slater	07/29/2021 08:16 AM	Noel Slater	Active	Process ...
Reset DTD_NetRev	07/28/2021 11:59 AM	Noel Slater			Active	Process ...
Assign	07/28/2021 08:17 AM	Pavel Mahlysh	07/28/2021 08:26 AM	Pavel Mahlysh	Active	Process ...
Demo Comparison Definition	07/28/2021 08:16 AM	Pavel Mahlysh			Inactive	...
Basic calc large number test	07/27/2021 01:59 PM	Noel Slater	07/30/2021 08:27 AM	Noel Slater	Active	Process ...
Copy TotCost	07/27/2021 09:35 AM	Noel Slater			Inactive	...
Comp rule - between test	07/26/2021 06:46 PM	Noel Slater	07/27/2021 01:54 PM	Noel Slater	Inactive	...
Staging table test	07/26/2021 06:19 PM	Noel Slater	07/26/2021 06:20 PM	Noel Slater	Active	Process ...
Incr NetRev 12%	07/14/2021 12:48 PM	Noel Slater	07/22/2021 09:42 AM	Isabel Tung	Active	Process ...
Net Revenue	07/12/2021 05:57 AM	Noel Slater	07/30/2021 10:16 AM	Noel Slater	Active	Process ...

10 items per page 1 - 10 of 53 items

From the **Actions** column, select the ellipsis (...) to edit, copy, or delete a definition. You can also process a definition, but definitions must first be active.

### ► Work with data transformation definitions

A data transformation definition is a mathematical formula 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 selecting:

- 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

The following table lists the available definition types:

Type	Description
<b>Assign Constant</b>	Stores 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.
<b>Basic Calculation</b>	Calculates and stores 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.
<b>Concatenate</b>	Joins Axiom fields and constants. You can use the constant as a delimiter.

Type	Description
<b>Comparison</b>	Creates If-Then-Else formulas that compare Axiom fields to each other or to constants, and stores a value based on whether the comparison is true or false.
<b>Copy Field</b>	Copies the value of one field to another field.

**NOTE:** A definitions inputs and results must be fields from within the same table.

## ► Understand inputs and results

### Inputs

If there is a custom column in the table, you can use data from the following dimension tables in the Table Library>!Dimensions folder:

- ACCT
- CALDATE
- CDMCODE
- CPT
- DEPT
- ENTITY
- FINCLASS
- JOBCODE
- LOCATION
- PAYOR
- PAYTYPE

### Results

You can store results in standard and custom columns in tables in the EDS folder, except columns in custom tables.

You cannot store results in the following column types:

- Keys
- Pointers to key column on other tables
- Data that results from cost model processing (tables under CostModel and CostResults)
- CM\$ tables
- Encounter total cost columns
- Columns, even custom, on any table in any folder other than EDS or dimensions

## ▶ Important notes about transforming data

Consider the following when using and processing definitions:

- All the fields (inputs and results) in a single definition must be from the same table. Axiom will not let you select a field from a different table.
- You must manage the processing order. If the results of one definition feed into the inputs of another definition, you must ensure the first definition completes successfully before processing the second one.
- When creating a custom column on a table to store results, we recommend that you:
  - Create only text, numeric, date, or flag (Boolean) types. The system will not stop you from creating an Integer or an Integer32 column, but numeric is our recommendation.
  - Do not set a default value on a custom column.

# Add, edit, or copy a data transformation definition

When adding or editing a definition name, note the following:

- Can include up to 80 characters.
- Are case-sensitive.
- Must have a unique name.

**IMPORTANT:** All the fields (inputs and results) in a single definition must be from the same table. Axiom will not let you select a field from a different table.

## To add, edit, or copy a data transformation definition

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** drop-down, select **Define data transformations**.

**NOTE:** Only users assigned the Axiom EDS Rules Writer role profile can see and access this feature.

2. Do one of the following:
  - To add a definition, select **+ Add**.
  - To edit or copy a definition, in the **Actions** column, select the ellipsis (...), and from the drop-down, select **Edit** or **Copy**.

3. At the top of the page, enter a name for the definition.

**NOTE:** Although the forward slash is accepted, you should avoid it.

4. On the **Step 1 Select data definition type** page, complete the following fields:

Field	Description
Type	<p>Select one of the following data definition types:</p> <ul style="list-style-type: none"> <li>• <b>Assign Constant</b> - Stores 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.</li> <li>• <b>Basic Calculation</b> - Calculates and stores 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.</li> <li>• <b>Concatenate</b> - Joins Axiom fields and constants. You can use the constant as a delimiter.</li> <li>• <b>Comparison</b> - Creates If-Then-Else formulas that compare Axiom fields to each other or to constants, and stores a value based on whether the comparison is true or false.</li> <li>• <b>Copy Field</b> - Copies the value of one field to another.</li> </ul>

5. Select **Next**, or select **Step 2 Apply parameters**. The fields to complete in this section are determined by the definition type you selected in Step 1. To complete the definition setup, select the following type:

**NOTE:** A definition's inputs and results must be fields from within the same table.

- [Assign Constant](#)
- [Basic Calculation](#)
- [Concatenate](#)
- [Comparison](#)
- [Copy Field](#)

## Assign Constant

Step 1 [Select data definition type](#) — Step 2 [Apply parameters](#)

Result:  = Value:   Reset to default

**Details**

Notes

Active

Type  
---

Created  
---

Updated  
---

Processed  
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6. Select **Result field**.

7. In the **Select field** dialog box, do the following:

a. From the **Table** drop-down, select the table in which to add, edit, or clear a value.

**NOTE:** The dialog box only shows those tables and fields that you are allowed to update.

b. Select a column name from those shown. You can find a desired column by doing one of the following:

- In the search box, enter the part or all of the column name. Axiom shows columns that include the name.
- To display a tree structure of all the columns, select the arrow next to the table name.

**NOTE:** Be aware of the maximum character limit of this column. Data going into the result field will be truncated if it exceeds that limit.

c. Select **Apply**.

8. Do one of the following:

- **Enter a value** - The value you enter in the **Value** field is determined by the table and field you select in the **Table** drop-down. For example, if the field is a date field (such as Encounter table>DischargeDate), then a date picker will appear.

Value type	Description
<b>Numeric</b>	Enter a positive or negative number with up to four decimal places.
<b>Date/time</b>	Select a date and time.
<b>Text</b>	Enter a value.  <b>NOTE:</b> If the value is large than the field, Axiom truncates the text.
<b>Boolean</b>	Select <b>True</b> or <b>False</b> .

- **Reset or clear the value** - Some fields in the database store default values. For these types of fields, you can replace the current value with the default value by selecting the **Reset to default** check box. If the Axiom field does not have a default value, then this option inserts a blank (null) value.
9. To identify the records in the database in which to apply the value, select **Criteria**. The Filter Wizard appears, letting you define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see [Using the Filter Wizard](#).
  10. In the **Details** section on the right side of the page, complete the following:
    - **Notes-** (Optional) Enter your own description to help you identify the definition.
    - **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.

**NOTE:** If the rule is selected as active, then Axiom automatically reviews the definition for any missing information or criteria, which are indicated with error messages. After resolving these issues and saving, the definition can be processed.

11. Select **Save**.
12. To process the definition now, select **Process**. Follow the instructions in [Process a data transformation definition](#).

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

## Basic Calculation



Step 1  
Select data definition type



Step 2  
Apply parameters

Result

=

Formulas may contain numbers, variables A-E, +, -, \*, / and ( ) to group.

Field  
A =       Field  
D =

Field  
B =       Field  
E =

Field  
C =

Criteria

Details

Notes

Active

Type

Created

Updated

Processed

### 6. Select **Result field**.

### 7. In the **Select field** dialog box, do the following:

- From the **Table** drop-down, select the table in which to store the value.

**NOTE:** The dialog box only shows those tables and fields that you are allowed to update. Only numeric fields are allowed for this definition type.

- Select a column name from those shown. You can find a desired column by doing one of the following:
  - In the search box, enter the part or all of the column name. Axiom displays columns that include the name.
  - Select the arrow next to the table name to display a tree structure of all the columns.

**NOTE:** Be aware of the maximum character limit of this column. Data going into the result field will be truncated if it exceeds that limit.

- Select **Apply**.

### 8. In the formula box, enter a formula by using numbers, using the variables identified as A-E, or a combination of the two. Valid operators are:

Operator	Description
( )	Use for grouping definition For example, A+(B*(C-D))
+	Addition
-	Subtraction
*	Multiplication
/	Division

9. In **Fields A-E**, select the fields to select the values to use in the formula. In the **Select field** dialog box, do the following:
  - a. From the **Table** drop-down, select the table in which to store the calculated value.

**NOTE:** The dialog box only shows those tables that you are allowed to update. You are not updating these fields, but simply using them as the inputs. Axiom shows numeric fields only.

- b. To select a column name, do one of the following:
    - In the search box, enter the part or all of the column name. Axiom shows columns that include the name.
    - Select the arrow next to the table name to display a tree structure of all the columns.
  - c. Select **Apply**.
10. To identify the records in the database in which to apply the value, select **Criteria**. The Filter Wizard appears letting you define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see [Using the Filter Wizard](#).
11. In the **Details** section on the right side of the page, complete the following:
  - **Notes-** (Optional) Enter your own description to help you identify the definition.
  - **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.
12. Select **Save**.
13. To process the definition now, select **Process**. Follow the instructions in [Process a data transformation definition](#).

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

## ▶ Concatenate

Step 1 **Select data definition type** — Step 2 **Apply parameters**

**Result**

Select =  +

Criteria

**Details**

Notes

Active

Type

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Created

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Updated

----

Processed

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6. Select **Result field**.

7. In the **Select field** dialog box, do the following:

a. From the **Table** drop-down, select the table in which to store the value.

**NOTE:** The dialog box only shows those tables/fields that you are allowed to update. Only text fields are allowed for this definition type.

b. Select a column name from those shown. You can find a desired column by doing one of the following:

- In the search box, enter the part or all of the column name. Axiom will display columns that include the name.
- Select the arrow next to the table name to display a tree structure of all the columns.

**NOTE:** Be aware of the maximum character limit of this column. Data going into the result field will be truncated if it exceeds that limit.

c. Select **Apply**.

8. Select **+**, and select one of the following from the drop-down:

- **Add constant** - Enter a constant value of up to 25 characters, including spaces.
- **Add field** - Select a field from the database by selecting the table where it resides.

9. As needed, continue to add constants and/or fields by selecting .

**TIP:** To remove a constant/fields, select the trash can icon .

10. To identify the records in the database in which to apply the value, select **Criteria**. The Filter Wizard appears letting you define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see [Using the Filter Wizard](#).

11. In the **Details** section on the right side of the page, complete the following:

- **Notes-** (Optional) Enter your own description to help you identify the definition.
- **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.

12. Select **Save**.

13. To process the definition now, select **Process**. Follow the instructions in [Process a data transformation definition](#).

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

## ▶ Comparison

1 Step 1  
Select data definition type

2 Step 2  
Apply parameters

**If**

Input Operator

=

▼

+

**Then**

Result

=

+

**Else (Optional)**

Result

=

Criteria

**Details**

Notes

Active

Type  
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Created  
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Updated  
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Processed  
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6. In the If section, complete the following:

Field	Description
<b>Input</b>	<p>In the <b>Select field</b> dialog box, do the following:</p> <ol style="list-style-type: none"> <li>From the <b>Table</b> drop-down, select the table in which to store the value.           <p><b>NOTE:</b> The dialog box only shows those tables that you are allowed to update.</p> </li> <li>Select a column name by doing one of the following:           <ul style="list-style-type: none"> <li>In the search box, enter the part or all of the column name. Axiom displays columns that include the name.</li> <li>To display a tree structure of all the columns, select the arrow next to the table name.</li> </ul> </li> <li>Select <b>Apply</b>.</li> </ol>
<b>Operator</b>	<p>Select one of the following:</p> <p>&gt; Greater than</p> <p>&gt;= Greater than or equal to</p> <p>&lt; Less than</p> <p>&lt;= Less than or equal to</p> <p>= Equal to</p> <p>&lt;&gt; Not equal to</p> <p>Between Only number or date values are available for comparison.</p> <p>Like Only text values are available for comparison.</p> <p><b>TIP:</b> You can use % and _ (underscore) to represent any string of characters or any single character. For example, %Aspirin will find Baby Aspirin, Buffered Aspirin, etc.</p>
<b>Numeric constant</b>	Enter a numeric, date, or text value, depending on the input field type you selected.

7. Add more If statements, as needed, by selecting .

**NOTE:** Select  first to choose if you are using a value from an existing field or entering a constant.

**TIP:** To remove a constant/fields, select the trash can icon .

8. In the **Then** section, complete the following:

Field	Description
<b>Result</b>	Select the table and column in which to store the value if the comparison is true.  <b>NOTE:</b> Be aware of the maximum character limit of this column. Data going into the result field will be truncated if it exceeds that limit.
<b>Text constant</b>	Enter the text value to add or edit to the field.

9. Add more Then statements, as needed, by selecting .

**NOTE:** Select  first to select if you are using a value from an existing field or entering a constant.

10. In the **Else (Optional)** section, in the **Text constant** field, enter the text value to add or edit to the field.

**NOTE:** You cannot change the **Result field** here. Whatever result field you selected in the Then section is used here.

11. To identify the records in the database in which to apply the value, select **Criteria**. The Filter Wizard dialog box appears letting you define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see [Using the Filter Wizard](#).

12. In the **Details** section on the right side of the page, complete the following:

- **Notes-** (Optional) Enter your own description to help you identify the definition.
- **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.

13. Select **Save**.

14. To process the definition, select **Process**. Follow the instructions in [Process a data transformation definition](#).

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

## ► Copy Field

Step 1 **Select data definition type** — Step 2 **Apply parameters**

Result: Select = Input: Select

Criteria

Details

Notes

Active

Type  
Created  
Updated  
Processed

6. Select **Result field**.

7. In the **Select field** dialog box, do the following:

a. From the **Table** drop-down, select the table in which to copy the value.

**NOTE:** The dialog box only shows those tables/fields that you are allowed to update.

b. Select a column name from those shown. You can find a desired column by doing one of the following:

- In the search box, enter the part or all of the column name. Axiom shows columns that include the name.
- To display a tree structure of all the columns, select the arrow next to the table name.

**NOTE:** Be aware of the maximum character limit of this column. Data going into the result field will be truncated if it exceeds that limit.

c. Select **Apply**.

8. Select **Input field**, and in the **Select field** dialog box, select the table and column to copy the value.

9. To identify the records in the database in which to apply the value, select **Criteria**. The Filter Wizard appears letting you define specific attribute to define the record(s) to update. For example, to apply a specific discharge date, you may not want to apply that change to every encounter. You can use the Filter Wizard to define what condition in which to add or edit the value, such as based on procedure code, diagnosis code, or any other attribute tied to the encounter. For instructions, see [Using the Filter Wizard](#).
10. In the **Details** section on the right side of the page, complete the following:
  - **Notes-** (Optional) Enter your own description to help you identify the definition.
  - **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.
11. Select **Save**.
12. To process the definition, select **Process**. Follow the instructions in [Process a data transformation definition](#).

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

# Activate or deactivate a data transformation definition

Only activated rules can be processed.

## To activate or deactivate a data transformation definition

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** drop-down, select **Define data transformations**.
2. In the **Actions** column, select the ellipsis (...), and select **Edit**.
3. In the **Details** section on the right side of the page, select the **Active** toggle.
4. Select **Save**.
5. To process the definition now, select **Process**.

**NOTE:** You can process the definition later from the **Data transformation definitions** page.

# Delete a data transformation definition

Deleting a definition does not delete data obtained as a result of processing the definition, nor does it change the data back to its original value.

## To delete a data transformation definition

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** drop-down, select **Define data transformations**.
2. In the **Actions** column of the definition to delete, select the ellipsis (...), and then select **Delete**.
3. At the **Delete?** prompt, select **Delete**.

# Process a data transformation definition

Processing a data transformation definition updates the database with the value changes you defined in the definition calculations. Only active rules can be processed.

**IMPORTANT:** While five different definitions can be processed together, Axiom determines the order in which they are processed. This may not be the same order in which they were selected. We recommend that if you need to process definitions in a specific order (such as the results of one definition are used as an input in a subsequent definition), you must ensure that the first definition completes before the next one is processed.

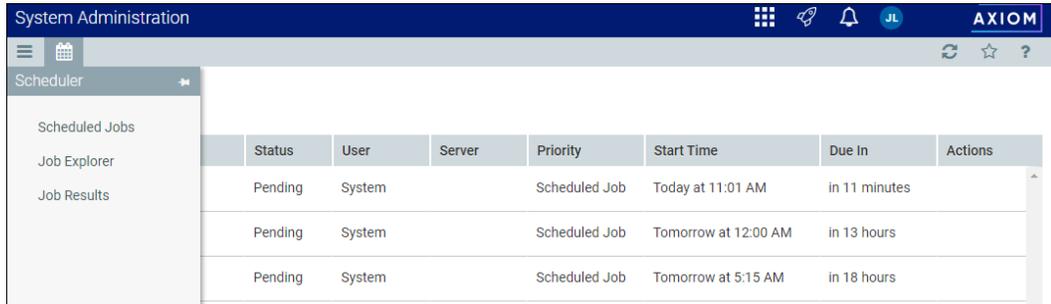
## To process a data transformation definition

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** drop-down, select **Define data transformations**.
2. In the **Actions** column for the definition to process, select **Process**.
3. If the definition uses the encounter table, the a **Process** dialog box appears. Complete the following, and then select **Process**:

Field	Description
<b>Name</b>	Displays the name of the definition, which cannot be edited from this dialog box.
<b>Entity</b>	Select one or more entities in which to process the definition.
<b>From/To</b>	To limit processing encounter data to a specific time frame, select a from and to date.
<b>Admit date/Discharge date</b>	Select whether to process encounters by admit or discharge date.

4. To view the process status of definitions, do the following:
  - a. Select the Area menu  in the Global navigation bar, and then select **System Administration**.
  - b. Select the menu icon  on the left side of the task bar , and then select **Scheduler**.
  - c. From the navigation pane, select **Tools>Scheduler**.
  - d. To display the Scheduler pane, select the calendar icon  , and then select **Job Results**. To refresh the list, select the Refresh icon  in the task bar.

**TIP:** To keep the Scheduler pane open while you are working on the page, select the thump tack icon .



The screenshot shows the 'System Administration' interface with the 'Scheduler' pane open. The pane contains a table with the following data:

Status	User	Server	Priority	Start Time	Due In	Actions
Pending	System		Scheduled Job	Today at 11:01 AM	in 11 minutes	
Pending	System		Scheduled Job	Tomorrow at 12:00 AM	in 13 hours	
Pending	System		Scheduled Job	Tomorrow at 5:15 AM	in 18 hours	

**NOTE:** For more information, see [Viewing job results in the Web Client](#) in the online help.

# Defining encounters

In Axiom, you can define and gather encounters together to easily analyze episodes of care and returns so that your organization can address a wide variety of business questions or challenges. This lets you 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.

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.

## ► About episodes and returns

An episode is a series of medical encounters that address a specific medical condition or center around a specific set of medical services. Episodes have been used by organizations for some time, but until recently, they were of interest from a clinical or quality perspective. Episodes are now becoming more popular due to the potential of being a source of reimbursement.

Episodes are similar to and often synonymous with bundles, which is the process of bundling a set of services and paying one amount to allocate across providers. A bundled payment methodology involves combining the payments for a physician, hospital, and other health care provider services into a single bundled payment amount. This amount is calculated based on the expected costs of all items and services furnished to a beneficiary during an episode of care. Payment models that provide a single bundled payment to healthcare providers can motivate them to furnish services efficiently, to better coordinate care, and to improve the quality of care. Healthcare providers receiving a bundled payment may either realize a gain or loss, based on how successfully they manage resources and total costs throughout each episode of care. A bundled payment also creates an incentive for providers and suppliers to coordinate and deliver care more efficiently because a single bundled payment will often cover services furnished by various health care providers in multiple care delivery settings.

By defining an episode, you create or select a data filter, which narrows the scope of the Encounter table to match events to the criteria, called the anchor. After further configuration of an optional pre-anchor and post-anchor, you can process the definition, which generates records in the database for reporting purposes.

A return is an episode when a patient who visited a clinic or doctor's office, or was admitted to a hospital and then discharged, returns again after some time for the same reasons.

► About encounter measure definitions

From the **Encounter measures** page, you can manage and process episode and return definitions. From this table, you can:

- View a list of all folders and definitions
- View the active status of definitions
- Add, edit, delete, or move folders
- Add, edit, delete, copy, or move definitions
- Process definitions

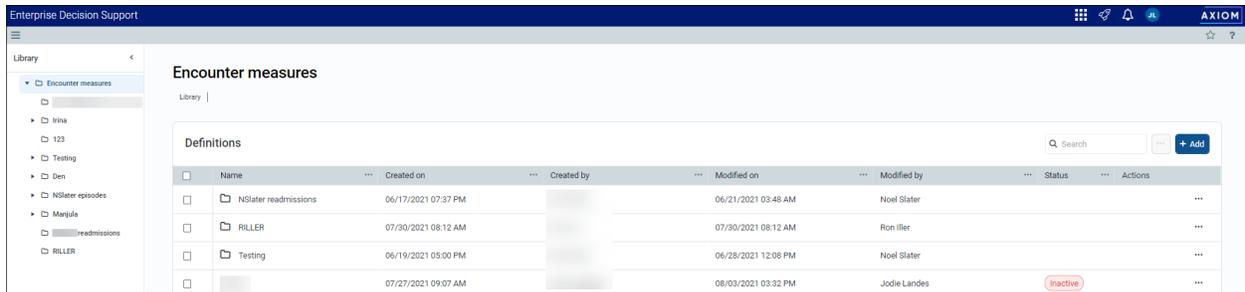
The **Library** side panel displays a hierarchical view of the folders. From this panel, you can easily go across the folders. To access the folder's content, select its name. The folder will open in a table format.

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, select the ellipsis(...) in any of the available headings. To add a definition or folder, select **+ Add** in the upper right corner of the page.

	Name	Created on	Created by	Modified on	Modified by	Status	Actions
<input type="checkbox"/>	NSlater readmissions	06/17/2021 07:37 PM		06/21/2021 03:48 AM	Noel Slater		...
<input type="checkbox"/>	RILLER	07/30/2021 08:12 AM		07/30/2021 08:12 AM	Ron Iler		...
<input type="checkbox"/>	Testing	06/19/2021 05:00 PM		06/28/2021 12:08 PM	Noel Slater		...
<input type="checkbox"/>		07/27/2021 09:07 AM		08/03/2021 03:32 PM	Jodie Landes	Inactive	...

# Managing folders

In the definition table, you can create folders to organize multiple episode and readmission definitions in a way that makes sense to your organization. To filter the list, select the ellipsis (...) in any of the columns in which to filter. You can also search for a specific folder or definition by entering its name in the search box in the upper right corner of the page.



	Name	Created on	Created by	Modified on	Modified by	Status	Actions
<input type="checkbox"/>	NSlater readmissions	06/17/2021 07:37 PM		06/21/2021 03:48 AM	Noel Slater		...
<input type="checkbox"/>	RILLER	07/30/2021 08:12 AM		07/30/2021 08:12 AM	Ron Iler		...
<input type="checkbox"/>	Testing	06/19/2021 05:00 PM		06/28/2021 12:08 PM	Noel Slater		...
<input type="checkbox"/>		07/27/2021 09:07 AM		08/03/2021 03:32 PM	Jodie Landes	Inactive	...

## ▶ Accessing folders

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

## ▶ Adding a folder

After creating a folder, it appears at the top of the table.

### To add or edit a folder

1. In the upper left corner of the page, select **+ Add**, and from the drop-down, select **Folder**.
2. In the **Add folder** dialog, enter the folder name, and select **Add**.

**NOTE:** The folder name must be unique.

## ▶ Editing a folder name

### To edit a folder name:

1. In the **Actions** column, select the ellipsis (...), and from the drop-down, select **Edit**.
2. In the **Folder details** pane, change the folder's name.
3. Select **Save**.

▶ Adding, editing, or deleting definitions in a folder

**To add or edit a definition in a folder**

1. In the **Name** column, select the folder name.
2. Do one of the following:
  - To add a definition, select **Add**, and from the drop-down select **Episode** or **Return**.
  - To edit a definition, select the ellipsis (...), and from the drop-down, select **Edit**.
3. Complete the definition by following the instructions in one of the following topics: [Adding, editing, or copying an episode definition](#) or [Adding, editing, or copying a return definition](#)

▶ Moving a folder

Axiom allows you to move folders to organize the list the way it makes sense to your organization.

**To move a folder**

1. In the **Actions** column, select the ellipsis (...), and from the drop-down, select **Move**.
2. In the **Move** dialog, select a location, and select **Move**.

▶ Deleting a folder

Folders that contain definitions cannot be deleted.

**To delete a folder**

1. In the **Actions** column, select the ellipsis (...), and from the drop-down, select **Delete**.
2. At the confirmation prompt, select **OK**.

# Adding, editing, or copying an episode definition

Episodes are organized around anchors.

- **Anchor** - A key event in the patient's history that defines the activities related to the treatment. For example, childbirth, surgery, or doctor visit to address a specific issue.
- **Pre-anchor** - An activity that precedes the anchor event, usually related in preparation for the anchor event, such as preparing for surgery or childbirth.
- **Post-Anchor** - An activity that happens after the anchor event. For example, observation after surgery or a necessary check-up after childbirth.

**NOTE:** Not all the episodes include pre-anchor or post-anchor activities. For example, if a patient visits a doctor, recovers, and does not need an additional check-up, then this episode will not include either a pre-anchor or post-anchor.

## To add, edit, or copy an episode definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, select **Define encounter rules**.
2. To add, edit, or copy a definition in a folder, select the folder name.
3. Do one of the following:
  - To add a definition, select + **Add**, and from the drop-down, select **Episode**.
  - To edit a definition, in the **Actions** column, select the ellipsis (...), and from the drop-down, select **Edit**.
  - To copy a definition, in the **Actions** column, select the ellipsis (...), and from the drop-down, select **Copy**. Copying an episode definition lets you create new definitions from existing ones.

## ▶ Anchor encounter tab

1 Step 1 Anchor encounter — 2 Step 2 Pre-anchor — 3 Step 3 Post-anchor

1. Select date range

Admit

Discharge

2. Select start and end dates

Start month/day/year

End month/day/year

3. Select criteria

Criteria

Allow an encounter to be in multiple episodes

Ignore time

Use secondary encounter identifier

Same value

Different value

Select field

Next

Details

Notes

Active

Bundle

Created

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Updated

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1. At the top of the page, enter a name for the definition.

- If this is a new definition, to enter a name, select where it says "Untitled".
- If you are editing or copying a definition, select where the current name appears, and change it as needed.

**NOTE:** Although the forward slash is accepted, you should avoid it.

2. In the **Select date range** section, select **Admit** or **Discharge**.

3. In the **Select start and end dates** section, select the start and end dates of the encounters to evaluate.

4. In the **Select criteria** section, do any of the following:

- To add a criterion, select **Criteria**. To identify the records in the database in which to identify the encounter, select **Criteria**. The Filter Wizard dialog appears, letting you select a specific attribute to define the record(s) (for example, based on procedure code, diagnosis code, or any other attribute tied to the encounter). For instructions, see [Using the Filter Wizard](#).

- To editor copy a criterion, select the existing filter name.
- To delete a criterion, next to the criterion name, select **X**.

5. At the bottom of the page, select the following options, as needed:

Option	Description
<b>Allow an encounter to be in multiple episodes</b>	Select this option to allow an encounter to be in more than one episode. For example, an encounter may meet the criteria of the anchor and post-anchor encounters. This option allows that encounter to be an anchor in one episode and a post-anchor in another episode within this definition.
<b>Ignore time</b>	Select this option if you do not want to consider the time when determining which encounters are eligible to be pre-anchor or post-anchor encounters. You may want to select this option if your encounter data does not have accurate timestamps on admit or discharge dates.  <b>NOTE:</b> If selected, 'Hours' will not be available when you define the timeframe for pre- and post-anchor encounters.
<b>Use secondary encounter identifier</b>	By default, Axiom returns results that meet the filter criteria and groups them into episodes/returns based on patient ID only. However, you can optionally use a secondary identifier to fine pre- and post-anchor encounters that have the same or different values (from the anchor) for the following codes: <ul style="list-style-type: none"> <li>• Principal diagnosis code (ICD-10-CM)</li> <li>• Principal procedure code (ICD-10-PCS)</li> <li>• APR-DRG code</li> <li>• MS-DRG code</li> <li>• CPT code</li> </ul> For example, if you create an episode for heart attacks and choose a secondary identifier of 'Same MS-DRG code' for a given patient, only the post-anchor encounters that also have the same MS-DRG code as the anchor encounter will be included in the episode. Any post-anchor encounters for that patient with a different MS-DRG code will be excluded from that episode.

6. At the bottom of the page, select **Next**, or at the top of the page, select **Step 2 Pre-anchor**. Complete the steps for these tabs using the instructions in the following section.

## ► Pre-anchor and Post-anchor tabs

The **Pre-Anchor** and **Post-Anchor** tabs work similarly in that they let you define any pre- or post-anchor events for the definition.

### To define the Pre-anchor and Post-anchor tabs:

1. In the **Select frequency** section, select one of the following:
  - To include only the first pre- or post-anchor encounter related to the anchor encounter, select **First time**.
  - To include every pre- or post-anchor encounter related to the anchor, select **Every time**.
  - If you do not want to include any pre- or post-anchor encounters, select **Never**.
2. In the **Select criteria** section, do any of the following:
  - To add a criterion to identify the pre- or post-anchor activity, select **Criteria**. For instructions, see [Using the Filter Wizard](#).
  - To edit or copy a criterion, select the existing filter name.
  - To delete a criterion, next to the criterion name, select **X**.
3. In the **Define timeframe** section, complete the following:

Field	Description
<b>Date type</b>	Select <b>Admit</b> or <b>Discharge</b> .
<b>Operator</b>	Select <b>Less than</b> or <b>Less than or equal to</b> .

Field	Description
Value	Enter a value.
Units	Select a unit type.
Date type	Select <b>Admit</b> or <b>Discharge</b> .

For example, let's say that you need to find return episodes that occurred a week after the patient was discharged. In this case, you would select the following:

- **Date type** - Admit (a date when patients were readmitted)
- **Operator** - Less than or equal to
- **Value** - 7
- **Units** - Days (this defines a week period)
- **Date type** - Discharged

Axiom will identify the episodes when a patient returned in a week or less after being discharged after the anchor encounter.

- In the **Details** section on the right side of the page, complete the following:
  - **Notes** - (Optional) Enter your own description to help you identify the definition.
  - **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.
  - **Bundle** - Select the toggle to allow the episode to be grouped with other episodes as a bundle of services.
- Select **Save**.
- To process the definition now, select **Process**. Follow the instructions in [Processing an episode or return definition](#).

**NOTE:** You can process the definition later from the **Encounter measures** main page.

# Adding, editing, or copying a return definition

A return is an episode when a patient who visited a clinic or doctor's office, or was admitted to a hospital and then discharged, returns after some time for the same reasons.

## To add, edit, or copy a return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, select **Define encounter episodes**.
2. To add, edit, or copy a definition that is in a folder, select the folder name.
3. Do one of the following:
  - To add a definition, select **+ Add**, and from the drop-down, select **Return**.
  - To edit a definition, in the **Actions** column, select the ellipsis (...), and from the drop-down, select **Edit**.
  - To copy a definition, in the **Actions** column, select the ellipsis (...), and from the drop-down, select **Copy**. Copying a return definition lets you create new definitions from existing ones.

## ► Step 1 - Anchor encounter tab

1 Step 1 Anchor encounter — 2 Step 2 Return encounter

1. Select date range

Admit

Discharge

2. Select start and end dates

Start month/day/year  End month/day/year

3. Select criteria

Criteria

Allow an encounter to be in multiple returns

Ignore time

Use secondary encounter identifier

Same value

Different value

Select field

Details

Notes

Active

Created

---

Updated

---

1. At the top of the page, enter a name for the definition.
  - If this is a new definition, to enter a name, select **"Untitled"**.
  - If you are editing a definition, select where the current name appears, and change it as needed.

**NOTE:** Although the forward slash is accepted, you should avoid it.

2. In the **Select date range** section, select **Admit** or **Discharge**.
3. In the **Select start and end dates** section, select the start and end dates of the encounter to evaluate.

4. In the **Select criteria** section, do any of the following:
  - To add a criterion, select **Criteria**. To identify the records in the database in which to identify the encounter, select **Criteria**. The Filter Wizard dialog appears, letting you select a specific attribute to define the record(s) (for example, based on procedure code, diagnosis code, or any other attribute tied to the encounter). For instructions, see [Using the Filter Wizard](#).
  - To edit or copy a criterion, select the existing filter name.
  - To delete a criterion, next to the criterion name, select **X**.
5. At the bottom of the page, select the following options, as needed:

Option	Description
<b>Allow an encounter to be in multiple episodes</b>	Select this option to allow an encounter to be in more than one episode. For example, an encounter may meet the criteria of the anchor and post-anchor encounters. This option allows that encounter to be an anchor in one episode and a post-anchor in another episode within this definition.
<b>Ignore time</b>	Select this option if you do not want to consider the time when determining which encounters are eligible to be pre-anchor or post-anchor encounters. You may want to select this option if your encounter data does not have accurate timestamps on admit or discharge dates.  <b>NOTE:</b> If selected, 'Hours' will not be available when you define the timeframe for pre- and post-anchor encounters.

Option	Description
<p><b>Use secondary encounter identifier</b></p>	<p>By default, Axiom returns results that meet the filter criteria and groups them into episodes/returns based on patient ID only. However, you can optionally use a secondary identifier to fine pre- and post-anchor encounters that have the same or different values (from the anchor) for the following codes:</p> <ul style="list-style-type: none"> <li>• Principal diagnosis code (ICD-10-CM)</li> <li>• Principal procedure code (ICD-10-PCS)</li> <li>• APR-DRG code</li> <li>• MS-DRG code</li> <li>• CPT code</li> </ul> <p>For example, if you create an episode for heart attacks and choose a secondary identifier of ‘Same MS-DRG code’ for a given patient, only the post-anchor encounters that also have the same MS-DRG code as the anchor encounter will be included in the episode. Any post-anchor encounters for that patient with a different MS-DRG code will be excluded from that episode.</p>

- At the bottom of the page, select **Next**, or at the top of the page, select **Step 2 Return encounter**. Complete the steps for this tab using the instructions in the following section.

▶ Step 2 - Return encounter tab

The screenshot displays the configuration interface for the 'Return encounter' step. At the top, there are two step indicators: 'Step 1 Anchor encounter' (completed) and 'Step 2 Return encounter' (active). The main configuration area is divided into three sections:

- 1. Select frequency:** Two radio buttons are present: 'First time' (selected) and 'Every time'.
- 2. Select criteria:** A button labeled 'Criteria' is visible.
- 3. Define timeframe:** This section includes several input fields:
  - Date type:** A dropdown menu with 'Choose date' selected.
  - Operator:** A dropdown menu with 'Not Selected' selected.
  - Value:** An empty text input field.
  - Units:** A dropdown menu with '...' selected.
  - After anchor encounter:** A text label.
  - Date type:** A dropdown menu with 'Choose date' selected.

On the right side, there is a sidebar with the following elements:

- Details:** A section header.
- Notes:** A large empty text area for notes.
- Active:** A toggle switch currently turned off.
- Created:** A field with '---' indicating no date.
- Updated:** A field with '---' indicating no date.

At the bottom left of the configuration area, there is a blue button labeled 'Activate'.

1. In the **Select frequency** section, select one of the following:
  - To obtain only pre- or post-anchors that take place only for the first time, select **First time**.
  - To obtain pre- or post-anchors that take place every time before/after the anchor, select **Every time**.
2. In the **Select criteria** section, do any of the following:
  - To add a criterion to identify the return activity, select **Criteria**. For instructions, see [Using the Filter Wizard](#).
  - To edit or copy a criterion, select the existing filter name.
  - To delete a criterion, next to the criterion name, select **X**.
3. In the **Define timeframe** section, complete the following:

Field	Description
Date type	Select <b>Admit</b> or <b>Discharge</b> .
Operator	Select <b>Less than</b> or <b>Less than or equal to</b> .
Value	Enter a value.
Units	Select a unit type.
Date type	Select <b>Admit</b> or <b>Discharge</b> .

For example, let's say that you need to find return episodes that occurred a week after the patient was discharged. In this case, you would you select the following:

- **Date type** - Admit (a date when patients were readmitted)
- **Operator** - Less than or equal to
- **Value** - 7
- **Units** - Days (this defines a week period)
- **Date type** - Discharged.

Axiom will identify the episodes when a patient returned in a week or less after being discharged after the anchor encounter.

4. In the **Details** section on the right side of the page, complete the following:
  - **Notes** - (Optional) Enter your own description to help you identify the definition.
  - **Active** - Select the toggle to activate or deactivate the definition. Only active definitions can be processed.
5. Select **Save**.

6. To process the definition now, select **Process**. Follow the instructions in [Processing an episode or return definition](#).

**NOTE:** You can process the definition later from the **Encounter measures** main page.

# Activating or deactivating an episode or return definition

Activating a definition means the definition is complete and ready for Axiom processing. If you are not yet ready to process the definition, you can click the Activate toggle to deactivate it.

## To activate or deactivate an episode or return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, select **Define encounter rules**.
2. In the **Actions** column of the definition, select the ellipsis (...), and select **Edit**.
3. In the **Details** section on the right side of the page, select the **Active** toggle.

**TIP:** Axiom will check the definition once you activate and save it. Resolve all error messages and save before processing.

4. Select **Save**.
5. To process the definition now, select **Process**.

**NOTE:** You can process the definition later from the **Encounter measures** page.

# Deleting an episode or return definition

Instead of deleting a definition, you can deactivate so that it cannot be processed. For instructions, see [Activating or deactivating an episode or return definition](#).

## To delete an episode or return definition

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, select **Define encounter episodes**.
2. In the **Actions** column of the definition to delete, select the ellipsis (...), and select **Delete**.
3. At the **Delete?** prompt, select **Delete**.

# Processing an episode or return definition

**NOTE:** Only active definitions can be processed.

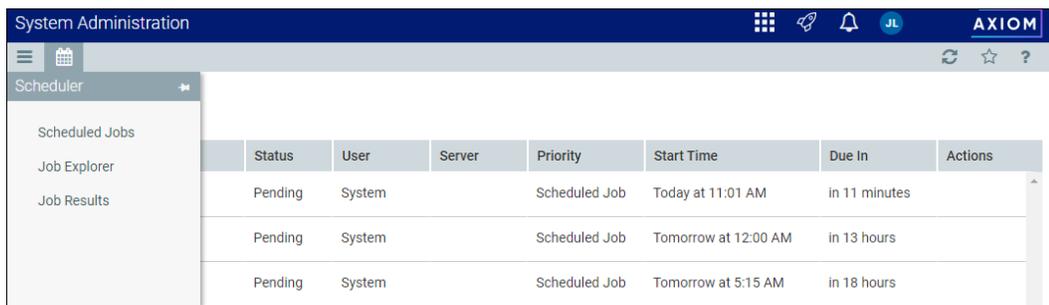
## To process an episode or return definition:

1. From the Enterprise Decision Support home page, in the **Encounter analysis** section, select **Define encounter rules**.
2. In the **Actions** column for the definition to process, select **Process**.

**NOTE:** A message appears at the top of the page that the definition will be processed as soon as possible. Also, if a definition is already scheduled for processing, the **Process** button will be grayed out (inactive). You can open and review the definition, but you will not be able to process or delete it.

3. To view the process status of definitions, do the following:
  - a. Select the Area menu  in the Global Navigation Bar, and select **System Administration**.
  - b. Select the menu icon  in the left side of the Task Bar, and select **Scheduler**.
  - c. From the navigation pane, select **Tools > Scheduler**.
  - d. Select the calendar icon  to display the Scheduler pane, and then select **Job Results**. To refresh the list, select the Refresh icon  in the task bar.

**TIP:** To keep the Scheduler panel open while you are working on the page, select the thumb tack icon .



Status	User	Server	Priority	Start Time	Due In	Actions
Pending	System		Scheduled Job	Today at 11:01 AM	in 11 minutes	
Pending	System		Scheduled Job	Tomorrow at 12:00 AM	in 13 hours	
Pending	System		Scheduled Job	Tomorrow at 5:15 AM	in 18 hours	

**NOTE:** For more information, see [Viewing job results in the Web Client](#) in the online help.

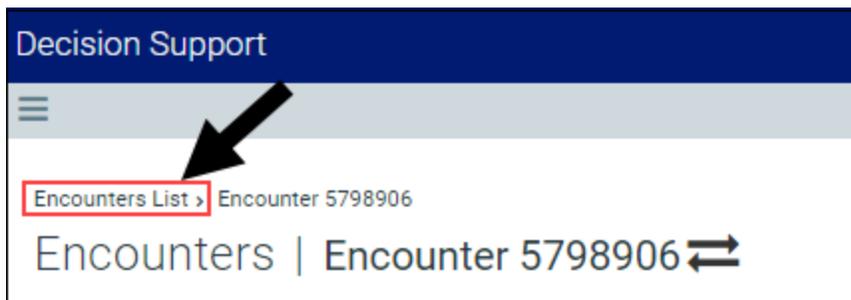
## Viewing encounter details

The Encounter Viewer allows you to view the entire data set for a patient's encounters.

To view encounter details:

1. From the Enterprise Decision Support home page, in the **Data enhancement and refinement** section, click **View encounters**.
2. In the **Enter an encounter** dialog, type the encounter number, and click **OK**.

To navigate back to the encounter selector, click **Encounters List** in the breadcrumb at the top of the page.



### ▶ Encounter records

The encounter record includes several tabs that contain encounter details organized into different areas so you can understand what occurred regarding a patient's visit.

#### Summary tab

Shows high-level overview information related to the encounter, including:

- Facility details
- Financial summary
- Admin/Discharge information
- Billing summary
- Cost category details

### Groupings tab

Shows the service lines and population assignments associated with the encounter.

### Coding tab

Shows codes related to the encounter, including:

- Encounter codes
- ICD Diagnosis
- ICD Procedures
- CPTs

### Providers tab

Shows the list of providers associated with the encounter, including:

- Provider name
- Role
- Date assigned

### Financial tab

Includes the following sub-tabs for two types of financial categories:

- **Payments & Adjustments** - Shows payment and/or adjustment detail information by account number. From the drop-down above the list, you can view all the payments and adjustments, payments only, or adjustments only.
- **Cost Details** - Shows cost information by department for items used in the encounter. To see more details about the item, select the link in the Department column.

### Payors tab

Shows the primary, secondary, and tertiary insurance plans used for the encounter, including:

- Sequence
- Insurance plan name and group
- Subscriber information
- Authorization details
- COB details
- Coverage and non-coverage details

### Surgeries tab

Shows a list of the provided surgical procedure details, including:

- Operation ID

- Procedure code and description
- CPT code and description
- Performing provider
- Surgery start and end time
- Surgery duration

#### Clinical tab

Shows the metrics specific to the encounter, including:

- Hospital acquired conditions
- Patient safety indicators
- Utilization
- Readmissions



# Using the Filter Wizard

You can use or create your own filters to customize the data to view. The Filter Wizard walks you through the process of building complex limit query filters, rather than having to construct them manually. You can create and save new filters for future use as well as use and edit existing filters.

## ▶ Using an existing filter

### To use an existing filter

1. Next to the **Preview** field, select the folder icon.

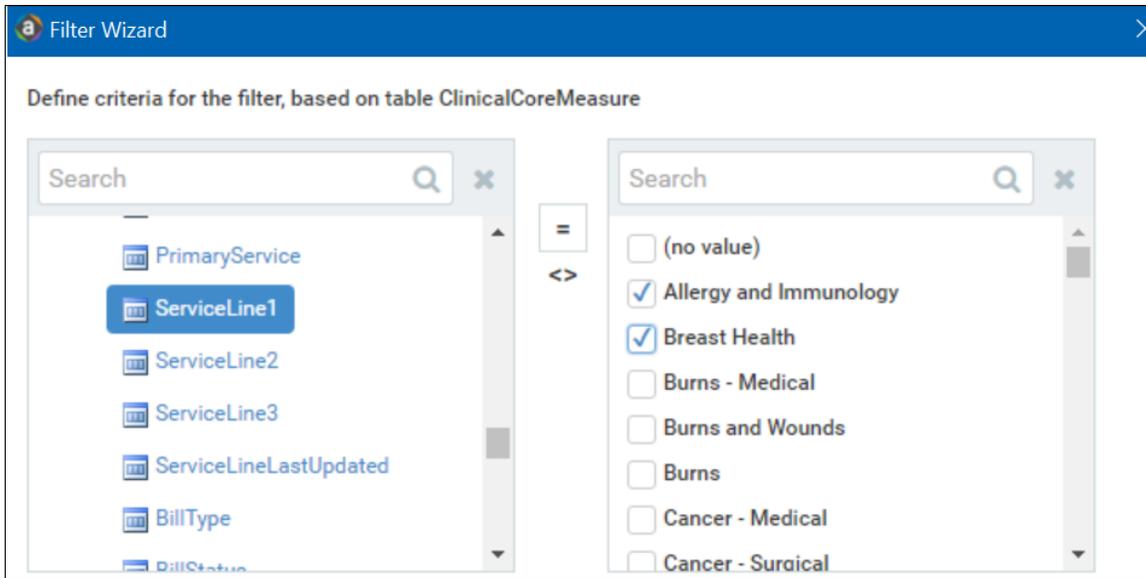


2. In the **Filter Library** dialog, select the filter to use, and select **OK**.
3. In the **Filter Wizard** dialog, select **Apply**.
4. Click **OK**.

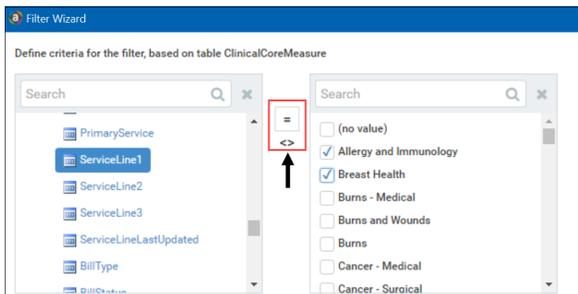
## ▶ Creating a filter

**TIP:** You can create a new filter from an existing filter by selecting it from the folder icon in the **Preview** field, and then follow these steps to make the appropriate changes. Make sure to give the filter a new name so that you do not overwrite the existing filter.

1. On the left side of the dialog, select the table column on which you want to base the filter. After you select a table column, the values in that column appear in the right side of the dialog.

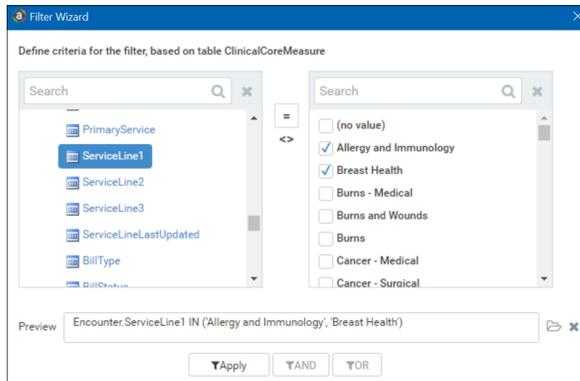


2. In the right side of the dialog, enter or select the value on which to base the filter. You can enter information in the field above the list of values to filter the list or to specify a value. If one or more values are selected, then those items are used in the filter. Otherwise, whatever you enter into the field is used by the filter.
3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than.



4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, edit your selections made above.

**NOTE:** For instructions about writing filter syntax, see [Filter criteria syntax](#).



5. Do one of the following:
  - If the filter criteria statement is finished, select **OK**. The Filter Wizard uses the statement in the Preview box (you do not have to select **Apply** in this case).
  - To create a compound filter, select **Apply** to move the current criteria statement into the **Filter** box. To create another criteria statement, repeat steps a-d. When the next statement is complete, to join it to the prior statement, select **AND** or **OR**.
6. In the **File name** field, enter a name for the filter.
7. In the **Description** field, enter a description of what the filter does.
8. Select **Save**.
9. In the Filter Wizard dialog, select **OK**.

## Filter criteria syntax

Several areas of Axiom Enterprise Decision Support use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

*Table.Column='Value'*

- *Table* is the name of the database table.
- *Column* is the name of the column in the database table.
- *Value* is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

- To filter data by regions, the filter criteria statement might be: `DEPT.Region='North'`. This would limit data to only those departments that are assigned to region North in the Region column.

- To filter data by a single department, the filter criteria statement might be: `DEPT.Dept=100`. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

## ▶ Operators

The criteria statement operator can be one of the following: `=`, `>`, `<`, `<>`, `<=`, `>=`. Greater than or less than statements can only be used with numeric values. For example:

```
ACCT.Acct>1000
```

SQL IN and LIKE syntax can also be used. For example:

```
DEPT.Region IN ('North','South')
```

## ▶ Compound criteria statements

You can use `AND` and `OR` to combine multiple criteria statements. If you are creating long compound criteria statements with multiple `AND`s or `OR`s, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR ACCT.Acct=200)
```

### NOTES:

- When filtering on multiple values in the same column, you must use `OR` to join the statements, not `AND`. In the example above, if the statement was instead `DEPT.Region='North' AND DEPT.Region='South'`, that statement would return no data because no single department belongs to both the North and South regions. When you use `OR`, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL `IN` syntax to create a compound statement for values in the same column. For example, the statement `DEPT.Region='North' OR DEPT.Region='South'` can also be written as `DEPT.Region IN ('North','South')`. The Filter Wizard uses `IN` syntax by default.

## ▶ Using criteria statements in functions

If you are using a criteria statement in a function, such as `GetData`, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1","DEPT.Region='North'", "GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

#### ▶ Referencing blank values in filters

If a string column contains a blank value, you may want to create a filter that includes or excludes records with these blank values. For SQL Server, the blank value is stored as an empty string. This empty string is indicated with empty quotation marks in the filter. For example: `ACCT.CMAssign=' '` or `ACCT.CMAssign<>' '`

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

#### ▶ Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

```
Dept.VP='O'Connor'
```

Invalid. This construction does not work because Axiom Enterprise Decision Support reads it as `Dept.VP='O'` and then does not know what to do with the rest of the text.

```
Dept.VP='O''Connor'
```

Valid. The extra apostrophe tells Axiom Enterprise Decision Support that the apostrophe is part of the string value and is not the closing apostrophe.

**NOTE:** This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom Enterprise Decision Support will construct the appropriate syntax for you.

#### ▶ Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is `YYYY-MM-DDTHH:MM:SS` for DateTime and `YYYY-MM-DD` for Date.

If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.