Release Notes

Axiom Healthcare Suite
Version 2022.1

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Contents

About the release notes

Syntellis is pleased to announce the 2022.1 release of the Axiom Healthcare Suite. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

The purpose of these release notes is to provide you with the following:

- High-level descriptions of new features
- Information to know before upgrading
- Steps for preparing for and scheduling your upgrade
- List of fixed issues

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

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

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

> **IMPORTANT:** Prior to upgrading, make sure to review the **Axiom 2022.1 Release Notes** as well as the release notes for each product licensed by your organization.

Upgrade considerations

There are product/platform dependencies to be aware of before taking upgrades in your environment.

Consider the following when upgrading to Axiom platform 2022.1:

- Clients with Comparative Analytics are required to upgrade this product to 2022.1 at the same time.
- Most of the of their FP&A products will need to be upgraded to at least version 2021.3 when platform or any product that is installed moves to 2022.1. For details, see the following table.
- Rolling Forecasting 1.0 clients (<2020.4) should move to at least 2021.3. This is a new install and not a standard upgrade. We are testing compatibility of RF 1.0 with 2022.1 platform, but this is not officially supported at this time.
- Clients with Enterprise Decision Support will need to contact Syntellis Support for assistance.
- Clients with Cost Accounting, Contract Management, and DSS that are not moving to EDS will need to contact Syntellis Support for assistance.

Just like releases in the past, Axiom platform needs to be at or ahead of the product versions installed.

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

Product	Considerations
Axiom Software Platform	Platform will need to be upgraded if any product needs is upgraded. Platform needs to be on the same version or newer than the installed products.
Axiom Budgeting and Performance Reporting	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. **NOTE**: This product will need to be on 2021.3 or greater to move the platform or any other product to 2022.1.
Axiom Capital Planning and Capital Tracking	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. Upgrade Axiom Capital Tracking at the same time as Axiom Capital Planning. **NOTE**: This product will need to be on 2021.3 or greater to move the platform or any other product to 2022.1.
Axiom Clinical Analytics	There are no required upgrade considerations with this release.

Product	Considerations
Axiom Comparative Analytics	Upgrade. **NOTE**: This product will need to be on 2022.1 to move the platform or any other product to 2022.1.
Axiom Contract Management	Contact your Syntellis Implementation Consultant to schedule an installation.
Axiom Enterprise Decision Support	Contact your Syntellis Implementation Consultant for a recommendation before scheduling an upgrade for this product, but you can upgrade the platform to receive the platform level gains.
Axiom Financial Planning	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, we recommend that you wait until it has concluded. **NOTE**: This product will need to be on 2021.3 or greater to move the platform or any other product to 2022.1.
Axiom Rolling Forecasting	Upgrade if you are on 2020.4 or greater, and you are not in an active planning cycle. If you are in a planning cycle, we recommend that you wait until it has concluded. Clients on versions before 2020.4 will need to go through a new product install process which requires the completion of several setup and verification steps to move to this new product. We have documentation and videos to guide you through this process and services available to assist. Please plan accordingly. **NOTE**: This product will need to be on 2021.3 or greater to move the platform or any other product to 2022.1. We cannot guarantee proper product functionality if you proceed with 2022.1 without upgrading to at least 2021.3.
Axiom Service Line Planning	This is a new product install. For more information, contact your Syntellis representative.
Axiom Strategy Management	Upgrade. There are no required upgrade considerations with this release.
Axiom Treasury Cash Management	This is a new product install. For more information, contact your Syntellis representative.

New features summary

This section includes a description of the enhancements included in each product of the Axiom Healthcare Suite. To go to a specific product section, select the appropriate link:

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

AxiomBudgeting and Performance Reporting

While no new functionality has been added or enhanced in Axiom Budgeting and Performance Reporting, it does deliver enhancements from Axiom Version 2022.1. For more information, see Axiom 2022.1 Release Notes.

Axiom Capital Planning and Capital Tracking

Enhancements in this release include:

Navigation enhancements

A new, modern method for product navigation has been introduced for an improved user experience. All top-level web navigation for Axiom Capital Planning and Capital Tracking is new and improves the ease of switching between applications and navigating within the application.

Axiom Clinical Analytics

Enhancements in this release include:

Regulatory content updates

We provide Version 39 Regulatory Updates and 2021 AHRQ software updates, including:

- 3M GPCS software update
- AHRQ software
- APR lookup tables
- Exclusions table for Coding Analytics
- HCPCs descriptions table
- HCAHPS Adjustment Weights
- ICD Diagnosis tables
- MS-DRG Grouper software
- MS-DRG lookup tables
- PPR norms
- Procedure tables

Axiom Comparative Analytics

Enhancements in this release include:

Navigation enhancements

A new, modern method for product navigation has been introduced for an improved user experience. All top-level web navigation for Comparative Analytics is new and improves the ease of switching between applications and navigating within the application.

Axiom Contract Management

Enhancements in this release include:

New report provides reimbursement insights by contract

The Winning Detail report delivers contract calculation details, displaying actual reimbursement, potential reimbursement, and loss, enabling you to clearly see areas for possible negotiation.

New report provides reimbursement insights by service line

The Winning Detail Service Line report provides calculation details that enable you to see, across payers, your revenue and losses for each service line for all the contracts in a given simulation.

New Change Tracking report

Use the Change Tracking report to help determine why a contract is not calculating, if a payer code is missing, which contract is using a payor code that you want to assign elsewhere, and so on.

Other enhancements

- **Recalculate from clauses and terms pages** – We enabled claims recalculation from clauses and terms pages. Now to recalculate and view changes after editing clauses or terms, click the Recalculate button to queue the parent provision for calculation; no need to navigate to the Recalculate Claims page.
- **Voucher line item code modifiers** – Previously, vouchers did not consistently display line item code modifiers that affect the reimbursement calculation. Some displayed only modifiers in the first position on a claim, while others displayed all modifiers regardless of position or whether they affected reimbursement, and some did not display modifiers at all. This has been corrected so that as of version 2022.1, vouchers will display only modifiers that affect the reimbursement calculation, regardless of which position the modifier appears on the claim. Other modifiers associated with a claim are displayed on the claim. For more information, see “View claim details” in the online help.
- **Claims** – Now when you make a percent adjustment to the CPT fee schedule amount, the modifier that affects reimbursement can be in any of the four modifier positions on the claim instead of needing to be in the first position.

New report provides reimbursement insights by contract

▶ Why use this feature

The Winning Detail report delivers contract calculation details, displaying reimbursement, loss, and potential reimbursement by contract, enabling you to clearly see areas for possible negotiation.

▶ How this feature works

What: The Winning Detail report enables you to see, by contract, all the elements that make up your reimbursement and expected payment, laid out in easy-to-read columns that clearly show what you were paid based on the contract terms, the total amount available without contract restrictions, and the difference between the two, down to the clause and term level. You can include claims data in the report to see how each claim affects reimbursement, and you can export the report to Excel for reviewing outside of Axiom Contract Management.

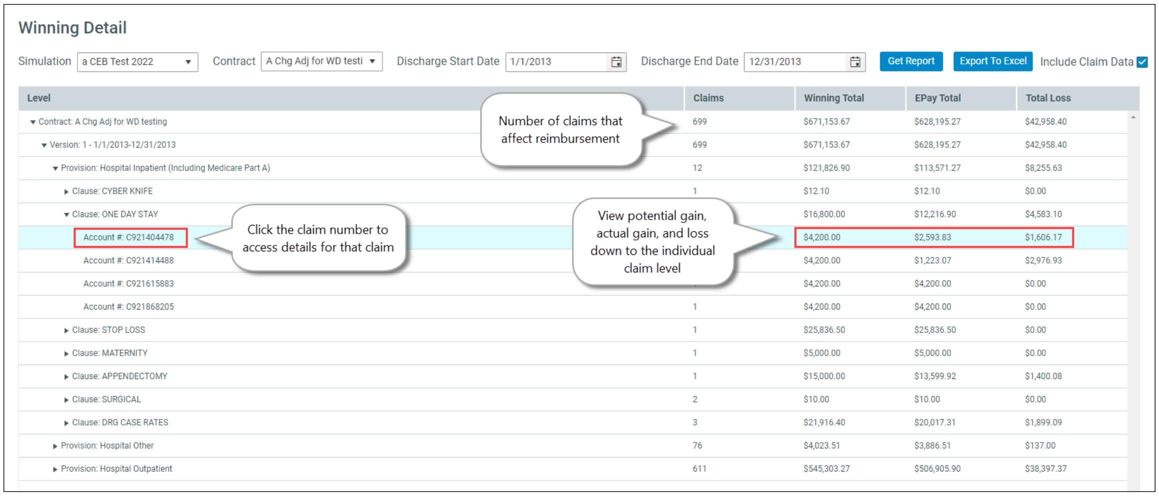
Where: This change applies to the Reports menu in the main menu header.

Who: Only Axiom Contract Management administrators and analysts can access and run this report.

How:

> **NOTE:** This report needs to be enabled before use. Please contact Syntellis Support for setup help. After enabling, you need to recalculate claims to generate data used in the report.

1. From the **Reports** menu in the main menu header, select **Winning Detail**.
2. From the **Simulation** drop-down, select the desired simulation.
3. Select a contract.
4. Select a date range.
5. To include claims data, select the **Include Claim Data** check box.
6. Click **Get Report**.



Where to find more information

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

- “Run the Winning Detail report”
- “Review Winning Detail reports”
- "Working with reimbursement detail reports"

New report provides reimbursement insights by service line

▶ Why use this feature

The Winning Detail Service Line report provides calculation details that enable you to see, across payers, your revenue and losses for each service line for all the contracts in a given simulation.

▶ How this feature works

What: View all the elements that make up your reimbursement and expected payment by service line. The report displays this information in easy-to-read columns that clearly show what you received from each payer, the total amount available without contract restrictions, and the difference between the two, down to the term level. As with the Winning Detail report, you can select to include claims information and you can export the report to Excel.

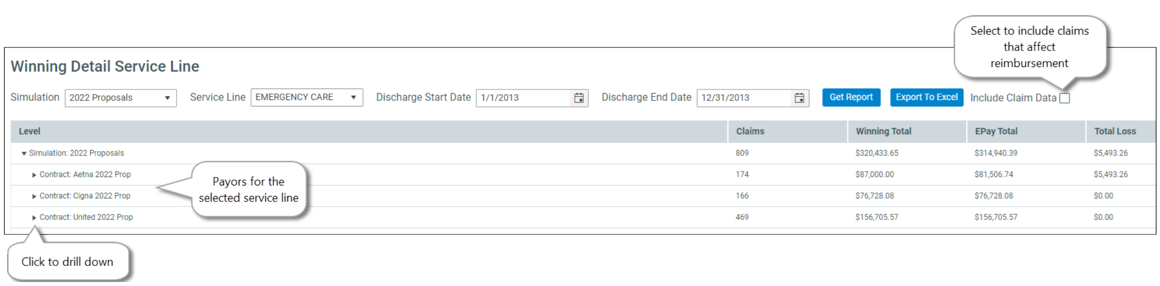
Where: This change applies to the Reports menu in the main menu header.

Who: Only Axiom Contract Management administrators and analysts can access and run this report.

How:

> **NOTE:** This report needs to be enabled before use. Please contact Syntellis Support for setup help. After enabling, you need to recalculate claims to generate data used in the report.

1. From the **Reports** menu in the main menu header, select **Winning Detail Service Line**.
2. Select the desired simulation.
3. Select the service line.
4. Select a date range.
5. To include claims data, select the **Include Claim Data** check box.
6. Click **Get Report**.



Where to find more information

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

- “Run the Winning Detail Service Line report”
- “Review Winning Detail reports”
- "Working with reimbursement detail reports"

New Change Tracking report

▶ Why use this feature

Use the Change Tracking report to help determine why a contract is not calculating, if a payer code is missing, which contract is using a payor code that you want to assign elsewhere, and so on.

▶ How this feature works

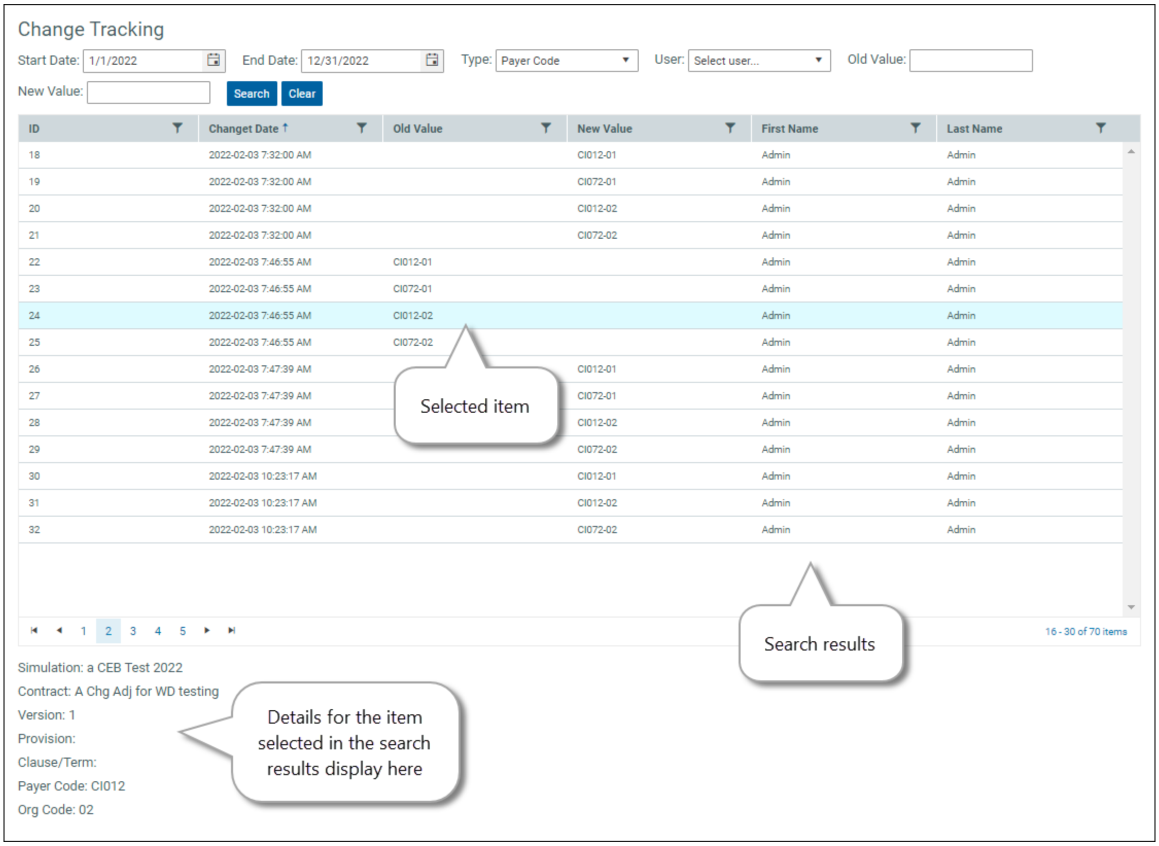
What: The Change Tracking report enables administrators to query the log files for changes based on attributes or payor codes assigned to a contract, and then see the details related to the change: the simulation, contract name, version number, related provision, clause, or term if any, and the payer code and the organizational code if they exist.

Where: This change applies to the Admin menu in the main menu header.

Who: Only Axiom Contract Management administrators can access this menu to query the log files.

How:

1. From the **Admin** menu, select **Change Tracking**.
2. On the **Change Tracking** page, select the query date range, whether to query attribute or payor code data, by user, or by value.
3. Click **Search**.
4. In the search results, locate the desired item and click in the row. Details about the event display in the lower left of the page.


Change Tracking
Start Date: 1/1/2022
End Date: 12/31/2022
Type: Payer Code
User: Select user...
Old Value:
New Value:
Search
Clear
ID
Changet Date
Old Value
New Value
First Name
Last Name
18 2022-02-03 7:32:00 AM CI012-01 Admin Admin
19 2022-02-03 7:32:00 AM CI072-01 Admin Admin
20 2022-02-03 7:32:00 AM CI012-02 Admin Admin
21 2022-02-03 7:32:00 AM CI072-02 Admin Admin
22 2022-02-03 7:46:55 AM CI012-01 Admin Admin
23 2022-02-03 7:46:55 AM CI072-01 Admin Admin
24 2022-02-03 7:46:55 AM CI012-02 Admin Admin
25 2022-02-03 7:46:55 AM CI072-02 Admin Admin
26 2022-02-03 7:47:39 AM CI012-01 Admin Admin
27 2022-02-03 7:47:39 AM CI072-01 Admin Admin
28 2022-02-03 7:47:39 AM CI012-02 Admin Admin
29 2022-02-03 7:47:39 AM CI072-02 Admin Admin
30 2022-02-03 10:23:17 AM CI012-01 Admin Admin
31 2022-02-03 10:23:17 AM CI012-02 Admin Admin
32 2022-02-03 10:23:17 AM CI072-02 Admin Admin
1 2 3 4 5
16 - 30 of 70 items
Selected item
Search results
Simulation: a CEB Test 2022
Contract: A Chg Adj for WD testing
Version: 1
Provision:
Clause/Term:
Payer Code: CI012
Org Code: 02
Details for the item selected in the search results display here

Axiom Enterprise Decision Support

Enhancements in this release include:

Navigation enhancements

A new, modern method for product navigation has been introduced for an improved user experience.

Cost model management

Managing cost models includes:

- Providing a view of all of your cost models in one place
- Displaying an overview of key attributes of your cost models
- Letting you make selected bulk edits to multiple cost models at one time

New cost reporting tables

Two new tables have been introduced:

Cost Detail Category Calculation Reporting table – For normal reporting users who are looking for a table that provides access to all cost detail records, including imported, Direct to Encounter generated, costed, and uncosted with access to all cost categories.

Encounter Total Costs Reporting table – For normal reporting users who are looking to report about cost with the ability to view cost categories, but not needing to get to the cost detail level of utilization data.

Clinical Performance Measures

Gain a better understanding of the impact of quality on patient utilization, cost, revenue, and margin.

Cost model management

▶ Why use this feature

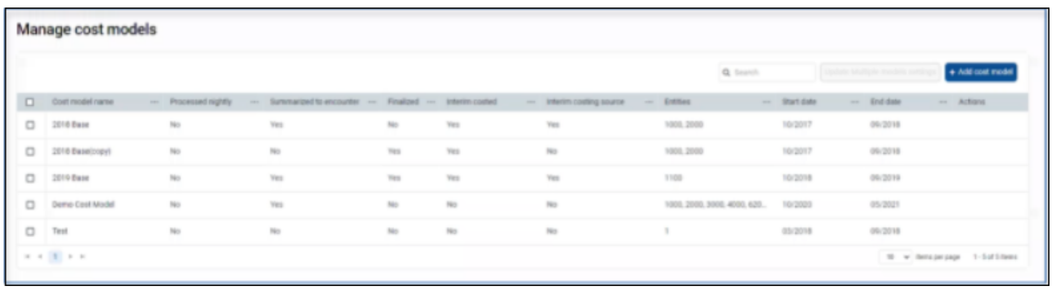
The **Manage cost models** screen:

- Provides a view of all of your cost models in one place.
- Displays an overview of key attributes of your cost models.
- Lets you to make selected bulk edits to multiple cost models at one time.

▶ How this feature works

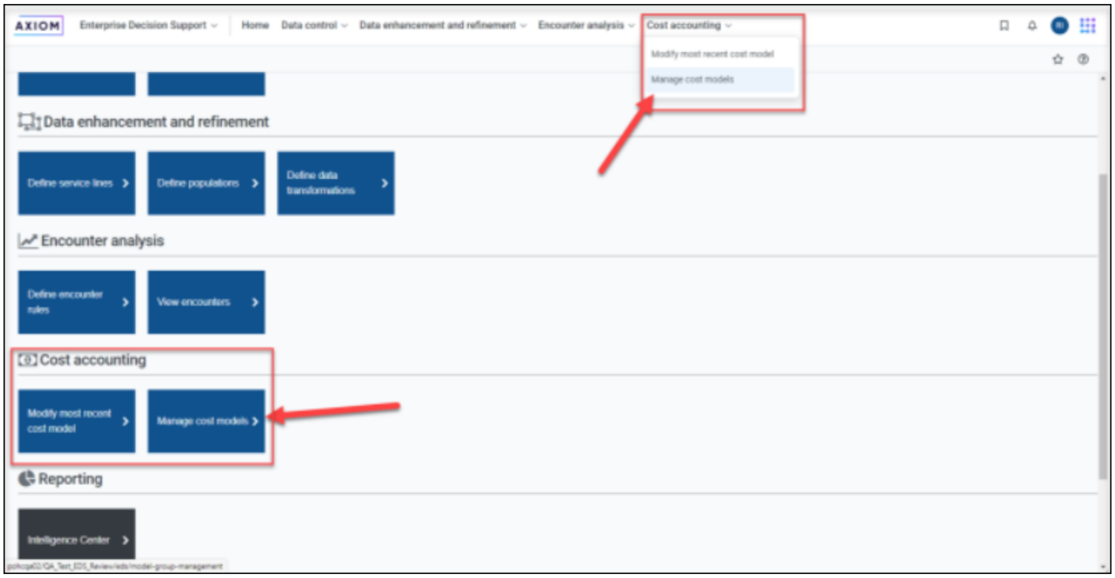
What: When determining what cost model you want to work with, Enterprise Decision Support provides an intuitive user interface for visibility into all available cost models and their key attributes.

Where: From the **Enterprise Decision Support** home page, under the **Cost Accounting** dropdown, select **Manage cost models**.

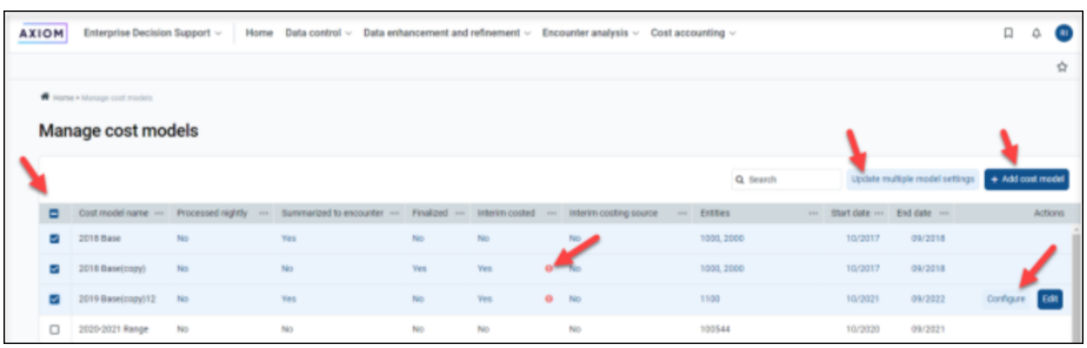


Who: Users assigned the Costing Admin role profile.

How: From the navigation bar on the **Enterprise Decision Support** home page, in the **Cost accounting** drop-down, select **Manage cost models**.



- To create a new cost model, from the **Manage cost models** screen, select **Add cost model**.
- To modify how a single existing cost model is set up, from the **Manage cost models** screen, under the **Actions** column, select **Configure**.
- To modify the contents of a cost model, from the **Manage cost models** screen, under the **Actions** column, select **Edit**.
- To modify multiple cost models simultaneously, from the **Manage cost models** screen, select the boxes to the left of the cost models you want to modify by, and then select **Update multiple model settings**.



Where to find more information

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

- "Manage cost models"

New cost reporting tables

▶ Why use this feature

Cost Detail Category Calculation Reporting table - For normal reporting users who are looking for a table that provides access to all cost detail records, including imported, Direct to Encounter generated, costed, and uncosted with access to all cost categories.

Encounter Total Costs Reporting table – For normal reporting users who are looking to report about cost with the ability to view cost categories, but not needing to get to the cost detail level of utilization data.

▶ How this feature works

What: The detailed data from CostDetailCategoryCalculation, D2E_CostDetailCategoryCalculation, CostDetail and D2E_CostDetail is aggregated by a schedule-able job into both the CostDetailCategoryCalculationReporting and EncounterTotalCostReporting tables.

Where: Axiom Scheduler in the desktop client.

Who: Users assigned Costing Admin role profile.

How: Open the desktop client, and perform the following steps:

1. Go to **Scheduler Jobs Library>EDS>Reporting** and double-click **PublishReportingTables**.

   The **Delete Cost Model** dialog box appears.

2. To find the Cost Model ID for the cost model to be deleted, on the left side, select **Variables** .
3. Select **Tasks**, then select **Delete Cost Model**, and under **Task Details**, enter the Cost Model ID.
4. Select **Run Once**. The associated cost model record and the associated cost model tables are deleted.

Where to find more information

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

- “Axiom file system”

Clinical Performance Measures

▶ Why use this feature

Use these performance measures to better understand the impact of quality on patient utilization, cost, revenue, and margin.

▶ How this feature works

What: Patient encounter data will be processed to determine quality measure assignment for use in reporting within Enterprise Decision Support.

Where: Scheduler Jobs involved – **Scheduler Jobs Library** > **EDS** > **CPM** >

- Trigger DME Processing
- Trigger Import DME Data
- Import DME Data
- Release DME Processing Lock

Tables Populated by CPM – **Tables** > **EDS** > **CPM** >

- CPMMeasureData
- CPMMeasure
- CPMBenchmarks
- CPMBenchmarkPeriods
- CPMPeerGroup

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

How: Upon initial setup, your historical data is processed through CPM. After that has completed, the scheduled jobs are run to process the last N months of encounter data on a monthly basis.

Trigger DME Processing runs on the 15th of each month, and Trigger Import DME Data runs on subsequent days to bring the data back into the tables. You can configure these jobs to run on different dates. We recommend that the lookback period be set based around when medical records have most encounters final coded.

▶ Where to find more information

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

- “Clinical Performance Measures”

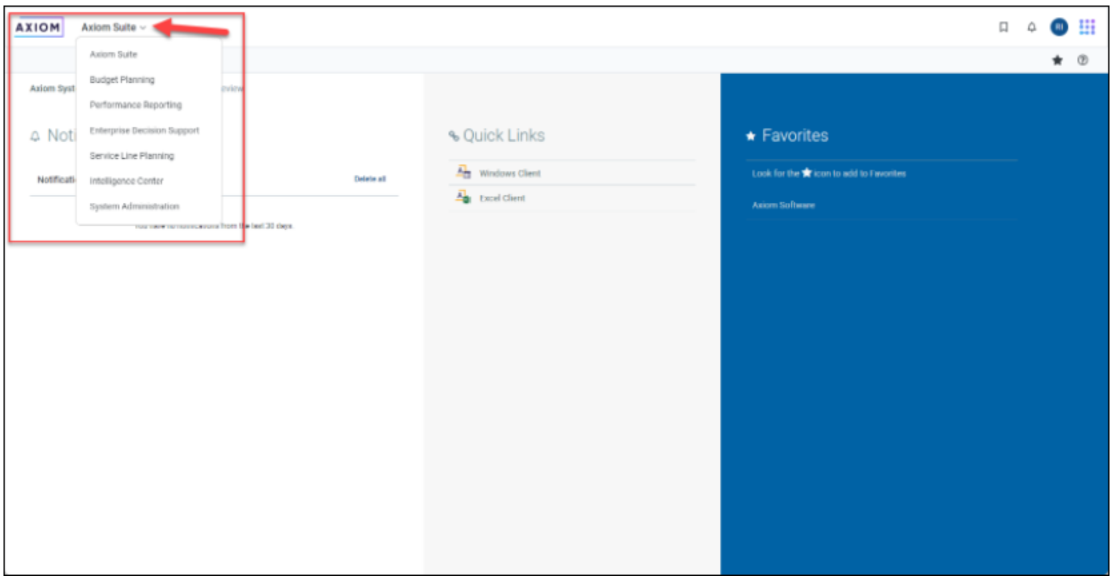
Navigation enhancements

Why use this feature

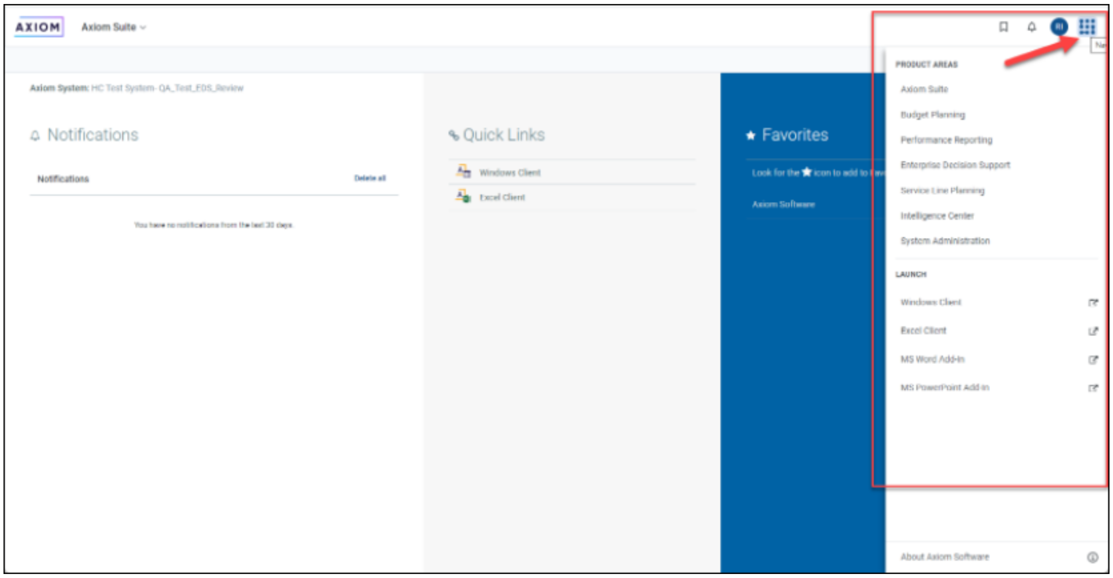
A new, modern method for product navigation has been introduced for an improved user experience.

How this feature works

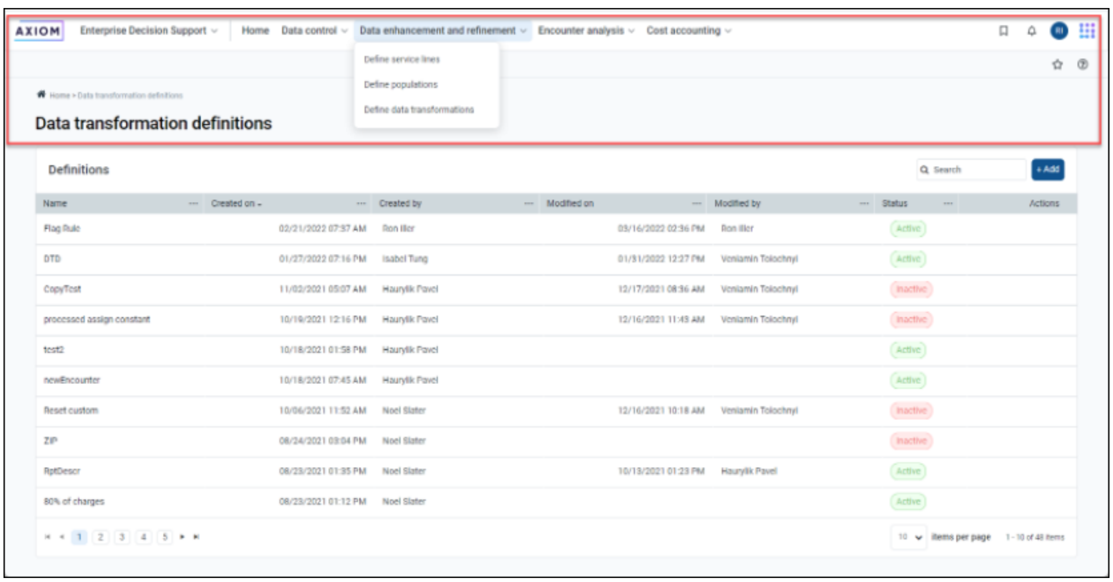
What: All screens have new navigation patterns (navigation bar) across the top of each page allowing easier access to all product functionality. No functionality has been removed or changed, though some options may have moved on the page.



Axiom Suite drop-down menu



Product area drop-down menu



EDS drop-down menus

Where: All screens represented in the Enterprise Decision Support navigation bar have been updated.

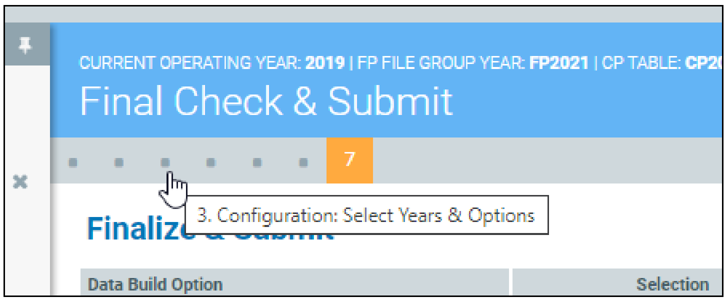
Who: All Enterprise Decision Support users.

How: From the Axiom home page, select **Axiom Suite** drop-down, and then select **Enterprise Decision Support**. Alternatively, on the right side of the Axiom home page, select the waffle icon, and under **Product Areas**, select **Enterprise Decision Support**. The **Enterprise Decision Support** home page appears. Select the appropriate task from the taskbar drop-downs.

Axiom Financial Planning

Enhancements in this release include:

- **Updated Rating Agency Medians**. In certain reports, users can select the latest rating agency medians for comparison purposes.
- **Updated Transfer to Financial Planning utility**. We have added page number tool tips to the Transfer to Financial Planning utility:



Axiom Rolling Forecasting

Enhancements in this release include:

New Payor Setup utility

Now you can associate payor mappings with Revenue, Deductions, and Statistic RFCodes so that payor data elements can be configured and reported at various specific levels in plan files and the Deductions Model calculator.

New alternative IP Census calc method

The Per Unit IP Census calc method provides an alternative way to calculate IP Census volume that eliminates the risk of unintended exponential growth in volume calculations.

Benefit % of Salaries calc method update

We updated the Percent of Salaries including OTA calculation so that it is both correct and also more transparent. We added a row related to the Salary One Time Adjustment (OTA) and Benefit OTA to clearly show the amounts being included in the percent calculations.

Deductions Model calculator updates

- **Changes to payor setup** – We removed the Standard Payor Setup section from the RF Deductions Setup utility and put that functionality in a new utility, the RF Payor Setup utility.
- **Number scale indicators** – We added number scale indicators ($000s) to the applicable row headings in the calculator to provide a visual cue of the format used in that row when entering amounts.

Plan file updates

- **Change a plan file calc method** – Instead of changing calc methods in the plan file worksheets, the preferred method is to change them in the RFCODE Dimension table using the Dimension Maintenance Utility. Changing calc methods in plan files is being deprecated. For more information, see “Change a plan file calc method” in the online help.
- **Plan file benefits calculations** – Contractual salaries are now excluded from benefits calculations in the plan file Forecast, Initiatives, and Summary worksheets. We updated the calculation methods so that you do not need to select a benefits code when the selected Salary code is E_ Salaries_Contract. For more information, see “Configure code matches for census, revenue, and salary” in the online help.

- **Plan file Revenue block label change** – In the plan file Forecast worksheet, the label for CMI Inpatient Admissions has been changed to CMI Inpatient Admits\Discharges, and the CMI Adjusted Admissions label has been changed to CMI Adjusted Admits\Discharges. The change allows for situations in which Discharges have been configured for RFCodes and the related driver for IP Census.
- **Forecast sheet Total rows now easier to see** – In the plan file Forecast worksheet, the Total rows for each section are now in boldface type with light gray background shading to differentiate them from other rows on the sheet. For both Actuals and Forecast columns, the numbers in these rows are also in boldface type.
- **Fixed/Variable % entries now autosaved at first use** – Previously, in the plan file Forecast worksheet, when you entered a Fixed/Variable percentage for the first time for a revenue item when the Forecast Method was set to the default "Driver," your input was lost when you saved unless you changed the Forecast Method to PriorForecast before saving. Now when you enter data in the Fixed/Variable percent column for the first time, when you save, the Forecast Method is automatically changed to PriorForecast, preserving your change. You still have the option to manually set Forecast Method to Driver at any time after saving the first input.
- **New Plan file configuration option** – Now you can control whether the OTA sections in the plan file Forecast worksheet are expanded or collapsed by default. Find this setting in the Planning Configuration utility. For more information, see "Configure planning" in the online help.
- **Forecast quarterly calculations now included in saved rows** – Prior to this release, in the Forecast worksheet, the Quarter 1 through Quarter 4 calculated fields were not included when rows were saved to the database, which could be a problem for reports needing the results calculated in those quarterly columns. Now, any rows from the worksheet that are saved will include quarterly data if it exists.
- **Certain revenue calc methods can be used for deductions** – If you need to use the Other Revenue, Global Data, or No Forecast calc methods for Forecast deductions, you can now do so without the results ending up in revenue totals instead of deductions. Previously, when these calculation methods were assigned to a deduction RFCode, they were excluded from the deduction results. The code has been modified so that if a deduction RFCode is listed as a deduction in the RFSUM column, and the assigned calculation method is Other Revenue, Global Data, or No Forecast, that item will still be treated as a deduction.
- **Forecast method impact changes** – For forecast items using a forecast method of averaged months (e.g., 3 Month Avg, 6 Month Avg, and so on), the forecast method will be used to get the initial rate for the first forecast period only; the second forecast month will use the results of the first month instead of taking the average of the set number of prior months. This update prevents the second forecast month from starting with an averaged value that does not reflect reality. Subsequent forecast periods will use the Last Month forecast method (start with the prior period results) and adjust as normal. The following calculation methods have been adjusted to work with this new approach: Expense, IP Census, Other Deduction, Other Revenue, Patient Revenue, Patient Revenue Net IP Census, Patient Revenue Net Per Unit, Pct of Salaries, Per Unit IP Census, Per Unit Volume, Rate Per FTE, Salary, and Volume.

Miscellaneous updates

- **RFCODE data table** – For deductions RFCode entries, the default calculation method for the Initiatives tab has been changed to Deduction.
- **Manager Dashboard** – **Executive Overview tab** – For all subtabs, when the **Totals or Per Unit Data** setting in Data Display Options is set to **Per Unit**, Historical Performance Analysis data is not available. When the **Totals Per Unit Data** setting is set to **Totals**, Historical Performance Analysis data is available, with two exceptions:
  - Summary tab's Net Income over Expenses KPI card
  - Labor Overview tab's Paid Hours per Unit KPI card

  These cards do not have historical analysis data regardless of the selected Totals per Unit Data setting in Data Display Options. For more information, see "Working with the Manager Dashboard" in the online help.

New Payor Setup utility

Why use this feature

Use the Rolling Forecasting Payor Setup utility to simplify handling payors and to associate payor mappings to Revenue, Deduction, and Statistic RFCodes so that payor data elements can be configured and reported on at the desired level of specificity. Previously, payor setup was part of the Deductions Model Configuration Utility. However, not all organizations use the Deductions Model calculator but still need to set up payors, so we moved this functionality to the new utility. Payors set up here affect payors used in plan files as well as in the Deductions Model calculator.

How this feature works

What: This feature functions much like it did when it was part of the Deductions Model configuration. You can group the payors to a single payor or any number of payors within the plan files. And, since the payor data is stored at the individual payor level but grouped at the plan file level only, the preserved payor details can be used in the Deductions Model calculator.

> **NOTE:** In the plan file Forecast and Initiatives sheets, when you make a percentage adjustment, the results of the adjustment on the original amounts roll together and add up correctly for grouped payors. However, on the worksheet, the percentages will get summed as well, which they should not. After saving and reopening the plan files, you will need manually correct the cells that contain summed percentages so that they reflect the actual percentages used.

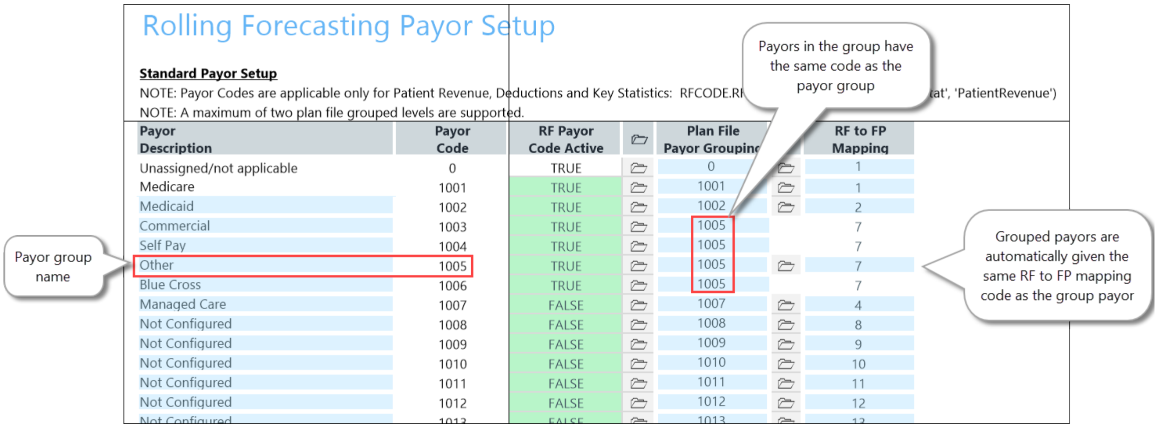
Where: This change applies to plan files, the Deduction Model Configuration Utility, and the RF Admin task pane's Tables section. Payor codes are applicable only for patient revenue, deductions, and key statistics.

Who: Only Axiom Healthcare Suite administrators can configure payors using this utility.

How: In the **RF Admin** task pane under **Tables**, open **RFPayor Configuration Utility**. To add and group payors:

1. To add a payor or payor group, in the next available "Not Configured" row of the **Payor Description** column, type a payor name or group into the blue cell, and then, in the **Active** column for that row, select **TRUE**.
2. To add a payor to the new group, in the **Plan File Payor Grouping** column, for each payor to be included in the group, double-click the folder icon () to the left of the column and then, in the **Choose Value** dialog, select the name of the group. Click **OK**. If you want to add multiple payors at a time, copy the group code and paste it into the **Plan File Payor Grouping** column for the payors to include.

3. (Optional) To map payors for use in Axiom Financial Planning, in the **RF to FP Mapping** column, double-click the folder icon to the left of the column and then, in the **Choose Value** dialog, select the FP payor code with which to associate the Axiom Rolling Forecasting payor.



4. Save your changes.

▶ Where to find more information

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

- "Configuring payors"

New alternative IP Census calc method

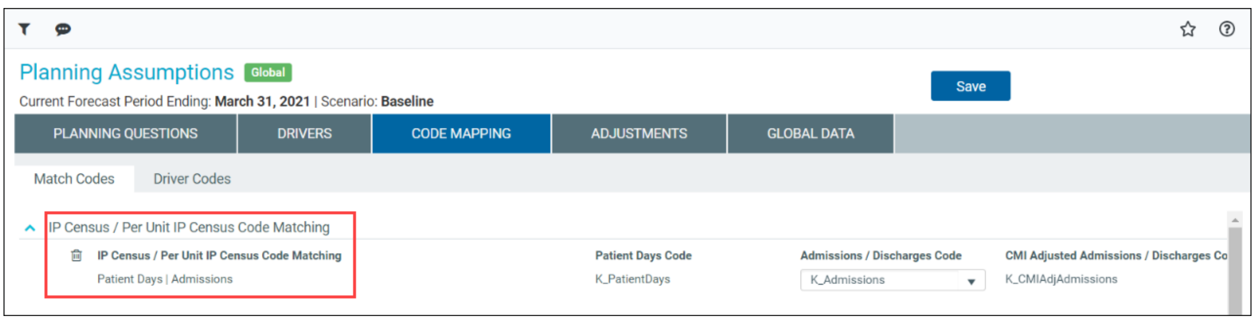
Why use this feature

The IP Census calc method now has a per unit variant calculation: Per Unit IP Census. Instead of using a Period over Period percent change like the regular IP Census, which can lead to unintended exponential growth when used in some situations, the new Per Unit IP Census calc method is based on unit rates, which allows you to enter IP Census adjustments in the plan file Forecast worksheet without resulting in exponential growth in revenue or other variable items driven by this calculation.

How this feature works

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

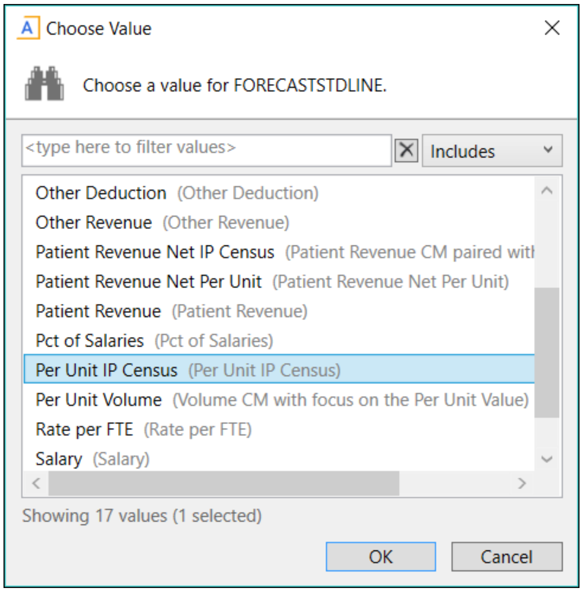
Where: The Per Unit IP Census calc method is used in the RFCODE table and the Volume section of the plan file Forecast worksheet. This calc method cannot be used as an insert; it must be configured in the Code Mapping driver. Both the IP Census and the Per Unit IP Census can share the same driver setup:



> **NOTE:** Calc method changes should be made in the Dimension Maintenance utility, which saves changes to the RFCODE table.

Who: You need to have calc method insert permissions, plus read and write access to the plan files. Only RF administrators can use the Dimension Maintenance utility.

How: To change the calc method to Per Unit IP Census for a Volume RFCode for all plan files that use it, launch the **Dimension Maintenance** utility. In the **Refresh Variables** dialog, select **RF - Rolling Forecast** as the product to edit and **RFCODE** as the dimension. For the desired RFCODE row, in the **ForecastStdLine** column, double-click click the folder icon and then, in the **Choose Value** dialog, select **Per Unit IP Census**. Save the changes. To view changes in the Forecast worksheet, reprocess the plan files.



▶ Where to find more information

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

- “Change a plan file calc method”

Update to the Benefit Percent of Salaries calculation

▶ Why use this feature

We updated the Percent of Salaries including OTA calculation so that it is both correct and also more transparent. We added a row related to the Salary One Time Adjustment (OTA) and Benefit OTA to clearly show the amounts being included in the percent calculations.

▶ How this feature works

What: We made the following changes to the Benefits Percent of Salaries calculation:

- Updated the Percent of Salaries including One Time Adjustments (OTAs) calculation so that Benefit Expense including OTAs is divided by Salary Expense including OTAs.
- Added a row related to Salary OTA and Benefit OTA to clearly show the amounts being included in the percent calculations. Prior to this, the Salary OTA total was not displayed, and the calculation for the Benefit impact of Salary OTAs was contained in one formula. We also renamed the totals row to "Total Benefits - Based upon Percent of Salaries including Salary OTAs."
- Updated the Quarterly Total column to calculate based on the Period Totals being summed instead of calculating a weighted percentage. The Salary and Benefit OTAs will sum in the Quarterly Totals.

Where: This change applies to the Benefits section of the plan file Forecast worksheet and to the Forecasting calculation method library.

Who: Users with permissions to edit plan files.

How:

1. From the user or Admin task pane, open a plan file.
2. On the **Forecast** worksheet, navigate to the **Benefits - Based upon Percent of Salaries** section. Notice the new Salary OTAs row.

Forecast

CCU Imaging - Test Scenario (Default) - 187

For the Period Ending July 31, 2021

	Payor	Forecast Method	Fixed / Variable %	FY 2021 Apr - Jun Actual	FY 2021 Jul Actual	FY 2021 Aug Forecast	FY 2021 Sep Forecast	FY 2021 Jul - Sep Projected
Benefits								
Benefits - Based upon Percent of Salaries								
Salary				4,203	1,601	1,751	1,901	5,253
Benefit Amount				1,209	603			
Driver Growth Assumption						0.0%	0.0%	0.0%
% Adjustment						0.0%	0.0%	0.0%
Period Over Period Change				207.5%	12.4%	0.0%	0.0%	0.0%
Benefit Adjustments				0	0	0	0	0
% of Salaries		3 Month Avg		28.8%	37.7%	36.2%	38.8%	37.6%
Amount Adjustment - Quarterly						51	49	100
Total - Benefits - Based upon Percent of Salaries				1,209	603	634	738	1,975
Cost per Unit				*$0.00*	*$0.00*	*$0.00*	*$0.00*	*$0.00*
One Time Adjustment for Forecasted Columns						0	0	0
Total including One Time Adjustments				1,209	603	634	738	1,975
Salary OTAs						100	0	100
Benefit Impact of Salary OTAs						36	0	36
Total Benefits - Based upon Percent of Salaries including Salary OTAs				**1,209**	**603**	**670**	**738**	**2,011**
% of Salaries including OTAs				**28.8%**	**37.7%**	**36.2%**	**38.8%**	**37.6%**
Cost per Unit				*$0.00*	*$0.00*	*$0.00*	*$0.00*	*$0.00*
Prior Forecast						0	0	0

3. Add Salary OTAs.
4. Review the impact to Salary OTAs and % of Salaries including OTAs in the % of Salaries Benefit calculation method.
5. Review the calculation of the % of Salaries Including OTAs row in the % of Salaries Benefit calculation method. The Salary OTA impacts both the % of Salaries line and % of Salaries including OTA line.
6. Review the changes to the Benefits impact of the Salary OTAs line.
7. Add a Benefit OTA. This allows for a difference in calculating the % of Salary OTA line as opposed to the % of Salaries line.
8. Save the plan file.

Where to find more information

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

- “Expenses”

Axiom Strategy Management

Navigation enhancements

A new, modern method for product navigation has been introduced for an improved user experience. All top-level web navigation for Comparative Analytics is new and improves the ease of switching between applications and navigating within the application.

Axiom Treasury Cash Management

Enhancements in this release include:

Drill down enhancement in Accounts Payable Management (APM)

APM Reporting and Analysis now allows you to drill down into a payment type to view the vendor detail.

Bank Fee Management (BFM) updates

- A new Contract Rates feature has been added to Bank Fee Management that allows you to enter contract bank fee management rates so you can view an analysis of Current vs. Contract rates.
- A new Trend Analysis feature has been added to BFM that allows you to view a 12-month trend of Bank fees with the ability to toggle between volume, price, and charges.

Analytics view of Cash Flow

A new feature has been added to the Cash Flow analysis to view Days Cash on Hand.

Configuration enhancements

- A new configuration option has been added to the Cash Flow / Working Capital module that allows you to select which BAI2 code to use for beginning/ending balance.
- A new configuration option has been added to the Cash Flow / Working Capital module that allows you to define Days Cash on Hand–Upper Limit and Lower Limit to view in the Cash Flow Analytics.

UI/UX Enhancements

The overall visual display in APM Analysis, BFM Analysis, Cash Flow Analysis, and Working Capital Dashboard has been enhanced to provide an improved user experience.

What to know before upgrading

IMPORTANT: You must apply the Axiom 2022.1 upgrade before applying any 2022.1 Axiom product upgrades. Axiom upgrades are **not** backwards compatible with all product versions. See Upgrade considerations for the Axiom products that need to be at version 2022.1 or version 2021.3 (Axiom compatibility release), other than Enterprise Decision Support, to perform appropriately. See the **Axiom 2022.1 Release Notes** and **Axiom Healthcare Suite 2022.1 Release Notes** for considerations before upgrading.

Key requirements

Unlike past releases, there are product/platform dependencies to be aware of before clients take upgrades in their environment.

Clients will need to consider the following when upgrading to Axiom platform version 2022.1:

- Clients with Comparative Analytics are required to upgrade to version 2022.1 at the same time. (We plan to release Axiom products and platform at the same time for 2022.1.)
- Clients will be required to upgrade most of their Financial Planning & Analysis products to at least version 2021.3. This does apply in a couple of edge cases like Rolling Forecasting version 1.0, but in general, clients need to be prepared to move their products forward to at least version 2021.3.
- Clients with Enterprise Decision Support must contact support for assistance. Enterprise Decision Support 2021.1, 2021.2, and 2021.3 are only intended for early adopters. Clients who migrate to an Enterprise Decision Support 21.* release have a strict dependency to having first been upgraded to Cost Accounting and Decision Support Services 2020.3.
- Enterprise Decision Support plans to release a 2022.1 version at the same time as Platform General Availability.
- Clients with Cost Accounting and Decision Support System that are not moving to Enterprise Decision Support will need to move to a compatible version of product (2020.3). The release date for this version is *to be determined*, but will be after the 2021.1 General Availability date.

Similar to releases in the past, Axiom platform needs to be at or ahead of product versions. If a client requests to move a product to 2022.1, they must upgrade their platform code.

Note: All Axiom product and platform dependencies previously described apply.

To identify potential issues, the Technical Account Management (TAM) team will be running a scan of clients during the upgrade process.

Key features

Some key features in 2022.1 include:

- Updated rating agency medians provided in Axiom Financial Planning: Annual update that is needed to keep this information up to date.
- Axiom Treasury Cash Management user experience refinements: Improvements made to reports and user experience in Cash Flow and Working Capital, Band Fee Management, and AP Management.
- Axiom Rolling Forecasting enhancements: Ability to break out or consolidate payer-level detail on the plan file, and improved handling of inflationary factors by moving away from the continuous rolling average to use of first forecast period only. For more details, see Axiom Rolling Forecasting Roundtable recording and release notes.

Other considerations

When upgrading to the 2022.1 version of Axiom Healthcare Suite, keep in mind the following:

- Syntellis is coordinating all Axiom EDS upgrades through our Upgrade Manager due to the significance of the upgrade, and steps to successfully transition to Axiom Enterprise Decision Support. To answer any questions you may have when considering the upgrade and timing, contact Syntellis Support.
- Along with upgrading to 2022.1, you will also need to upgrade to Axiom Comparative Analytics 2022.1.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- Syntellis delivered reports may be replaced. Any report that you saved under a different name or created new will remain untouched. Replaced reports are available in Document History, if needed.
- Any Syntellis delivered report that was moved to a new location will automatically move back to its original location.
- Syntellis product templates and calculation method libraries will be replaced.
- Product task panes will be replaced.
- Process definitions will not be replaced.
- Driver files will be replaced.
- Security roles and sub-systems will be reset to their configured settings. All user security exceptions you may have made will remain intact.
- Specific items configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, will remain as is. Any required modifications to these areas are covered in the release notes, if required.

FAQ

1. Can I upgrade platform without upgrading my product version?

No. This 2022.1 release of the Axiom platform is unlike past releases, and there are product dependencies and compatibility requirements that must be considered before upgrading. Most Axiom products will need to be upgraded to 2021.3, with minor exceptions. Clients with Comparative Analytics, Enterprise Decision Support, Cost Accounting, or Decision Support Services will require special consideration. To review your options in more detail, contact Syntellis Support.

2. Can I upgrade specific products without upgrading platform?

Your Axiom product always needs to be on the same version of the product or older. The key in 2022.1 is that if any product and consequently the platform moves to 2022.1, there are other product dependencies to consider before these changes occur.

Preparing for and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to familiarize yourself with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization's Axiom Master System User (MSU) to contact support by creating a support ticket to schedule an installation date and time with at least three days of advance notice. The request should include the following information:
    - Desired Axiom platform version.
    - Desired Axiom for Healthcare product and version.
    - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
    - Propose an approximate two-hour downtime window when Syntellis can apply update(s) to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps needed to enable features for this version.

Issues fixed in 2022.1

The following table lists the resolutions for issues addressed in 2022.1, released on May 23, 2022:

Excel and Web systems

Issue	Description
[126989] Document AllowClientExtension property changes in 2021.1 release notes and online doc forward	**Summary:** Updated the AllowClientExtension on all FP&A products: Treasury Cash Management, Capital Planning and Capital Tracking, Healthcare Suite, Strategy Management, Financial Planning, Budget Planning and Reporting. **Resolution:** Corrected by updating all tables for AllowClientExtension property for the product listed in the Summary. An alternate approach is to create a custom table that contains the same key columns as the table you want to extend, and using this new custom table in reports when data from the custom tables needs to be included. The tables will join on the key columns to produce the output.