

Release Notes

Axiom Rolling Forecasting
Version 2022.2

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

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2022.2 release of Axiom Rolling Forecasting. Each product release provides new features, enhancements, and configuration options to meet your needs. Many of these features and enhancements are a direct result of your feedback and suggestions.

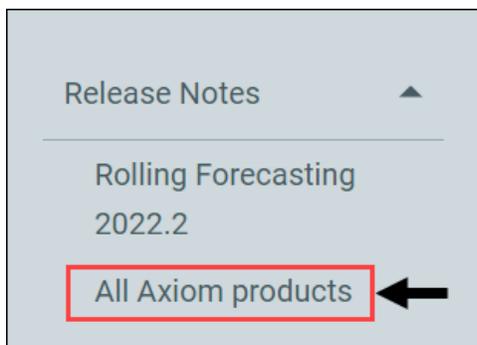
The purpose of these release notes is to provide you with the following:

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

TIP: Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Rolling Forecasting online help. On the help home page, click the Release Notes link at the top of the page.

▶ Accessing current and older release notes for Axiom Healthcare and Axiom Financial Institutions products

The online help for Axiom Healthcare products includes a page with links to current and past release notes for the last several years. To access this page, [open the product online help](#), and at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.



New features and enhancements in 2022.2

Axiom Rolling Forecasting includes the following new features and enhancements in this release:

Executive summary reports

Four new executive summary reports help you evaluate, understand, and improve your forecast results for your entire organization or specific departments:

- [Labor Summary report provides insight to trends in labor data](#)

Use the Labor Summary report to review your data while preparing your forecast. This report provides a detailed trend review of labor components, including Salary Expense, Hours, FTEs, and Average Hourly Rate.

- [Code Trend Summary report provides insight to trends in RfCode data](#)

Use the Code Trend Summary report to review any cross-section of RfCodes. The report displays past, current, and forecast data for any combination of individual or summarized RfCodes and RfGroups, and enables you to review code trends.

- [Actual Compared to Prior Forecast report helps you gauge forecast performance](#)

Use the Actual Compared to Prior Forecast report to improve the accuracy, value, and integrity of your forecast process by assessing how well your forecasts have held up over time, and how close those forecasts came to what was actually posted.

- [Consolidated Income Statement and Key Metrics report helps verify statistics](#)

Use the Consolidated Income Statement and Key Metrics report before finalizing a forecast to spot and correct areas that need to be updated. Review individual or combined RfGroup income statements with key metrics that are calculated using a selectable key driver or statistic in the report.

Balance Sheet and Cash Flow utility

- [Redesigned Balance Sheet and Cash Flow calculator improves usability](#)

Easily model your balance sheets as part of creating and managing forecasts. The redesigned calculator's linear flow of data includes statistics, ratios, and cash flow. The data is presented in an easy-to-understand format, and the calculator automatically updates data in response to plan file changes.

- **Initiate File Group Trigger** – Controls whether changes in plan files trigger the Balance Sheet and Cash Flow calculator to update data automatically. For details, see “Balance Sheet and Cash Flow – Initiate File Group Trigger” in “Configure Planning” in the online help.

- **Include Income in Balance Sheet** – Moved this setting from the Refresh Variables dialog to the Planning Configuration utility’s Reports section. For details, see “Balance Sheet and Cash Flow – Include Income in Balance Sheet” in “Configure Planning” in the online help.

Plan files

- **Insert or change calculation methods** – Removed the ability to insert or change calculation methods using the right-click menu in the worksheets or the Additions menu on the Main ribbon tab. To insert calculation methods, see “Insert a calc method in the Forecast worksheet” in the online help. To change calculation methods, see “Change a plan file calc method” in the online help.
- **Forecast History** – You can now select the prior period as the historical comparison time frame in the Forecast History worksheet. A new toggle in the Planning Configuration utility enables you to select either Current or Prior period data. For more information, see “Forecast History Comparison Period” in “Configure Planning” in the online help.

- [Include non-key statistics in your forecasts](#)

Use the new Non Key Statistics section to include non-key statistics in your forecasts. When you pair a non-key statistic with a per unit calculation (calc) method, you can calculate more precise revenue and expenses per unit amounts in your forecasts.

- [New payor-linked calculation methods improve forecast accuracy](#)

Improve the accuracy of your forecasts by linking specific payors to specific patient revenue and deductions so that changes to one payor’s volume does not affect other payors’ volumes. Previously, volume changes in the forecast affected all payors because the volume calculation (calc) methods were used at the All Payors level. Using the new volume calc methods, you can now link specific payors to specific revenue and deduction volume calculations.

- [Initiative Status Update utility improves the accuracy of historical reports](#)

Use the Initiative Status Update utility to assign approval status to initiatives for specific RF Periods so that initiative data is represented accurately in reports. Previously, initiative data that was approved in any historical periods was excluded from reports when the initiative’s status was later set to Exclude.

Miscellaneous Updates

- **Scenario Manager** – Removed the ability to access the Drivers utility from within the Scenario Manager because it interfered with processing. After creating a scenario, or to edit a scenario’s driver settings, you must navigate manually to the Driver utility to configure the settings. For more information, see “Configure scenario driver settings” in the online help.

- [Summarize data by RFGroup](#)

If you use summarize data utilities to import your General Ledger (GL) data to Axiom Rolling Forecasting, you can now filter by RFGroup using two new summarization utilities:

- The first utility summarizes actuals by RFGroup.
- The second utility summarizes Budget data by RFGroup.

If you make changes to an RFGroup and need to reimport data, you can import just the affected groups instead of all of your files.

Labor Summary report provides insight to trends in labor data

▶ Why use this feature

Use the Labor Summary report to review your labor-related data while preparing your forecast. This report provides a detailed trend review of labor components, including Salary Expense, Hours, FTEs, and Average Hourly Rate. This report is part of a series of executive summary reports that help you review, finalize, and improve the integrity of your forecasts.

▶ How this feature works

What: The Labor Summary report displays labor-related trend data that compares actuals to forecasts in tables and charts, based on your report data selections. You can view trend data by full-time employees (FTEs), hours, salary expense or average hourly rate, in both monthly and quarterly formats. The report also helps you spot potential problem areas with percentage change data that shows how much change has occurred or is likely to occur between months and quarters.

Where: This report is available from the Reporting section of the RF Admin and RF User task panes.

Who: All Axiom Rolling Forecasting users can access this report. The ability to select RFGroups depends on users' permissions.

How:

NOTE: To work with this report, verify that Rolling Forecasting actual data is loaded and forecast data exists for the periods used in the report.

1. In the **RF Admin** or **RF User** task pane under **Reporting**, double-click **Labor Summary**.
2. In the **Refresh Variables** dialog, select the report criteria, and then click **OK**.

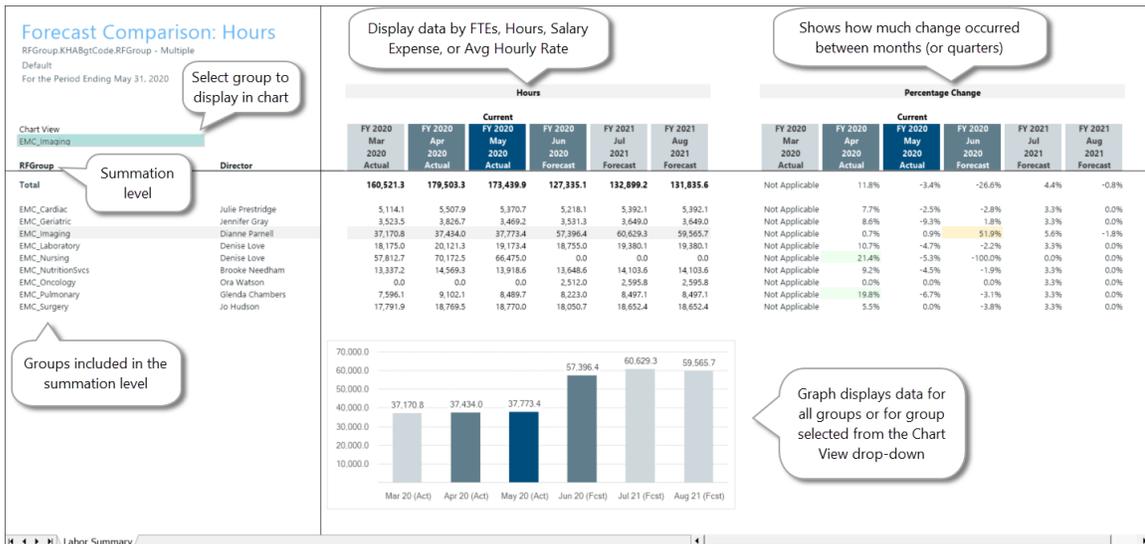
Refer to the following table for an explanation of criteria options:

NOTE: When viewing the report, you can change the criteria to see different sets of data or see the data grouped in different ways. On the **Main** ribbon tab, click **Refresh Data** and then change the selections.

Field	Description
Select Group to Filter By	Select the group type for the source data.

Field	Description
Select [group] (Leave blank for All)	To pull data from all groups, leave the default (All), or select one or more specific groups.
Select Indicator	Select whether to view comparison and trend data by FTE, Hours (paid hours), Salary Expense, or Average Hourly Rate.
Select Period View	Select to compare data by month (the default) or by quarter.
Select # of Actual [periods]	Select the number of periods of past data (actuals) to include in the report. You can include up to 2 years of historical data.
Select # of Forecast [periods]	Select the number of periods of future data (forecast) to include in the report. You can include up to 2 years of forecast data.
Select Scenario	Select the scenario to apply to the report data.
Include Approved Initiatives?	Select to include data from approved initiatives.
Select Summation Level	Select the group level at which to sum the report data.

In the following example, the selected data type is RFGGroup, the indicator is Hours, and the summation level is RFGGroup.



▶ Where to find more information

The following topic in the online help has been added or updated with information related to this feature:

- "About executive summary reports"

Code Trend Summary report provides insight to trends in RfCode data

▶ Why use this feature

Use the Code Trend Summary report to review any cross-section of RfCodes. The report displays past, current, and forecast data for any combination of individual or summarized RfCodes and RfGroups and enables you to review code trends. For example, you can view how statistics are trending by code. This report is part of a series of executive summary reports that help you review, finalize, and improve the integrity of your forecasts.

▶ How this feature works

What: This report displays RfCode trend data by RfGroup and compares actuals to forecasts for monthly or quarterly periods. Totals for the groups and codes are displayed in the report's Summary section, with links to a Details section showing a breakdown of totals. The report also displays percentage change data that shows how much change has occurred or is likely to occur between months and quarters, enabling you to spot potential problem areas.

NOTE: Links to details requires selecting the option to group data into sections with subtotals.

Where: This report is available from the Reporting section of the RF Admin and RF User task panes.

Who: All Axiom Rolling Forecasting users can access this report. The ability to select RfGroups depends on users' permissions.

How:

NOTE: To work with this report, verify that Rolling Forecasting actual data is loaded and forecast data exists for the periods used in the report.

1. In the task pane under **Reporting**, double-click **Trend Summary**.
2. In the **Refresh Variables** dialog, select the RfGroups and RfCodes for which you want to review trend data, and how you want the data displayed, and then click **OK**. Refer to the following table for an explanation of options:

NOTE: When viewing the report, you can change the criteria to see different sets of data or see the data grouped in different ways. On the **Main** ribbon tab, click **Refresh Data** and then change the selections.

Field	Description
Select RFGroup Field to Filter By	Select the group type for the source data.
Select [group] (Leave blank for All)	To pull data from all groups, leave the default (All), or select one or more specific groups.
Select RFCode Field to Filter by	Select whether to view trend data by RFCode, KHABgtCode, FSDetail, or FSSummary.
Select [field] (Leave blank for All)	To pull data from all fields, leave the default (All), or select one or more specific fields. For example, you can select a specific section of RFCodes.
Select Period View	Select whether to compare data by month (the default) or by quarter.
Select # of Actual [periods]	Select the number of periods of past data (actuals) to include in the report. You can include up to 2 years of actual data.
Select # of Forecast [periods]	Select the number of periods of future data (forecast) to include in the report. You can include up to 3 years of forecast data.
Include in CY Budget?	Select the checkbox to include data from the current year budget.
Select Scenario	Select the scenario to apply to the report data.
Include Approved Initiatives?	Select to include data from approved initiatives.
Group Data Into Sections with SubTotals?	Displays the data grouped by RFCode.Type. When you select this option, the Summary section provides links to the Detail sections. If you do not select this option, all data is displayed in a list by the group type selected without links in the Summary section.
Select RFGroup Summation Level	Select the RFGroup level at which to sum the report data. This is the group that displays in the first column on the left side of the report. The tables on the right display totals for each item or person listed in the group.
Select RFCode Summation Level	Select the group level at which to sum the reported RFCode data. This group is displayed in the second column on the left of the report.

In the following example, the selected data type is RFGroup, with the RFGroups summation level set to RFGROUP, and the RFCode Summation level set to FSSummary. Three months of actual and forecast data is displayed. Summarized data displays in the top section with links to detailed data in the lower section.

Forecast Trend Report
 RFGroup: Multiple Selected
 Default: For the Period Ending May 31, 2020

Selected RFCode field, all codes included

Amount of change between months (or quarters)

RFGroup summation level

RFCode summation level

Click links to jump to details

Click sub section heading to return to top of report

Colored shading alerts you to possible issues

RFGroup	FSSummary	RFCode: ALL						CY Budget	Percentage Change				
		Current			Current				Current				
		FY 2020 Mar 2020 Actual	FY 2020 Apr 2020 Actual	FY 2020 May 2020 Actual	FY 2020 Jun 2020 Forecast	FY 2021 Jul 2021 Forecast	FY 2021 Aug 2021 Forecast		FY 2020 Jun 2020 Budget	FY 2020 Apr 2020 Actual	FY 2020 May 2020 Actual	FY 2020 Jun 2020 Forecast	FY 2021 Jul 2021 Forecast
SUMMARY													
Income Statement													
Total Revenue		43,340,667	42,142,181	32,928,416	35,653,934	35,629,410	41,284,111	9.2%	(2.8%)	(21.9%)	8.3%	(0.1%)	
Total Deductions		20,436,730	22,244,360	21,022,054	50,000	50,000	21,880,032	8.8%	(5.5%)	(99.8%)	0.0%	0.0%	
Net Revenue		19,264,788	21,096,307	21,120,126	32,878,416	35,603,934	35,579,410	19,404,078					
Total Expenses		20,100,096	21,330,857	21,490,591	14,483,360	14,654,102	14,627,780	20,319,582	6.1%	0.7%	(32.6%)	1.2%	(0.2%)
Net Income		(835,307)	(234,550)	(370,465)	18,395,055	20,949,832	20,951,630	(915,504)					
Hours													
Total Hours		260,925	294,102	282,091	223,291	232,053	230,990	835,412	12.7%	(4.1%)	(20.8%)	3.9%	(0.5%)
Statistics													
Total Key Statistics		691,702	693,803	705,123	658,883	711,631	729,453	722,417	0.3%	1.6%	(6.6%)	8.0%	2.5%
Total Other Statistics		136,102	129,765	129,569	-	-	-	177,565	(4.7%)	(0.2%)	(100.0%)	0.0%	0.0%
Balance Sheet													
Total Assets		-	-	-	-	-	-	44,191,764	0.0%	0.0%	0.0%	0.0%	
Total Liabilities		-	-	-	-	-	-	14,432,221	0.0%	0.0%	0.0%	0.0%	
Total Equity		128,328	142,653	156,978	-	-	-	16,820,602	11.2%			0.0%	
DETAILS													
Revenue		39,701,518	43,340,667	42,142,181	32,928,416	35,653,934	35,629,410	41,284,111	9.2%			0.1%	
EMC_Cardiac	R_PatientRev	3,344,650	3,629,706	3,637,134	3,756,784	3,904,931	3,756,784	4,263,036	8.5%	0.2%	3.3%	3.9%	(3.8%)
EMC_Clinics	R_OtherRev	83,254	83,090	82,942	166,185	83,095	83,095	88,233	(0.2%)	(0.2%)	(00.4%)	(50.0%)	0.0%
EMC_Clinics	R_PatientRev	74,467	56,984	70,944	65,414	75,401	70,371	85,143	(23.5%)	24.5%	(7.8%)	15.3%	(6.7%)
EMC_ChicalCare	R_PatientRev	626,366	733,625	580,144	-	-	-	430,137	17.1%	(20.9%)	(100.0%)	0.0%	0.0%
EMC_Emergency	R_PatientRev	827,860	868,800	898,064	1,068,751	1,253,866	1,278,379	1,106,893	4.9%	3.4%	19.0%	17.3%	2.0%
EMC_Geriatric	R_PatientRev	264,100	241,500	286,374	618,558	787,966	703,777	242,582	(8.6%)	18.6%	(116.0%)	27.4%	(10.7%)
EMC_HomeHealth	R_PatientRev	649,579	731,088	685,137	739,246	896,098	887,926	786,857	12.5%	(6.3%)	7.9%	21.2%	(0.9%)
EMC_imaging	R_NonOpRev	-	-	-	-	-	-	1,376	0.0%	0.0%	0.0%	0.0%	0.0%
EMC_imaging	R_OtherRev	1,646	1,238	2,838	1,907	1,907	1,907	1,347	(24.8%)	(129.2%)	(32.8%)	0.0%	0.0%

► Where to find more information

The following topic in the online help has been added or updated with information related to this feature:

- "About executive summary reports"

Actual Compared to Prior Forecast report supports forecast integrity

▶ Why use this feature

Use the Actual Compared to Prior Forecast report to improve the accuracy, value, and integrity of your forecast process by assessing how well your forecasts have held up over time, and how close those forecasts came to what was actually posted. This report is part of a series of executive summary reports that help you review, finalize, and improve the integrity of your forecasts.

▶ How this feature works

What: Select any period of actuals to compare to one or more prior forecasts of the same period to evaluate how close the forecasts came to the actual data. The report is presented in an income statement format that can pinpoint areas where forecasted values need to be improved. You can expand summary data and drill down to details by double-clicking carets (∨).

Where: This report is available from the Reporting section of the RF Admin and RF User task panes.

Who: All Axiom Rolling Forecasting users can access this report. The ability to select RFGroups depends on users' permissions.

How:

NOTE: To work with this report, verify that Rolling Forecasting actual data is loaded and forecast data exists for the periods used in the report.

1. In the task pane under **Reporting**, double-click **Action vs. Forecast Comparison**.
2. In the **Refresh Variables** dialog, select the report criteria, and then click **OK**.

Refer to the following table for an explanation of options.

NOTE: When viewing the report, you can change the criteria to view different sets of data or view the data grouped in different ways. On the **Main** ribbon tab, click **Refresh Data**, and then change the selections.

Field	Description
Select Group to Filter By	Select the group type for the source data.
Select [group] (Leave blank for All)	To pull data from all groups, leave the default (All), or select one or more specific groups. This field is optional.
Select Scenario	Select the scenario to apply to the report data.
Use Current Period [period]	The most recent actuals month is selected by default. To use a different month, clear this checkbox, and then select the applicable period from the Select Actual Period field.
Select Actual Period	This option is displayed only if you cleared the Use Current Period checkbox. Click Choose Value and select a period of actuals.
Select Comparison Period(s)	Select one or more forecast periods to compare with actuals. Available forecast periods depend on the selected actual period. If you do not specify periods, only the selected actual period is displayed in the report. This field is optional.
Include Approved Initiatives?	Select to include data from approved initiatives.
Select Summation Level	Select the group level at which to sum the report data.

In the following example, the selected group type is RFRollup, with the RFGroups for the summation level. You can replace any forecast periods that do not have data with periods that do.

Actual Compared to Prior Forecast Income Statement
 Variances are calculated by comparing May 2020 actual data to previous forecast data for May 2020.
 RFRollup: EMC
 Scenario: 1 - Default
 For the Period Ending: May 31, 2020

Selected Actuals period: 202011 May 2020 Actual

Comparison forecast periods: Forecasted: Mar 2020, Forecasted: Feb 2020

Double-click to view legend for data status alerts

Drill down to details

Select specific group or display data for all (default)

Column is blank if period has no data

Colored shading alerts you to possible issues. See legend.

	202011 May 2020 Actual	Forecasted: Mar 2020 Forecast	Variance	Variance Percent	Forecasted: Feb 2020 Forecast	Variance	Variance Percent
Volume/Statistics							
Volume/Driver Statistics							
Total Volume/Driver Statistics	398,608	54	398,554	738,062.6%	53	398,555	751,990.2%
Volume/Key Statistics							
Total Volume/Key Statistics	705,123	17,593	687,529	3,907.9%	-	705,123	0.0%
Volume/Statistics Used For Per Unit Calculations	705,123	17,593	687,529	3,907.9%	-	705,123	0.0%
Per Unit Information (NOTE: Per unit calculations may not be reliable at this summation level.)							
Total Patient Revenue Per Unit	\$59.16	\$486.99	(\$427.83)	(87.9%)	\$59.16		0.0%
Total Operating Revenue Per Unit	\$29.95	\$205.70	(\$175.74)	(85.4%)	\$29.95		0.0%
Total Operating Expense Per Unit	\$30.48	\$403.65	\$373.17	92.4%	(\$30.48)		0.0%
Salary Expense (Including Contract Labor and Benefits) Per Unit	\$14.21	\$58.02	\$43.81	75.5%	(\$14.21)		0.0%
Total Supply Expense Per Unit	\$6.50	\$145.08	\$138.59	95.5%	(\$6.50)		0.0%
Total Paid Hours Per Unit	0.4001	29.1479	28.7479	98.6%	(0.4001)		0.0%
Income Statement							
Patient Revenue							
EMC_Cardiac Inpatient Revenue	2,721,674	953,527	1,768,147	185.4%	-	2,721,674	0.0%
EMC_Clinics Inpatient Revenue	8,825	46	8,779	18888.6%	-	8,825	0.0%
EMC_CriticalCare Inpatient Revenue	580,099	19,237	560,862	2915.5%	-	580,099	0.0%

▶ Where to find more information

The following topic in the online help has been added or updated with information related to this feature:

- "About executive summary reports"

Consolidated Income Statement and Key Metrics report provides insight to statistics

▶ Why use this feature

Use the Consolidated Income Statement and Key Metrics report before finalizing a forecast to spot and correct areas that need to be updated. This report is part of a series of executive summary reports that help you review, finalize, and improve the integrity of your forecasts.

▶ How this feature works

What: This report compares statistics for the current actual period to the most recent forecast of the same period in an income statement format. Review individual or combined RFGroup income statements with key metrics calculated using a key driver or statistic within the report. Variance amounts and percent change columns are included for each comparison forecast period. You can drill down to view to RFCode detail for each summary section. You can configure statistics in the report from drivers and adjust data in plan files.

Where: This report is available from the Reporting section of the RF Admin and RF User task panes.

Who: All Axiom Rolling Forecasting users can access this report. The ability to select RFGroups depends on users' permissions.

How:

NOTE: To work with this report, verify that Rolling Forecasting actual data is loaded and forecast data exists for the periods used in the report.

1. In the task pane under **Reporting**, double-click **Consolidated IS & Key Metrics**.
2. In the **Refresh Variables** dialog, select the report criteria, and then click **OK**.

Refer to the following table for an explanation of options:

Field	Description
Select RFGroup Field to Filter By	Select the group type for the source data.
Select [group] (Leave blank for All)	To pull data from all groups, leave the default (All), or select one or more specific groups.
Select Period View	Select to compare data by month or by quarter.

Field	Description
Select # of Actual [periods]	Select the number of months or quarters of past data (actuals) to include in the report. You can include up to 24 months of historical data.
Select # of Forecast [periods]	Select the number of months or quarters of future data (forecast) to include in the report. You can include up to 34 months of forecast data. You must select at least one month.
Include CY Budget?	Select to include data from the current year budget.
Select Scenario	Select the scenario to apply to the data pulled into the report.
Include Approved Initiatives?	Select to include data from approved initiatives.
Select RFGGroup Summation Level	Select the group level at which to sum the reported data.

► Top of report

The top of the report displays the **Volume/Statistics** section followed by some per-unit totals. You can view data for all RFGroups or select a single group from the **Select RFGGroup to view** drop-down.

Consolidated IS & Key Metrics
 RFGroup: ALL
 Defaults
 For the Period Ending May 31, 2020

Select RFGGroup to view: All

Select specific group or All (default)

	Current						CY Budget	Percentage Change				
	FY 2020 Mar	FY 2020 Apr	FY 2020 May	FY 2020 Jun	FY 2021 Jul	FY 2021 Aug		FY 2020 Jun	FY 2020 Apr	FY 2020 Jun	FY 2021 Jul	FY 2021 Aug
	Total	Actual	Actual	Forecast	Forecast	Forecast	Budget	Actual	Actual	Forecast	Forecast	Forecast
Volume/Statistics												
Volume/Driver Statistics												
Total Volume/Driver Statistics	388,863	391,522	398,608	367,048	352,843	355,296	367,048	0.7%	1.8%	(7.9%)	(3.9%)	0.7%
Volume/Key Statistics												
Total Volume/Key Statistics	734,612	736,703	705,123	656,427	711,531	729,353	748,955	0.3%	(4.3%)	(6.9%)	8.4%	2.5%
Volume/Statistics Used for Per Unit Calculations	734,612	736,703	705,123	656,427	711,531	729,353	748,955	0.3%	(4.3%)	(6.9%)	8.4%	2.5%
Per Unit Information												
Total Patient Revenue Per Unit	\$77.90	\$58.25	\$59.16	\$49.23	\$49.36	\$48.12	\$81.86	(25.2%)	1.6%	(16.8%)	0.3%	(2.5%)
Total Operating Revenue Per Unit	\$36.06	\$28.63	\$29.94	\$49.88	\$49.97	\$48.71	\$44.03	(20.6%)	4.6%	66.6%	0.2%	(2.5%)
Total Operating Expense Per Unit	\$39.12	\$16.57	\$30.47	\$21.95	\$20.54	\$20.00	\$48.98	(57.6%)	83.8%	(28.0%)	(6.4%)	(2.6%)
Salary Expense (Including Contract Labor and Benefits) Per Unit	\$20.63	\$14.17	\$14.21	\$6.48	\$6.11	\$7.88	\$24.57	(31.3%)	0.3%	(40.3%)	(4.3%)	(2.9%)
Total Supply Expense Per Unit	\$7.28	(\$6.65)	\$6.50	\$6.29	\$5.80	\$5.66	\$8.21	(191.3%)	(197.7%)	(3.2%)	(7.7%)	(2.4%)
Total Paid Hours Per Unit	0.3796	0.3992	0.4001	0.3396	0.3256	0.3162	1.4088	5.2%	0.2%	(15.1%)	(4.1%)	(2.9%)

Legend for data status alerts:

Alert Type	Threshold
Success	15.00%
Caution	35.00%
Warning	75.00%

Displays when Current Year budget is selected in refresh variables

Columns on the right provide trend data

► Middle section

The middle of the report is the income statement section with the capability to drill down to details for each RFGGroup.

Consolidated IS & Key Metrics RFGroup: ALL Default: For the Period Ending May 31, 2020 Select RFGroup to view: All		Current						CY Budget	Percentage Change					
		FY 2020	FY 2020	FY 2020	FY 2020	FY 2021	FY 2021	FY 2020	FY 2020	Current		FY 2020	FY 2021	FY 2021
		Mar 2020 Actual	Apr 2020 Actual	May 2020 Actual	Jun 2020 Forecast	Jul 2021 Forecast	Aug 2021 Forecast	Jun 2020 Budget	Apr 2020 Actual	May 2020 Actual	Jun 2020 Forecast	Jul 2021 Forecast	Aug 2021 Forecast	
Income Statement														
Patient Revenue														
Inpatient Revenue	26,642,215	29,600,544	27,741,923	18,734,202	20,085,344	20,249,700	28,080,862	11.1%	(6.3%)	(32.5%)	7.2%	0.8%		
Outpatient Revenue	11,754,854	12,398,151	13,110,181	12,645,088	13,910,498	13,715,010	14,159,214	5.5%	5.7%	(3.5%)	10.0%	(1.4%)		
Other Patient Revenue	18,832,848	912,160	864,500	936,091	1,128,147	1,134,755	19,066,062	(95.2%)	(5.2%)	8.3%	20.5%	0.6%		
Total Patient Revenue	57,229,918	42,910,854	41,716,604	32,315,381	35,123,988	35,099,465	61,306,138	(25.0%)	(2.8%)	(22.5%)	8.7%	(0.1%)		
Total Deductions	31,529,639	22,244,360	21,022,054	-	-	-	34,775,665	(29.4%)	(5.5%)	(100.0%)	0.0%	0.0%		
Net Patient Revenue	25,700,278	20,666,494	20,694,550	32,315,381	35,123,988	35,099,465	26,530,473	(19.6%)	0.1%	56.2%	8.7%	(0.1%)		
Total Other Revenue	789,354	423,313	419,077	429,945	429,945	429,945	6,444,921	(46.4%)	(1.0%)	2.6%	0.0%	0.0%		
Total Operating Revenue	26,489,632	21,089,807	21,113,626	32,745,326	35,553,934	35,529,410	32,975,394	(20.2%)	0.1%	55.1%	8.6%	(0.1%)		
Operating Expenses														
Salaries & Wages	12,428,833	8,869,829	8,419,263	4,712,840	4,900,238	4,875,814	14,109,974	(28.6%)	(5.1%)	(44.0%)	4.0%	(0.5%)		
Employee Benefits	2,725,777	1,569,500	1,600,296	854,197	871,695	869,797	4,294,933	(42.4%)	2.0%	(46.6%)	2.0%	(0.2%)		
Purchased Services	683,384	432,122	605,988	547,359	547,359	547,359	950,620	(36.8%)	40.2%	(9.7%)	0.0%	0.0%		
Supplies	5,351,130	(4,900,734)	4,581,742	4,128,520	4,128,520	4,128,520	6,150,825	(191.6%)	(193.5%)	(9.9%)	0.0%	0.0%		
Other Expenses	6,378,660	5,456,943	5,474,973	4,167,347	4,167,347	4,167,347	8,791,423	(14.5%)	0.3%	(23.9%)	0.0%	0.0%		
Depreciation & Interest	1,167,229	781,911	801,828	27	28	29	2,383,857	(33.0%)	2.5%	(100.0%)	3.7%	3.6%		
Total Operating Expenses	28,735,013	12,209,572	21,484,091	14,410,290	14,615,187	14,588,866	36,681,632	(57.5%)	76.0%	(32.9%)	1.4%	(0.2%)		
Income from Operations	(2,245,381)	8,880,235	(370,465)	18,335,036	20,938,746	20,940,544	(3,706,238)	(49.5%)	(104.2%)	(5049.2%)	14.2%	0.0%		
Margin %	(8.5%)	42.1%	(1.8%)	56.0%	58.9%	58.9%	(11.2%)	(596.7%)	(104.2%)	(3291.2%)	5.2%	0.1%		
Net Margin %	(4.1%)	45.8%	2.0%	56.0%	58.9%	58.9%	(4.0%)	(1225.6%)	(95.5%)	2640.6%	5.2%	0.1%		
Total Non-Operating Revenue	(254,616)	-	-	-	-	-	1,027,875	(100.0%)	0.0%	0.0%	0.0%	0.0%		
Excess of Revenue Over Expense	(2,499,997)	8,880,235	(370,465)	18,335,036	20,938,746	20,940,544	(2,678,363)	(455.2%)	(104.2%)	(5049.2%)	14.2%	0.0%		
Adjusted EBIDA %	(9.5%)	42.1%	(1.8%)	56.0%	58.9%	58.9%	(7.9%)	(541.9%)	(104.2%)	(3291.2%)	5.2%	0.1%		

Expand carets to view details

Bottom section

At the bottom of the report is the Key Metrics section with detailed per-unit information and drillable labor utilization metrics.

Consolidated IS & Key Metrics RFGroup: ALL Default: For the Period Ending May 31, 2020 Select RFGroup to view: All		Current						CY Budget	Percentage Change					
		FY 2020	FY 2020	FY 2020	FY 2020	FY 2021	FY 2021	FY 2020	FY 2020	Current		FY 2020	FY 2021	FY 2021
		Mar 2020 Actual	Apr 2020 Actual	May 2020 Actual	Jun 2020 Forecast	Jul 2021 Forecast	Aug 2021 Forecast	Jun 2020 Budget	Apr 2020 Actual	May 2020 Actual	Jun 2020 Forecast	Jul 2021 Forecast	Aug 2021 Forecast	
KEY METRICS														
Profitability														
Operating Margin %	(8.5%)	42.1%	(1.8%)	56.0%	58.9%	58.9%	(11.2%)							
Operating EBIDA Margin %	(4.1%)	45.8%	2.0%	56.0%	58.9%	58.9%	(4.0%)							
Excess Margin %	(9.5%)	42.1%	(1.8%)	56.0%	58.9%	58.9%	(7.9%)							
Key Operating Per Unit Indicators														
Per Unit - Gross Revenue	\$77.90	\$58.25	\$59.16	\$49.23	\$49.36	\$48.12	\$81.86							
Per Unit - Net Revenue	\$34.98	\$28.05	\$29.35	\$49.23	\$49.36	\$48.12	\$35.42							
Per Unit - Operating Revenue	\$36.06	\$28.63	\$29.94	\$49.88	\$49.97	\$48.71	\$44.03							
Per Unit - Total Operating Expense	\$39.12	\$16.57	\$30.47	\$21.95	\$20.54	\$20.00	\$48.98							
Per Unit - Salaries & Wages (incl Contract Labor)	\$16.92	\$12.04	\$11.94	\$7.18	\$6.89	\$6.69	\$18.84							
Per Unit - Benefits	\$3.71	\$2.13	\$2.27	\$1.30	\$1.23	\$1.19	\$5.73							
Per Unit - Supplies	\$7.28	(\$6.65)	\$6.50	\$6.29	\$5.80	\$5.66	\$8.21							
Per Unit - Purchased Services	\$0.93	\$0.59	\$0.86	\$0.83	\$0.77	\$0.75	\$1.27							
Key Operating Metrics														
% of Gross Patient Revenue - Deductions	55.1%	51.8%	50.4%	0.0%	0.0%	0.0%	56.7%							
% of Gross Patient Revenue - Net Revenue	(3.9%)	20.7%	(0.9%)	56.7%	59.6%	59.7%	(6.0%)							
% of Salaries - Benefits	21.9%	17.7%	19.0%	18.1%	17.8%	17.8%	30.4%							
% of Operating Revenue - Supplies	20.2%	(23.2%)	21.7%	12.6%	11.6%	11.6%	18.7%							
% of Operating Revenue - Purchased Services	2.6%	2.0%	2.9%	1.7%	1.5%	1.5%	2.9%							
Labor Utilization														
Total Compensation Ratio	57.2%	49.5%	47.5%	17.0%	16.2%	16.2%	55.8%							
Total Labor Cost Per FTE	\$7,895.69	\$5,170.12	\$5,287.00	\$3,623.79	\$3,746.42	\$3,744.94	\$2,290.77							
Total Average Hourly Rate	\$44.57	\$30.16	\$29.85	\$21.14	\$21.15	\$21.14	\$13.37							
Total Paid Hours per Selected Statistic	0.3796	0.3992	0.4001	0.3396	0.3256	0.3162	1.4088							
Total FTEs	1,574.1	1,715.6	1,592.4	1,300.5	1,308.0	1,302.0	6,159.5							
Total Paid Hours	278,846	294,102	282,091	222,948	231,699	230,636	1,055,145							
Total Salaries	12,428,833	8,869,829	8,419,263	4,712,840	4,900,238	4,875,814	14,109,974							

Drill to details

Where to find more information

The following topic in the online help has been added or updated with information related to this feature:

- "About executive summary reports"

Redesigned Balance Sheet and Cash Flow calculator improves usability

▶ Why use this feature

Easily model your balance sheets as part of creating and managing forecasts. The redesigned calculator's linear flow of data includes statistics, ratios, and cash flow. The data is presented in an easy-to-understand format, and the calculator automatically updates data in response to plan file changes.

NOTE: While working closely with several clients during the early adopter stage of the 2022.2 release, we found that even experienced Balance Sheet and Cash Flow users can benefit from assistance with the initial setup process. Please contact Syntellis so we can help ensure that you are making effective and efficient use of this utility.

▶ How this feature works

What: The calculator has two sheets—the Forecast sheet and the Financial Statement sheet. The Forecast sheet is populated with data from Management Reporting and updated from driver values. You refine the data with manual changes to the various assets and liabilities in the Forecast sheet. From there, the data flows to the Financial Statement sheet where you can review the results.

Where: The calculator is available from the Other Calculators section of the RF Admin task pane.

Who: Only Axiom Rolling Forecasting administrators and analysts can access and use the Balance Sheet and Cash Flow calculator.

How:

1. Create one or more balance sheet groups in the RFGROUP table. Each group consists of RFGROUPs that you selected to include in the balance sheet calculations.
2. In the **Planning Configuration** utility's **Visibility Options** settings under **Reports**, verify that the **Balance Sheet and Cash Flow - Initiate File Group Trigger** is set to **Yes**.

NOTE: The trigger must be set to **Yes** if you intend to use the calculator.

3. In the **Planning Configuration** utility's **Visibility Options** settings under **Reports**, select to include or exclude income in the Balance Sheet (default is exclude) by clicking the **Balance Sheet and Cash Flow – Include Income in Balance Sheet** toggle to either **Yes** or **No**.
4. In the **Driver** utility's **Balance Sheet Assumptions** settings, configure the balance sheet assumptions.

5. In the RF Admin task pane under **Other Calculators**, double-click **Balance Sheet and Cash Flow**.
6. In the **Refresh Variables** dialog, select the **Balance Sheet Group** and **Scenario**, and then click **OK**.
7. In the **Forecast** sheet, select calculation methods and add or adjust values in the blue cells as needed.
8. On the **Main** ribbon tab, click **Save**.
9. View the results in the **Financial Statements** sheet.

Financial Statements EMC_BalanceSheet Default For the Period Ending May 31, 2020		FY 2020	FY 2020	FY 2020	FY 2020	FY 2021	FY 2021	FY 2021	FY 2021	FY 2021
		Apr Actual	May Actual	Jun Forecast	Apr - Jun Projected	Jul Forecast	Aug Forecast	Sep Forecast	Jul - Sep Forecast	Oct - Dec Forecast
Statement of Revenue and Expense										
Patient Revenue										
Inpatient Revenue	29,600,544	27,741,923	20,996,602	78,339,069	22,347,744	22,512,101	22,822,336	67,682,181	75,482,042	
Outpatient Revenue	12,398,151	13,110,181	12,642,357	38,150,688	13,909,631	13,716,655	14,360,391	41,986,677	47,509,270	
Other Patient Revenue	912,160	864,500	936,091	2,712,751	1,128,147	1,134,755	1,243,379	3,506,280	4,521,953	
Gross Patient Revenue	42,910,854	41,716,604	34,575,050	119,202,508	37,385,522	37,363,510	38,426,106	113,175,138	127,513,265	
Deductions from Patient Revenue										
Contractual Discounts	20,767,000	19,006,982	8,873,561	48,647,543	9,663,091	9,747,971	10,083,992	29,495,053	34,223,887	
Bad Debt	-	-	100,000	100,000	-	-	-	-	-	
Provision for Charity	1,477,360	2,015,072	-	3,492,432	-	-	-	-	-	
Total Deductions from Revenue	22,244,360	21,022,054	8,973,561	52,239,976	9,663,091	9,747,971	10,083,992	29,495,053	34,223,887	
Net Patient Revenue	20,666,494	20,694,550	25,601,489	66,962,533	27,722,432	27,615,539	28,342,114	83,680,085	93,289,378	
Other Operating Revenue	429,813	425,577	513,035	1,368,424	429,945	429,945	429,945	1,289,836	1,289,836	
Total Operating Revenue	21,096,307	21,120,126	26,114,524	68,330,957	28,152,377	28,045,484	28,772,060	84,969,920	94,579,214	
Operating Expenses										
Salaries and Wages	8,720,877	8,321,339	5,121,405	22,163,620	5,325,301	5,292,026	5,174,416	15,791,743	15,890,949	

► 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:

- “Create an RF balance sheet group”
- “Configure Balance Sheet and Cash Flow assumptions”
- “Model balance sheet and cash flow”
- “About the Balance Sheet and Cash Flow calculator”

Include non-key statistics in your forecasts

▶ Why use this feature

Use the new Non Key Statistics section to include non-key statistics in your forecasts. When you pair a non-key statistic with a per unit calculation (calc) method, you can calculate more precise revenue and expenses per unit amounts in your forecasts.

▶ How this feature works

What: Associate non-key statistics with your RFGroups and make them available for selection in your forecasts. Set up the non-key statistic in the Non Key Statistics section, assign it a per-unit calc method, and then save it. This process makes the non-key statistic available for selecting from volume drop-downs in the Revenue and Expenses sections of the plan file Forecast worksheet.

Where: This change applies to the plan file Forecast worksheet and the other plan file tabs where non-key statistics are displayed. The Non Key Statistic section is located between the Key Statistics and Other Statistics sections. The new non-key statistics in this section are available for selection in any of the Forecast worksheet's statistics drop-downs.

Who: Axiom Rolling Forecasting administrator, analysts, and users with the appropriate permissions can access this feature.

How:

To add non-key statistics to your Forecast:

1. In the **RF User** or **RF Admin** task pane, open a plan file, and then click the **Forecast** tab.
2. In the **Forecast** worksheet, either scroll to or use the **Main** ribbon tab's **GoTo** feature to access the **Non Key Statistics** section.
3. Double-click **+Double Click to Insert New Non Key Statistic**.
4. In the **Insert Calc Method(s) in sheet Forecast** dialog, select **Per Unit Volume**, select the number of non-key statistics to add, and then click **OK**.
5. In the **Calc Method Variables** dialog:
 - a. Select the **KHABgtCode** to associate with the statistic, and then click **OK**.
 - b. (Optional) Select a payor to associate with the statistic, and then click **OK**.
 - c. Click **OK**.
6. In the new non-key statistics section, select a global driver, and then enter global amounts and adjustments.

7. In the **Main** ribbon tab, click **Save**.

The new non-key statistic is available for selection in Revenue and Expense drop-downs.

The screenshot shows the 'Forecast' interface for 'EMC Home Health - Default' for the period ending May 31, 2020. The interface is divided into sections: 'Non Key Statistics', 'Other Statistics', and 'REVENUE'. A callout bubble points to a 'Saved non key statistic' in the 'Forecast Method' column. Another callout bubble points to a dropdown menu in the 'Non-Key Statistic' field under 'Other Patient Revenue', with the text 'Non key statistic is available in statistics drop-downs'. The dropdown menu lists various statistics, with 'Non-Key Statistic' highlighted in red. The table on the right shows data for FY 2020 (Apr Actual, May Actual, Jun Forecast, Apr Proj).

	FY 2020 Apr Actual	FY 2020 May Actual	FY 2020 Jun Forecast	FY 2020 Apr Proj
Non Key Statistics				
IP Units				
Unadjusted IP Units per No Growth	0	0	3	
Global Driver Growth Assumption	0.00	0.00	3.33	
IP Units per No Growth	0.0%	0.0%	0.0%	
Amount Adjustment	5.00	5.00	3.33	
Amount Adjustment - Quarterly	5	5	0	
Total - IP Units	0	0	3	
One Time Adjustment for Forecasted Columns			0	
Total IP Units including One Time Adjustments	0	0	3	
Prior Forecast	0	0	0	
+ Double Click to Insert New Non Key Statistic				
Other Statistics				
+ Double Click to Insert New Other Statistic				
REVENUE				
Patient Revenue				
Other Patient Revenue				
Non-Key Statistic - S_NonKeyTest	731,088	685,137	226	
Driver Inflation Assumption	0	0	3	
Inflation Adjustment		0.0%	0.0%	
Period Over Period Change	10.0%	(9.2%)	0.0%	
Revenue Adjustment	0	0	0	
Average Rate Per Unit	74.74	67.84	70.18	42
Amount Adjustment - Quarterly		0	0	

To select a non-key statistic:

1. In the appropriate revenue or expenses section in the plan file **Forecast** sheet, click the volume drop-down and select **Non-Key Statistic**.
2. In the field that appears immediately below the field you just selected, select the non-key code option. The statistics row is populated with the values from the non-key statistic you selected.

NOTE: All metrics within the calc method will use that non-key statistic in calculations where a non-key statistic is selected.

New payor-linked calculation methods improve forecast accuracy

▶ Why use this feature

Improve the accuracy of your forecasts by linking specific payors to specific patient revenue and deductions so that changes to one payor's volume does not affect other payors' volumes. Previously, volume changes in the forecast affected all payors because the volume calculation (calc) methods were used at the All Payors level. Using the new volume calc methods, you can now link specific payors to specific revenue and deduction volume calculations.

▶ How this feature works

What: Use these new calc methods to map payor-specific volumes to specific patient revenue and deductions so that those volumes calculated in the Forecast affect only the specific payor. Use the three patient revenue calc methods in the Patient Revenue blocks and the deduction payor volume calc method in the Other Deductions blocks:

- Patient Revenue Net per unit payor volume linked – Link a payor with a patient revenue net per unit volume code.
- Patient Revenue Net IP Census payor volume linked – Link a payor with a patient revenue volume code.
- Patient Revenue Payor Volume Linked – Link a payor with a Patient Volume code.
- Other Deduction Payor Volume Linked – Link a payor with an Other Deduction volume code.

Where: This change applies to the RFCODE dimension and plan file forecasts.

Who: Only Axiom Rolling Forecasting administrators and analysts can map RFCodes with payor-linked calc methods.

How:

1. In the **Dimension Maintenance** utility, open the **RFCODE** dimension.
2. Locate the revenue or deduction payor code that you want to link to a volume code.
3. In the **ForecastStdLine** column, double-click the folder icon on the right, and from the **Choose Value** dialog, select the applicable payor volume linked calc method, and then click **OK**.
4. Save your changes.

Maintenance				
Dimension : RFCODE				
DataSet filter : (DataSetName IN ('General', 'RF') OR DataSetName = '')				
(*) the column is duplicate. Only the first instance will be saved back				
RFCODE	Description	KHABgtCode	ForecastStdLine	InitStdLi
D_IPOther	IP Deductions - Other	D_IPOther	NA	NA
D_IPSelfPay	IP Deductions - SelfPay	D_IPSelfPay	NA	NA
D_Medicaid_IP	Contractual Allowance - IP Medicaid	D_Contractual	NA	NA
D_Medicaid_OP	Contractual Allowance - OP Medicaid	D_Contractual	Other Deduction Payor Volume Linked	NA
D_Medicare_IP	Contractual Allowance - IP Medicare	D_Contractual	NA	NA
D_Medicare_OP	Contractual Allowance - OP Medicare	D_Contractual	NA	NA
D_MgdCare_IP	Contractual Allowance - IP Managed Care	D_Contractual	NA	NA

When you make future changes in your forecast to a volume amount that is mapped to a specific payor, only that payor will be affected.

► 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:

- "Working with the Dimension Maintenance Utility"

Summarize data by RFGroup

▶ Why use this feature

If you use summarize data utilities to import your General Ledger (GL) data to Axiom Rolling Forecasting, you can now filter by RFGroup using two new summarization utilities:

- The first utility summarizes actuals by RFGroup.
- The second utility summarizes Budget data by RFGroup.

If you make changes to an RFGroup and need to reimport data, you can import just the affected groups instead of all of your files.

▶ How this feature works

What: Use these new summarization utilities to import summarized actual data and summarized budget data that is filtered by selected RFGroup. These utilities are the same as the other Summarize Actual Data and Summarize Budget Data utilities except that each has a new drop-down for selecting an RFGroup to the Variables dialog. You can select only one RFGroup to import at a time when filtering by RFGroup.

Where: This change applies to the Data Transformation section of the RF Admin task pane.

Who: Only Axiom Rolling Forecasting administrators can use this feature to import summarized data.

How:

1. In the **RF Admin** task pane under **Data Transformation**, double-click one of the following:
 - Summarize Actual Data (filter by RFGroup)
 - Summarize Budget Data (filter by RFGroup)
2. In the **Execute Import: Summarize [data type] Data (filter by RFGroup)** dialog, click **Execute**.
3. In the **Variables** dialog, select the year, whether or not to include statistics, and the type of hours.
4. From the **Select RFGroup** drop-down, select an RFGroup.
5. Click **OK**.



▶ Where to find more information

The following topic in the online help has been added or updated with related information:

- "Summarize data"

Initiative Status Update utility improves the accuracy of historical reports

▶ Why use this feature

Use the Initiative Status Update utility to assign approval status to initiatives for specific RF Periods so that initiative data is represented accurately in reports. Previously, initiative data that was approved in any historical periods was excluded from reports when the initiative’s status was later set to Exclude.

▶ How this feature works

What: A date stamp and approval status are associated with each line item in an initiative. When you assign a status to an initiative, that status is saved to the Forecast table for that forecast year, which associates the initiative status with specific time periods. Approved initiative data is included in plan file totals and is represented within report totals associated with specific RF periods. The Initiative Status Update utility displays all the RF Periods associated with an initiative and allows you to change the status of the initiative for any of those RF Periods. For example, for historical initiatives that now have Exclude status, you can change the status to Approve for those periods during which the initiative was approved so that the data is displayed in reports that include data from those historical periods.

Where: This change applies to the Tables section of the RF Admin task pane and to initiatives in plan files.

Who: Only Axiom Rolling Forecasting administrators and analysts can access this utility to update the status of initiatives.

How:

1. In the **RF Admin** task pane under **Tables**, double-click **Initiatives Status Update Utility**.
2. In the **Refresh Variables** dialog, select the criteria, and then click **OK**.

Refer to the following table for an explanation of criteria options:

Field	Description
Select Field to Filter By	Select the group type for the source data.
Select [group] (Leave blank for All)	To pull data from all groups, leave the default (All), or click Choose Value and select one or more specific groups.

Field	Description
Select Initiative(s) (Leave blank for All)	(Optional) Select the initiatives to include in the utility.
Select Scenario(s) (Leave blank for All)	(Optional) Select the scenario to apply. Initiatives associated with the selected scenarios appear in the utility.

3. In the **Initiative Status Update** utility, locate the columns with the periods you want to change.

The screenshot shows the 'Initiatives Status Update' utility. The table has the following structure:

RF Group	Initiative	Description	Type	Initiative Status	202007	202009	202007	202007	202007	202007
					1	1	11	11	14	15
					Default	Default	Scenario Copy Test	ABC Test	Copy of Default	Syntell
EMC_Imaging	EMC_Imaging_1_1	Test Scenario Copy	RFGGroup	Approve	Approve	Exclude	Approve			
EMC_Imaging	EMC_Imaging_13_1	Test Scenario Copy	RFGGroup	Approve				Approve		
EMC_Imaging	EMC_Imaging_14_1	Test Scenario Copy	RFGGroup	Approve					Approve	
EMC_Imaging	EMC_Imaging_15_1	Test Scenario Copy	RFGGroup	Approve						Approve
EMC_Nursing	EMC_Nursing_1_1	RLNTest	RFGGroup	Approve	Approve	Approve	Approve			
EMC_Nursing	EMC_Nursing_13_1	RLNTest	RFGGroup	Approve				Approve		
EMC_Nursing	EMC_Nursing_14_1	RLNTest	RFGGroup	Approve					Approve	
EMC_Nursing	EMC_Nursing_15_1	RLNTest	RFGGroup	Approve						Approve

4. From the related drop-downs, select the status.

5. Save the utility.

► 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:

- "Initiatives tab"
- "Build an RF Group initiative"
- "Build an RF Project initiative"
- "Working with plan files"

What to know before upgrading

IMPORTANT: You must apply the Axiom 2022.2 upgrade before applying any 2022.2 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.2 before the first product upgrade. Refer to the **Axiom 2022.2 Release Notes** and **Axiom Healthcare Suite 2022.2 Release Notes** for considerations before upgrading.

When upgrading to the 2022.2 version of Axiom Rolling Forecasting, note the following:

- You can replace Syntellis reports. Any report that you created or saved under a different name remains unchanged. Revised reports are available in Document History.
- Any Syntellis report that was moved to a new location is automatically moved back to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced.
- Driver files are replaced.
- Security roles and subsystems are reset to their configured settings. Your user security exceptions remain intact.
- Specific items that are configured as part of your company or organization's implementation such as imports, exports, driver files, and process management files, remain unchanged. Any required modifications to these areas are covered in the release notes.
- Shared tables might have their columns reordered or have new columns added to them.

Preparing and scheduling upgrades

Summary of the upgrade process:

1. **Review product release notes** – Review this document to become familiar with the new features and functionality.
2. **Schedule an installation date** – Submit a request to your organization’s Axiom System Administrator 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:
 - Axiom platform version.
 - Axiom for Healthcare product and version.
 - Whether to first refresh and apply updates to the Axiom test sandbox with a copy of the production instance of Axiom. If so, provide the earliest date that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply updates 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 to enable features for this version.

Getting help and training

Syntellis provides world-class resources directly within the Axiom system. Axiom Help provides topics, knowledge base articles, documents, webinar/training announcements, and videos to guide you through managing your system. To access these resources, do any of the following:

- **Windows and Excel Clients** – From the Main or Admin ribbon tab, click **Online Help**, and then select the product. Axiom Help opens in a new browser window.

NOTE: The online help opens only for products you are licensed to use.

- **Contextual help** – Form/web-enabled features and products include contextual help directly within the user interface. This information provides a quick summary and instructions specifically related to the page you are using. You can access this information by clicking the question mark in the upper right corner of the page. To access the full Axiom Help system, click **Open Help** at the top of the contextual help dialog.



▶ Syntellis Central

[Syntellis Central](#) provides centralized self-service content and resources for the Axiom Rolling Forecasting platform and suite of products. Using Syntellis Central, you can:

- Search help across all Axiom products.
- Access tips, tricks, and best practices in our knowledge base.
- Find training and certification content including on-demand, video, webinars, labs, and instructor-led courses.
- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.
- Review open Software Service project status and details.

Issues fixed in 2022.2

The following table lists the resolutions for issues addressed in 2022.2, released on August 15, 2022:

Calculators

Issue	Description
Balance Sheet and Cash Flow Redesign - Implement config driver component to set active state of trigger [142648]	<p>Summary: When changes were made to plan files that affected values in the Balance Sheet and Cash Flow (BSCF) calculator, a Scheduler job was triggered to update the calculator. However, not all users use the BCSF calculator, so the automatic triggering of a Scheduler job related to an unused feature caused confusion.</p> <p>Resolution: Set the default of the automatic trigger for the Scheduler job to Off. Created a toggle switch in the Planning Configuration utility for users to set this job to On if they plan to use the BSCF calculator.</p>
(2022.2 GA) Summary tab data in Deductions Model not querying back after save [147353]	<p>Summary: In the Deductions Model calculator, when users completed and saved their model, the once-populated Summary tab was blank because the Control Sheet was set to zero out the Summary sheet after saving.</p> <p>Resolution: Changed the Control Sheet settings for the Summary tab so that the report saves without zeroing out the data.</p>

Drivers

Issue	Description
(2022.2) Global Data issues as a follow up to RfCode.Khabgtcode compliance introduced in 22.1 [141551]	<p>Summary: When the global data calculation method was used in a plan file, the data coming from the driver was not KHABgtCode compliant.</p> <p>Resolution: Updated the Global Data calculation method to be RfCode.KHABgtCode compliant. The calculation now allows only the insertion of RfCodes where ForecastStdLine = Global Data and RfCodes that exist in KHABgtCode column. If data in the Global Data driver was stored at the RfCode level, the plan file was updated to bring consolidated results from the driver table at the KHABgtCode level. Subsequently, Syntellis updated the Update Global Data utility to consolidate records and save data at the RfCode.KHABgtCode level, and to delete orphaned records (where RfCode does not equal KHABgtCode).</p>

Plan files – Forecast

Issue	Description
<p>(2022.2) [T3] Case Number 00466146 - On the Employee Benefit Rate per FTE line, the Actuals qtr columns sum the three months while the forecast quarter columns calculate the Rate per FTE [139147]</p>	<p>Summary: In the plan file Forecast worksheet, on the Employee Benefit Rate per FTE line, the Actuals quarter columns summed three months, which was incorrect, while the forecast quarter columns calculated the Rate per FTE for the quarter, which was correct.</p> <p>Resolution: Changed the quarterly results in forecast periods to reflect the total benefits for the quarter/FTEs for the quarter. Also changed the labels to reflect Benefits per FTE rather than Rate per FTE.</p>
<p>RF Patient Revenue Net Per Unit CM - Inconsistent calculation when making adjustments in forecast periods [140702]</p>	<p>Summary: In the plan file Forecast worksheet, when users made an adjustment in a forecast period using the Patient Revenue Net Per Unit calculation method, the inflationary percentage adjustment was not included. Additionally, any One Time Adjustments (OTA) that came from the Volume calculation methods were not calculated correctly.</p> <p>Resolution: Updated the Patient Revenue Net Per Unit calculation method to include the percent inflation changes. For all monthly forecast period columns, updated the Average Rate Per Unit row to incorporate the inflation factor. To correct the OTA issue, updated the Net Patient Revenue Including OTA formula to reference the correct cells.</p>
<p>(2022.2) Forecast CML: Per Unit Volume CM - Incorrect references when using OP or Oth Global Drivers [141415]</p>	<p>Summary: In the plan file Forecast worksheet, when users inserted a Per Unit Volume calculation method using the Global IP/OP/Other driver paired with a different forecast method (for example, Last Month, Same Month, 3 Month Avg., and so on), the first forecast month referenced the correct forecast method, but the second and subsequent months did not, regardless of the global driver that was used.</p> <p>Resolution: Updated the calculation methods to reference the correct global driver for the second and subsequent forecast months.</p>

Issue	Description
(2022.2 GA) Case Number 00474083 - RF_GlobalData new column needed [147307]	<p>Summary: In the plan file Forecast sheet, users created an All Payors group with a system-assigned payor code that was not zero. However, Global Data used a payor code of zero. When users tried to import historical data with a payor code different from zero and that historical data was tied to Global Data using the Global Data calculation method, the forecasted data did not interact with the imported historical data.</p> <p>Resolution: Hard coded payor zero in the Global Data calculation method formula. Any global data will now interact with imported historical data regardless of the chosen payor. Saving to the non-zero payor line will work as intended.</p>

Reporting

Issue	Description
[2022.2] Consolidated Summary: Formula Errors in Free Cash Flow Calculation [137168]	<p>Summary: In the Consolidated Summary report, formula errors caused issues with the indicators for Average Daily Census, Free Cash Flow (excluding Working Capital), and Capital Spend - % of Operating EBIDA.</p> <p>Resolution: Updated the formulas to reference the correct source amounts in their calculations.</p>

Scenarios

Issue	Description
RFNavigation- Planning Questions does not refresh on open to load the exception questions copied from previous scenario [134569]	<p>Summary: In the Scenario Manager, when users created a new scenario within the same period as when the last scenario was created, and then saved exceptions, the new scenario drivers loaded. However, on the Planning Questions tab, the default planning questions loaded without exception question blocks. If users applied or saved their changes, the exceptions were displayed.</p> <p>Resolution: The error was related to the Driver Processing job not being finished before users navigated to the Drivers utility. Syntellis hid the Next button so that users must access the Drivers utility from the RF Admin Task pane.</p>

Issues fixed in 2022.2.1

The following table lists the resolutions for issues addressed in 2022.2.1, released September 19, 2022:

Drivers

Issue	Description
(2022.2 Patch 1) Case Number 00473136 - RF Drivers not updating current quarter forecast months [149635]	<p>Summary: In the Drivers tab of the Drivers utility, users could not enter a percentage amount for an adjustment because input cells were incorrectly referenced.</p> <p>Resolution: Updated the cell formulas to include the correct cell references.</p>
(2022.2 Patch 1) Adjustments driver - #N/A error thrown for inserted global records [152840]	<p>Summary: In the Adjustments tab of the Drivers utility, when users inserted a global record on one of the Adjustment tab's sub tabs and then saved, when the form refreshed, the inserted record was no longer displayed. When users tried to edit other data in the driver, they received an error message.</p> <p>Resolution: Identified and adjusted an incorrect reference in the affected dynamic calc method.</p>

Issues fixed in 2022.2.2

The following table lists the resolutions for issues addressed in 2022.2.2, released October 10, 2022:

Plan files

Issue	Description
(2022.2 Only) Case Number 00480707 - RF Labor Summary Report is not producing results for Quarterly FTE setting [154830]	<p>Summary: In the Labor Summary report, when users selected FTEs as the indicator and Quarterly as the period view in the Refresh Variable dialog, data for FTEs was not displayed in the report. References in the related row of the supporting worksheet were incorrect.</p> <p>Resolution: Updated the formulas in the reference worksheet to reference the correct row.</p>
(2022.2 Only) RF Labor Summary Report is missing header formatting with Monthly setting [154832]	<p>Summary: In the Labor Summary report, the column header formatting was missing if the selected period view was Monthly. In the supporting Time! worksheet, references were incorrect.</p> <p>Resolution: Updated the formulas in the reference worksheet so that the header formatting is used.</p>
2022.2.2 only) Case Number 00480456 - Summary tab: FTE show up fine on the Forecast tab, but are listed as 0 in the Summary [153636]	<p>Summary: In the plan file Forecast tab, FTE amounts were listed as expected, but in the Summary tab, Total Paid FTE amounts were missing because a referenced column was missing.</p> <p>Resolution: Updated the supporting reference worksheet to include the new column.</p>