Release Notes

Axiom Healthcare Suite
Version 2022.2

AXIOM

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About the release notes

Syntellis is pleased to announce the 2022.2 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 2022.2 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 2022.2:

- Clients with Comparative Analytics are required to upgrade this product to 2022.2 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 2022.2. For details, see the following table.
- Rolling Forecasting 1.0 clients (<2020.4) should move to at least 2021.3. This versionis a new install and not a standard upgrade. We are testing compatibility of RF 1.0 with 2022.1 platform, but this upgradeis not officially supported at this time.
- Clients with Enterprise Decision Support mustwill 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 2022.2.
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 2022.2.
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 2022.2.
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 2022.2.
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 2022.2. We cannot guarantee proper product functionality if you proceed with 2022.2 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

Axiom Budgeting and Performance Reporting

Axiom Budgeting and Performance Reporting 2022.2 includes the following enhancement in this release:

Performance Reporting Security Update utility – Enhancements improve your ability to manage all users. For more information, see "Managing Performance Reporting user security" in the online help.

Axiom Capital Planning and Capital Tracking

While no new functionality has been added or enhanced in Axiom Capital Planning and Axiom Capital Tracking, these products deliver enhancements from Axiom Version 2022.2. For more information, see Axiom 2022.2 Release Notes.

Axiom Clinical Analytics

No new features or enhancements were included in this release.

Axiom Comparative Analytics

While no new functionality has been added or enhanced in Axiom Comparative Analytics, this product does deliver enhancement from Axiom Version 2022.2. For more information, see Axiom 2022.2 Release Notes.

Axiom Contract Management

Enhancements in this release include:

New Winning Detail report links

New links from contract clauses and terms pages enable you to quickly understand where your reimbursement comes from. You can view the entire Winning Detail report for the contract or just the report data for a specific clause or term.

CMS DRG Factors page improvements

The following improvements have been made to the CMS DRG Factors page:

- **Operating Adjustments Codes** – An Operating Adjustments Code tab was added for calculating the Medicare outlier for the COVID add-on. Use this tab to add the matching code for an adjustment.

- **DRG Weight Adjustment** – A DRG Weight Adjustment field was added to the Settings tab. Enter a percentage multiplier if a code on a claim matches the value on the Operating Adjustments Code tab.
- **Post Acute hover tip** – To view an explanation of how selecting the Post Acute checkbox affects a calculation, on the Transfer Codes tab, hover your cursor over the question mark to the right of the Post Acute column heading.

Payer code and insurance plan code descriptions visibility

- The ability to include an organization-specific payer code or insurance plan code description library file is now available as part of the standard import. Previously, you had to contact Customer Support to update descriptions. Now you only need to contact Customer Support to help with the initial setup. After setup, updated Org Code/Payer Code descriptions will be incorporated into the nightly import process. The file must include OrgCode, PayerCode, and Description.
- Use the added OrgCode/PayerCode description to view code descriptions that are assigned to a contract version.

New Winning Detail report links

Why use this feature

New links from contract clauses and terms pages enable you to quickly understand where your reimbursement comes from. You can view the entire Winning Detail report for the contract or just the report data for a specific clause or term.

How this feature works

What: A Winning Detail button added to clauses and terms pages opens the Winning Detail report in a new tab for the associated contract. A new trophy icon in the icon column on clauses and terms pages opens a dialog that displays the Expected Payment, Winning Payment, and Total Loss amounts for the clause or term, and the number of claims associated with the data. If no data is associated with the clause or term, the dialog reads “No results” and displays zeros in the fields.

Where: This change applies to contract Clauses and Terms pages.

Who: Only Axiom Contract Management administrators and analysts can access the report or the summary of report results.

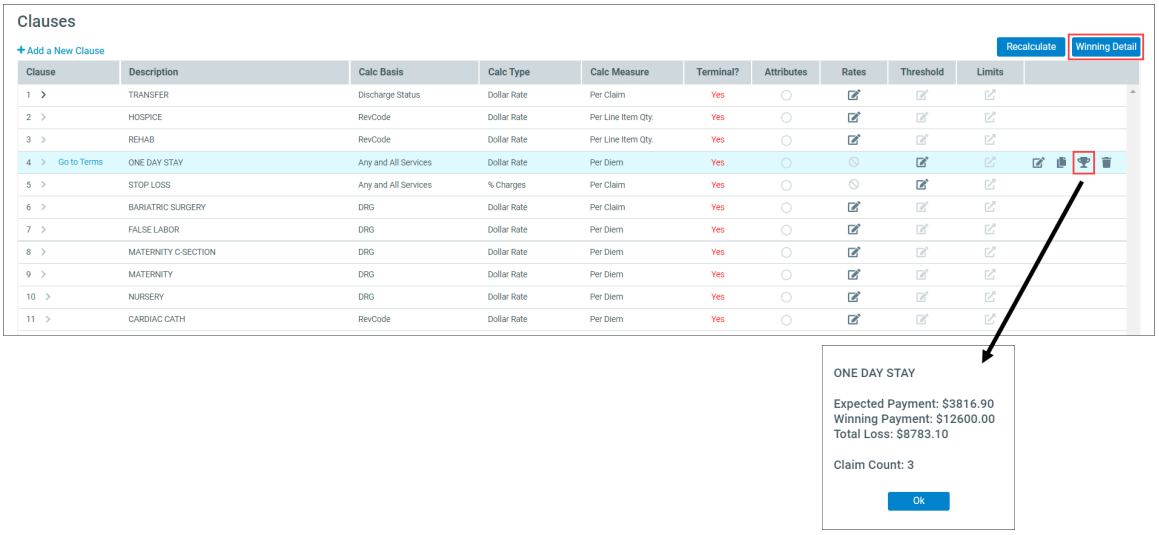
How:

On the **Clauses** or **Terms** page of a contract for which there is a Winning Detail report, do any of the following:

- If needed, click **Recalculate** to get the latest claims data for the report.
- To view the Winning Detail report for the contract, click the **Winning Detail** button. The report opens in a new tab.

- To view the impact of a specific clause or term, in the icon column for that row, click the Trophy icon ( ). A pop-up dialog displays the Expected Payment, Winning Payment, and Total Loss amounts for the clause or term, and the number of associated claims.

> **NOTE:** Clauses and terms with no associated report data display a "No results" dialog.



Where to find more information

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

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

Axiom Enterprise Decision Support

Axiom Enterprise Decision Support did not release for this version.

Axiom Financial Planning

While no new functionality has been added or enhanced in Axiom Financial Planning, it does deliver enhancements from Axiom Version 2022.2. For more information, see Axiom 2022.2 Release Notes.

Axiom Rolling Forecasting

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 Axiom Rolling Forecasting 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 Axiom Rolling Forecasting 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

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.

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**.

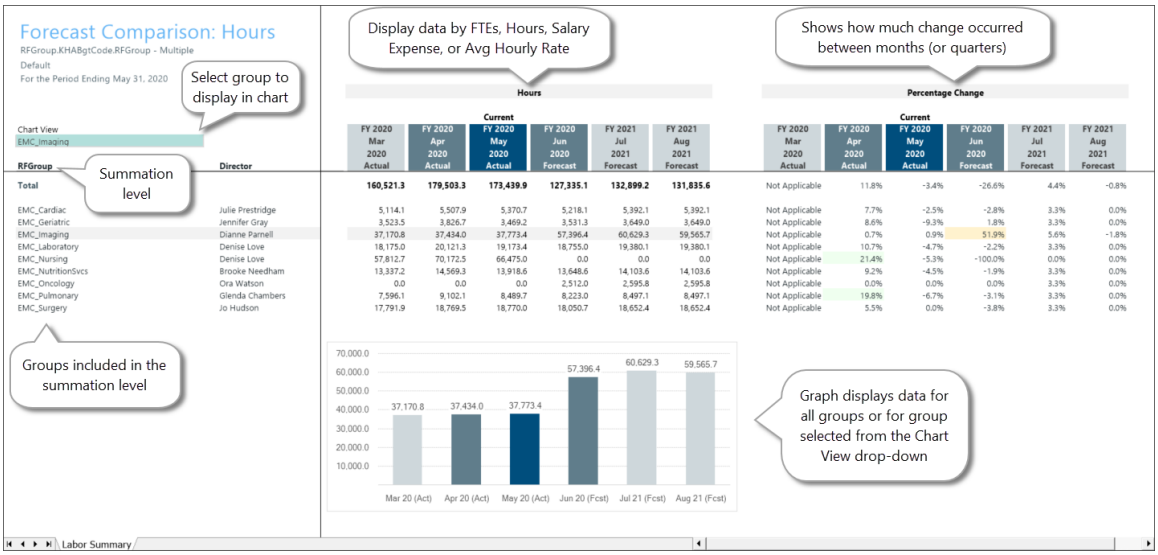
   Refer to the following table for an explanation of criteria options:

   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.
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 actual data.

Field	Description
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 RFGroup, the indicator is Hours, and the summation level is RFGroup.



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.

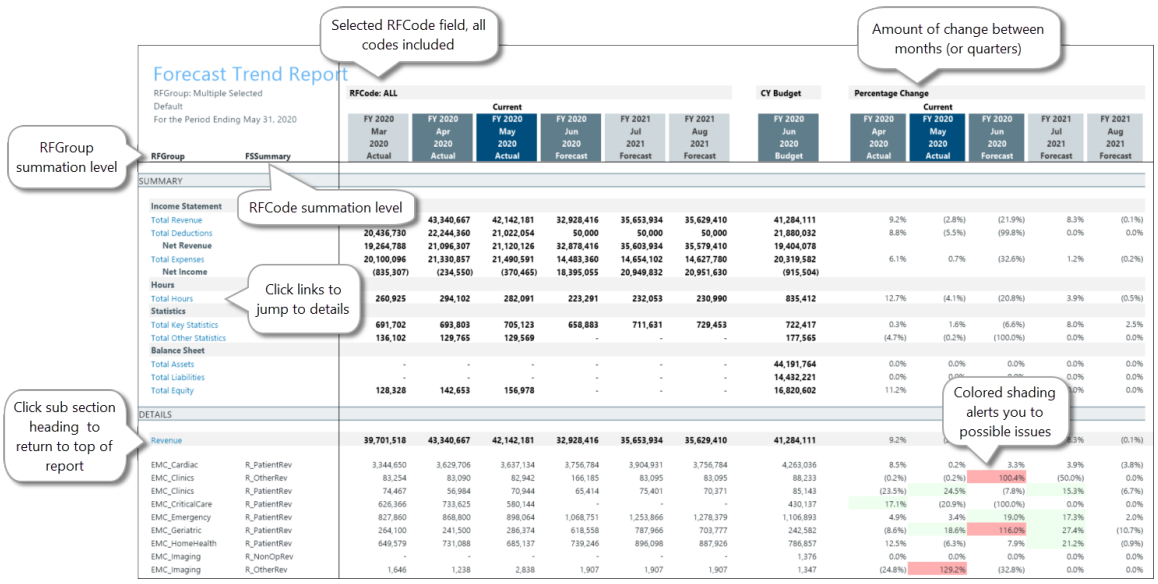
1. In the task pane under **Reporting**, double-click **Trend Summary**.
2. In the **Refresh Variables** dialog, select the RFGroups and RFCodes for which you want to review trend data, and how you want the data displayed, and then click **OK**. Refer to the following table for an explanation of options:

   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.

Field	Description
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.



Where to find more information

The following topic in the Axiom Rolling Forecasting 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.

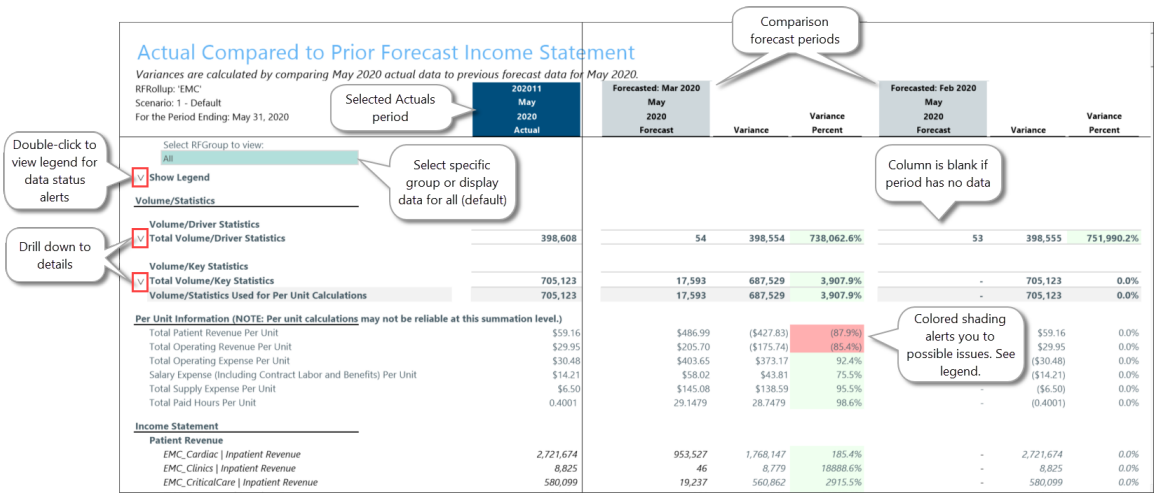
1. In the task pane under **Reporting**, double-click **Action vs. Forecast Comparison**.
2. In the **Refresh Variables** dialog, select the report criteria, and then click **OK**.

   Refer to the following table for an explanation of options.

   NOTE: When viewing the report, you can change the criteria to see 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.



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.

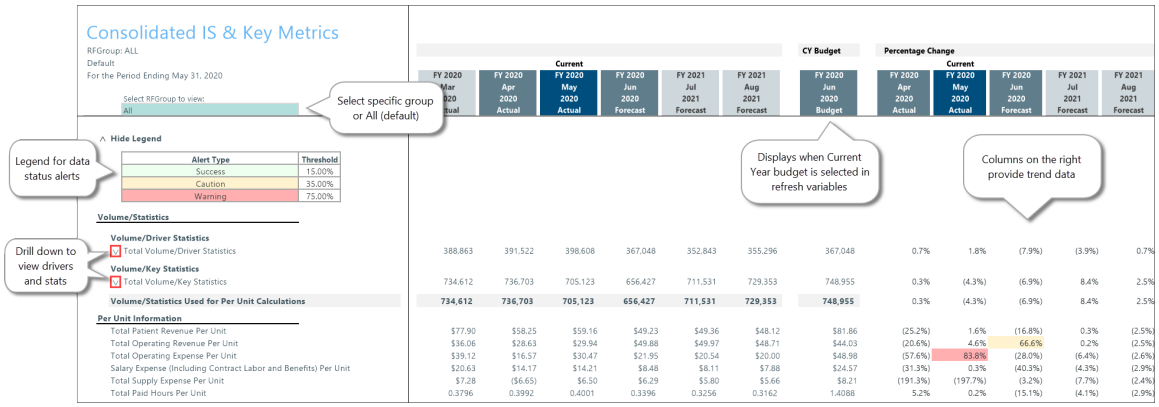
1. In the task pane under **Reporting**, double-click **Consolidated IS & Key Metrics**.
2. In the **Refresh Variables** dialog, select the report criteria, and then click **OK**.

   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.
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 past 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 RFGroup Summation Level	Select the group level at which to sum the reported data.

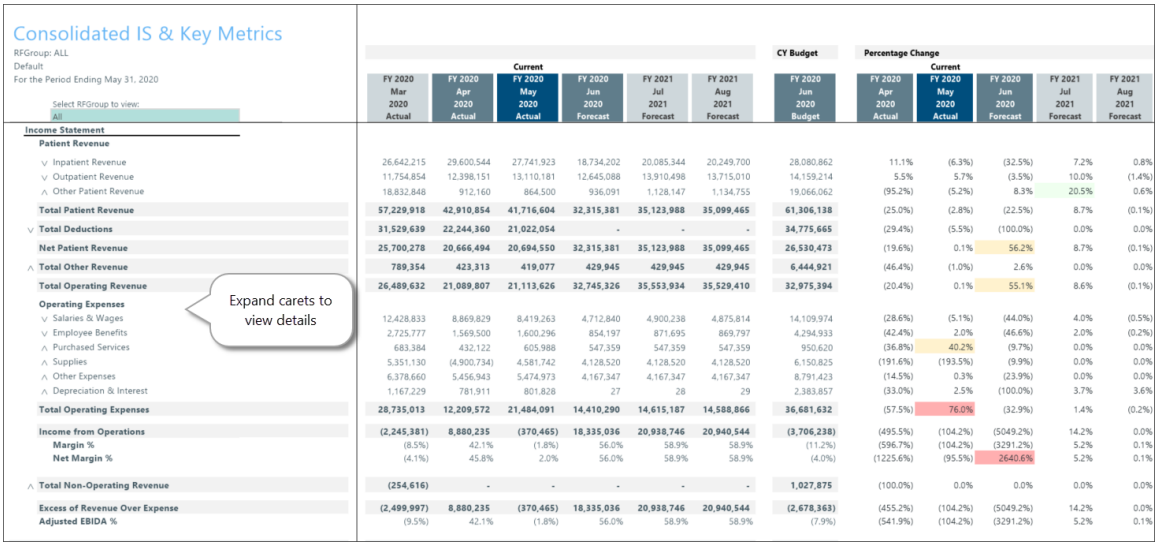
Top of report

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 RFGroup to view** drop-down.



Middle section

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



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 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	FY 2021 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

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 Apr Actual	FY 2020 May Actual	FY 2020 Jun Forecast	FY 2020 Apr - Jun Projected	FY 2021 Jul Forecast	FY 2021 Aug Forecast	FY 2021 Sep Forecast	FY 2021 Jul - Sep Forecast	FY 2021 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

Forecast \ Statements

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”

Axiom Strategy Management

While no new functionality has been added or enhanced in Axiom Strategy Management, this product does deliver enhancement from Axiom Version 2022.2. For more information, see Axiom 2022.2 Release Notes.

Axiom Treasury Cash Management

While no new functionality has been added or enhanced in Axiom Treasury Cash Management, this product does deliver enhancement from Axiom Version 2022.2. For more information, see Axiom 2022.2 Release Notes.

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 Healthcare Suite, note the following:

- Along with upgrading to Axiom 2022.2, you must upgrade to Axiom Comparative Analytics 2022.2.
- This product upgrade contains updated templates, calculation methods, updated drivers, and remediated defects.
- This product upgrade may contain updated templates, calculation methods, and remediated defects.
- 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.

Preparing for 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.

Issues fixed in 2022.2

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

Issue	Description
(2022.2) UX change request related to suite navigation: Changing listing of order of products and rename to Product Suite [136054]	**Summary:** Change label of product navigation from Axiom Suite to Product Suite and alphabetize order of products. **Resolution:** Implemented changes identified in Summary.