

## **Release Notes**

Axiom Budgeting and  
Performance Reporting  
Version 2022.3

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame that has a purple-to-blue gradient. The frame is composed of two horizontal lines and two vertical lines, with the top and bottom lines being slightly longer than the side lines.

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# About the Release Notes

Syntellis is pleased to announce the 2022.3 release of Axiom Budgeting and Performance Reporting. 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.

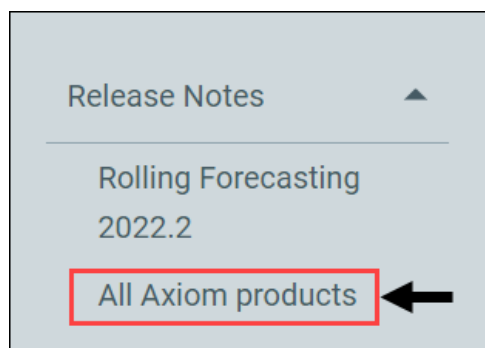
The purpose of these release notes is to provide you with the following:

- 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 Budgeting and Performance Reporting 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 in 2022.3

Axiom Budgeting and Performance Reporting 2022.3 includes the following enhancements in this release:

- [Department-specific self-balancing productivity adjustment hours](#)

Prior to this release, the self-balancing productivity adjustment could only be applied globally to either all departments or to all departments assigned to a budget group within the 02 Budget Labor Configuration Driver. Although both of these original global options still exist, new functionality in the 24 Budget Labor Benchmark Driver now lets you apply this zero-balance adjustment to specific departments.

- **Approved initiative volumes saved in the BUD\_PAY12 table** – Approved department initiative volumes are now saved in the BUD\_Pay12 table. You can review the volumes to determine whether to add them to other department budget productivity stats when transferring to Bud\_Pay27\_20XX tables.
- **Tables for 2024** – Data tables for the year 2024 were created to store data when the year rolls over. The tables are located in the **Table Library > Budgeting > Flex Budget** folder, and in **Table Library > Management Reporting > Actuals >**.

# Department-specific, self-balancing productivity adjustment hours

## ► Why use this feature

Use the Self-Balancing Adjustment to Target feature to apply zero-balance budget adjustments to individual departments. This feature ensures that those departments manage their budgets to the set fixed FTE target, Worked Hour Per Unit of Service (WHPUOS) target, or a combination of both targets, in the budget plan files.

## ► How this feature works

**What:** Prior to the 2022.3 release, you used the Budget Labor Configuration driver to set the zero-balancing productivity adjustment. Productivity target adjustment calculations were an all-or-nothing option that were applied globally to every department or to departments that belonged to a budget group. Although you can still use those options, the new Self-Balancing Adjustment to Target feature enables you to apply targets to individual departments. For example, suppose the departments in a budget group all create their budgets to target except for one or two that regularly create their budgets above the defined target. You could apply adjustment targets to just those departments, forcing them to create budgets that meet the set targets.

**Where:** This change applies to the Budget Labor Benchmark driver in **Axiom > File Groups > Budget-20XX**, the Budget Labor Configuration driver, and related plan files. The new Self-Balancing Adjustment column was added to the Budget Labor Benchmark driver. You enable the zero-balance budget adjustment in the Budget Labor Configuration driver and/or the Budget Labor Benchmark driver, but the adjustment is calculated in the budget plan file in both the Jobcode and Employee Detail Labor calculation methods. The calculated adjustment is saved to the Bud\_Pay12\_YYYY table.

**Who:** Only Axiom administrators and analysts with security rights to update the Budget drivers can enable these zero-balance productivity adjustments.

**How:** In the Budget Labor Configuration driver, you can either enable the adjustment in the Global section for every department or enable the adjustment for departments that are assigned to a budget group. Both of these global options are still available and work as they always have. You apply the new adjustment feature in the Budget Labor Benchmark driver.

1. In the **Budget File Group** under **Drivers**, double-click **02 Budget Labor Configuration**.

The Global settings at the top of the driver apply to all department plan files:

Budget Workbook Labor Configuration Settings									
		Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl
Global Setup		Default JobCode:							
Activate Dept Based Pay?		<div>Jobcode &gt;&gt;</div> JDept <div>Yes</div>							
Save	Global (Drivers)	Global							
		FTE Day Type		FTE Scale	FTE Hours				
		Default	Calendar Days	Yearly	2,080.00				
Global Hours per FTE Convention									
Global Calendar Days		366	365	365	182	183		365	365
Global Work Days in Period		261	261	260	173	87		260	276
Global Hours in Period		2,088.00	2,080.00	2,080.00	1,037.15	1,042.85		2,080.00	2,080.00
Global Number of Holidays					4	2		6	6

The **Use Self-Balancing to Target** column on the **Jobcode** tab settings (see following image) control which calculation mechanism is used within the plan files for the listed department.

Budget Workbook Labor Configuration Settings									
		Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	
Save	Medical Center	EMC							
		FTE Day Type		FTE Scale	FTE Hours				
	EMC Hours per FTE Convention	Default	Calendar Days	Yearly	2,080.00				
	EMC Calendar Days	366	365	365	243	122		365	
	EMC Work Days in Period	261	261	260	173	87		260	
	EMC Hours in Period	2,088.00	2,080.00	2,080.00	1,384.77	695.23		2,080.00	
	EMC Number of Holidays				4	2		6	
Labor Configuration		R	Denotes use of Global default						
% of Staffing Change with Volume									
Medicare Tax									1.45%
Current FICA Rate		Consider impact of pre-tax benefit selections							6.20%
Current FICA Limit									\$118,500
Retirement Below FICA limit									5.00%
Retirement Above FICA limit									9.00%
Retirement Max Limit									\$0
Uniform Merit Increase Date?							No		
FTE Comparison to YTD		Empl_List - Scheduled FTEs or Current Year Budget FTEs					CYB_FTE		
Projected FTE Starting Point		YTD FTEs or Scheduled/Budget FTEs per above					YTD_FTE		
Forecast FTEs from Projection									
Hours per PayPeriod									
Hours per Monthly									
KHASum Code for Agency							PaidHoursContract		Salaries
KHASum Code for Physician							PaidHoursPhy		Salaries
Use Self-Balancing to Target on Jobcode tab? ***		No					Variable-Productive		Fixed
Jobcode to use for Self-Balancing Jobcode Adjustment							JTargetAdj		JTarget
Paytype to use for Self-Balancing Jobcode Adjustment							P0001		P0001
*** Update Dept specific adjustments to Yes/No in the 24 Budget Labor Benchmark driver									

- To create an exception to the Global configurations option, create a budget group with different configuration settings using the **Double Click to Insert New Budget Group** link.

In the following example, the Global configuration is set to **Yes**, but the EMC budget group configuration is set to **No**, which indicates that if you use only the configuration settings in the Budget Labor Configuration driver, the self-balancing adjustment is applied to all department plan files *except* the department plan files that are assigned to the EMC budget group.

Budget Workbook Labor Configuration Settings		Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl	BudPrelim	Bud_Target	
Global Setup												
Activate Dept Based Pay?		Default JobCode: <input type="text"/> JDept <input type="text"/> Yes										
Save	Global (Drivers)	Global										
		FTE Day Type		FTE Scale		FTE Hours						
		Default	Calendar Days	Yearly	2,080.00							
Global Hours per FTE Convention		366	365	365	182	183						
Global Calendar Days		261	261	260	173	87						
Global Work Days in Period		2,088.00	2,080.00	2,080.00	1,037.15	1,042.85	2,080.00	2,080.00	2,080.00	2,080.00		
Global Hours in Period												
Global Number of Holidays		4										
Labor Configuration												
% of Staffing Change with Volume		5.00%										
KHA Sum Code for Agency		PaidHoursContract										
KHA Sum Code for Physician		PaidHoursPhy										
SalariesContract		SalariesPhy										
Use Self-Balancing to Target on Jobcode tab?		Yes										
Jobcode to use for Self-Balancing Jobcode Adjustment		Variable-Productive										
Paytype to use for Self-Balancing Jobcode Adjustment		Fixed										
		Jobcode >> JTargetAdj << Jobcode										
		Paytype >> P0001 << Paytype										

Global set to Yes

Budget Workbook Labor Configuration Settings		Two Years Ago	Last Year	Current Bud	YTD	ProjCalc	ProjAdj	ProjTtl	BudTtl	BudPrelim	
Save	Medical Center	EMC									
		FTE Day Type		FTE Scale		FTE Hours					
		Default	Calendar Days	Yearly	2,080.00						
EMC Hours per FTE Convention		366	365	365	243	122					
EMC Calendar Days		261	261	260	173	87					
EMC Work Days in Period		2,088.00	2,080.00	2,080.00	1,384.77	695.23	2,080.00	2,080.00	2,080.00	2,080.00	
EMC Hours in Period											
EMC Number of Holidays		4									
KHA Sum Code for Agency		PaidHoursContract									
KHA Sum Code for Physician		PaidHoursPhy									
SalariesContract		SalariesPhy									
Use Self-Balancing to Target on Jobcode tab? ***		No									
Jobcode to use for Self-Balancing Jobcode Adjustment		Variable-Productive									
Paytype to use for Self-Balancing Jobcode Adjustment		Fixed									
		Jobcode >> JTargetAdj << Jobcode									
		Paytype >> P0001 << Paytype									
*** Update Dept specific adjustments to Yes/No in the 24 Budget Labor Benchmark driver											

EMC set to No

3. Save the driver.
4. To create an exception to the two global settings, in the **Budget File Group** under **Drivers**, double-click **24 Budget Labor Benchmark**.
5. In the **Use Self Balancing Adjustment to Target in Jobcode tab** column, select the drop-down option appropriate to your situation. Use the following table for reference:



Department in budget group? Y/N	Budget Labor Config –Budget Group setting	Budget Labor Benchmark – Use Self Balancing Adjustment to Target in Jobcode tab setting	Result for the specific department
Yes	Yes	Labor Config Driver	Self-balancing adjustment is applied
Yes	No	Labor Config Driver	Self-balancing adjustment is not applied
Yes	Yes	No	Self-balancing adjustment is not applied
No	N/A	Labor Config Driver	Global setting in the Budget Labor Configuration driver is applied
No	N/A	No	Self-balancing adjustment is not applied
No	N/A	Yes	Self-balancing adjustment is applied

6. Save the driver.

### ► Additional examples

When the self-balancing adjustment to target is disabled, the FTEs From Target are calculated and displayed in the shaded box above the column headers in the plan file Jobcode tab (see following image). The FTEs From Target are calculated by comparing the Target FTEs, which is either a fixed FTE Target or the product of budgeted volume and the assigned departmental worked hours per unit of service, plus the budgeted FTEs. If the FTEs from Target are positive, the budget preparer can add the number of FTEs to any combination of budgeted jobcode blocks and still be within the Target FTEs. If the FTEs from Target are negative, the budget preparer must reduce budgeted FTEs to reach the Target FTEs.

In the following plan file example, the self-balancing adjustment is disabled, so the adjustment to target rows are not calculated:

<b>JobCode</b> 27200 - EMC Radiology - MRI (JobCode)						FTEs From Target 10.00 10.00 11.45 PAID Hrs/Unit 0.000 0.000 0.567			
						<b>FTEs - Projected Using Actual</b>			
						FY 2022 Budget	YTD Actual	Mar-Jun Projected	FY 2023 Budget
JStat	27200	<b>Dept Primary Statistic</b>		Current Rate	Start Rate	End Rate	Alloc Rate		
		Departmental Total						0	3,641
		Total Program Additions						0.00	0.00
		Total Position Changes						0.00	0.00
		Total Productive FTEs						0.00	0.00
		Total Non-Productive FTEs						0.00	0.00
27200		Fixed Adjustment to Target						0.00	0.00
27200		Variable Productive Adjustment to Target						0.00	0.00

*Self-balancing adjustment is disabled.*

In the following example, the self-balancing adjustment is enabled and the adjustment to target rows are calculated automatically and saved to the Bud\_Pay12\_YYYY table in the JTarget job code. This process forces the department to budget to the assigned Benchmark Targets if the budget preparer has not adjusted the number of FTEs in the job code blocks:

<b>JobCode</b> 27200 - EMC Radiology - MRI (JobCode)						FTEs From Target 10.00 0.00 0.00 PAID Hrs/Unit 0.000 0.000 7.110			
						<b>FTEs - Projected Using Actual</b>			
						FY 2022 Budget	YTD Actual	Mar-Jun Projected	FY 2023 Budget
JStat	27200	<b>Dept Primary Statistic</b>		Current Rate	Start Rate	End Rate	Alloc Rate		
		Departmental Total						0	3,641
		Total Program Additions						0.00	0.00
		Total Position Changes						0.00	0.00
		Total Productive FTEs						0.00	0.00
		Total Non-Productive FTEs						0.00	0.00
JTargetAdj	27200	Fixed Adjustment to Target						10.00	9.01
JTargetAdj	27200	Variable Productive Adjustment to Target						0.00	2.45

*Self-balancing adjustment is enabled.*

In the following example, while the default setting is **Labor Config Driver** (02 Budget Labor Configuration driver), the drop-down also includes **Yes** or **No** options. Even though the department is assigned to the EMC Budget Group and the self-balancing adjustment is set to **No** in the 02 Budget Labor Configuration driver, you can enable the adjustment for department 27200 EMC Radiology – MRI by selecting **Yes** from the drop-down in the **24 Budget Labor Benchmark** driver. The adjustment is not enabled for all other departments assigned to the EMC budget group.

Benchmark Factors											
Dept	Department Name	Target Type	Total FTEs	CY TARGET		Paid-Wrk Variance	Total FTEs	NY TARGET		Paid-Wrk Var	Use Self Balancing Adjustment to Target in Jobcode Tab
				WHPUOS	PHPUOS			WHPUOS	PHPUOS		
26790	EMC Same Day Surgery	WHPUOS	0.000	2.393	2.692	12.47%	0.000	2.393	2.659	9.98%	Labor Config Driver
26810	EMC GI Lab	WHPUOS	0.000	4.030	4.549	12.88%	0.000	4.030	4.490	10.24%	Labor Config Driver
26840	EMC Continence Clinic	WHPUOS	0.000	1.488	1.624	9.18%	0.000	1.488	1.613	7.76%	Labor Config Driver
26850	EMC Labor And Delivery	WHPUOS	0.000	26.271	30.004	14.21%	0.000	26.271	29.539	11.06%	Labor Config Driver
27030	EMC Central Supply	WHPUOS	0.000	0.156	0.176	13.14%	0.000	0.156	0.174	10.41%	Labor Config Driver
27060	EMC Laboratory	WHPUOS	0.000	0.081	0.093	14.11%	0.000	0.081	0.091	11.00%	Labor Config Driver
27070	EMC Pathology Support	WHPUOS	0.000	0.113	0.126	11.07%	0.000	0.113	0.125	9.06%	Labor Config Driver
27100	EMC Blood Bank	WHPUOS	0.000	0.319	0.362	13.28%	0.000	0.319	0.357	10.49%	Labor Config Driver
27200	EMC Radiology - MRI (JobCode)	Both	10.000	1.397	1.492	6.80%	10.000	1.397	1.482	5.73%	Yes
27210	EMC Radiology - CT Scan	WHPUOS	0.000	0.779	0.861	10.56%	0.000	0.779	0.853	8.72%	Labor Config Driver

## ► Where to find more information

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

- "Budget Labor Configuration"
- "Budget Labor Benchmark driver"

# What to know before upgrading

**IMPORTANT:** You must apply the Axiom 2022.3 upgrade before applying any 2022.3 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to the Axiom 2022.3 before the first product upgrade. Refer to the **Axiom 2022.3 Release Notes** and **Axiom Healthcare Suite 2022.3 Release Notes** for considerations before upgrading.

When upgrading to the 2022.3 version of Axiom Budgeting and Performance Reporting, note the following:

- Along with upgrading to Axiom 2022.3, you must upgrade to Axiom Comparative Analytics 2022.3.
- 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.
- 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 five 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 Budgeting and Performance Reporting 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 2022.3

The following table lists the resolutions for issues addressed in 2022.3, released November 7, 2022:

Budgeting: templates, plan files, and reports

Issue Description	Description
PFB-08285 - Urgent - Depreciation Calc Method does not update [41086]	<p><b>Summary:</b> In plan files, when users inserted a new row for Depreciation, inserted a Fixed calculation (calc) method, and then changed the calc method to Depreciation, the values from the Depreciation driver did not appear after users refreshed the plan file.</p> <p><b>Resolution:</b> Added a table dependency to the Depreciation driver Axiom Query (AQ) so that the driver runs. To view the calculated depreciation, users must either close and reopen the plan file or reprocess the plan file.</p>
PFB-08491 - When adding a jobcode block, the jobcode description field in the first row of the block is not picking up the default glacct/hracct for the jobcode [43667]	<p><b>Summary:</b> In the plan file Jobcode tab, when users manually inserted a jobcode block, the jobcode description field in the first row of the block did not pick up the default glacct/hracct for the jobcode.</p> <p><b>Resolution:</b> Added a related column value calc method variable below the Select Job Code variable. The added calc method variable retrieves the jobcode.hract and jobcode.glacct values and places them in the Jobcode worksheet.</p>
PFB-08681 - Budget Key Statistics: Cell J6 is .YTD and should be .TOT so cell J3 resolves to CYB_TOT (BUD2019.TOT) [48332]	<p><b>Summary:</b> In the Budget Key Statistics by Department Report, cell J6 was set to YTD (Year to Date) instead of TOT (Total), which caused the column to return the year-to-date results instead of the total.</p> <p><b>Resolution:</b> Changed the cell to the correct code, TOT.</p>
PFB-09483 - Incorrect reference in volume formulas row 45 on Employee tab [82207]	<p><b>Summary:</b> In the plan file Employee tab, the labor statistic was not picked up correctly because of an incorrect cell reference.</p> <p><b>Resolution:</b> Updated the cell formula to reference the correct cell.</p>
Salaries Do Not Match - not picking up PayrollGLMapping configuration when present [94332]	<p><b>Summary:</b> In the budget reconciliation report Salaries Do Not Match, salary and hours data came through inconsistently.</p> <p><b>Resolution:</b> Updated the affected Aqs so that the report data is populated correctly and consistently.</p>

Issue Description	Description
[T3] Case Number 00454070 - Plan Files - Budget method on stat_rev resolving to incorrect value [130903]	<p><b>Summary:</b> When users created a new plan file, and then added a statistic in the Budget Statistics driver, the budget method in the plan file Stat_Rev sheet was New Per Total OP/ER/Clinic Visits instead of Global Assumptions.</p> <p><b>Resolution:</b> Updated the affected cell formulas to reference the correct term, Global, instead of New Global.</p>
BP - Defect 58838 PFB-09210 - Initiatives Volumes not included in BUD_PAY12 [132163]	<p><b>Summary:</b> Approved Budget initiative volumes were not saving to BUD_PAY12_20XX table. Users had to pull these in a report and then manually add them to the table if needed to calculate the Budget WHPUOS.</p> <p><b>Resolution:</b> Updated the table and related calculation methods so that approved budget initiative volumes save to the same Initiative row where hours, revenues, and expenses are currently saved in the BUD_PAY12_20XX Table.</p>
Bud Jobcode tab- displaying dev hidden columns in default view [136040]	<p><b>Summary:</b> On the plan file Jobcode tab, two columns used by developers were visible to users.</p> <p><b>Resolution:</b> Updated the code for the columns so that they are not displayed to users.</p>
Budget Template: Expense worksheet AQ7, AQ12, and AQ13 need to be made KHABgtCode/KHABgtMap compliant [139112]	<p><b>Summary:</b> On the plan file Expense tab, AQ7, AQ12, and AQ13 were not KHABgtCode compliant, possibly causing duplicate entries and save failures.</p> <p><b>Resolution:</b> Updated the Sum By fields to be KHABgtCode compliant in the affected AQs.</p>
[T3] Case Number 00465725 - Question on Base Rate in the Employee List in Plan File [140915]	<p><b>Summary:</b> In plan files, users had multiple job codes per EmpID per dept, with differing rates of pay. However, the pay rate defaulted to the maximum pay rate for that EmpID and was not specific to the job code.</p> <p><b>Resolution:</b> Updated the AQ2 field definition to include the AxAggregate(Max) base rate, and disabled AQ3.</p>



Issue Description	Description
[T3] Case Number 00469301 - Duplicate of Dept Other Pay on Full Process [142823]	<p><b>Summary:</b> On the plan file Jobcode tab, a paytype was duplicated when users processed the plan file using the full process. Using the full process was required to populate the column forward and to map the paytype account to the General Ledger (GL) account and flow to the Expense tab. Prior to using the full process, users changed a calc method.</p> <p><b>Resolution:</b> Updated the formulas in the Calc Method Library for the three DEPT calc methods so that they create the key that the AQ11 requires.</p>
Case Number 00472085 - Setting up the Budget Deductions Utility [147054]	<p><b>Summary:</b> In the Budget Deductions utility, if the filter and default filter were the same, the Sum By on the control sheet for AQ2 was ignored and discharges were not pulled into the utility.</p> <p><b>Resolution:</b> Updated the formulas in AQs 2 through 8 to remove duplicate fields.</p>
Case Number 00475052 - Employee tab, employee records are hidden [148394]	<p><b>Summary:</b> On the plan file Employee tab, names for current employees did not always appear. The expand/collapse lookup on the tab needed advanced logic for the key.</p> <p><b>Resolution:</b> On the Employee, Jobcode, and Staffing Labor tabs, updated the lookup logic to include DEPT.KHABgtMap.</p>
Case Number 00475837 - Add New Encounter ProviderDetail FINCLASS Calc Method [148508]	<p><b>Summary:</b> On the plan file ProviderDetail tab, the DEPT was not mapped for the last provider on the tab when users used the Add New Encounter ProviderDetail FINCLASS calc method.</p> <p><b>Resolution:</b> Corrected the calc method formula to reference the correct cell.</p>
Case Number 00478648 - CDM Calc Method- % does not flow to Outpatient Line of CM [151572]	<p><b>Summary:</b> In plan files, percentage adjustments were not updated from the global setting because of an incorrect reference in the check formulas.</p> <p><b>Resolution:</b> Updated the check formulas to use the correct reference and corrected other referencing issues where applicable.</p>

## Performance Reporting

Issue Description	Description
PFB-08537 - Exec Monthly Package Refresh Year does not work [46544]	<p><b>Summary:</b> In the Executive Monthly Package report, when users selected the year prior to the current system year from the Refresh Variables, headers in the report were not updated. Instead, they displayed the current year.</p> <p><b>Resolution:</b> Updated the report formulas so that users can select the prior year.</p>
PFB-08712 - Account Analysis: Variance percentage divides by actuals instead of budget. [48339]	<p><b>Summary:</b> In the Account Analysis report, the variance percentage divided by actuals instead of the budget value.</p> <p><b>Resolution:</b> Corrected the variance percentage formula to divide by the budget value instead of actuals in the Current Period and Year to Date columns.</p>
PFB-09021 - Labor Summary by Dept Does NOT use DEPT.RptMap [51975]	<p><b>Summary:</b> In the Labor Summary by Department report for users that used DEPT.RPTMAP, when Statistics were from one department and hours were from another, FTE (Full Time Employee) data did not appear in the report.</p> <p><b>Resolution:</b> Changed the Sum By field to DEPT.RPTMAP for AQ1 through AQ4 to make the report RPTMAP compliant.</p>
PFB-09099 - ClientAcctCategoryMap. ClientStmntCategory – Extend to 200 characters [54746]	<p><b>Summary:</b> In the ClientAcctCategoryMap table, the ClientStmnCategory column was expanded to 200 characters by consultants after initial installation but was reduced to 50 characters when users upgraded the product.</p> <p><b>Resolution:</b> Set the maximum string length for the ClientAcctCategoryMap table ClientStmntCategory column to 200 characters.</p>
[T3] Case Number 00452351 - Bi-Weekly Payroll Analysis (Biweekly Single Department Dashboard) is not producing the current average hourly rate for some job classes within certain departments [130902]	<p><b>Summary:</b> The Productivity - Bi-Weekly SingleDept Payroll Analysis dashboard did not produce the current average hourly rate for some job classes within certain departments. For example, there was no current average hourly rate for NR, but there were hours and dollars associated with the job class. Identified output dependencies for JobClass and noted that if outputs differ for the related AQs or field definitions are different, issues occur.</p> <p><b>Resolution:</b> Adjusted the code so that lookup references are correct.</p>

# Issues fixed in 2022.3.1

The following table lists the resolutions for issues addressed in 2022.3.1, released December 5, 2022:

Budgeting: templates, plan files, and reports

No client-facing issues for Budgeting were addressed in 2022.3.1

Performance Reporting

Issue Description	Description
(2022.3 Patch) [T3] Case Number 00452351 - Bi-Weekly Payroll Analysis (Biweekly Single Department Dashboard) is not producing the current average hourly rate for some job classes within certain departments [154485]	<p><b>Summary:</b> The Productivity - Bi-Weekly SingleDept Payroll Analysis dashboard did not produce the current average hourly rate for some job classes within certain departments. For example, there was no current average hourly rate for NR, but there were hours and dollars associated with the job class. Identified output dependencies for JobClass and noted that if outputs differ for the related AQs or field definitions are different, issues occur.</p> <p><b>Resolution:</b> Adjusted the code so that lookup references are correct.</p>

# Issues fixed in 2022.3.3

The following table lists the resolutions for issues addressed in 2022.3.3, released February 7, 2023:

## Budgeting

Issue Description	Description
(2022.3 Patch 3) Case Number 00492156 - Budget Workbook, Jan-June Expense is not Correct [164390]	<p><b>Summary:</b> When building their operating budget plan files, users noticed that in the Jan-June projected expenses, \$0 was populating for a Dept.Acct. The related formula was referencing the wrong cell on the Variable tab. Additionally, on the Expense tab, a field change caused an error to be returned instead of data.</p> <p><b>Resolution:</b> Removed the incorrect variable from the lookup field reference formula on the Variables tab and updated the Add New Calc Method formulas on the Expense tab.</p>

## Performance Reporting

No client-facing issues for Performance Reporting were addressed in 2022.3.3.

# Issues fixed in 2022.3.4

The following table lists the resolutions for issues addressed in 2022.3.4, released March 31, 2023:

## Budgeting

Issue Description	Description
(2022.3 Patch 4) Case Number 00502656 - 02 Labor Configuration Driver, If February is included in the YTD from the Variables tab, M45 changes to TRUE and the YTD hours and ProjCalc hours for the current year does not calculate correctly. [#1168071]	<b>Summary:</b> If February was included in the YTD from the Variables tab, M45 changed to TRUE and the YTD hours and ProjCalc hours for the current year did not calculate correctly.  <b>Resolution:</b> The formula in the YTD column (column U) was fixed globally to include all months in the YTD and ProjCalc calculations.

## Performance Reporting

No client-facing issues for Performance Reporting were addressed in 2022.3.4.

# Manual setup instructions

There are no manual setup or configuration steps required for this release.