Release Notes

Axiom Rolling Forecasting

Version 2022.3

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Contents

About the Release Notes

Syntellis is pleased to announce the 2022.3 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.

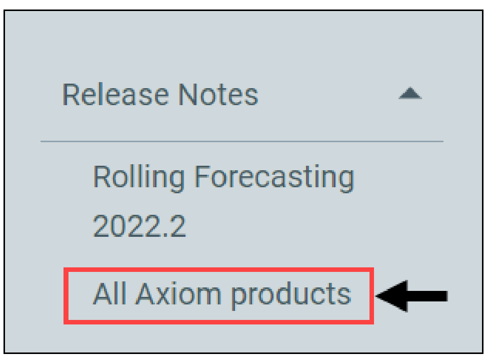
The purpose of these release notes is to provide you with the following:

- 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 2022.3

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

Plan file enhancements

- Configure holidays

  Use the **Holiday** tab in the Planning Configuration utility to set your organization's observed holidays and update them automatically when you roll forward.

- **Automated Workday calculations** – You no longer need to update workdays every time a period is rolled forward. Instead of manual fields, workdays are now calculated automatically based on the new **Holiday List** table. When you set up your organization's recognized holidays, the system calculates workdays for all periods. For more information, see "Configure workday period" in the online help and Configure holidays.

- Configure report options

  Use the **Report Options** tab in the Planning Configuration utility to control refresh variables for RFGroup and RFCODE grouping columns in reports and manage report alert thresholds.

- **IP Census and Per Unit IP Census Calculation Method updates** – The calculation (calc) method codes were updated so that if you use the IP Census, the proper codes populate the IP Census block and do not appear elsewhere. If the IP Census calc method is not used or is not set up, the codes populate under the assigned calc method.

- Expire an initiative

  Use this feature to retire old or unused initiatives and remove them from being displayed in plan files and reports.

Deductions Model enhancements

The following updates and enhancements to the Deductions Model calculator and related features provide tools for improved deductions forecasting.

- Forecast payor component deductions

  Use payor deduction categories to include the forecast of gross revenue charges, deductions, and statistics by rolled up payor components in the Deductions Model calculator.

- New payor deduction categories

  Use the Payor Setup utility to create deduction categories for classifying payors into components that you can use to forecast statistics, revenue, and deductions in the Deductions Model calculator.

- **Payor Component Refresh Variables** – Use new payor category options in the calculator's Refresh Variables dialog to select which payor categories to use in your deductions forecasts. If no payor categories are set up, the Refresh Variables dialog does not include the option to select them.
- **Payor Zero (unassigned) separated from Payor 1001 (Medicare)** – Payor 0 and Medicare are no longer grouped together, so you can use each separately in the calculator. Payor 0 is now a separate line item in the calculator.
- **Bad Debt, Charity Care, and Administrative Adjustments** – Totals for Bad Debt, Charity Care, and Administrative expense actuals are calculated for all payors regardless of which payor categories you select for modeling in the Deductions Model calculator. The total gross inpatient and outpatient amounts are determined by the RF Deductions group and scenario set in the Deduction Model refresh variables. Three new rows above the Administrative Adjustments section provide the grand totals for IP Revenue, OP Revenue, and Total Revenue.

Reports

- New Payor Summary report

  Use the Payor Summary report to review all of the data from multiple deduction models in one report.

Other enhancements

- **RF Admin and RF Fcst task panes** – Reporting sections for both task panes are now alphabetized to make them consistent.

Forecast payor component deductions

▶ Why use this feature

Your deductions calculations can now account for the complexities of your organization's general ledger structure. Use the new payor deduction capabilities in the Deductions Model calculator to forecast gross charges, deductions, and statistics by rolled-up payor components. These payor deduction categories give greater flexibility and specificity in forecasting payor-related deductions.

▶ How this feature works

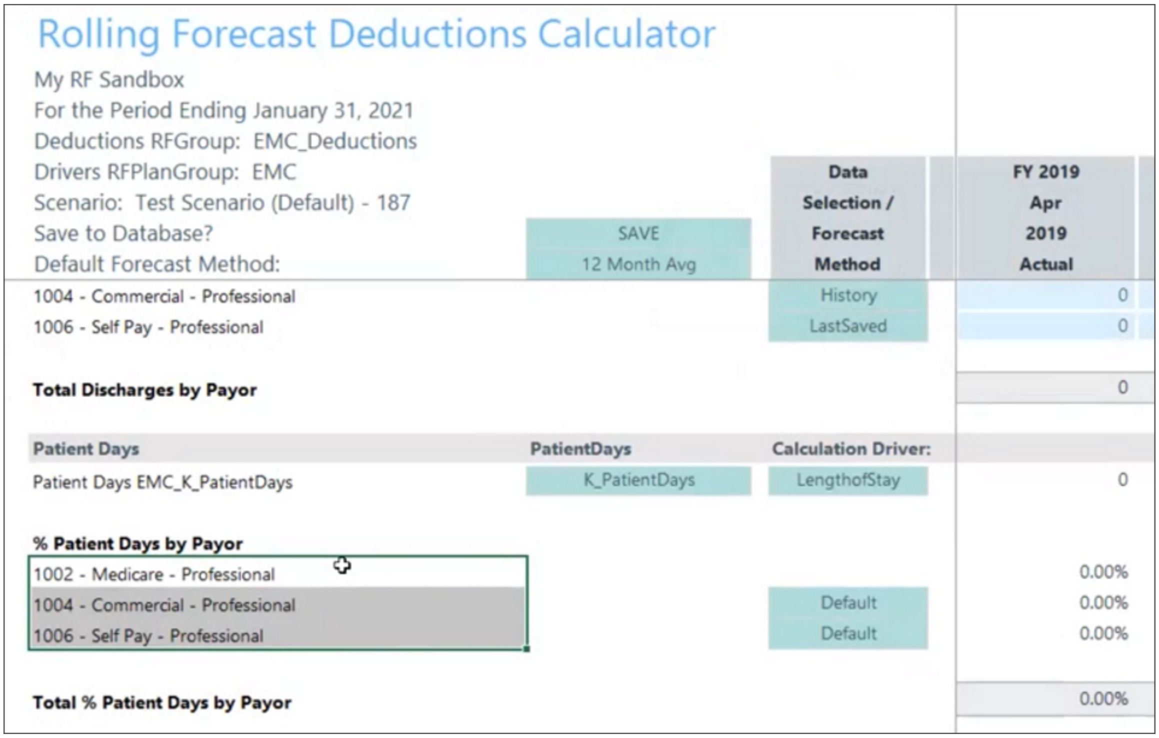
What: You might decide to keep subgroups of payors separate in your deductions forecasts (for example, institutional Medicare and commercial Medicare payors). You can now create deduction categories in the Payor Setup utility, and then assign payors to the categories. When you open the Deductions Model calculator, select the payor categories you want to model. The calculator brings in the data associated with those payor categories and displays the results by category on individual lines.

Where: This change applies to the Deductions Model calculator that is available from the Other Calculators section of the RF Admin task pane.

Who: Only Axiom Rolling Forecast administrators can forecast payor components using the Deductions Model calculator.

How:

1. In the **RF Admin** task pane under **Tables**, double-click **Payor Configuration Utility**, and then create deduction categories and assign payors to them.
2. Save your changes.
3. In the **RF Admin** task pane under **Other Calculators**, double-click **Deductions Model**.
4. In the **Refresh Variables** dialog, select the payor categories and other criteria as needed, and then click **OK**. The payor categories and related data are displayed on individual lines in the calculator, as shown in the following example.



If you have multiple deductions models, use the Payor Summary report to review payor forecast data from all of your models.

▶ 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:

- "New payor deduction categories"
- "Calculating deductions"
- “Configuring payors”

New payor deduction categories

Why use this feature

Use the Payor Setup utility to create deduction categories for classifying payors into components. Then, use these payor components when you forecast statistics, revenue, and deductions in the Deductions Model calculator.

How this feature works

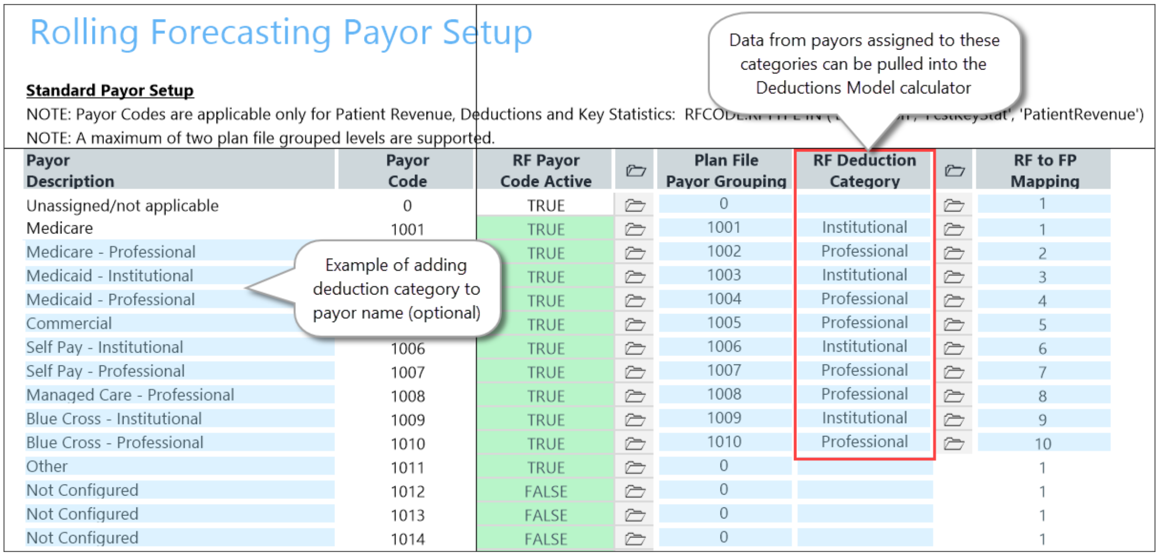
What: In the Payor Setup utility, create deduction payor rollup categories, and then assign those categories to payors. These component classifications are saved to the Payor Dimension table. You can bring them into the Deductions Model calculator and include them in your deductions forecasts. Using payor deduction categories, you can choose which payors to include in your deductions model as specialized groups. You can also customize the Deductions Model calculator to narrow the model to a specific payor category, include only unassigned payors, or include all payors.

Where: This change applies to the Payor Setup Utility and the Deductions Model calculator.

Who: Only Axiom Rolling Forecasting administrators can set up deduction categories and assign them to payors.

How:

1. Decide how you want to categorize the payors in your deductions model. For example, you may want to define them by professional and institutional, as shown in the following example.
2. In the **RF Admin** task pane under **Tables**, double-click **Payor Configuration Utility**.
3. In the **RF Deduction Category** column of the **Rolling Forecasting Payor Setup** utility, enter the category name to use with the first payor listed, and then work your way down the list and assign the rest of the payors to a category as needed.
4. On the **Main** ribbon tab, click **Save**.



Payor Description	Payor Code	RF Payor Code Active	Plan File Payor Grouping	RF Deduction Category	RF to FP Mapping
Unassigned/not applicable	0	TRUE	0		1
Medicare	1001	TRUE	1001	Institutional	1
Medicare - Professional	[illegible]	TRUE	1002	Professional	2
Medicaid - Institutional	[illegible]	TRUE	1003	Institutional	3
Medicaid - Professional	[illegible]	TRUE	1004	Professional	4
Commercial	[illegible]	TRUE	1005	Professional	5
Self Pay - Institutional	1006	TRUE	1006	Institutional	6
Self Pay - Professional	1007	TRUE	1007	Professional	7
Managed Care - Professional	1008	TRUE	1008	Professional	8
Blue Cross - Institutional	1009	TRUE	1009	Institutional	9
Blue Cross - Professional	1010	TRUE	1010	Professional	10
Other	1011	TRUE	0		1
Not Configured	1012	FALSE	0		1
Not Configured	1013	FALSE	0		1
Not Configured	1014	FALSE	0		1

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:

- “Configuring payors”
- “Forecast payor component deductions”
- “Calculating deductions”
- “About the Deductions Model calculator”

New Payor Summary report

Why use this feature

Use the Payor Summary report to review data from multiple deduction models in one report. This report includes related metrics so that you can review the aggregated data for reasonableness to improve your statistic, revenue, and deductions forecast calculations.

How this feature works

What: The Payor Summary report aggregates the forecast data from one or more deduction models and displays it in three main section:

- Metrics – Patient deduction and revenue statistics, presented in collapsible sub sections
- Summary – Totals for patient revenue, deductions, and reimbursement
- Details – Details by payor where applicable. Includes Administrative Adjustments, Charity, and Bad Debt data independent of selected payor categories.

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

Who: Only Axiom Rolling Forecasting Administrators and Analysts can access this report.

How:

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

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

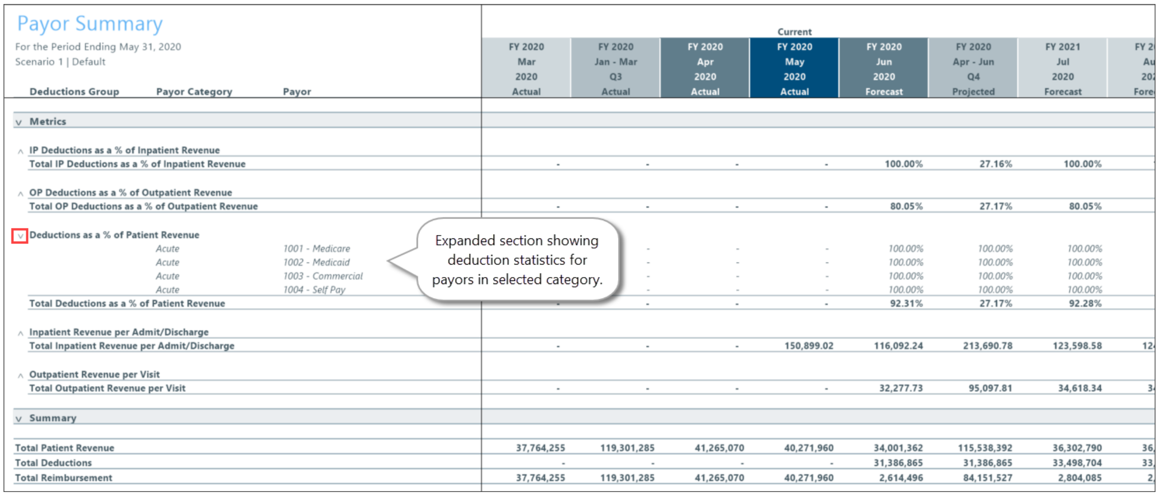
   NOTE: When viewing the report, you can change the criteria to view different sets of data or data grouped in different ways. On the **Main** ribbon tab, click **Refresh Data**, and then change the selections in the dialog.

Field	Description
Select Deductions Group(s) (Leave blank for All)	Select the Deductions Group from the **Choose Value** dialog. You can select multiple groups.

Field	Description
Select Uncategorized Payors	To include only payors that do not belong to any payor category, select the checkbox. **NOTE:** This checkbox is available only if you created payor deduction categories in the Payor Setup Utility. If you select this checkbox, the Select Payor Category field disappears.
Select Payor Category (Leave blank for all)	Do one of the following: • To include all payor categories, leave the field blank. • To include specific payor categories, click **Choose Value** and select a category. **NOTE:** This field is available only if you created payor deduction categories in the Payor Setup Utility.
Select Scenario	Select the scenario to apply to the report data.
Select RF Deductions Model Option (optional)	To use an alternate configuration to present data in a format that is more consistent with outpatient reporting, select one of the following: • **Standard**: Displays all sections of the model for Inpatient and Outpatient data. • **Physician Only**: Hides and deactivates AQs for Inpatient leaving only Outpatient related sections of the model visible.
Select Number of Actual Periods	Select the number of periods of past data (actuals) to include in the report. You can include up to two years and two months (26 months) of data.
Select Number of Forecast [periods]	Select the number of periods of future data (forecast) to include in the report. You can include up to two years and 10 months (34 months) of data.

3. Click **OK**.

> **TIP:** The default report view is by month, but you can switch the view to quarters using the **Change View** option in the **Main** ribbon tab.



Payor Summary
For the Period Ending May 31, 2020
Scenario 1 | Default

Deductions Group	Payor Category	Payor	FY 2020 Mar 2020 Actual	FY 2020 Jan - Mar Q3 Actual	FY 2020 Apr 2020 Actual	Current FY 2020 May 2020 Actual	FY 2020 Jun 2020 Forecast	FY 2020 Apr - Jun Q4 Projected	FY 2021 Jul 2020 Forecast
Metrics									
IP Deductions as a % of Inpatient Revenue									
Total IP Deductions as a % of Inpatient Revenue			-	-	-	-	100.00%	27.16%	100.00%
OP Deductions as a % of Outpatient Revenue									
Total OP Deductions as a % of Outpatient Revenue			-	-	-	-	80.05%	27.17%	80.05%
Deductions as a % of Patient Revenue									
	Acute	*1001 - Medicare*		-	-	-	*100.00%*	*100.00%*	*100.00%*
	Acute	*1002 - Medicaid*		-	-	-	*100.00%*	*100.00%*	*100.00%*
	Acute	*1003 - Commercial*		-	-	-	*100.00%*	*100.00%*	*100.00%*
	Acute	*1004 - Self Pay*		-	-	-	*100.00%*	*100.00%*	*100.00%*
Total Deductions as a % of Patient Revenue			-	-	-	-	92.31%	27.17%	92.28%
Inpatient Revenue per Admit/Discharge									
Total Inpatient Revenue per Admit/Discharge			-	-	-	150,899.02	116,092.24	213,690.78	123,598.58
Outpatient Revenue per Visit									
Total Outpatient Revenue per Visit			-	-	-	-	32,277.73	95,097.81	34,618.34
Summary									
Total Patient Revenue			37,764,255	119,301,285	41,265,070	40,271,960	34,001,362	115,538,392	36,302,790
Total Deductions			-	-	-	-	31,386,865	31,386,865	33,498,704
Total Reimbursement			37,764,255	119,301,285	41,265,070	40,271,960	2,614,496	84,151,527	2,804,085

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:

- “Calculating deductions”
- “New payor deduction categories”
- “Forecast payor component deductions”

Configure holidays

Why use this feature

Use the Holidays tab in the Planning Configuration utility to set your organization's observed holidays and update them automatically when you roll forward. The workday period calculation is now tied to your configured holidays.

How this feature works

What: Set up observed holidays for your organization, including whether to observe a holiday on the actual calendar date, the previous Friday, or the following Monday if the holiday falls on a weekend. Your organization's workday periods are calculated automatically based on your scheduled holidays. When you make changes to the Holiday List that affect work weeks, your workday periods are automatically recalculated.

> **IMPORTANT:** If you make changes to the Holiday List or the RF Period after processing plan files, you must reprocess the plan files for the changes to appear in reports.

Where: This change applies to the Planning Configuration utility, which is accessible from the RF Admin task pane under Setup.

Who: Only Axiom Rolling Forecasting administrators and analysts who have the Rolling Forecast Global Driver Management role can configure holidays.

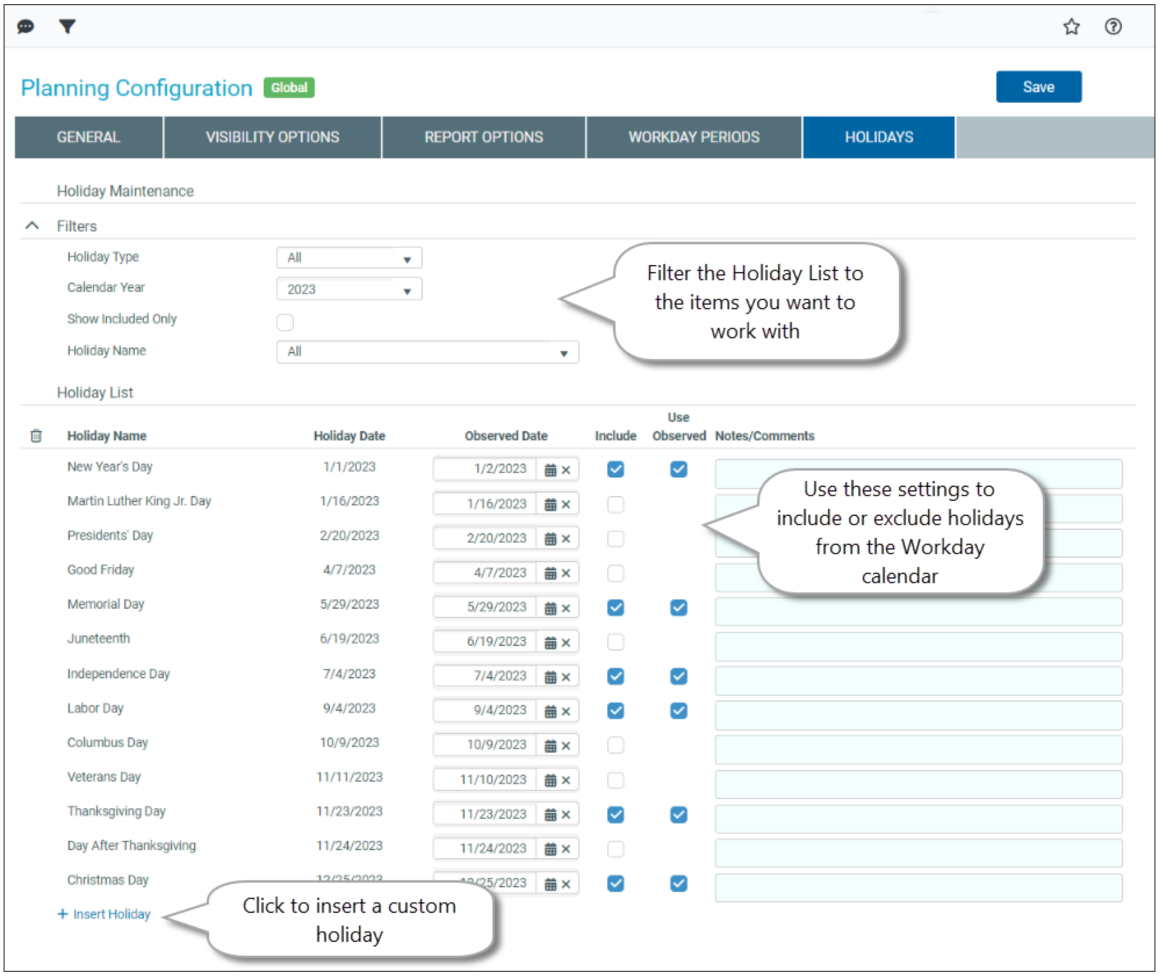
When: Holiday setup is usually done annually, but the administrator may need to make changes.

How:

1. In the **RF Admin** task pane under **Setup**, double-click **Configuration Utility**.
2. Click the **Holidays** tab.
3. In the **Filters** section, use the options to narrow the Holiday List to the required time frame and holidays:

Field	Options/Description
Holiday Type	• **All** – Includes all holidays in your settings. • **Standard** – Includes the following six holidays: New Years Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day • **Common** – Includes the following seven holidays: Martin Luther King Day, Presidents Day, Good Friday, Juneteenth, Columbus Day, Veterans Day, Day After Thanksgiving • **Inserted** – Adds holidays that are not in the picklist.
Calendar Year	Do one of the following: • Select the calendar year to view and edit holidays. • Select **All** to apply to all years.
Show Included Only	Display only holidays by selecting the **Inclusion** checkbox in the Holiday List.
Holiday Name	Select a specific holiday to review or edit.

4. In the **Holiday List**, do any of the following:
    - To add a listed holiday that is not included, select the **Include** checkbox.
    - To remove a listed holiday, clear the **Include** checkbox.
    - To change when a holiday is observed, click the calendar icon in the **Observed Date** column for that holiday, and then select a different date.
    - To change a holiday from the observed date to the date the holiday occurs on the calendar, clear the check box in the **Use Observed** column .
    - To add a custom holiday:
        a. At the bottom of the **Holiday Name** column, click **+ Insert Holiday**.
        b. In the name field, type the holiday name, and then add the holiday date. If the holiday falls on a non-workday, add the observed date.
        c. (Optional) Add any notes about the holiday in the Notes/Comments field.
    - To remove a custom holiday, in the delete column to the left of the holiday, click the checkbox. The holiday is deleted when you save your changes.
5. Click **Save**. If your changes affect the workday periods, you are reminded that all users must exit the drivers before you proceed.



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:

- “Configure workday periods”
- “Set the fiscal year and period”

Configure report options

Why use this feature

Use the Report Options tab in the Planning Configuration utility to control refresh variables for RFGroup and RFCODE grouping columns used in reports, and for managing report alert thresholds.

How this feature works

What: The Report Options tab contains settings that apply to various Axiom Rolling Forecasting reports:

- Refresh Variables for Grouping Columns – Use these settings to control which RFGroup and RFCode grouping columns are available in report Refresh Variables dialogs.
- Threshold Management report configuration table – Use these settings to manage the thresholds that trigger color-coded alerts in reports, such as the RFCode Trend Summary. The alerts call attention to data in the report that might need adjustment.

Where: This change applies to the Planning Configuration utility, which is accessible from the RF Admin task pane under Setup.

Who: Only Axiom Rolling Forecasting administrators and analysts who have the Rolling Forecast Global Driver Management role can configure support options.

When: These options are usually set during the initial system setup or annually, but the administrator may need to make changes.

How:

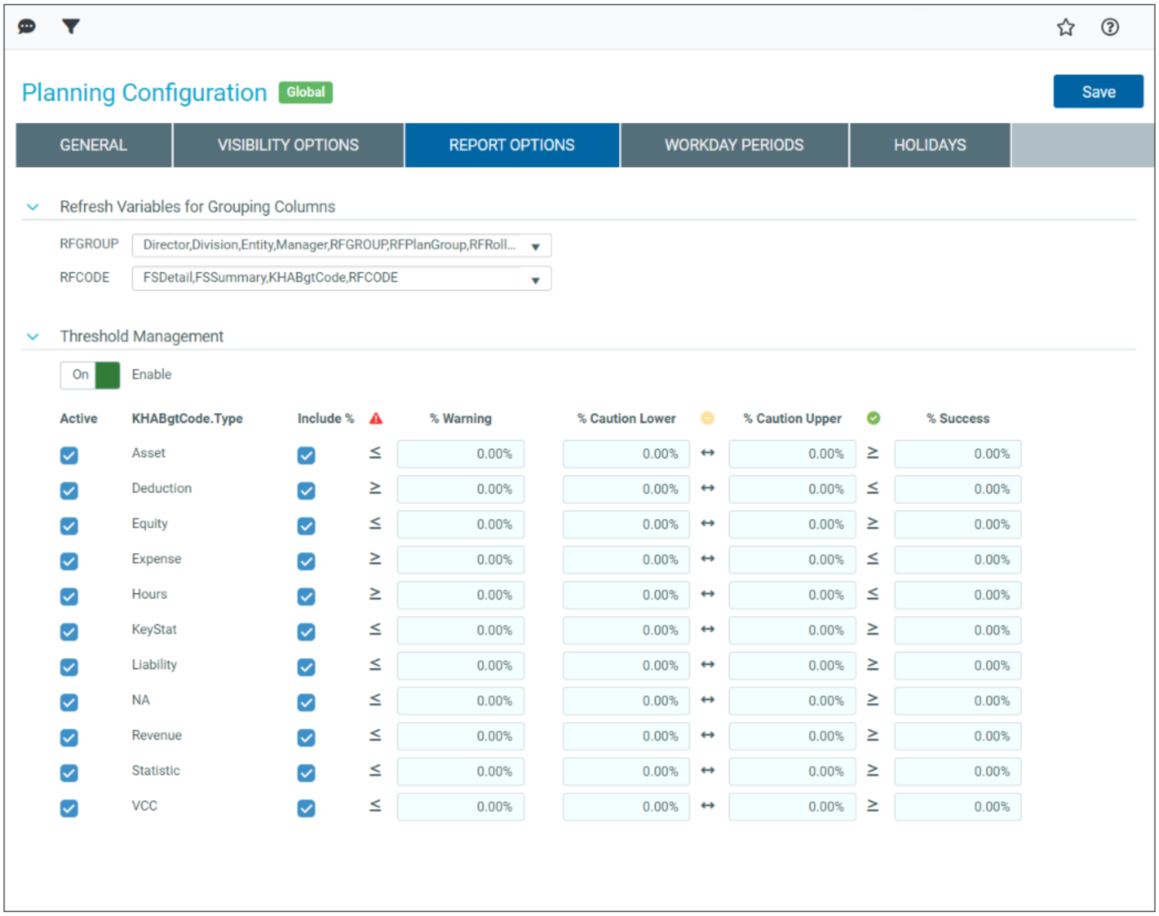
To configure report options:

1. In the **RF Admin** task pane under **Setup**, double-click **Configuration Utility**.
2. Click the **Report Options** tab, and then select from the following options:

3.

Option	Description/Action
Refresh Variables for RFGroup Grouping – RFGROUP	Control which RFGroup table columns are available for selection in the Refresh Variable dialog for the Rolling Forecasting reports: a. Click the drop-down. b. In the list of RFGroup columns, select the checkboxes for the RFGroups to include, and then clear the checkboxes for those RFGroups to exclude. c. Click **OK**, and then click **Save**. **NOTE:** To make your selections available in the Refresh Variable dialog for reports, you must click **Save**. d. In the confirmation dialog, click **OK**.
Refresh Variables for RFGroup Grouping – RFCODE	Control which RFCODE table columns are available for selection in the Refresh Variable dialog for Rolling Forecasting reports: a. Click the drop-down. b. In the list of RFCode columns, select the codes to include, and then clear the checkboxes to exclude the applicable RFCODES. c. Click **OK**, and then click **Save**.
Threshold Management	a. To enable threshold management, click the toggle to **On**. b. Use the settings to enter success, caution, and warning threshold amounts and percentages for the various report line items listed in the KHABgtCode.Type column. c. To remove threshold use for a specific KHABgtCode type in reports, in the **Active** column, clear the checkbox.

4. Click **Save**.



▶ 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:

- "Review RFCode trends"
- “Using executive summary reports”

Expire an initiative

Why use this feature

Use this feature to expire (remove) old or unused initiatives from being displayed in plan files and reports.

How this feature works

What: Initiatives that are unused, no longer needed, or created in error can be expired so that they do not appear in plan files, which includes the Initiatives tab or in reports.

Initiatives can only be set to expired in the RFID Dimension table.

Initiative State	Result
RFID.Approve = Approve	Initiative line items are included in the Summary tab totals and the Initiative section is populated.
RFID.Approve = Exclude	Initiative line items are excluded in the Summary tab totals and the Initiative section is not populated.
RFID.Approve = Expired	Initiative does not appear in, or interact with, the Initiative tab.

> **TIP:** To keep the initiative but exclude it from being displayed in the plan file Summary tab, forecast totals, and reports, set the initiative's status to **Exclude**.

Where: This change applies to:

- Plan file Initiatives tab
- Summary tab
- RFID dimension table
- Initiatives Status Update utility
- Reports that include initiatives

Who: Only Axiom Rolling Forecasting administrators can expire initiatives.

How: After finalizing a current forecast period, review your initiatives to determine whether any should be expired, and then use the following procedure to expire those initiatives.

IMPORTANT: Only expire an initiative if you are certain that you will not need in the future. After an initiative is expired, you cannot bring it back under the same Initiative ID. To bring back an expired initiative that was never used, create a new initiative under a new ID.

1. In Axiom **Explorer** navigate to **Libraries** > **Table Library** > **Dimensions** > **RFID**.

   NOTE: The RFID dimension cannot be updated using the Dimension Maintenance utility.

2. In the **RFID** column of the **RFID** table, locate the Initiative to expire, and then type **Expire** in the **Approve** column.
3. In the **Expiration_RFPeriod** column, enter the date that you expired the initiative in the format YYYYMM. Note that this date is for information purposes only. The initiative is not expired until you save the RFID table.
4. In the **Main** ribbon tab, click **Save**.

Data Type String Length	String 50	String 150	String 20	String 25	String 64	Integer	String 150	String 25	String 25	Integer	Integer	
Description	Rolling Forecast ID	Description	Initiative Type	Approve	Save Custom	Save Tag Document ID	Save Tag Custom	"Project" for CTtoRF integration only	file for CT to RF integration. Use 'Include' for Initiatives	Scenario RF	Internal time stamp. RFPeriod (YYYYMM) indicator when an Initiative expires	Ca
Delete Row	RFID	Description	InitType	Approve	SaveCustom	SaveTagDocID	SaveTagCustom	InitPro	CTtoRFInclude	Scenario	Expiration_RFPeriod	
	EMA_InternalMedicine_16_1					0		Initiative	Include	16		
	EMA_InternalMedicine_2					0		Initiative	Include	0		
	EMA_InternalMedicine_3	Revenue Increase	1	Exclude	RFInitiatives_EMA_Inte	5670		Initiative	Include	0		
	EMC_Clinics_1	RLNTest	1	Approve	RFInitiatives_EMC_Clini	5672		Initiative	Include	0		
	EMC_Emergency_1	Test TFS-75612	1	Exclude	RFInitiatives_EMC_Eme	5674		Initiative	Include	0		
	EMC_Emergency_2	Emergency expansion	2	Approve	RFInitiatives_EMC_Eme	5674		Initiative	Include	0		
	EMC_Geriatric_1					0		Initiative	Include	0		
	EMC_HomeHealth_1		1	Exclude	RFInitiatives_EMC_Hom	5676		Initiative	Include	0		
	EMC_HomeHealth_16_1	Home Health 1	RFGroup	Approve	RFInitiatives_EMC_Hom	0		Initiative	Include	16		
	EMC_HomeHealth_16_2	Home Health North	RFGroup	Expire	RFInitiatives_EMC_Hom	0		Initiative	Include	16	202210	
	EMC_HomeHealth_16_3	Home Health 1	RFGroup	Approve	RFInitiatives_EMC_Hom	0		Initiative	Include	16		
	EMC_HomeHealth_16_4	Home Health North	RFGroup	Exclude		0		Initiative	Include	16		
	EMC_HomeHealth_2		2	Exclude	RFInitiatives_EMC_Hom	5676		Initiative	Include	0		
	EMC_HomeHealth_3		3	Exclude	RFInitiatives_EMC_Hom	5676		Initiative	Include	0		
	EMC_HomeHealth_8_1					0		Initiative	Include	8		
	EMC_Imaging_1					0		Initiative	Include	0		

Example of expired initiative in the RFID table

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"
- "Update initiative status"
- "Manually updating the RFID dimension table"

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 Rolling Forecasting, note the following:

- 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 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 2022.3

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

Calculators

Issue	Description
(2022.3) Summary tab data in Deductions Model not querying back after save [145932]	**Summary:** In the Deductions Model calculator, when users completed and saved their models, the Summary tab cleared the previous data but did not reset with the newly saved data, so the Summary sheet was blank. **Resolution:** Changed the Control Sheet settings for the Summary tab so that the report saves the new data.
(2022.3 GA) RF Deductions Model: Driver rate changes are not being retrieved due to incorrect period referencing in the Data Lookup [156264]	**Summary:** In the Deductions Model calculator, the patient revenue rate increase from the driver table was always zero, which was not correct. The Data Lookup filter on the Variables tab referenced the wrong cells to determine which RFPeriod to use. **Resolution:** Added an RFPeriod data lookup sequence to the Variables tab, and then changed the reference to the correct cell.
(2022.3) RF Deductions Model - Inconsistent auto-seed logic for Forecast periods based on inputs from earlier periods [157828]	**Summary:** In the Deductions Model calculator, when users added or changed values for earlier forecast periods in rows that had multiple input fields, missing logic in some of the calculations in the Medicare block caused incorrect amounts in subsequent Forecast periods. **Resolution:** Updated the calculation formulas in the Medicare block so that changes to inputs in previous forecast periods calculate amounts correctly for later forecast periods.

Drivers

Issue	Description
RF Drivers - Drivers formatting differences for initial periods of New RF Code Exception cm [145633]	**Summary:** In the Drivers tab of the Drivers utility, when users added a new RFCode Exception in Driver Forecast Assumptions, and then entered Growth Adjustment values for multiple periods, the field formatting was inconsistent. **Resolution:** Updated the formatting for the Growth Adjustment input cells so that they are consistent across all columns.

Issue	Description
(2022.3) Case Number 00473136 - RF Drivers not updating current quarter forecast months [147022]	**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. **Resolution:** Updated the cell formulas to include the correct cell references.
(2022.3) Adjustments driver - #N/A error thrown for inserted global records [152816]	**Summary:** In the Adjustments tab of the Drivers utility, when users inserted a global record on an Adjustment tab sub-tab and then saved, the inserted record was not displayed when the form was refreshed. When users tried to edit other data in the driver, they received an error message. **Resolution:** Identified and adjusted an incorrect reference in the affected dynamic calculation (calc) method.

Plan files – Forecast

Issue	Description
(2022.3) Case Number 00474083 - RF_GlobalData new column needed [147685]	**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 that was different from zero, and the historical data was tied to Global Data using the Global Data calculation method, the forecasted data did not interact with the imported historical data. **Resolution:** Hard-coded payor zero in the Global Data calculation method formula. Any global data now works with the global data code, regardless of payor. Saving to the non-zero payor line works as intended.
(2022.3) Case Number 00480393 - Per Unit Volume Calc Method - Statistics section: inconsistency in second forecasted qtr calculation [153366]	**Summary:** In the plan file Forecast worksheet, the forecasted quarters for Patient Days per Calendar day in the Statistics section did not calculate the three-month average consistently in all quarters, which resulted in different amounts. The same three-month average should be used for all quarters. **Resolution:** Updated the calculation formula to reference the correct cells and variables so that the formula remains correct as it transitions through the Current Quarter periods.

Plan files – Initiatives

Issue	Description
Actuals entered in Initiatives tab should not show up as Actuals in Summary tab [143449]	**Summary:** In the Initiatives section of the plan file Summary tab, actuals data from initiatives was included in the totals. Initiatives data is user-defined, so no data was pulled from any real historical periods. Any data in the actuals columns was not true historical data and therefore caused inaccuracies. **Resolution:** Updated the code so that results for actual periods in the Summary tab are zeroed out in the results for actuals columns and are not displayed in any totals. Actual periods on the Initiatives tab are also not displayed.

Reporting

Issue	Description
[T3] Case Number 00468015 - Report filter/data grid issue - Month End Variance [141700]	**Summary:** When users tried to drill down to details in the Month End Variance report, they received error messages because the report passed the users' security filters with the drill filter. **Resolution:** Adjusted the code so that the report does not pass user security filters with drill filters.
RF Task Panes - Reporting section - sort order differences [145629]	**Summary:** The lists of reports in the Reporting sections of the RF User and RF Admin task panes were not alphabetized, so the two lists did not match. **Resolution:** Changed the order of reports listed in both task panes so that they are displayed in alphabetical order.
RF - Actual vs Forecast Comparison Report AQ2 Error [157065]	**Summary:** In the Actual Compared to Prior Forecast report, when users selected a summation level that was different from the RFGroup filter, they received an error message. **Resolution:** Updated the code reference in the Axiom Query 2.