Release Notes

Axiom Healthcare Suite

Version 2022.3

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Contents

About the release notes

Syntellis is pleased to announce the 2022.3 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 2022.3 Release Notes** as well as the release notes for each product licensed by your organization.

Upgrade considerations

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

Consider the following when upgrading to Axiom platform 2022.3:

- Clients with Comparative Analytics are required to upgrade to Axiom platform 2022.1 or greater at the same time.
- Most Financial Planning and Analysis (FP&A) products must be upgraded to version 2021.3 or later when Axiom platform or any product that is installed is upgraded to version 2022.1 or greater. For details, see the following table.
- Rolling Forecasting 1.0 clients (before 2020.4) should upgrade to Axiom platform version 2021.3 or later. Rolling Forecasting 2022.2 is a new install and not a standard upgrade. We are testing compatibility of Rolling Forecasting version 1.0 with version 2022.2 platform, but this upgrade is not officially supported at this time.
- Clients with Enterprise Decision Support must contact Syntellis Support for assistance.
- Clients with Cost Accounting, Contract Management, and Decision Support Services that are not moving to Enterprise Decision Support must contact Syntellis Support for assistance.

As in past releases, Axiom platform must be on the same or later version of the product versions that are installed.

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

Product	Considerations
Axiom Software Platform	Platform must be upgraded if any product is upgraded. Platform must be on the same or later version of 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, Syntellis recommends that you wait until the planning cycle is completed. **NOTE**: This product must be on version 2021.3 or later to move the platform or any other product to version 2022.1 or greater.

Product	Considerations
Axiom Capital Planning and Capital Tracking	Upgrade if you are not in an active planning cycle. If you are in an active planning cycle, Syntellis recommends that you wait until it is completed. Upgrade Axiom Capital Tracking at the same time as Axiom Capital Planning. **NOTE**: This product must be on version 2021.3 or later to move the platform or any other product to version 2022.1 or greater.
Axiom Clinical Analytics	There are no required upgrade considerations with this release.
Axiom Comparative Analytics	Upgrade. **NOTE**: This product must be on version 2022.1 or greater to move the platform or any other product to version 2022.1 or greater.
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. However 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, Syntellis recommends that you wait until it is completed. **NOTE**: This product must be on version 2021.3 or greater to move the platform or any other product to version 2022.1 or greater.
Axiom Rolling Forecasting	Upgrade if you are on version 2020.4 or later and you are not in an active planning cycle. If you are in a planning cycle, we recommend that you wait until it is completed. To move to this new product, clients on versions prior to 2020.4 must complete a new product install process that requires several setup and verification steps. Syntellis offers documentation and videos to guide you through this process and has services available to assist. Please plan accordingly. **NOTE**: This product must be on version 2021.3 or greater to move the Axiom platform or any other product to 2022.1 or greater. We cannot guarantee proper product functionality if you proceed with platform 2022.1 or greater without upgrading the product to at least 2021.3.
Axiom Service Line Planning	This is a new product install. For more information, contact your Syntellis representative.

Product	Considerations
Axiom Strategy Management	Upgrade. No required upgrade considerations are necessary 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 Service Line Planning
- Axiom Strategy Management
- Axiom Treasury Cash Management

Axiom Budgeting and Performance Reporting

No new features or enhancements were included in this release.

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 2022.3. For more information, see Axiom 2022.3 Release Notes.

Axiom Clinical Analytics

Axiom Clinical Analytics 2022.3 includes the following enhancements in this release:

Regulatory content updates

We provide Version 40 Regulatory Updates software updates, including:

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

New measure: Days With Acute Care Within 30 Days of Discharge

In the Data Management Engine (DME), a new measure, 'Days With Acute Care Within 30 Days of Discharge' has been created. DME migration is automatically populated in this measure for all historical data.

Axiom Comparative Analytics

While no new functionality has been added or enhanced in Axiom Comparative Analytics, this product does deliver enhancements from Axiom Version 2022.3. For more information, see Axiom 2022.3 Release Notes.

Axiom Contract Management

Axiom Contract Management delivers the following features and enhancements for 2022.3:

Adjust claim codes

Annual claim code changes are reflected in contract terms but not in the historical claims data used in modeling. Use the Code Adjustments feature to map claim codes so that you can incorporate these code changes into your models.

Other enhancements

- **Standard Reports UI** – The look, feel, and functionality of Standard Reports have been updated to be consistent with the rest of Axiom Contract Management.
- **Simulation mapping** – The updated admin Simulation Mapping page now points to the Professional data tables for users with systems that contain only professional claims.

Adjust claim codes

Why use this feature

Annual claim code changes are reflected in contract terms but not in the historical claims data used in modeling. Use the Code Adjustments feature to map claim codes so that you can incorporate these code changes into your models.

How this feature works

What: The Code Adjustment feature enables you to map old codes to new codes so that when you need to use historical data that includes older codes, the old codes will be replaced with the new codes during the reimbursement calculation process. You can map the following code types:

- DRGs
- ICD-10 Procedure or Diagnosis codes
- Line Item codes
- Modifiers

Line Item Codes and Modifiers can be excluded from claims processing so that you can see the difference in your reimbursements before and after they are applied.

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

Who: Only Axiom Contract Management administrators can adjust claim codes. Analyst and non Admin users can view code mappings but not add, edit, or delete them.

How:

1. In the main menu header, click **Claims** > **Code Adjustments**.
2. On the **Code Adjustments** page, from the **Simulation** drop-down, select a simulation.

   NOTE: You cannot adjust claim codes in the LIVE simulation.

3. By default, code adjustments are enabled when you save them. If you do not want this group of adjustments to be enabled for processing in this simulation, clear the **Enabled** checkbox.
4. Use one of the following methods to map codes:

▶ Manual entry

a. In the **Code Type** drop-down, select the type of code to map.

b. Click **+ Add New Record**.

c. In the new row, type the old code, a description of the code, the new code to map to, and the new description, in the corresponding columns.

▶ From File

Use this method to import code mappings from a file.

a. In the **Import From File** dialog, from the **Code Type to import** drop-down, select the code type or use **All** (default) if your file contains multiple code types.

b. Click **+ Select files**.

c. Select the code or rate file on your computer and then click **Open**.

d. When the file name displays in the **Import From File** dialog, click **Upload**.

▶ From Simulation

Use this method to copy code mappings from another simulation.

a. In the **Import From Simulation** dialog, from the **Simulation** to import drop-down, select the simulation containing the mappings.

b. From the **Code Type** to import, select the code type or leave the default (All).

c. Click **Import**

5. If you want to exclude a code from processing during recalculation, and grouping and pricing, select the checkbox in the **Exclude** column.

> **NOTE:** Only line item codes and modifiers can be excluded. If the code type selected is any other type, the Exclude column is not displayed.

6. To save changes, click **Save Changes**.

Axiom Enterprise Decision Support

Service line processing enhancements

The following updates and UI enhancements provide tools for improved service line processing.

Select a time frame to process service line schema

- Provides support for start and end date input parameters.
- Enables users to select a date range on process scheme confirmation dialog box.

Launch scheduled service line schema processing from the user interface

Analysts can:

- Initiate batched schema processing by scheduled job from the user interface
- Select all new encounters processing
- Set the date range of data processing

Manage service line schema groups in bulk

To upload a file with schema data, an **Upload table** button was added to the **Add New Schema** dialog box. The button is disabled until the schema name is specified.

Download existing group hierarchy service line schema

To download a file with schema data, a **Download table** button was added to the **Add New Schema** dialog box. The button is disabled until the schema name is specified.

To download a template, group information must not be set.

Download service line definitions

- A menu item was added to the **Service Line Definition** page.
- The **Download** dropdown contains two options: **Table** and **Template**.

The file is downloaded after an appropriate file type is selected.

Upload service line definitions

An **Upload table** button was added to the **Service Line Definition** page.

The following tables contain data after a file import:

- ServiceLineAssignment
- ServiceLineSchema[1-8] (depending on schema number)
- ServiceLineGroupAssignment

Process service line schema by Discharge date

An updated dialog box provides service line data processing by discharge date.

Add service line schema to batch

A **Batched** column was added to the service line schemas list next to **Active** column.

Users can now add or remove schemas from the batch.

Notification when mandatory service line schema fields are empty

Error messages were added to the dialog box when mandatory fields are empty to enable the **Save** button.

Service line schema activated when schema processing starts

A dialog box that activates the service line schema for processing appears after selecting the **Process Schema** button.

Configure Schema user interface adjusted when adding values to groups

- A **No group values added yet** error message appears when no group values are available.
- Group value input appears after selecting **Add values** button.
- A validation error message appears when attempting to save an empty group value.

Validation added when adding or editing service line definition data

While adding or editing service line definition data, the system is validated and shows error dialog boxes under the **Name** or **Filter** fields, as appropriate.

Variability enhancements

The following updates and UI enhancements improve the use variability for the costing general ledger (CGL), one-time adjustments, manual adjustments, and processing microcost transactions.

Variability column added to existing cost model Costing General Ledger (CGL) tables

A variability column was added to existing cost model Costing General Ledger (CGL) tables.

Variability column updates to one-time adjustments

Cost Variability percentages (%) appear for all one-time adjustments that were processed. The variability column is updated when data is saved.

View variability information when Transaction Microcost is processed

Variability information appears when Transaction Microcost records are processed.

Adding service line schemas to batch

▶ Why use this feature

As an Axiom data analyst, you can add service line schemas to batch for processing.

▶ How this feature works

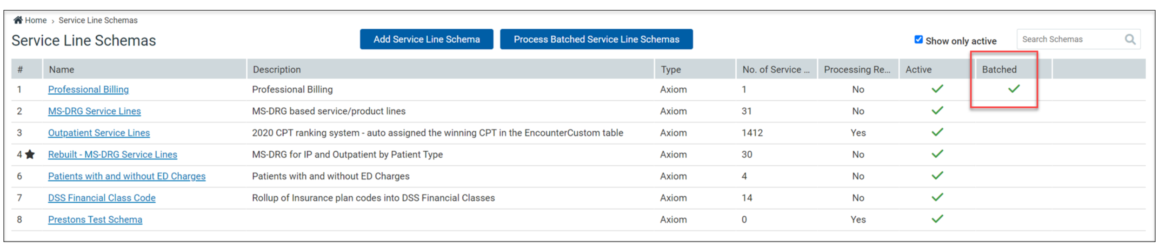
What: Add service line schemas to batch to allow the system to process these batched service line schemas.

Where: This change applies to the Data enhancement and refinement > Define service lines > Service Line Schemas page.

Who: Axiom data analysts who add service line schemas to batch for the system to process.

How:

1. On the EDS home page, under **Data enhancement and refinement**, select **Define service lines**. The **Service Line Schemas** page appears.
2. In the **Batched** column, select **add to Batch** for the service line schema you want to add to batch. The service line schema must be active as identified with a green check mark in the adjacent **Active** column. The system marks the service line schema as added with a green check mark in addition to a system notification. You can remove the service line schema from the batch by selecting the green check mark. The green check mark disappears in addition to a system notification.



The system marks the service line schema as added with a green check mark in addition to a system notification. You can remove the service line schema from the batch by selecting the green check mark. The green check mark disappears in addition to a system notification.

Managing service line schema groups in bulk

▶ Why use this feature

As an Axiom data analyst, you can manage groups in bulk by uploading an Excel file upload while creating or editing schemas.

▶ How this feature works

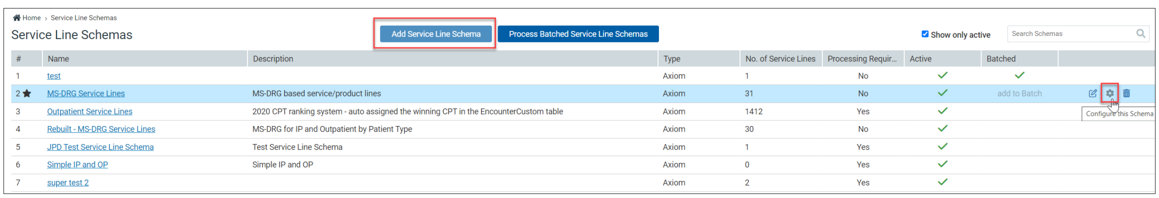
What: Manage service line schema groups in groups allowing you to add groups, add group values to groups, edit groups, and edit group values.

Where: This change applies to the Data enhancement and refinement > Define service lines > Add Service Line Schema > Configure Schema dialog box > Groups tab.

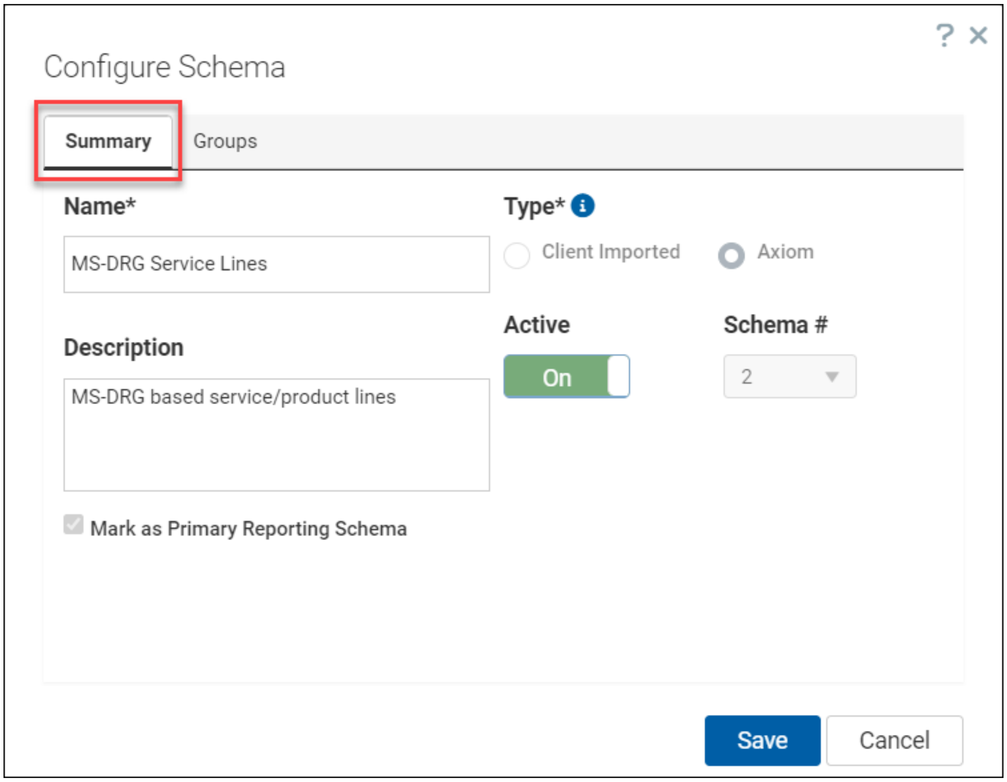
Who: Axiom data analysts who manage service line groups in bulk.

How:

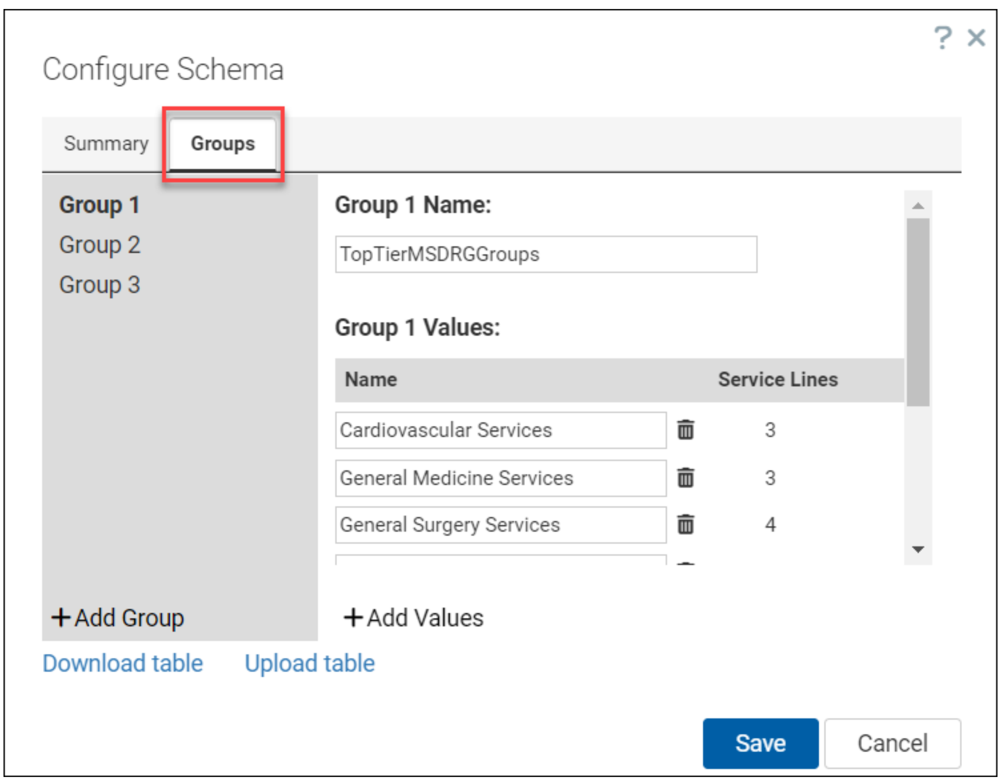
1. On the EDS home page, under **Data enhancement and refinement**, select **Define service lines**. The **Service Line Schemas** page appears.
2. Select the **Add Service Line Schema** button. Alternatively, at the far right of any schema row, select the gear icon (Configure this schema).



The **Configure Schema** dialog box appears with the **Summary** tab already populated. You must add a schema **Name** and **Type** to activate the **Save** button.



3. Select the **Groups** tab.



4. To add a schema group from an Excel file, click **Download table** or **Upload table**, and make a selection from the file browser. Each spreadsheet must contain a group value ID and a group value.
5. The system:
    - Validates each spreadsheet as a separate group.
    - Adds a new group when a newly completed spreadsheet is detected.
    - Adds an empty group when a blank group is detected between completed ones.
    - Updates the group value if the value of group value ID was changed.
    - Updates the group value if the value for certain position in the list was changed (for group downloaded from the UI with no ID).
    - Adds a new group value when the system detects the group value with no group value ID.
6. To add a schema group, select **Add Group**. To add values to the schema group, select **Add Values**. You must add a group value to a group name to activate the **Save** button.
7. If the system detects file validation errors, you can download the file to view and correct them. If the system successfully validates the files, updated groups and group values appear.

Processing batched service line schemas

Why use this feature

As an Axiom data analyst, you can launch nightly or scheduled processing of batched service line schema for imported or updated patient data.

How this feature works

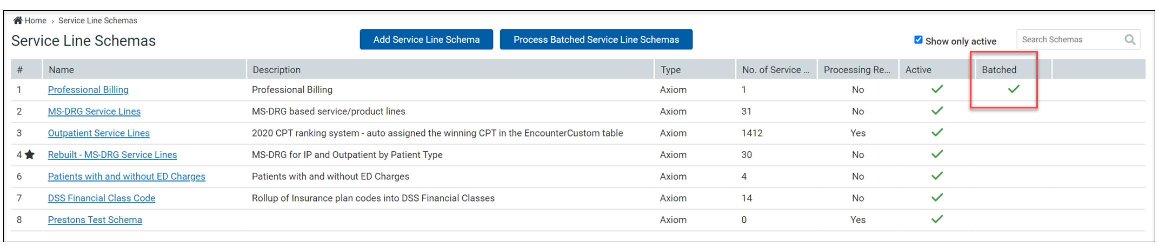
What: Process batched service line schema by initiating a scheduled job for all new encounters or a date range. The system processes data against the batched service line schemas.

Where: This change applies to the Data enhancement and refinement > Define service lines > Service Line Schemas page.

Who: Axiom data analysts who process batched service line schema.

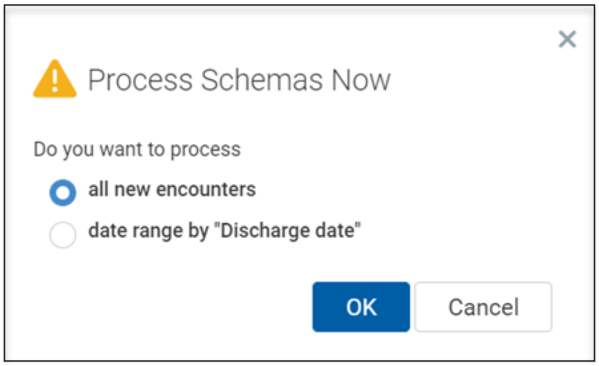
How:

1. On the EDS home page, under **Data enhancement and refinement**, select **Define service lines**. The **Service Line Schemas** page appears.
2. Ensure at last one service line schema is marked as Batch. In the Batched column, select **add to Batch**. For information about this step, see Adding service line schemas to batch.
3. Select the **Process Batched Service Line Schemas** button.

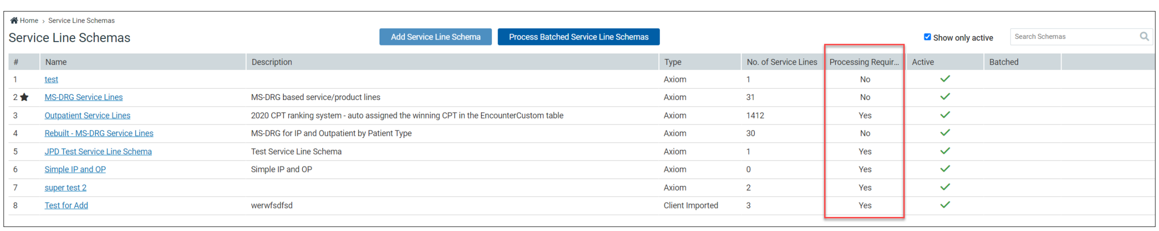


#	Name	Description	Type	No. of Service ...	Processing Re...	Active	Batched
1	Professional Billing	Professional Billing	Axiom	1	No	✓	✓
2	MS-DRG Service Lines	MS-DRG based service/product lines	Axiom	31	No	✓	
3	Outpatient Service Lines	2020 CPT ranking system - auto assigned the winning CPT in the EncounterCustom table	Axiom	1412	Yes	✓	
4 ★	Rebuilt - MS-DRG Service Lines	MS-DRG for IP and Outpatient by Patient Type	Axiom	30	No	✓	
6	Patients with and without ED Charges	Patients with and without ED Charges	Axiom	4	No	✓	
7	DSS Financial Class Code	Rollup of Insurance plan codes into DSS Financial Classes	Axiom	14	No	✓	
8	Prestons Test Schema		Axiom	0	Yes	✓	

The **Process Schema Now** dialog box appears.



4. Select either:
   - **all data** - Selecting this radio button processes all encounters and generates an **Information** dialog box notifying you with a Job schedule ID to be run as soon as possible. After selecting **OK**, the **Service Line Assignments | Results** page appears identifying the result details of the job.
   - **date range by "Discharge date"** - Selecting this radio button generates a From (month and year) and To (month and year) dropdown for you to identify a time frame. If you select a start date later than an end date, an error appears. The end date automatically shifts to the start date (same month and year). Encounters are processed by Admit date belonging to the defined date range.
5. You can create a new schema, check its status in the **Processing Required** column in the Service Line Schemas list. Alternatively, you can process any existing schema, change its service line, assignments, or definition, and click **Save**. The status is set to **Yes** in the **Processing Required** column. Processing both schemas produces a status of **No** in the **Processing Required** column.



#	Name	Description	Type	No. of Service Lines	Processing Requir...	Active	Batched
1	test		Axiom	1	No	✓	
2 ★	MS-DRG Service Lines	MS-DRG based service/product lines	Axiom	31	No	✓	
3	Outpatient Service Lines	2020 CPT ranking system - auto assigned the winning CPT in the EncounterCustom table	Axiom	1412	Yes	✓	
4	Rebuilt - MS-DRG Service Lines	MS-DRG for IP and Outpatient by Patient Type	Axiom	30	No	✓	
5	JPD Test Service Line Schema	Test Service Line Schema	Axiom	1	Yes	✓	
6	Simple IP and OP	Simple IP and OP	Axiom	0	Yes	✓	
7	super test 2		Axiom	2	Yes	✓	
8	Test for Add	werwfsdfsd	Client Imported	3	Yes	✓	

Selecting a time frame to process service line schema

▶ Why use this feature

As an Axiom data analyst, you can select the type of the schema processing when creating a new service line schema or modifying an existing one by processing:

- All data
- Data within a date range

▶ How this feature works

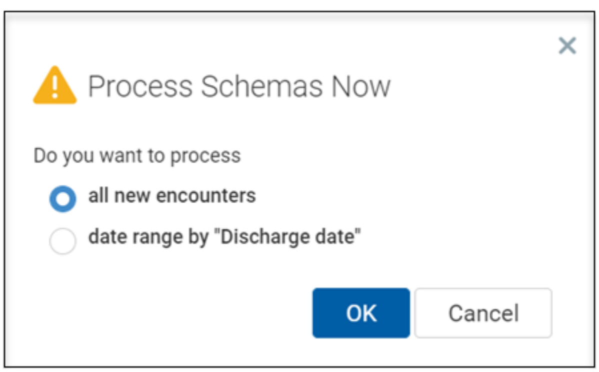
What: Process service line schema by selecting either all data or a data range, and the system processes all encounters within that time frame by Discharge date. When modifying existing schema, the system will identify any schema that requires re-processing. The system identifies newly created schema as requiring processing in the service line Schemas list.

Where: This change applies to the Data enhancement and refinement > Define service lines > Service Line Schemas page.

Who: Axiom data analysts who select a time frame when processing service line schema.

How:

1. On the EDS home page, under **Data enhancement and refinement**, select **Define service lines**. The **Service Line Schemas** page appears.
2. Select a schema, and on the far right of the row, select the pencil and paper icon (Open the Schema to view the Service Lines). The **Service Line Definition** page appears.
3. Select the **Process Schema** button. The **Process Schema Now** dialog box appears.

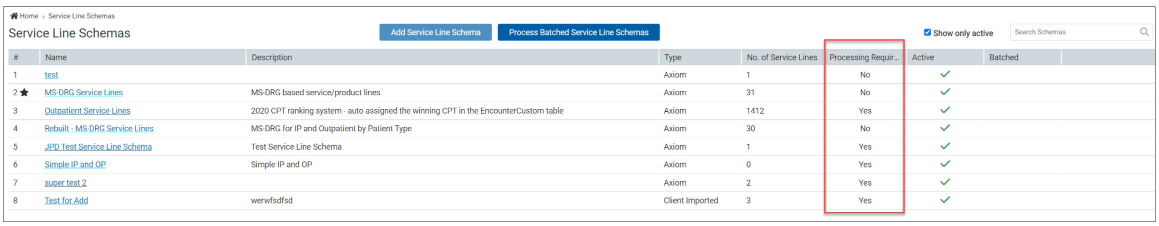


4. Select either:
   - **all data** - Selecting this radio button processes all encounters and generates an

Information dialog box notifying you with a Job schedule ID to be run as soon as possible. After selecting **OK**, the **Service Line Assignments | Results** page appears identifying the result details of the job.

- **date range by "Discharge date"** - Selecting this radio button generates a From (month and year) and To (month and year) dropdown for you to identify a time frame. If you select a start date later than an end date, an error appears. The end date automatically shifts to the start date (same month and year). Encounters are processed by Admit date belonging to the defined date range.

5. You can create a new schema, check its status in the **Processing Required** column in the Service Line Schemas list. Alternatively, you can process any existing schema, change its service line, assignments, or definition, and click **Save**. The status is set to **Yes** in the **Processing Required** column. Processing both schemas produces a status of **No** in the **Processing Required** column.



Uploading and downloading service line definitions

▶ Why use this feature

As an Axiom data analyst, you can upload and download service line definitions to add or edit definitions of service line schema.

▶ How this feature works

What: Upload and download service line definitions allowing you to add or edit definitions of service line schema.

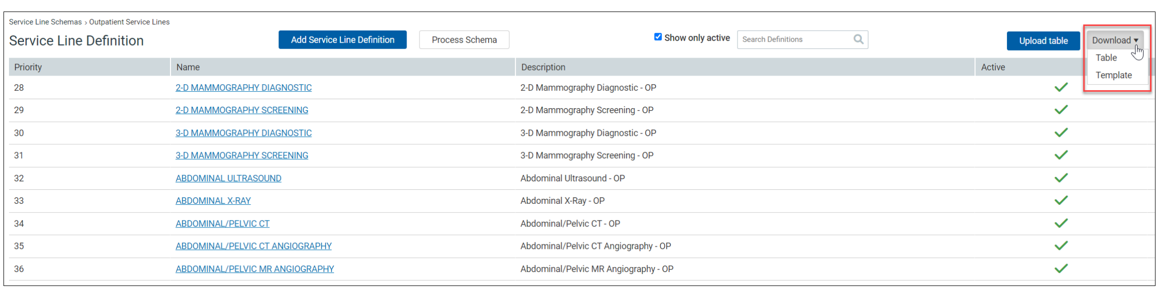
Where: This change applies to the Data enhancement and refinement > Define service lines > Add Service Line Schema > Service Line Definition > Add Service Line Definition tab.

Who: Axiom data analysts who upload service line definitions.

How:

1. On the EDS home page, under **Data enhancement and refinement**, select **Define service lines**. The **Service Line Schemas** page appears.
2. Select a schema, and on the far right of the row, select the pencil and paper icon (Open the Schema to view the Service Lines). The **Service Line Definition** page appears.
3. Select **Upload table** and make a selection from the file browser.

   If no errors are detected, the system adds the new or edits the existing service line definitions. If validation errors occur, you can download the error file to view and correct them.
4. Select **Download** to download either a table or template for service line definitions. The table contains existing service line definitions; the template is a blank file with column headings.



Axiom Financial Planning

While no new functionality has been added or enhanced in Axiom Financial Planning, it does deliver enhancements from Axiom Version 2022.3. For more information, see Axiom 2022.3 Release Notes.

Axiom Rolling Forecasting

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 have them update automatically when your roll forward.

- **Automated Workday calculations** – Now 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, these are used to calculate the workdays for all periods. For more information, see "Configure workday periods" 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 used in reports, and for managing report alert thresholds.

- **IP Census and Per Unit IP Census Calculation Method updates** – The calculation method codes have been updated so that if the IP Census is used, the proper codes come into the IP Census block and do not appear elsewhere.

- Expire an initiative

  Use this feature to expire old or unused initiatives to 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** – New payor category options in the calculator's Refresh Variables dialog enable you to choose 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 selected 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 have been alphabetized to make them consistent.

Forecast payor component deductions

▶ Why use this feature

Now your deductions calculations can 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 allow you greater flexibility and specificity in forecasting payor-related deductions.

▶ How this feature works

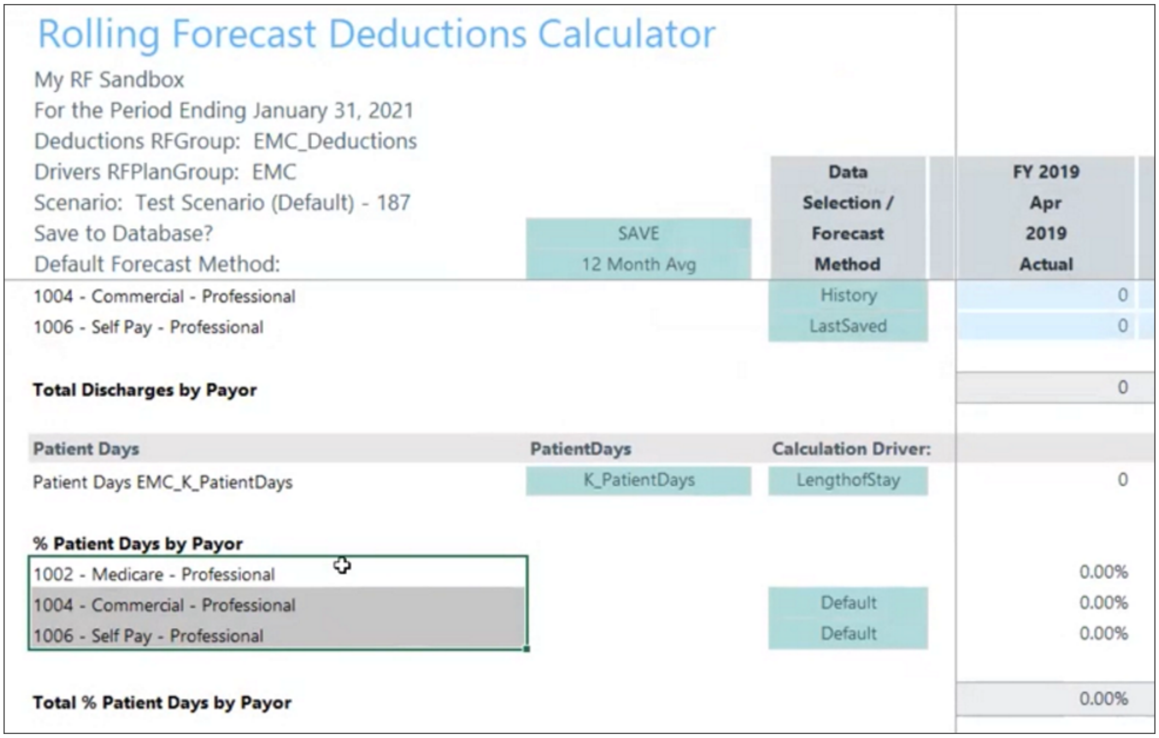
What: Say you have subgroups of payors: for example, institutional Medicare and commercial Medicare payors, and you want to keep them separate from each other in your deductions forecasts. Create deduction categories in the Payor Setup utility, and then assign payors to the categories. When you open 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 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. Save your changes.
2. In the **RF Admin** task pane under **Other Calculators**, double-click **Deductions Model**.
3. In the **Refresh Variables** dialog, select the payor categories to use 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, you can use the Payor Summary report to review payor forecast data from all of your models.

New payor deduction categories

▶ Why use this feature

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.

▶ How this feature works

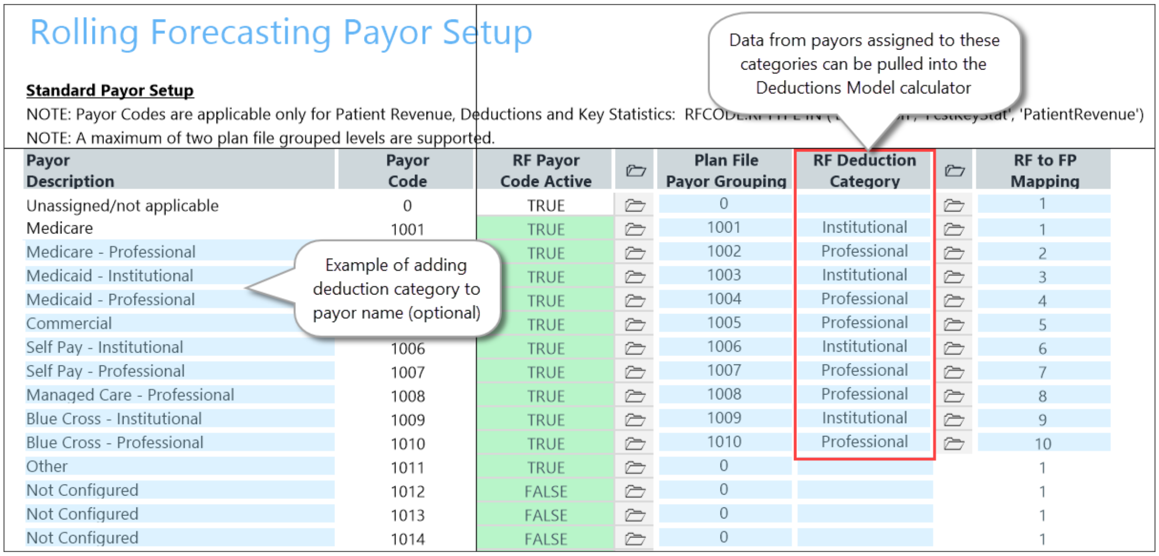
What: In the Payor Setup utility, create deduction payor rollup categories and then assign those categories to payors. These component classifications are saved to the Payor Dimension table. From there, they can be brought into the Deductions Model calculator and included in your deductions forecasts. Payor deduction categories enable you to choose which payors to include in your deductions model as specialized groups. When you open the Deductions Model calculator, you have the option to narrow the model to a specific payor category, to include only unassigned payors, or to 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 used 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 **Rolling Forecasting Payor Setup** utility, in the **RF Deduction Category** column, enter the category name to be used with the first payor listed, then work your way down the list assigning the rest of the payors to a category as needed.
4. On the **Main** ribbon tab, click **Save**.



Rolling Forecasting Payor Setup

Standard Payor Setup

NOTE: Payor Codes are applicable only for Patient Revenue, Deductions and Key Statistics: RFCODE... 'PatientRevenue')

NOTE: A maximum of two plan file grouped levels are supported.

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	1002	TRUE	1002	Professional	2
Medicaid - Institutional	1003	TRUE	1003	Institutional	3
Medicaid - Professional	1004	TRUE	1004	Professional	4
Commercial	1005	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

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 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 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 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 Axiom Queries 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 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	FY 2 Au 20 Fore
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	12
Outpatient Revenue per Visit										
Total Outpatient Revenue per Visit			-	-	-	-	32,277.73	95,097.81	34,618.34	3
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	36,
Total Deductions			-	-	-	-	31,386,865	31,386,865	33,498,704	33,
Total Reimbursement			37,764,255	119,301,285	41,265,070	40,271,960	2,614,496	84,151,527	2,804,085	2,

Expanded section showing deduction statistics for payors in selected category.

Configure holidays

▶ Why use this feature

Use the Holidays tab in the Planning Configuration utility to set your organization's observed holidays and have them update automatically when you roll forward. 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, or, if the holiday falls on a weekend for a given year, the previous Friday or the following Monday. Your organization's workday periods are automatically calculated based on your scheduled holidays. When you make changes to the Holiday List that affect work weeks, your workday periods are automatically recalculated.

> **IMPORTANT:** Be aware that if you make changes to the Holiday List or the RF Period after processing plan files, the plan files will need to be reprocessed for the changes to appear in reports.

Where: This change applies to the Planning Configuration utility 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.

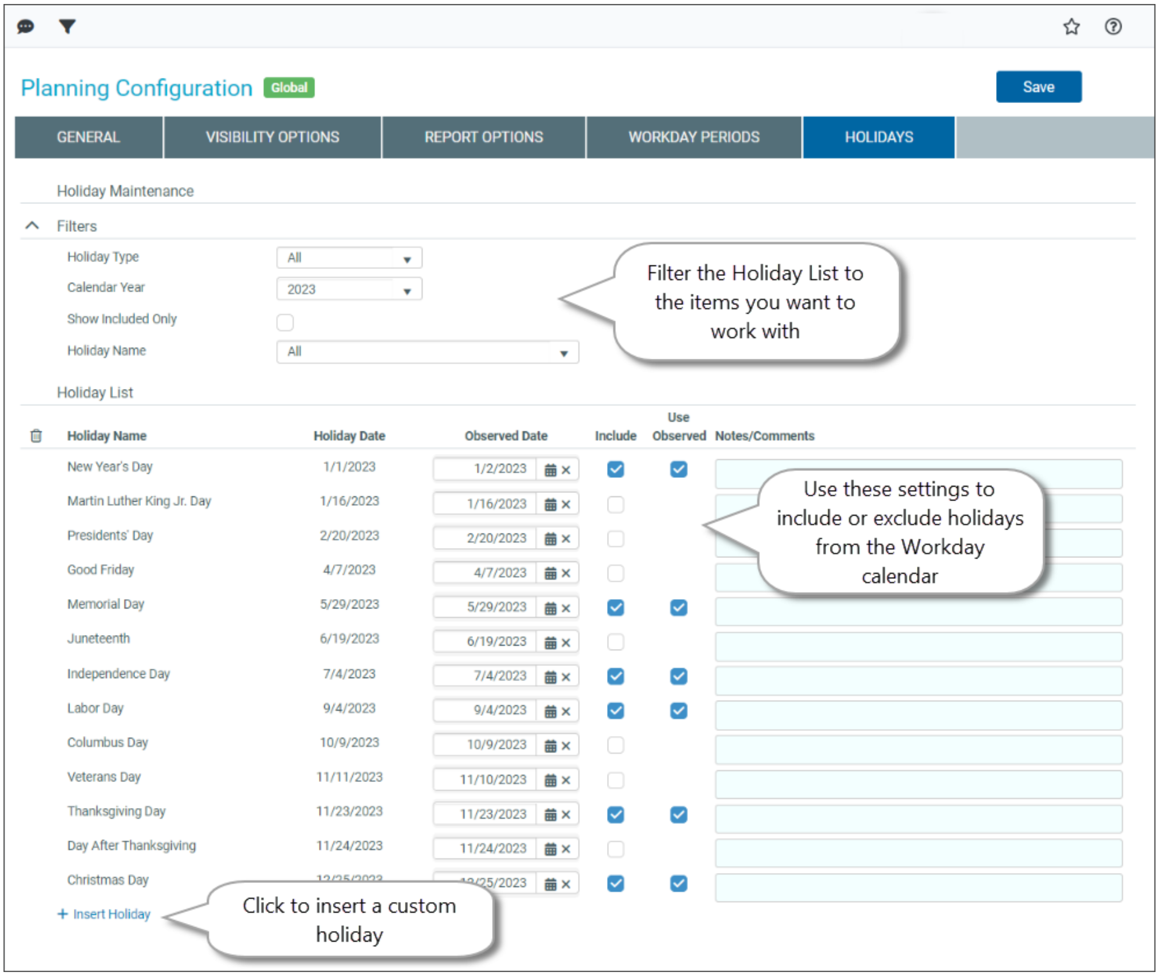
When: Holiday setup is usually done annually, but the administrator may need to make changes.

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 desired time frame and holidays you want to work with:

Field	Options/Description
Holiday Type	• **All** – Select to include all holidays in your settings. • **Standard** – Includes the following 6 holidays: New Years Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day • **Common** – Includes the following 7 holidays: Martin Luther King Day, Presidents Day, Good Friday, Juneteenth, Columbus Day, Veterans Day, Day After Thanksgiving • **Inserted** – Holidays added that are not in the picklist
Calendar Year	Do one of the following: • Select the calendar year for which you want to view and edit holidays. • Select **All** to apply to all years.
Show Included Only	Select to display only holidays with a checked **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, in the **Observed Date** column for that holiday, click the calendar icon and select a different date.
   - To change a holiday from the observed date to the date the holiday falls on the calendar, in the **Use Observed** column, clear the checkbox.
   - 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, 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.


Planning Configuration
Global
Save
GENERAL
VISIBILITY OPTIONS
REPORT OPTIONS
WORKDAY PERIODS
HOLIDAYS
Holiday Maintenance
Filters
Holiday Type
All
Calendar Year
2023
Show Included Only
Holiday Name
All
Filter the Holiday List to the items you want to work with
Holiday List
Holiday Name
Holiday Date
Observed Date
Include
Use Observed
Notes/Comments
New Year's Day 1/1/2023 1/2/2023
Martin Luther King Jr. Day 1/16/2023 1/16/2023
Presidents' Day 2/20/2023 2/20/2023
Good Friday 4/7/2023 4/7/2023
Memorial Day 5/29/2023 5/29/2023
Juneteenth 6/19/2023 6/19/2023
Independence Day 7/4/2023 7/4/2023
Labor Day 9/4/2023 9/4/2023
Columbus Day 10/9/2023 10/9/2023
Veterans Day 11/11/2023 11/10/2023
Thanksgiving Day 11/23/2023 11/23/2023
Day After Thanksgiving 11/24/2023 11/24/2023
Christmas Day
Use these settings to include or exclude holidays from the Workday calendar
+ Insert Holiday
Click to insert a custom holiday

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 these settings work

What: The Report Options tab now contains the RFGroup grouping columns for refresh variables setting that was moved from the Visibility Options tab in the Planning Configuration utility. In addition, a new, similar setting was added that allows administrators and analysts to control which RFCODE grouping columns are available for selection in reports that allow you to select a specific Grouping Column when determining which RFCode classifications to select or sum by.

The Report Options tab also contains another new feature, the Threshold Management report configuration table. These settings allow you to manage the thresholds that trigger color-coded alerts used in reports such as the RFCode Trend Summary. The alerts call attention to data in the report that may need adjustment.

Where: This change applies to the Planning Configuration utility 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:

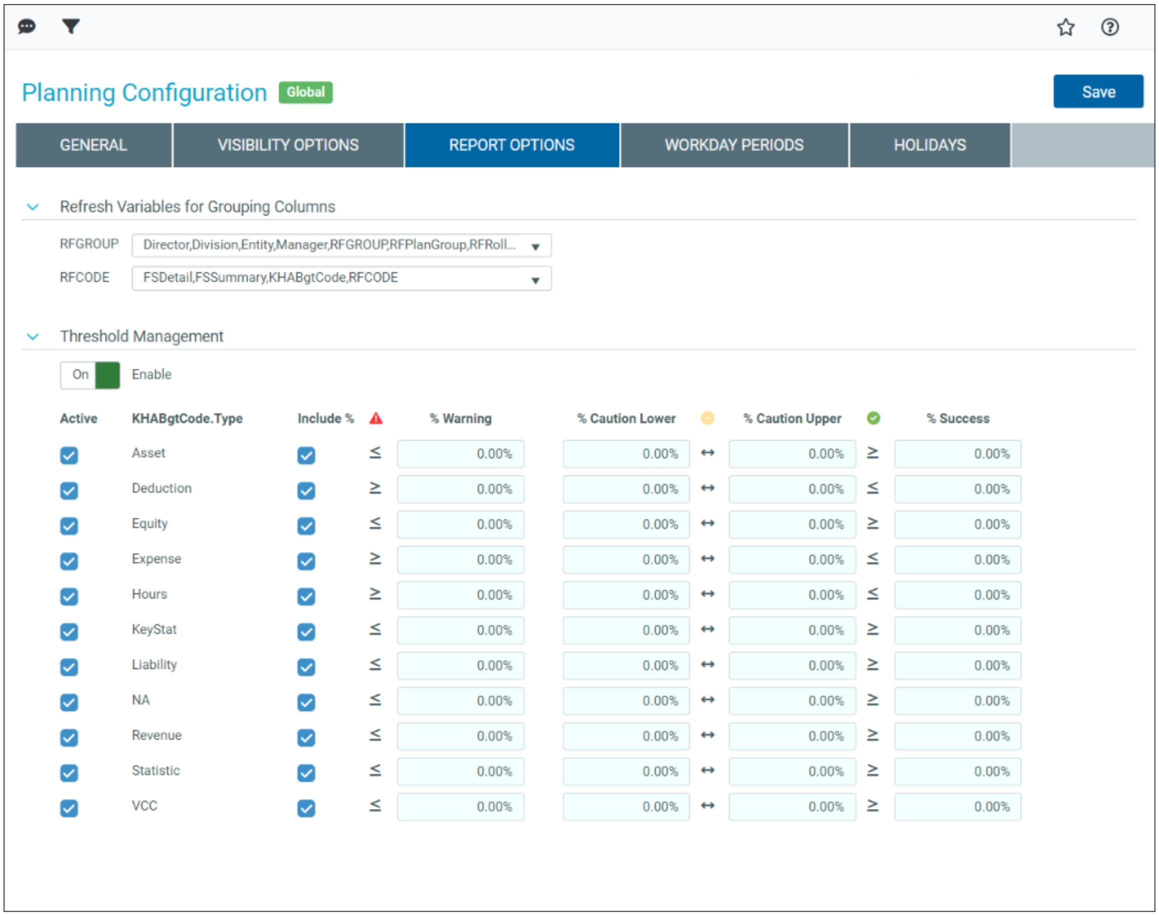
To configure report options:

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 that allow RFCode selection: a. Click the drop-down. b. In the list of RFCode columns, select the codes to include and then clear the checkboxes for those RFCODES to exclude. 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. c. To remove threshold use for a specific KHABgtCode type in reports, in the **Active** column, clear the checkbox.

4. Click **Save**.


Planning Configuration
Global
Save
GENERAL
VISIBILITY OPTIONS
REPORT OPTIONS
WORKDAY PERIODS
HOLIDAYS
Refresh Variables for Grouping Columns
RFGROUP
Director,Division,Entity,Manager,RFGROUP,RFPlanGroup,RFRoll...
RFCODE
FSDetail,FSSummary,KHABgtCode,RFCODE
Threshold Management
On
Enable
Active
KHABgtCode.Type
Include %
% Warning
% Caution Lower
% Caution Upper
% Success
Asset ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
Deduction ≥ 0.00% 0.00% ↔ 0.00% ≤ 0.00%
Equity ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
Expense ≥ 0.00% 0.00% ↔ 0.00% ≤ 0.00%
Hours ≥ 0.00% 0.00% ↔ 0.00% ≤ 0.00%
KeyStat ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
Liability ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
NA ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
Revenue ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
Statistic ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%
VCC ≤ 0.00% 0.00% ↔ 0.00% ≥ 0.00%

Expire an initiative

▶ Why use this feature

Use this feature to expire old or unused initiatives to remove them 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 reports.

> **TIP:** If you want 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 the plan file Initiatives tab and Summary tab, the RFID dimension table, the Initiatives Status Update utility, and 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 if any should be expired. For any initiatives that need to be expired, use the following procedure.

> **IMPORTANT:** Only expire an initiative if you are certain that you will not need to bring it back. Once an initiative is expired, it cannot be brought back under the same Initiative ID. If you want 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, in the Approve column, type **Expire**.
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 will not be expired until you save the RFID table.
4. In the **Main** ribbon tab, click **Save**.

Data Type	*String*	*String*	*String*	*String*	*String*	*Integer*	*String*	*String*	*String*	*Integer*	*Integer*	
String Length	*50*	*150*	*20*	*25*	*64*		*150*	*25*	*25*			
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**	**Approv**	**SaveCustom**	**SaveTagDocI**	**SaveTagCust**	**InitPro**	**CTtoRFInclud**	**Scenari**	**Expiration_RFPerio**	
	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_Hon	5676		Initiative	Include	0		
	EMC_HomeHealth_16_1	Home Health 1	RFGroup	Approve	RFInitiatives_EMC_Hon	0		Initiative	Include	16		
	EMC_HomeHealth_16_2	Home Health North	RFGroup	Expire	RFInitiatives_EMC_Hon	0		Initiative	Include	16	202210	
	EMC_HomeHealth_16_3	Home Health 1	RFGroup	Approve	RFInitiatives_EMC_Hon	0		Initiative	Include	16		
	EMC_HomeHealth_16_4	Home Health North	RFGroup	Exclude		0		Initiative	Include	16		
	EMC_HomeHealth_2		2	Exclude	RFInitiatives_EMC_Hon	5676		Initiative	Include	0		
	EMC_HomeHealth_3		3	Exclude	RFInitiatives_EMC_Hon	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

Axiom Strategy Management

While no new functionality has been added or enhanced in Axiom Strategy Management, this product does deliver enhancements from Axiom Version 2022.3. For more information, see Axiom 2022.3 Release Notes.

Axiom Treasury Cash Management

While no new functionality has been added or enhanced in Axiom Treasury Cash Management, this product does deliver enhancements from Axiom Version 2022.3. For more information, see Axiom 2022.3 Release Notes.

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 Healthcare Suite, note the following:

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

Preparing 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 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.

Issues fixed in 2022.3

No client-facing issues were addressed in 2022.3 specific to the Healthcare Suite, released on November 7, 2022. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

Issues fixed in 2022.3.1

No client-facing issues were addressed in 2022.3.1 specific to the Healthcare Suite, released on December 5, 2022. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.