Release Notes

Axiom Rolling Forecasting
Version 2023.1

AXIOM

320 N Sangamon St
Suite 700
Chicago, IL 60607
(847) 441-0022
www.syntellis.com
info@syntellis.com

Version: 2023.1.2

Updated: 4/19/2023

Contents

About the Release Notes

Syntellis is pleased to announce the 2023.1 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.
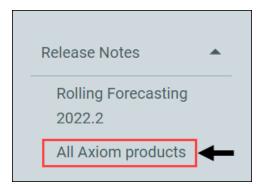
The purpose of these release notes is to provide you with the following:

- 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 2023.1

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

Enhanced integration with Axiom Financial Planning

New integration and data transfer features offer significant improvements to the transfer of data between Axiom Rolling Forecasting and Axiom Financial Planning. These features reduce processing time, eliminate disruption to non-integration reporting assets, and reduce manual entry requirements needed to transfer data used in long-term planning.

Other enhancements

- **Update Global Data utility** – The Update Global Data utility now automatically receives actual data from the Global Data driver. This new functionality pulls actual values into global data records, which reduces or eliminates the need to manually enter data. For more information on using the Global Data driver, see "Configure the Global Data driver" in the online help.

- **Actual Compared to Prior Forecast Income Statement report** – You can review actual data even if there is no corresponding forecast data. You can also review forecast data even if no corresponding actual data is present. For information about the report, see "Compare actuals to prior forecasts" in the online help.

- **Salary Calc Method adjustments to actual months** – This release delivers the following updates:

  ○ The Fixed Salary adjustment row now allows manual entry for all current quarter periods.

  ○ Two interim rows were added to account for the adjustments in actual periods.

  ○ In actual periods, the Adjusted Total row is now referenced in the Average Hourly Rate calculation.

- **Balance Sheet and Cash Flow calculator** – Added Year-To-Date (YTD) income statement element columns on the SupportingData, Forecast, and Statements tabs to calculate and reference the YTD Excess of Revenue Over Expenses beginning balance value for the current year on the Forecast tab, which seeds the data on the Statements tab. For more information on the calculator, see "About the Balance Sheet and Cash Flow calculator" in the online help.

Enhanced integration with Axiom Financial Planning

▶ Why use this feature

New integration and data transfer features offer significant improvements to the transfer of data between Axiom Rolling Forecasting and Axiom Financial Planning. These features reduce processing time, eliminate disruption to nonintegration reporting assets, and reduce manual entry requirements needed to transfer data used in long-term planning.

▶ How this feature works

What: The new integration features includes the following:

- A new Deductions Model toggle in the Systems Settings Utility lets you select how you use the Deductions Model calculator. When testing data, or if you do not use the calculator to forecast deductions, set the toggle to "No" to prevent the test data from being included in data transfers. When creating actual forecasts, set the toggle to "Yes" to use statistics, revenue, and deductions data from the Deductions Model calculator in forecasts.

- FPIntegration, a new RFDType in the RFDType dimension table, eliminates confusion and simplifies the need to recognize different Rolling Forecasting data types during the transfer.

- New RF_Integration_20XX tables store blended data from both the deduction and forecast tables when you save plan files or deduction models. Only actual and forecasted data that is used for long-range forecasting within Financial Planning is stored in these tables.

  > **NOTE:** You must have a licensed copy of Axiom Financial Planning to store deductions and forecast data in the RF integration tables.

- In Financial Planning, the integration utility Transfer to Financial Planning recognizes the new Rolling Forecasting integration assets. See "Using the Transfer to Financial Planning utility" in the Axiom Financial Planning online help for details.

Where: This change applies to the System Settings Utility, the Deductions Model calculator, the RFDType Dimension table, and RF integration tables in the Axiom Table Library.

Who: Only Axiom Rolling Forecasting administrators can use these integration tools.

How:

1. Open the **Systems Setting Utility**, click the **Deduction Details Selection** toggle to **Yes**, and then click **Save**.

2. Use the **RF Payor Setup** utility to map RF payors to Financial Planning.

3. Use the **Deductions Model** calculator to create deductions forecasts.

> **NOTE:** If you do not use the Deductions Model calculator to forecast deductions, deductions data populates the RF_Integration table from plan files and forecast tables.

4. In Axiom Financial Planning, use the **Transfer to Financial Planning** integration utility to transfer data from Rolling Forecasting.

▶ 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 system settings"
- "Configuring Payors"
- "About the Deductions Model calculator"
- "Set up the Deductions Model calculator"
- "Calculating deductions"

What to know before upgrading

> **IMPORTANT:** You must apply the Axiom 2022.4 upgrade before applying any 2023.1 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2022.4 before the first product upgrade. Refer to the **Axiom 2022.4 Release Notes** and **Axiom Healthcare Suite 2023.1 Release Notes** for consideration before upgrading.

When upgrading to the 2023.1 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 any of the following changes:

  - Columns reordered

  - New columns added

  - Old columns removed (rare)

    If you copy and paste into or from Axiom tables, please review the column order of those tables after upgrading to assess the impact to your internal processes.

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 2023.1

The following table lists the resolutions for issues addressed in 2023.1, released on February 13, 2023:

Calculators

Issue	Description
(2023.1) RF Deductions Model - Inconsistent auto-seed logic for Forecast periods based on inputs from earlier periods [153925]	**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 inputted data in previous forecast periods calculate amounts correctly for later forecast periods.
(2023.1) RF Deductions Model: Driver rate changes are not being retrieved due to incorrect period referencing in the Data Lookup [156240]	**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 when determining which RFPeriod to use. **Resolution:** Added an RFPeriod data lookup sequence to the Variables tab, and then changed the reference to the correct cell.
RF BSCF Refine Income Stmt Data Utilization [161426]	**Summary:** In the Balance Sheet and Cash Flow calculator, Current Maturities of Debt amounts were inaccurately subtracted from both Existing Long-Term Debt and New Long-Term Debt amounts. **Resolution:** Added an Adjustment line item for adjusting the Existing Long-Term Debt as needed. Removed the subtraction of Current Maturities of Debt from both the Total Existing Long-Term Debt and Total New Long-Term Debt Subtotals to correct the amounts transferred to the Statements tab.
Case Number 00489622 - PFB - RF Deductions Model - Physician [162808]	**Summary:** In the Deductions Model calculator with the Physician's only setting enabled in the Refresh Variables, users reviewing the payor mix found that it totaled more than 100%. The Axiom query that totaled the amounts was not used by the Physician Only model of the calculator. **Resolution:** Updated the formula to span the rows needed to total the payor mix. Enabled the Physician Only model to use the same Axiom query as the Standard model.

Plan files – Forecast

Issue	Description
Case Number 00481083 - Months not showing up when View is selected to Months Only [154479]	**Summary:** On the plan file Forecast tab, when users selected only the Show Months option from the Change View menu on the Main ribbon tab, some of the month columns were hidden. **Resolution:** Updated the column formulas on the Forecast tab to reference the correct row when determining potential views.
(2023.1) Case Number 00480393 - Per Unit Volume Calc Method - Statistics section: inconsistency in second forecasted qtr calculation [156130]	**Summary:** On the plan file Forecast tab, 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.
RF - Confusing label of Calendar years on by-months columns in RF Template [159284]	**Summary:** On plan file tabs with period columns comprising a fiscal year, the columns in the fiscal year that were a part of a previous or future calendar year had the same year displayed in the period column heads, which was potentially confusing. **Resolution:** Added a calendar year label to the month displayed under the fiscal year label in column headers. For example: Nov-21. This change was made on the Summary, Forecast, History, and Initiatives tabs.
Case Number 00487090 - Defect| RF Calc Method issue with the dropdown of "Driver"/"PriorForecast" on the Other Revenue / Salary / Expense calc method [159625]	**Summary:** On the plan file Forecast tab, when users selected the "Driver" option from the Forecast Method drop-down in the Other Revenue, Salary, and Expense sections, and then saved the worksheet, the selection reverted to "PriorForecast." **Resolution:** Updated the formulas in the drop-downs to retain the option that was last saved in the plan file.

Reporting

Issue	Description
Consolidated IS & Key Metrics - Refresh variables Not valid value for Scenario [156530]	**Summary:** When users opened the Consolidated IS & Key Metrics report, the Refresh Variables dialog displayed the error "187 is not a valid value for 'Scenario.'" **Resolution:** Corrected the formula that pulls the default value for a scenario when users open the report.
(2023.1) RF - Actual vs Forecast Comparison Report AQ2 Error [157876]	**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 Axiom Query 2.

Issues fixed in 2023.1.2

No client-facing issues were addressed in 2023.1.2, released on April 24, 2023.