Release Notes
Axiom Contract Management
Version 2023.1

AXIOM

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

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About the Release Notes

Syntellis is pleased to announce the 2023.1 release of Axiom Contract Management. 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 Contract Management online help. On the help home page, click the Release Notes link at the top of the page.

▶   Accessing current and older release notes for Axiom Healthcare and Axiom Financial Institutions products

The online help for Axiom Healthcare products includes a page with links to current and past release notes for the last several years. To access this page, open the product online help, and at the top of the menu on the left side of the page, click **Release notes > All Axiom products**.
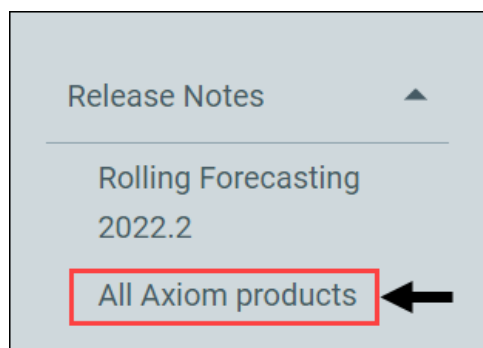
New features in 2023.1

Enhancements in the release include:

- New calculations were added when creating a clause or term in a contract:

  ○ Added the ability to limit line reimbursement by dollar and percentage per line amount for Line Item MPR.

  ○ Adjusts the threshold to a per-diem charge by adding a Thresh Basis field to the Thresholds page to qualify a claim for an outlier based on total per-diem reimbursement.

  ○ Added ability to exclude services from charge outlier qualification by setting one or both service types (revenue code and line-item code) as exclusions for thresholds.

- Added functionality for locking contracts:

  ○ Admins can now protect contract terms by locking them. Locks provide added security, prevent editing of terms, and may only be removed by the Admin who applied the lock or a system-defined Super User.

  ○ The ability to lock contracts was added to the Admin Menu. When a contract is locked at the simulation, contract, or version level, the contract elements at that indicated level and below are View Only until an Admin user unlocks the contract.

  ○ CMA tracks the ID and time a contract is locked or unlocked and displays that information in **Admin** > **Change Tracking**.

- Admins modeling proposals can now associate charge adjustments with multiple effective dates for varying rates in any given simulation:

  ○ A date range was added to charge adjustments.

  ○ A date range was added to code adjustments.

  ○ Adjustments can be turned off or on.

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 Contract Management, 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 three days of advance notice. The request should include the following information:

   • Axiom platform version.

   • Axiom for Healthcare product and version.

   • Whether to first refresh and apply updates to the Axiom test sandbox with a copy of the production instance of Axiom. If so, provide the earliest date that Syntellis can do this.

   • Propose an approximate two-hour downtime window when Syntellis can apply updates to the production instance of Axiom during regular business hours, Monday through Friday 7 AM to 7 PM Central (except holidays recognized by Syntellis).

3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps to enable features for this version.

Getting help and training

Syntellis provides world-class resources at your fingertips 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:

- **Online help** – From the main menu header, click **Help**, and then select **Contract Management Help**. The Contract Management Help opens in a new browser window.
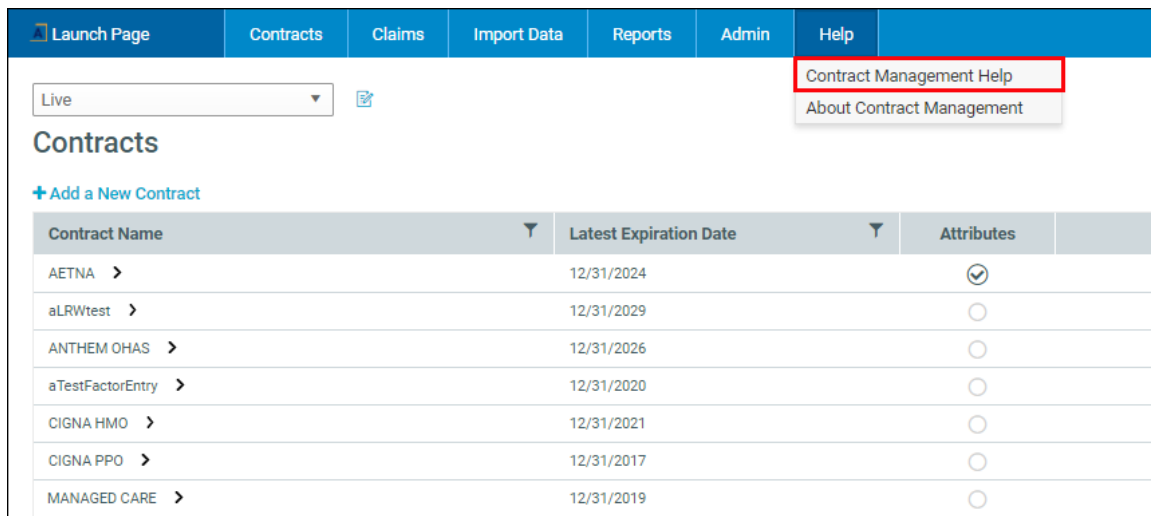
- **Contextual help** – For selected Axiom Contract Management main pages such as the Contracts page, Drill-Down Reports page, View a Claim, and others, accessing the help from these pages opens the online help topic related to that feature.

▶ Syntellis Central

Syntellis Central provides centralized self-service content and resources for the Axiom Contract Management 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:

Issue	Description
Case Number 00470657 - Contract Management Clone Clauses Missing Term Details - threshold rates not copied [143901]	**Summary:** When cloning a clause that contains a term with a Threshold, the term is copied but the Threshold details are not copied. **Resolution:** Term details are now included when cloning a clause.

Issues fixed in 2023.1.1

No client-facing issues were addressed in 2023.1.1, released on March 31, 2023.

Issues fixed in 2023.1.2

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