Release Notes
Axiom Financial Planning
Version 2023.1

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.1 release of Axiom Financial Planning. 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 Financial Planning 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**.
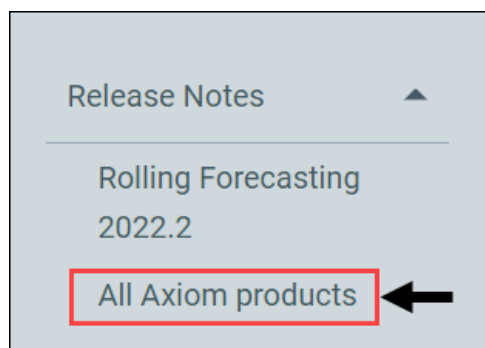
New features in 2023.1

Enhancements in this release include:

- The Rating Agency Medians were updated with 2022 data.

- The ability to integrate volume, revenue, and deduction Payor-level data from the Rolling Forecasting (RF) Deduction tables was added. The Transfer to Financial Planning (FP) utility has been updated to recognize the new RF integration assets. Mapping RF to FP dimensions in the transfer utility is still required when transferring data from Rolling Forecasting: RFGroup to FPNode, RFCode to FPCode, and RF to FP Payor Mapping Codes. Only Approved initiative data is transferred to Financial Planning.

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 Financial Planning, note the following:

- Along with upgrading to Axiom 2022.4, you must upgrade to Axiom Financial Planning 2023.1.
- This product upgrade contains updated templates, calculation methods, updated drivers, 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 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 Financial Planning 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
PFB-07322 - Clone node & refresh history [34016]	**Summary:** Historical data did not populate correctly when a node was cloned and the setup driver had the "Update Historical Data when opening plan files" option selected. **Resolution:** Historical data now populates properly regardless of the setup property when cloning a node.
Eliminations Node does not save Contractual Allowance payor codes [87750]	**Summary:** When using an elimination node, the Inpatient Contractual Allowance data by payer was not saved to the database. **Resolution:** Added the appropriate codes to the elimination node so that the data is reflected in a payor-based report.
Transfer to Financial Planning Failed when tables are missing even though they are not used [151801]	**Summary:** Failures in the Transfer to Financial Planning (FP) utility occurred in certain tables (AT2023, BUD2023, and CYF2023) that were missing (regardless of whether they were used in the transfer). **Resolution:** The error message no longer appears if one of the tables is missing.
Node Rebuild Utility does not open when too many nodes exist [152077]	**Summary:** Node Rebuild Utility failed to open when too many nodes existed. **Resolution:** Node Rebuild Utility opens regardless of the number of nodes.
Physician template Div/0 error [153392]	**Summary:** The Physician template produced a #DIV/0 error. **Resolution:** This error was resolved with an error trap and now displays the applicable data.
When processing plan files from control panel payor mix shift data does not update [154631]	**Summary:** When processing plan files from the control panel, the payor mix shift did not process data correctly. **Resolution:** The payor mix shift now generates correctly when processed from the control panel.
Transfer to FP - Import error when RF selected for Year 1 and/or 2 but not Year 3 [155398]	**Summary:** An import error appeared in the Transfer to Financial Planning (FP) utility when users selected Rolling Forecast (RF) for Year 1 and/or 2, but not Year 3. **Resolution:** Users can now select any year for Rolling Forecast (RF) in the Transfer to Financial Planning (FP) utility.