

Release Notes

Axiom Healthcare Suite
Version 2023.1

The logo for AXIOM, featuring the word "AXIOM" in a bold, white, sans-serif font. The text is enclosed within a thin, light blue rectangular border. The background of the logo area is a dark blue gradient with a pattern of overlapping circles in various shades of blue.

AXIOM

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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 2023.1 Release Notes** as well as the release notes for each product licensed by your organization.

Upgrade considerations

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

Consider the following when upgrading to Axiom platform 2022.4:

- Clients with Comparative Analytics are required to upgrade to 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 2022.3 is a new install and not a standard upgrade. We are testing compatibility of Rolling Forecasting version 1.0 with version 2022.3 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 a 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.

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 2023.1 Release Notes** and **Axiom Healthcare Suite 2023.1 Release Notes** for consideration before upgrading.

When upgrading to the 2023.1 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 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.

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

Axiom Budgeting and Performance Reporting 2023.1 includes the following enhancements:

INFOR API Integration

The Axiom platform release will deliver a standard API connection to be used within Axiom ETLs and Scheduler jobs. Each product will implement a standard and recommended data integration package.

Highlights:

- A decrease in time to ROI with improvements to implementation time, effort, cost, and complexity
- A standard, recommended approach to implementation
- Improved consistency and reliability

Other enhancements

- **PayType Dimension** – Six-column validation to eliminate non-valid entries and greatly reduce Axiom Query errors during plan file processing. Entries in the following columns are now validated:
 - Jobcode
 - Staffing
 - Employee
 - Provider
 - GLAcct
 - HrAcct

IMPORTANT: The new validation columns changed the column order of the PayType dimension table, and existing entries that become invalid because of this validation will be changed automatically. Invalid account entries will be changed to “0” (zero), and invalid paytypes will be changed to “NA.” You must review the table and update pay types that were changed in any of the six newly validated columns.

Use the PayType Dimension Validation Audit report to identify classification changes made to the PayType dimension table following your first release upgrade after 2022.3. For instructions and location of the report, see [Manual setup instructions](#) in the release notes.

- **Initiative account association and automatic calculations** – New initiative calculation (calc) methods enable you to link your accounts with common associations and provide greater flexibility when budgeting your initiatives. These associations save time when making changes to accounts with associated expenses and minimize the possibility of making changes to one account and missing the associated accounts. For example:
 - Deductions – Associate a deduction with a revenue account, and then enter a percentage (%) to automatically calculate the budgeted deduction expense as a percentage of the selected revenue account.
 - Salaries – Associate a salary account with an hours account, and then enter an average hourly rate to automatically calculate the salary expense.
 - Detail Benefits w Percent – Associate a benefit account with a salary account, and then enter a percentage to automatically calculate the benefit expense as a percentage of salary expense.

Each one of these new calc methods has a corresponding “Add...” calc method for adding new, additional accounts as needed.

- **Headers automatically enabled in utilities, drivers, and plan files** – Instead of opening a plan file or driver and selecting the Headers checkbox on the Main ribbon tab, headers are now enabled automatically on all worksheets.

Axiom Clinical Analytics

Welcome to Version 2023.1 of Axiom Clinical Analytics!

Enhancements in this release include:

Limit set for number of reminder emails sent for a workflow (Professional Practice Evaluation only)

You can limit the number of Professional Practice Evaluation (PPE) reminder emails that can be sent for an open workflow (for example, a reminder email for a reviewer to complete pending items).

Gestational age added as a field for encounters in Clinical Case Summary (CCS) and reports adjusted

Healthcare analysts can add the gestational age (age of the unborn child measured in weeks) in a Clinical Case Summary (CCS) and include it in reports.

Ethnicity added as a field in Clinical Case Summary (CCS)

Healthcare analysts can break down data by ethnicity and filter on ethnicity to better understand the role ethnicity plays in the outcome of patients.

CPT 2023 updates to v40

Current Procedural Terminology (CPT) 2023 code sets and descriptions, which are released by the American Medical Association (AMA), have been updated to version 40. This includes profile filters, details view, and Clinical Case Summaries.

Unique names required on PPE reports, distributions, and distribution reports

To eliminate duplicate names in the system, Clinical Analytics requires unique names for Professional Practice Evaluation (PPE) reports, distributions, and distribution reports.

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 2022.4. For more information, see [Axiom 2022.4 Release Notes](#).

Axiom Comparative Analytics

While no new functionality has been added or enhanced in Axiom Comparative Analytics, this product does deliver enhancements from Axiom Version 2022.4. For more information, see [Axiom 2022.4 Release Notes](#).

Axiom Contract Management

Axiom Contract Management delivers the following features and enhancements:

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.

Axiom Enterprise Decision Support

Enterprise Decision Support delivers the following new and updated features and enhancements:

Relative Cost Unit (RCU) cost method added

The RCU cost method leverages the results of all previously-run cost method results as the basis for calculating one or multiple cost categories.

Ability to run the Relative Cost Unit (RCU) process from the **Process cost advanced screen for processing in correct order**

To run the RCU process from the **Process cost advanced** page, a new **RCU** checkbox was added under the **Process cost** column so that it can be processed in the correct order.

Add Relative Cost Unit (RCU)-related database tables for creating stories and processing RCU definitions under EDS/Cost Model/RCU folder

To find all RCU-related data, a new RCU folder was added for RCU processing under EDS/Cost Model.

To add RCU-specific tables in this folder, you can store RCU configurations and process RCU definitions when calculating RCU costing.

System processes Relative Cost Unit (RCU) if RCU version is configured in the cost model, and you select RCU for processing - Total Cost Processing

EDS processes the **RCU% Allocation** calculation after RCU Cost has been processed so that you can obtain the percentage of allocation.

This enhancement only includes processing of RCU type Total and does not include processing of RCU types, Fixed and Variable.

System processes Relative Cost Unit (RCU) if RCU version is configured in the Cost Model, and you select RCU for processing - Fixed and Variable Processing

EDS processes the **RCU% Allocation** calculation after RCU Cost has been processed so that you can obtain the percentage of allocation.

This enhancement only includes processing of RCU type Total, and does not include processing of RCU type, Total Cost.

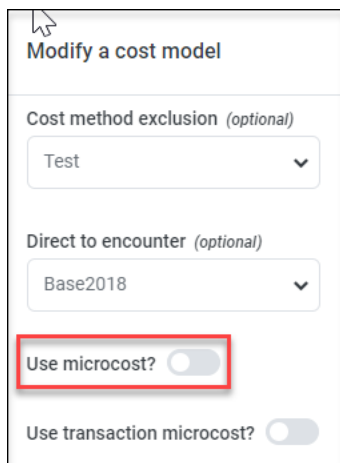
Microcosting enhanced

Microcosting provides the flexibility to load different acquisition costs by service month. This change was made possible by adding the ServiceYM to the MicroCostItem table.

NOTE: For clients moving from prior EDS versions (2021.x – 2022.3) to 2023.1 who already have used microcosting:

- You must repopulate the MicroCostItem table, making sure each department/costitem/costcategory is represented for the appropriate service year and month (ServiceYM in table, format yyyyymm) for your cost model:
 - You can choose to just replicate the values that you had in your historical MicrocostItemTable (now stored as MicroCostItemLegacy, for reference) for all Service YMs, or you may want to introduce new acquisition costs for some of those Service YMs.
 - You must manually make these changes either by cutting/pasting directly into the MicroCostItem table in the Windows client, or by modifying and rerunning your custom microcost import.

Select Microcost as an option within a cost model so that version is no longer used in the process



The screenshot shows a 'Modify a cost model' window. It contains two dropdown menus: 'Cost method exclusion (optional)' with 'Test' selected, and 'Direct to encounter (optional)' with 'Base2018' selected. Below these are two toggle switches. The first, 'Use microcost?', is currently turned off and is highlighted with a red rectangular box. The second, 'Use transaction microcost?', is also turned off.

Created new MicroCostItem table with Service Year Month column replacing Microcost table

- You can add the effective year and month that the microcost transaction occurred, which lets you allocate the microcost entries by month.
- The **Version** column was removed from the Microcost item table.

Archived the MicroCostItem table contents MicrocostItemLegacy table

The table is located in **Table library > EDS > CostModel > Microcost > MicroCostItem**:

As part of removing the **Version** option in the Microcost feature, the table was renamed so that the historical (legacy) data is retained and available for you to review.

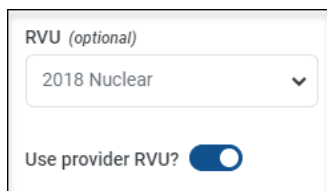
Provider Relative Value Units (pRVU) cost method added

The Provider RVU (pRVU) method allows costing calculations to look across departments to consider a provider's entire activity. It requires provider-specific general ledger departments and other considerations to implement.

Currently, this method should only be used by clients who have used pRVU in Cost Accounting/Decision Support Services (CA/DSS) and are going through their migration to Enterprise Decision Support (EDS). Additional front-end enhancements and documentation will be provided in 2023 to provide more guidance to clients looking to implement pRVU for the first time in EDS. If you are interested in implementing pRVU, contact your Customer Relationship Executive (CRE) for more information.

Added and updated Provider Relative Value Units (pRVU) version within a selected cost model so that you can allocate the appropriate pRVU updates

- On **Cost Model** page, added a new **RVU (optional)** label.

A screenshot of a user interface element. It features a dropdown menu with the text "RVU (optional)" above it. The dropdown is currently open, showing "2018 Nuclear" as the selected option. Below the dropdown is a toggle switch labeled "Use provider RVU?", which is currently turned on (blue).

- Added a dropdown that defaults to **Optional** as the value. The behavior is identical to the **RVU** dropdown on the same page.
- The Dropdown field is available only when you select **Use provider RVU**.
- Enabled you to create a new version from **Cost Model** page.

Run the Provider RVU process from the **Process cost advanced** page for processing in the correct order

- Added new **Item Type** column to the Cost RVU table that you must populate to properly process pRVU.
- Added new **Provider RVU** check box in the **Process cost advanced > Process cost** column.

Other enhancements

Added additional columns and sorting functions in the **Cost Cat** selection page providing complete information for making proper selections

- Added the **Report Detail** column, which is populated from the **CostCat** table.
- Added the **Report Group** column, which is populated from the **CostCat** table.
- The default **Cost Categories** column is listed in alphabetical order.
- Added the ability to sort on the **Report Detail** and **Report Group** column headers on the **RCU Definitions - Cost Categories** page.

Added new columns to the **cm\$ CostResults** table structure for **Fixed Cost**, **Variable Cost**, and **Volume**

Added three columns to the cm\$ model that is specific to Cost Results tables to enable Relative Cost Unit (RCU) to run more efficiently and improve data presentation for more useful reporting and review.

- **Fixed Cost** (Total calculated fixed costs) is the same data type as Calculated Cost.
- **Variable Cost** (Total calculated variable costs) is the same data type as Calculated Cost.
- **Volume** is the same same data type as CostDetail.

Axiom Financial Planning

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: RFGGroup to FPNODE, RFCode to FPCode, and RF to FP Payor Mapping Codes. Only Approved initiative data is transferred to Financial Planning.

Axiom Rolling Forecasting

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.

Axiom Strategy Management

While no new functionality has been added or enhanced in Axiom Strategy Management, this product does deliver enhancements from Axiom Version 2022.4. For more information, see [Axiom 2022.4 Release Notes](#).

Axiom Treasury Management

New features for 2023.1 include the following:

TCM Home page

The home page in Axiom Healthcare Suite (TCM) was enhanced to display a dashboard that provides summary data and graphs based on cash balances and bank activity.

Variance Report

The [Variance report](#) summarizes data from historical, forecast, and budget (if enabled) cash flow information and displays variance columns between the available options.

Ability to integrate budget data

- Back-end tables were created to help convert a company's existing budget data (which is organized by entity, department, and account) to the dimensions in TCM (bank account, BAI2 cash code, and Detail Rollup).
- Mapping was developed to convert monthly budget data from an accrual basis to a daily cash basis.
- The [budget integration feature](#) provides the option to use budget data as a method in the cash forecast in order to account for seasonality, growth in volumes, and inflation.
- Additional settings are available in [CFWC Administration > Settings](#) to facilitate more accurate calculations for cash forecasting.

Two methods of excluding transactions

- Set up an [Exclusion Rule](#) in Cash Flow/Working Capital > Exclusion Miner.
- Indicate exclusions in the Detail Drill window accessed in [Cash Flow/Working Capital > Cash Flow Report](#).

Daily Operating Expense feature

- Calculate a day's cash on hand, which is used in Cash Flow Analysis and Cash Forecasting.
- Edit for individual companies and effective months or set default [Daily Operating Expense](#) (DOE).

Enhancements in this release include:

Option to hide rows with \$0 amounts on the Cash Forecast

To save on screen real estate on the [Cash Forecast](#) page, a new toggle switch is available to exclude any line items with no values.

Ability to expand and collapse all Inflow and Outflow sections on the Cash Forecast

In addition to expanding and collapsing line items on the [Cash Forecast](#) page, the entire Inflow and Outflow sections are now expandable and collapsible.

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 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 Healthcare Suite 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

No client-facing issues were addressed in 2023.1 specific to the Healthcare Suite, released on February 13, 2023. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

Technical considerations

No technical considerations are necessary for this release.