

Release Notes

Axiom Enterprise Decision
Support
Version 2023.2

The Axiom logo consists of the word "AXIOM" in a bold, white, sans-serif font. It is enclosed within a rectangular frame made of two parallel lines, one light blue and one light purple, which are slightly offset from each other.

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.2 release of Axiom Enterprise Decision Support. Each product release provides new features, enhancements, and configuration options. 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:

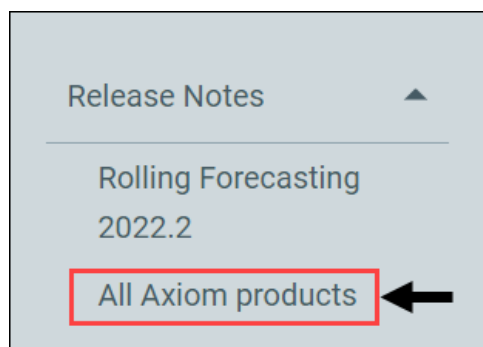
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

Each Axiom Healthcare Suite product has their own separate release notes that provide additional details about features and fixes that are specific to that product.

Prior to upgrading, review the **Axiom 2023.2 Release Notes** and the release notes for each product that is licensed by your organization.

► Accessing current and older release notes for Axiom Healthcare 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**.



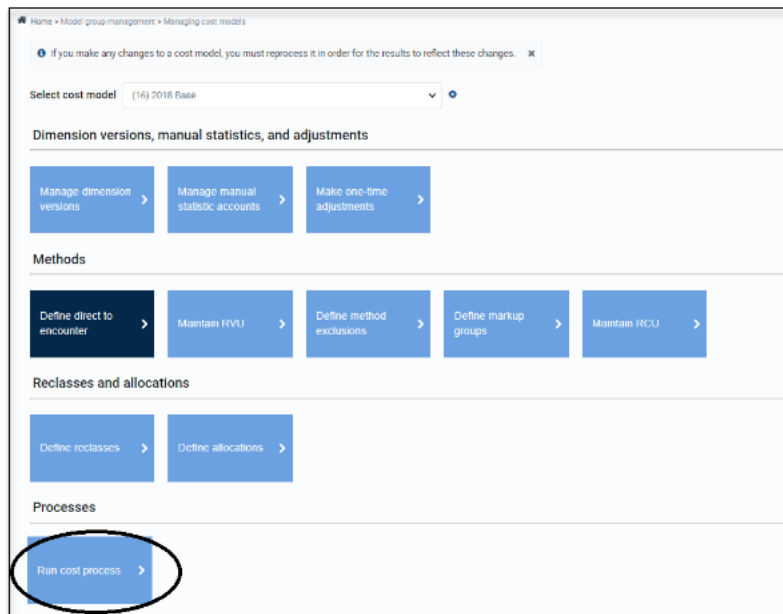
New features in 2023.2

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

Redesigned cost processing page

To make processing more streamlined and transparent, Syntellis redesigned the **Cost Processing** page. The result is one central page where you can manage and review all steps that are related to costing.

You still access the page from the **Processes** section of the **Managing cost models** page. To launch, click **Run cost process**.



► Navigation

Select from the following sections in the quick nav list:


- Acquire data
- Summarize results
- Reconciliation reports

► Acquire data

Use this section to control data that can be summarized or created to facilitate future cost processing.

Costing General Ledger (CGL) acquisition is the same as in previous Enterprise Decision Support (EDS) releases with the following enhancements:

- You must enter the beginning year, ending year, and month for the cost model, rather than just the ending year. The **From Year and Month** defaults to the start of the cost model period, which makes the range easier to view.
- To reload the CGL, use the toggles to select or clear the following items:
 - Clear manual statistic
 - Clear payroll statistics
 - Clear one-time adjustments
- Payroll statistics load both dollars and hours as statistics, rather than only dollars.
- Payroll statistics have their own process group and are not included with General Ledger (GL) actuals. This mechanism drives the select or clear toggling decisions when importing data. You can use this functionality in reporting.
- Date and status from the last GL import for the cost model are displayed.

Acquire data	
CGL	Last completed
<input type="checkbox"/> Import actual GL	03/22/2023 11:19 AM 

► Import data

With import data, you can process custom scheduler jobs directly from the cost process page and run them inline with other data acquisition tasks.

After you click **Select load type**, the section expands for you to enter import information necessary for processing.

You can select from four types of tasks:

- Microcost
- Relative Value Unit (RVU)
- Transaction microcost
- Other (used for any import task other than Microcost, RVU, or Transaction microcost)

Use **Select Document** to select the scheduler job from the **Scheduler Jobs Library** for processing.

Select Document

Scheduler Jobs Library

Click **Add load type** to add as many jobs as required. These tasks are run in-line with the other steps as indicated on the page and in the order you add them. This process occurs after the other data acquisition steps, but before any process cost steps.

NOTE: At this time, only standalone scheduler jobs that do not require variable input are applicable to select in this section.

► Direct to encounter (D2E)

You can create the D2E cost detail, which automatically clears any previous D2E detail that was associated with the cost model before processing. The date of the last successful completion is displayed, as well as the status of that job.

You can clear D2E cost detail if you no longer need to keep it.

► Cost Item Usage (CIU)

You can populate the CIU and review the last completed date and status.

Use **Select Document** to select the scheduler job from the **Scheduler Jobs Library** for processing.

► Process cost

This section displays a checklist of the steps to manipulate the CGL and calculate costing methods and provides the date of the last successful completion of every step.

Process cost			
	Process cost	Clear results	Last completed
Tx Micro	<input type="checkbox"/>	<input type="checkbox"/>	
Micro	<input type="checkbox"/>	<input type="checkbox"/>	
Reverse markup	<input type="checkbox"/>	<input type="checkbox"/>	
Reclasses	<input type="checkbox"/>	<input type="checkbox"/>	
Allocations	<input type="checkbox"/>	<input type="checkbox"/>	
Provider RVU	<input type="checkbox"/>	<input type="checkbox"/>	
RVU	<input type="checkbox"/>	<input type="checkbox"/>	
RCC	<input type="checkbox"/>	<input type="checkbox"/>	
RCU	<input type="checkbox"/>	<input type="checkbox"/>	

You can either process or clear the task in each line. The checklist automatically displays the recommended clearing logic when you process a step and provides a transparent view into the impact of selecting or clearing steps. The checklist can also be helpful for reprocessing certain steps.

In some instances, you may override the default clearing behavior by clearing the box under **Clear results**.

► **Summarize results**

Using this section, you can select one, two, or three of the following summarization steps for processing.

Summarize results			
	Process	Clear results	Last completed
Summarize cost model ⓘ	<input type="checkbox"/>	<input type="checkbox"/>	
Summarize encounters	<input type="checkbox"/>	<input type="checkbox"/>	
Summarize reporting tables	<input type="checkbox"/>	<input type="checkbox"/>	

The order is important and is enforced by the page:

- **Summarize cost model** – Writes costs to EncounterTotalCosts, CostDetailTotalCosts, and CostDetail, and summarizes data from the CostDetailCategoryCalculation (CDCC) and D2E_CostDetailCategoryCalculation tables.
- **Summarize to encounter** – Writes costs to the Encounter table and summarizes data from the EncounterTotalCosts table.
- **Summarize reporting tables** – Writes costs to the EncounterTotalCostsReporting (ETCR) and CostDetailCategoryCalculationReporting (CDCCR) tables and summarizes data from CostDetailCategoryCalculation (CDCC). This step replaces the need to run a PublishReportingTables scheduler job from the thick client.

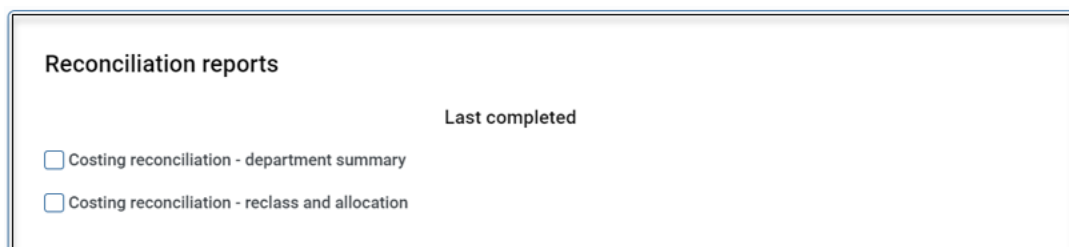
NOTE: These tables are cleared and repopulated during each run and include only data from cost models set as **Summarized to Encounter** as well as uncosted encounter data that already exists in Axiom.

To unlock and include subsequent tasks, you must complete earlier summarization tasks or select them to process on this run. Like the process cost section, each step is displayed with the option to process or clear the task. The last completed date is also displayed.

► Reconciliation reports

Because a key part of the costing process involves reviewing reconciliation reports, you can select from a limited number of standard reports on the Cost Processing page and generate them at the end of the costing process. These reports are refreshed for the current cost model and saved to the snapshot folder under the **EDS** section of the **Reports Library**.

The selection of cost model driven reports will continue to expand in future releases.



Reconciliation reports

Last completed

☐ Costing reconciliation - department summary

☐ Costing reconciliation - reclass and allocation

► Processing

After you make your selections, start the process by clicking **Process** under the navigation section of the page.

New Service Line Intelligence and data model

Axiom Cloud-only feature

Syntellis now offers a service line visualization using a new data model with Visual Insights (VI).

You must purchase VI to either use this visualization or leverage the data model. You cannot customize a data model without a VI license.

This new visualization replaces the legacy Service Line dashboard, which will remain in the product until the first release of 2024.

► Service Line Intelligence

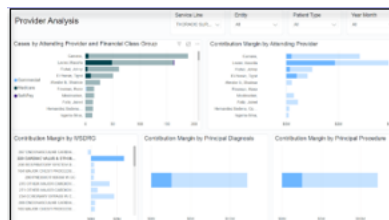
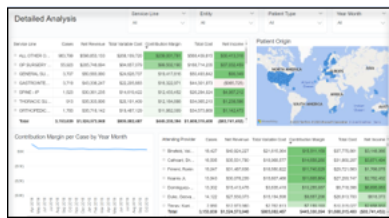
This new visualization appears in Report Library > Enterprise Decision Support in a new folder called **50 Visual Insight dashboards**. This is the location where all standard visualizations will be delivered in future releases.



▼ ☐ Enterprise Decision Support

- ☐ 01 Custom Costing Reports
- ☐ 02 Data Validation Reports
- ☐ 03 Recon Reports
- ☐ 04 DSS Reports
- ☐ 05 CPM Reports
- ☐ 50 Visual Insights Dashboards
- ☐ 99 Report Snapshots

The Service Line dashboard offers much of the same content that is available in the legacy versions, but in a format that replaces many tabular summarizations with updated informative visuals. See the following images for examples.



► EDS encounter model

The VI-based data model is the foundation for Service Line Intelligence. After acquiring the VI license, you can open, review, copy and modify a data model to view the source columns for dimension fields and calculations for measures.

Enhancements to EDS tables and standard imports

The following tables and standard imports were enhanced:

- Core table indexes
- Staging tables
- Standard staging to production imports
- Additional costing columns

► Core table indexes

Changes were made to the unique constraints on the following tables to enforce the sequence column as unique and eliminate duplicating sequenced records for any given encounter. This enhancement changed the following “code” columns to no longer be keys in these tables:

- CPT
- Diagnosis
- Procedure
- Payor

An audit is performed by Syntellis before the upgrade. If your system currently contains duplicates, Syntellis recommends retaining only the most recent records. Tables affected by this change are:

- EncounterDiagnosis
- EncounterPayor
- EncounterProcedure
- EncounterCPT

► Staging tables

The following staging tables no longer require, and will not accept, EncounterSeq. These tables were changed to accept your Encounter number directly, which is consistent with the structure of the Encounter, EncounterPatient, and CostDetail tables. The transform to look up or create an associated EncounterID was added to the standard imports, as noted in the next section.

- EncounterCPTStaging
- EncounterDiagnosisStaging
- EncounterEmergencyStaging
- EncounterPaymentStaging
- EncounterPayorStaging

- EncounterProcedureStaging
- EncounterProviderStaging
- EncounterSurgicalStaging

NOTE: These staging tables will be truncated when you upgrade.

IMPORTANT: Clients using custom imports **MUST** make appropriate adjustments to account for these changes before continuing their data loads in EDS 2023.2.

Recommended actions for your custom imports:

- Remove the EncounterSeq working column.
- Remove the EncounterSeq related transform.
- Map the client Encounter directly to the staging Encounter column.

► Standard staging to production imports

The following standard EDS imports were adjusted to account for the changes in the staging tables that were previously identified. These imports look up or create EncounterIDs as necessary and map the data into the EncounterID column:

- EncounterCPT from Staging
- EncounterDiagnosis from Staging
- Encounter from EncounterEmergencyStaging
- EncounterPayment from Staging
- EncounterPayor from Staging
- EncounterProcedure from Staging
- EncounterProvider from Staging
- EncounterSurgical from Staging

No changes were necessary for the Encounter, EncounterPatient, or CostDetail standard imports.

NOTE: If your organization does NOT use these standard imports, you are required to either adopt them or make those changes manually to your custom imports.

► Additional costing columns

Additional cost subtotal columns were added for convenience and consistency:

- CostDetailCategoryCalculation includes a TotalCost column in addition to the existing FixedCost and VariableCost columns.
- TransactionTotalCosts includes TotalCost, TotalFixedCost, TotalVariableCost, TotalDirectCost and TotalIndirectCost columns.

► **Standardized EDS folders**

New folders were added to the Report Library to keep EDS reports and dashboards organized within your system. New folders may be introduced within this numeric range as the product evolves.



What to know before upgrading

IMPORTANT: You must apply the latest Axiom upgrade before applying any 2023.2 Axiom product upgrades. Axiom upgrades are backward compatible so you can upgrade different products at different times, but you must upgrade to Axiom 2023.1 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

NOTE to Installers: With the release of Axiom Enterprise Decision Support (EDS) 2023.2, clients must perform some preliminary work to address various duplication and import adjustments. Technical Account Management (TAM) must ensure that clients make the changes identified in the EDS release notes in the sandbox after their initial refresh and upgrade.

TAM must contact the EDS product team for any upgrade to EDS 2023.2 moving forward.

When upgrading to the 2023.2 version of Axiom Enterprise Decision Support, 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 returned to its original location.
- Syntellis product templates and calculation method libraries are replaced.
- Product task panes are replaced.
- Process definitions are not replaced. Process Manager will not currently work with the new system tables and web-based pages and utilities. Please review and potentially revise any Cost Accounting process definitions, depending on the scope and tasks that were created and are in use.
- 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 described in the release notes. For example, Process Manager-defined processes for Cost Accounting must be modified by Client Success and have limitations with accessing web-based tasks.
- 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, 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 familiarize yourself 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:
 - Desired Axiom platform version.
 - Desired Axiom for Healthcare product and version.
 - Indicate whether to first refresh the Axiom test sandbox with a copy of the production instance of Axiom and apply update(s) to it. If so, provide the soonest that Syntellis can do this.
 - Propose an approximate two-hour downtime window when Syntellis can apply update(s) 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 needed to enable features for this version.

Getting help and training

Syntellis provides world-class resources directly within the Axiom system. Axiom Help provides topics, release notes, webinar/training announcements, and videos to guide you through managing your system.

To access these resources, click **Online Help** from the **Main** or **Admin** tabs, and then select the product. Axiom Help opens in a new browser. The online help opens only for products you are licensed to use.

► 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 2023.2

The following table lists resolutions for issues addressed in 2023.2, released on May 15, 2023:

Issue	Description
Manual statistics not sorting properly in the web [163198]	<p>Summary: When managing manual statistic accounts in cost modeling, interactive column sorting did not work in edit mode.</p> <p>Resolution: Column sorting works in edit mode by either ascending or descending order.</p>
Reclasses: Active reclasses from other reclass versions are selected for processing [163544]	<p>Summary: When processing a reclass definition, all active reclasses that were selected from other reclass versions failed during processing.</p> <p>Resolution: For successful processing, reclasses with no results in the Costing General Ledger (CGL) table include only the cost model-specific reclass definitions.</p>
Cost model configuration: No additional entities can be added after a delete and save in the cost model [164546]	<p>Summary: You could not add entities after deleting or saving entities when modifying a cost model. If previous entities were not modified, new entries were ignored.</p> <p>Resolution: Differences between the previous and new entity lists are compared, and if the entity exists in the cost model modification, it is saved.</p>
System configuration: Reclasses and Account range are not added to EDSAcct by default [163585]	<p>Summary: New accounts that corresponded to added reclass account range and allocation account range were not added by default to the EDSAcct table in the current version.</p> <p>Resolution: New accounts that corresponded to added reclass account range and allocation account range accounts are now added by default on the EDSAcct table in the current version.</p>
Account type for Advanced and Standard Methods offset accounts should be Expense and not NA [166880]	<p>Summary: When setting the Advanced Method Offset Account and Standard Method Offset Account in Configure System Settings, the new ACCT records were not created with Expense as an account type. Instead, they were created as an NA account type, which led to reconciliation variances when calculating cost in EDS.</p> <p>Resolution: The account type was modified to be Expense when adding new Standard Method Offset Account and Advanced Method Offset Account on the System Configuration page in EDS.</p>
Update the mapping on ABC-02. MicroCostItem Load to read from	<p>Summary: The MicroCostItem Load import starter template was not updated to work properly in EDS systems 23.1 or later.</p>

Issue

MicroCostItem table [168454]

Description

Resolution: Mapping was updated on ABC-02. The MicroCostItem Load to:

- Target the MicroCostItem table
- Removed references to version column
- Provided support for ServiceYM with new mapping and validation
- Added new transform to insert record in CostModelTaskExecution
- Deleted redundant transform steps (set CostCatID, set CostItemID)
- Removed new CostCat record creation

Issues fixed in 2023.2.1

The following table lists resolutions for issues addressed in 2023.2.1, released on June 19, 2023:

Issue	Description
Publish Reporting Tables – subtotal columns not calculating appropriately [54160] [54167] [51869]	<p>Summary: For some clients, total and subtotal columns were not calculating appropriately.</p> <p>Resolution: Modified the Publish Reporting Tables job for using underscores in costcat names and various costcat configurations.</p>
Encounter Dirty Transform missing on CostDetail from Staging table [53947]	<p>Summary: Encounter Dirty Transform was missing from the Staging table on CostDetail.</p> <p>Resolution: A new transform was added to the transform list for the CostDetail from the Staging table.</p>
Visual Insights EDS Encounter Model's entity field is pulling from incorrect field [56092]	<p>Summary: The Visual Insights EDS Encounter data model was incorrectly pointing to Encounter.AdmittingProvider.Entity.</p> <p>Resolution: The data model was corrected to point to Encounter.Entity.</p>
EDS Service Line Intelligence visualization updates [56061]	<p>Summary: The Service Line Intelligence dashboard was displaying Total Variable Cost which was confusing in the context of the matrix visualizations.</p> <p>Resolution: The Total Variable Cost column was replaced with Total Direct Cost on the Detailed Analysis and Profitability Trends tabs.</p>

Issues fixed in 2023.2.2

No client-facing issues were addressed in 2023.2.2, released on July 17, 2023.

Issues fixed in 2023.2.3

No client-facing issues were addressed in 2023.2.3, released on August 14, 2023.

Issues fixed in 2023.2.4

The following table lists resolutions for issues addressed in 2023.2.4, released on September 11, 2023:

Issue	Description
[63801]	<p>Summary: The Save function was not successful even though no errors were present. Instead, the browser window displayed a 'Pending' spinner, the definition was not saved, and the system locked up. All processes that wrote changes to the database (such as cost processing, opening the desktop application, running ETLs, and so on) could no longer proceed and no error messages were displayed to users informing them of what happened.</p> <p>Resolution: The Save function now works correctly without errors and associated tables are populated with the correct information. If users attempt to save something that is invalid, errors explicitly state the issue.</p>
[71461]	<p>Summary: Syntellis provided AgeInYears on the JSON request, but if the patient was a baby, the AgeInYears was equal to 0 (zero). Currently, encounters that attempted to group an APR-DRG were returned as unable to be processed. 3M Support stated "If the birthdate is not provided, the system is required to pass age in days withage in years."</p> <p>Resolution: 3M processing populates request JSON to 3M service fields as follows:</p> <ul style="list-style-type: none">• BirthDate field should be populated by encPatient.DateOfBirth value• If encPatient.DateOfBirth is null or encPat.DateOfBirth <= '1901-01-01' (invalid value), BirthDate field should be empty, AgeInYears = encounter.AgeAtAdmission > Age.Age

Issues fixed in 2023.2.5

No client-facing issues were addressed in 2023.2.5, released on October 9, 2023.

Technical considerations

No technical considerations or instructions needed for this release.