Release Notes

Axiom Rolling Forecasting
Version 2023.2

AXIOM

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About the Release Notes

Syntellis is pleased to announce the 2023.2 release of Axiom Rolling Forecasting. 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**.
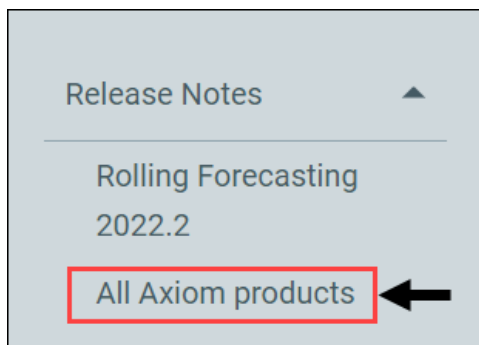
New features in 2023.2

This release includes the following new features and enhancements:

Added Quarterly and Annual views to reports

The Actual Compared to Forecast, Consolidated Income Statement & Key Metric, and Labor Summary reports have additional refresh variables that enhance the analytic review of data by providing quarterly and annual comparisons.

Automated headers for templates, reports, and utilities

Headers have been enabled for all templates, reports, and utilities when opened. Header can be hidden for presentation purposes, if desired.

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 2023.2 before the first product upgrade. Refer to the **Axiom Release Notes** for consideration before upgrading.

When upgrading to the 2023.2 version of Axiom Rolling Forecasting, 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.
- 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 or 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 then 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 refresh and apply upgrades.
   - An approximate two-hour downtime window when Syntellis can apply updates to the production instance of Axiom. The downtime window should occur during regular business hours of Monday through Friday 7 AM to 7 PM Central Time (except for 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, 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

No client-facing issues were addressed in 2023.2 specific to the Healthcare Suite, released on May 15, 2023. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

No client-facing issues were addressed in 2023.2, released on May 15, 2023.

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

Calculators

Issue	Description
RF Deductions Model - Config Utility set to Exclude persistently offers the option to select in GoTo menu [163091]	**Summary:** When items were selected for exclusion in the Deduction Model Configuration Utility, those options were still provided in the GoTo navigation menu. **Resolution:** The GoTo navigation menu was updated to provide only the options that are set to **Include** in the Deduction Model Configuration Utility.
RF Deductions Model - Config Utility set to Exclude for Revenue - Charity and Bad Debt reference hidden sections for quarterly calculations [163141]	**Summary:** The Inpatient (IP), Outpatient (OP), and Total Revenue amounts that were used to calculate the percentage of Administrative, Charity Care, & Bad Debt in the Deduction Model could disappear based on the selections in the Deduction Model Configuration Utility. **Resolution:** Updated the visibility formulas for the IP, OP, & Total Revenue rows within Deduction model to always **Show Row** regardless of inclusion/exclusion selection in the Deduction Model Configuration Utility.

Plan files — Forecast

Issue	Description
Other Deduction CMLs are not calculating as expected – inconsistent with other CMLs both in terms of inclusion/exclusion of adjustments and the percentage measure used to carry forward the deduction as a % of revenue [161232]	**Summary:** The Other Deduction and Other Deduction Payor Volume Linked calculation methods were not intuitive in how they were used in calculating patient revenue. **Resolution:** Made the following adjustments: • Changed the percentage of total revenue calculation to use an arithmetic adjustment (rather than geometric) for the inflation amounts • Incorporated the amount adjustments into the percentages • Allowed the amount adjustments to be included in the total deduction line even if the total patient revenue line is zero
Save/delete incorrect Initiatives tab with payor (162101)	**Summary:** When inserting a new CM into an initiative associated with a payor, some data issues occurred if the payor value was 0 (zero). **Resolution:** Added a new Axiom Query (AQ) to sweep child records when the parent payor records are deleted from the RF_Forecast table.
RF Patient Revenue Calc Method shows 2 different "Per Unit" amounts [167817]	**Summary:** Two different per-unit amounts appeared in the Patient Revenue calculation method. The value in the Net Inpatient Revenue Per Unit field was incorrect and did not match the value in the Average Rate Per Unit field. **Resolution:** Changed the formula on the Net Patient Revenue Per Unit line.

Reporting

Issue	Description
Case Number 00489619 - PFB: RF Consolidated Summary Drilling [162099]	**Summary:** Drill capability in the Consolidated Summary report did not function correctly in quarterly and annual period views. **Resolution:** Drill capability was restored when selecting the quarterly and annual period views in the Consolidated Summary report.

Issue	Description
RF Labor Summary Report - Monthly vs Quarterly Result Differences [164516]	**Summary:** When adding the Quarterly and Annual views to the Labor Summary report, the totals were not summed correctly when the data could be a blend of actual and forecast in the current quarter or year only. **Resolution:** Added a Supporting Data worksheet to the report, which calculates the mixed periods on a per-month basis and sums them correctly for the current quarter and year.
RF Consolidated Income Statement and Key Metric Report - Monthly vs Quarterly Result Differences [164725]	**Summary:** When adding the Quarterly and Annual views to the Consolidated Income Statement and Key Metric report, the totals were not summed correctly when the data could be a blend of actual and forecast in the current quarter or year only. **Resolution:** Additional columns and logic were added to the report to calculate the mixed periods correctly for both the current quarter and year.
RF Trend Report - Monthly vs Quarterly Result Differences [164726]	**Summary:** When adding the Quarterly view to the Trend report, the totals were not summed correctly when the data could be a blend of actual and forecast in the current quarter only. **Resolution:** Additional columns and logic were added to the report to calculate the mixed periods correctly for the current quarter.
RF Dashboard: Operational Overview is missing Descriptions from various KPIs (167654)	**Summary:** Expanded KPI boxes displayed multiple lines but no descriptions. **Resolution:** Removed the logic to save only if the record does not exist.

Technical considerations

Use this section to call out any issues that clients need to know about, including any related to upgrading/installation.

Writers: if there are no technical considerations for the release, do not include this topic in the release notes.