**Release Notes**

Axiom Budgeting and
Performance Reporting
Version 2023.2

AXIOM

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# Contents

# About the Release Notes

Syntellis is pleased to announce the 2023.2 release of Axiom Budgeting and Performance Reporting. 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 2023.1 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**.
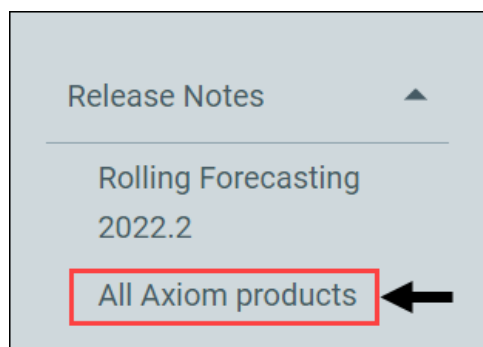
# New features in 2023.2

Axiom Budgeting and Performance Reporting 2023.2 includes the following enhancements:

- Added Visual Insights Content for manual delivery:

  - Altered the data model that provides a starter set of measures, fields, and tables to be included in a visualization in the Intelligence Center.

- Responded to Client Requests regarding Budget-Provider Comp Spread:

  - Added dropdown selections for Provider Hour & Dollar spreads to the 33 Budget Provider List Driver.

  - Added a row that houses global, configurable options for assigning spread methods to the 29 Budget Provider Configuration Driver.

  - Applied either the global spread option in the 29 Budget Provider Configuration Driver or the Provider-specific option in the 33 Budget Provider List Driver to spread the monthly budget salary expense values.

- Drill reports used in budget reporting:

  - Drill report used to provide GL Transactions from plan files referenced the current year from the Period Table, which is acceptable when preparing the Next Year Budget. However, when reviewing a plan file from a previous file group, the GL Transaction data could not be reconciled. A change was made to pass the variable for the year from the plan file, which remains static within the file group, instead of referencing the dynamic Period Table.

- Added a new Global Assumptions Calculation method, which pulls projected and next year budget values from the 03 Budget Statistics driver.

# 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.

When upgrading to the 2023.2 version of Axiom Budgeting and Performance Reporting, 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 currently 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 covered 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, 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

## Drivers, templates, calc methods, and other non-reporting features

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

Budgeting: templates, plan files, and drivers

| Issue Description | Description |
|---|---|
| Case Number 00478190 - Jobcode tab, Paytype Mapping not being picked up due to MATCH range in various CMLs. [150390] | **Summary:** Look-up ranges in calculation methods were an inconsistent number of rows, which sometimes caused inconsistent results. <br><br> **Resolution:** Adjusted look-up ranges to remove row references and perform full-column review. |
| BP Reconcile Payroll12 to Financial-Dollars - Primary table for File Processing requires revision - static BUD2014. [#154737] | **Summary:** The primary table used for file processing in the Reconcile Payroll12 to Financial Dollars was set to a static BUD2014 setting instead of dynamic DEPT. <br><br> **Resolution:** Adjusted the primary table to be DEPT. |
| Duplicate of Dept Other Pay on Full Process - Staffing & Employee tabs. [#154935] | **Summary:** A duplicate row of Department Other Pay was added to the plan file when performing a full process more than once. <br><br> **Resolution:** In the Dept Pay CMs (Dept_InputTotal, Dept_InputMonthly, & Dept_AvgPerProdHr), integrated preset keys for AQ control columns were based on sum by structure. |
| BP JobCode tab - Dept_InputMonthly CM - Dollars input fields require default flag rebuild logic to preserve user changes. [#154950] | **Summary:** The build plan file replaced user changes with a default calculation. <br><br> **Resolution:** Identified a manual override for dollar input field calculations that were required for rebuild logic to preserve user changes. |
| ProviderDetail tab - Potential rebuildability issues for first few rows in details section. [#155570] | **Summary:** Inputs for the first few rows were not always present in the Provider Details. <br><br> **Resolution:** Identified and fixed rebuild issues with interaction between the Provider driver and processing plan files. |

| Issue Description | Description |
|---|---|
| Current Year Projected Rate Percent in Driver 14 Calculated Twice in Budget Plan Files. [#160067] | **Summary:** When Driver 14 Budget Labor Rates were used to add in a Market adjustment for current year rates, Empl_List was not used, and the jobcode block used Base in Jobcode Labor Methodology, the percentage appeared to be factored in twice when applied to the Start Rate in plan files.<br><br>**Resolution:** Removed first instance of the multiplication made to the Base rate increase. |
| Case Number 00489385 - Initiative Dollars and Hours Duplicate in Bud_Pay12 with Emp Labor Type. [#162098] | **Summary:** Salary dollars and hours that were entered as a Dept Initiative were duplicated on the Employee tab due to Save tags on both the Initiative and Employee tabs.<br><br>**Resolution:** Removed the Save tag in Employee Labor Method, which removed duplicate salary dollars and hours saved from the Employee tab. Amounts are now only saved from the Initiative tab. |
| BP Provider Detail - Comment and Spread saves to table but setup restricts querying database values. [#163298] | **Summary:** The BP Provider Detail - Comment and dropdown list was saved to the table, but the setup restricted querying database values. The plan file did not query user changes.<br><br>**Resolution:** Identified and fixed rebuild issues with interaction regarding the Provider driver and processing plan files. |
| Case Number 00492156 - Budget Workbook, Jan-June Expense is not Correct. [#164180] | **Summary:** Projected expenses were not calculated correctly following a KHABgtMap compliance update.<br><br>**Resolution:** Modified the data lookup for default value purposes to be KHABgtCode-compliant only. |
| BP Expense tab Add New Detail CM is not rebuilding correctly. [#164559] | **Summary:** When inserting Add New Detail CM after a rebuild, the data that was inserted was lost.<br><br>**Resolution:** Added batch numbers to capture and save data. |
| Total Revenue Variance Formula can produce incorrect results when the deduction variance is negative [#38656] | **Summary:** In the Stat_Rev tab, the dollar variance formula on the Total Revenue row summed patient and other revenue and subtracted deductions. However, when the deduction variance was negative, this formula subtracted a negative, which caused an unintended summation.<br>**Resolution:** Changed the formula in U116 to R116-K116. |

| Issue Description | Description |
|---|---|
| Expense tab: Use Preliminary Estimate on Detail Calc method setting of No doesn't Hide Row [#38878] | **Summary:** When [BUDGET CONFIGURATION DRIVER] 'Use preliminary estimate on detail calc method?' is set to 'No', the preliminary estimate line appears in the plan file.<br><br>**Resolution:** Added a Hide/Show feature to the CT and DJ columns on the second row of the Add New Detail and the Detail calculation methods. |
| Suppress Global Adj column N in Provider_Simple_Rev calc method. [#63904] | **Summary:** Global Revenue Adj% appears in column N in the Provider_Simple_Rev calculation method.<br><br>**Resolution:** The Global Adj% is not used in this calculation and no longer appears in column N. |
| Driver 14 Budget Labor Rates - Not applying rates consistently between Staffing and Employee labor type [#164708] | **Summary:** When no employees were associated with a jobcode on the Empl_List tab and a merit increase was applied from driver 14, the increase was not applied on the Staffing **labor** tab.<br><br>**Resolution:** Updated the formulas that do not depend upon an hours check on the Staffing tab. |
| Case Number 00502656 - 02 Labor Configuration Driver, If February is included in the YTD from the Variables tab, M45 changes to TRUE and the YTD hours and ProjCalc hours for the current year does not calculate correctly. [#167861] | **Summary:** The current year Year-To-Date and Projected FTE factors in the 02 Budget Labor Configuration Driver were incorrectly calculated when the month of February was included in the current year YTD period when budgeting for a Leap Year and the FTE Scale selected was Yearly or Monthly.<br><br>**Resolution:** The formulas associated with the Yearly and Monthly FTE scale options were updated to correctly calculate the current YTD and Projected FTE factors. |

Performance Reporting

| Issue Description | Description |
|---|---|
| Bi-Weekly Payroll Analysis is showing incorrect XValueName due to different formula compared to the rest of the row. [#160559] | **Summary:** Identified a field in AVG Hourly Rate on the Productivity tab that did not pull the correct XValueName.<br><br>**Resolution:** Identified the outlier formula compared to row pattern and adjusted to a similar, functional formula. |
| Executive Monthly Package - Incorrect Time Periods on BVRollup tab [#40933] | **Summary:** On the BV Rollup tab, the Current YTD and Last YTD both displayed the current year.<br><br>**Resolution:** Updated the information that appears in cell W3 to display the previous year. |

# Issues fixed in 2023.2.1

The following table lists the resolutions for issues addressed in 2023.2.1, released May 26, 2023:

Budgeting: templates, plan files, and drivers

| Issue Description | Description |
| --- | --- |
| Budget Provider Config Driver 29 - Monthly FTE Spread for Providers inputs not responding to Monthly Default Spread for Providers Source dropdown. [#169930] | **Summary:** Monthly FTE Spread for Providers inputs did not respond to the Monthly Default Spread option on the Providers Source dropdown. <br><br> **Resolution:** Inputs now respond to the selected picklist option. |

# Issues fixed in 2023.2.2

The following table lists the resolutions for issues addressed in 2023.2.2, released July 17, 2023:

Budgeting: templates, plan files, and drivers

| Issue Description | Description |
|---|---|
| Case Number 00507639 - Target budget adjustment not saving as expected on Employee tab. [#59160] | **Summary:** For departments budgeting by employee, the target adjustments from the budget plan files did not save the dollars and hours from the Employee tab to the Bud_Pay12_XXXX database table. This issue caused various reports to show different budget values for salaries.<br><br>**Resolution:** Copied hour and dollar cell references from FE109:GE109 to FE107:GE107. |

# Manual setup instructions

There are no manual setup or configuration steps required for this release.