**Release Notes**

Axiom Healthcare Suite
Version 2023.2

AXIOM

320 N Sangamon St
Suite 700
Chicago, IL 60607
(847) 441-0022
www.syntellis.com
info@syntellis.com

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# Contents

# About the release notes

Syntellis is pleased to announce the 2023.2 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

Please note the following product/platform dependencies before taking upgrades in your environment.

As a general recommendation, you should upgrade to the latest version of Axiom platform and the latest product versions. However, if upgrading is not an option, consider the following dependencies when upgrading to the Axiom platform or any product in your system to a version that is newer than 2021.3:

- Clients with Comparative Analytics are required to upgrade to 2022.1 or greater at the same time.

- Clients must upgrade most Financial Planning and Analysis (FP&A) products to version 2021.3 or later when Axiom platform or any installed product is upgraded to version 2022.1 or greater. For details, refer to the following table.

- Rolling Forecasting 1.0 clients (before 2020.4) are required to upgrade to version 2021.3 or later.

  > **NOTE:** Rolling Forecasting 2021.3 represents a new install and not a standard upgrade. Online documentation, videos, and services are available to support this process and help your organization move forward.

- 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 upgrade to 2020.31.

The following table describes upgrade considerations that your product administrator should review to determine the applicable course of action:

| Product | Considerations |
|---|---|
| Axiom Software Platform | In most cases, Axiom platform must be upgraded if any product is upgraded. As a best practice, keep the Axiom Platform on the latest version and patch that is available. |
| 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. <br><br>**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.<br><br>**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 | No required upgrade considerations are necessary with this release. |
| Axiom Comparative Analytics | Upgrade.<br><br>**NOTE**: This product must be on version 2022.1 or greater to move the platform or any other product to 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.<br><br>**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. |

| Product | Considerations |
|---|---|
| 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, 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.<br><br>Syntellis offers documentation and videos to guide you through this process and has services available to assist. Please plan accordingly.<br><br>**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. |
| 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 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 Healthcare Suite, note the following:

- 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, 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 2023.2 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 drop-down selections used for Provider Hour & Dollar spreads to the 33 Budget Provider List Driver.

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

  ○ Applied either the global spread option selected in the 29 Budget Provider Configuration Driver or the Provider-specific option selected 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 was referencing 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 would not tie. A change was made to pass the variable for the year from the plan file, which will remain static within the file group instead of referencing the dynamic Period Table.

# Axiom Clinical Analytics

Welcome to Version 2023.2 of Axiom Clinical Analytics!

Enhancements in this release include:

**Profile filters added for all fields in Details**

You can add profile filter types to fields with a "Group By" designation on the Details page.

**Updates for FY 2023 Q1 CPT/PLA**

Current Procedural Terminology (CPT)/Proprietary Laboratory Analyses (PLA) code sets and descriptions were updated for 2023 Q1. The updates include profile filters, details view, and clinical case summaries. New codes and updated descriptions appear anywhere in the system where CPT codes exist.

**Scorecards reporting: Clinical Case Summary updates**

For users with access to clinical case summaries, the following new columns are available when clicking the **DRG, Diagnosis, and Procedures** tab under the Procedures label:

- Operating Physician
- Operating Physician ID
- Anesthesiologist
- Anesthesiologist ID

**Scorecards reporting: Advanced Analytics updates**

In Advanced Analytics (Pharmacy, CPT, Service Details, Treatment Analysis), when you select the physician role, the new options are:

- Operating Physician (Principal Px)
- Operating Physician (Principal or Secondary Px)

**Scorecards reporting: Easy Patient Download charges**

The column headers on the **Detail Charges Download** Excel file and Details page changed to **Operating Physician (Principal Px)**.

**Scorecards reporting: Easy Patient Download export updates**

Four columns and labels were added to the **Easy Patient Download** Excel file on the **Procedures** tab:

- Operating Physician
- Operating Physician ID

- Anesthesiologist

- Anesthesiologist ID

**Scorecards reporting: Last Day of Service updates**

For scorecards, you can select two new options in the Last Day of Service section:

- Operating Physician (Principal Px)

- Operating Physician (Principal or Secondary Px)

**Scorecards reporting: Patient List updates**

For scorecards, the column header was updated as **Operating Physician (Principal Px)** in the Patient List section.

**Account number column added to Easy Patient Download and populated**

In scorecards, an **Account Number** column was added to the **Diagnoses**, **Procedures**, and **Physicians** tabs of the **Easy Patient Download** Excel file. The column is populated with the patient account number to reference patients in the report.

**PPE: Speed increased in Dashboard tab with many workflows**

Processing speed was improved in the Physician Practice Evaluation (PPE) dashboard tab, even when multiple workflows are displayed.

The **Physicians** tab shows physicians for every physician role, except those that are subsets of other roles.

**New SDOH measure created**

The Social Determinants of Health (SDOH) measure was added to scorecards and Physician Practice Evaluation (PPE) reports in areas where you can add a section.

For more information about SDOH and using ICD-10-CM Z codes, see Centers for Medicare & Medicaid Services.

**3-Day Readmission measure added to readmission reports**

For integration into the readmission analysis tools, a 3-Day readmission measure was added to the following reports:

- Frequent Readmission report - Simple

- Frequent Readmission report - Detail

- Readmission block

- Readmission Analysis section

- Readmission Bar Graph Analysis section in PPE

- Clinical Case Summary Quality and Safety tab

# 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 2023.1. For more information, see Axiom 2023.1 Release Notes.

# Axiom Comparative Analytics

Comparative Analytics delivers the following new and updated features and enhancements:

## Data Compliance Audit report

The Data Compliance Audit report provides a single reporting view of the Axiom financial data readiness each month. It identifies missing data sources, invalid and missing standard data identification, and reconciliation between data sources. Each of these areas impact the data quality of multiple products and analytic readiness.

This enhancement results in more accurate comparative peer group data.

## Comparative Analytics Admin budget table update

The options to build budget tables for the years 2018 to 2021 are no longer available on the Comparative Analytics Admin task pane. Starting with this release, the only budget table options are for the years 2022 - 2025.
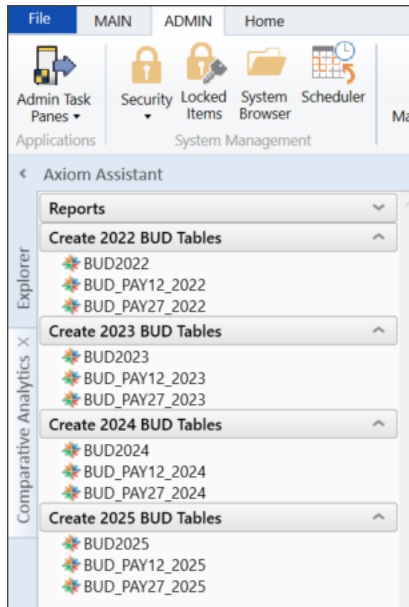


## CPA_SyncAIDataJob update

The daily scheduling rule for the CPA_SyncAIDataJob task is no longer available. Starting with this release, the task can be executed either manually or via the Comparative Analysis landing page event trigger.

# Axiom Contract Management

Axiom Contract Management 2023.2 delivers the following features and enhancements:

Enhancements in the release include:

**Correct rate displays based on Calc Type**

When viewing and editing clauses/terms with Calc Basis 'Any and All Services' and 'All Other Line Items', the full rate (up to four decimal places) is now displayed in the rate and as a tool tip from the clauses/terms page.

**Improved Drill-Down Reports**

Drill-Down Reports were modernized for enhanced speed and stability.

# Axiom Enterprise Decision Support

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**.
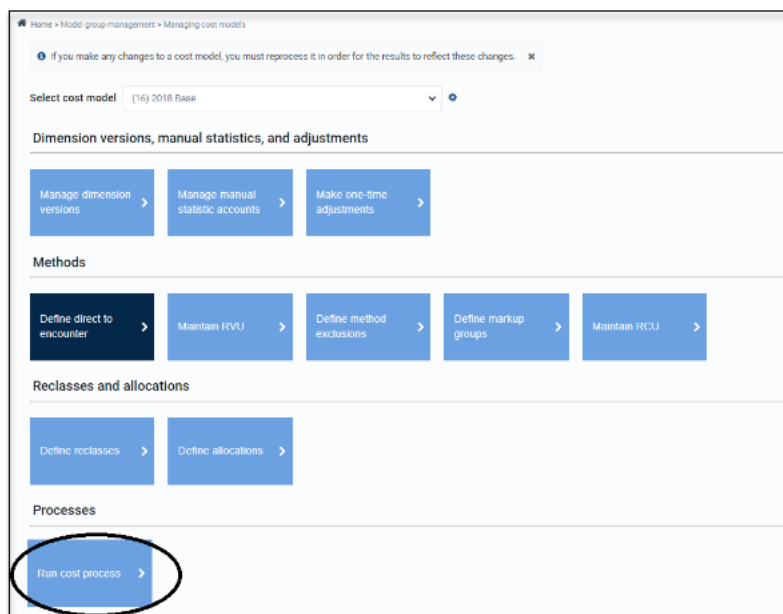


▶ **Navigation**

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.



▶ **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.

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.

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.



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.
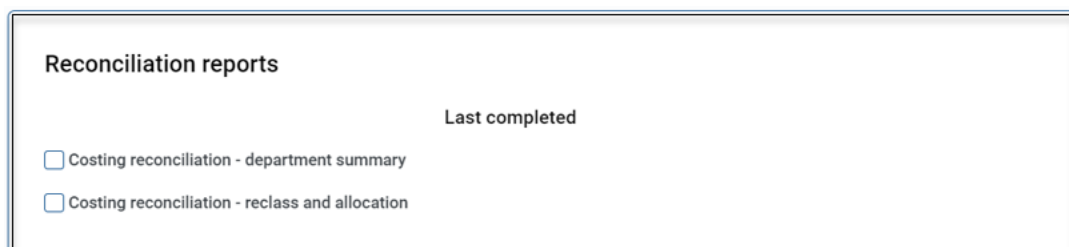


► **Processing**

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

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.
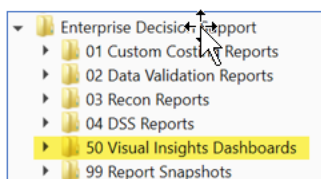


The service line dashboard offers much of the same content that is available in the legacy versions, but in a format that replaces many tablular summarizations with updated informative visuals. See the following images for examples.
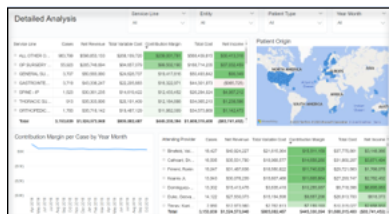
▶ **EDS encounter model**

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.

# Axiom Financial Planning

While no new functionality has been added or enhanced in Axiom Financial Planning 2023.2, it does deliver enhancements from Axiom Version 2023.1. For more information, see Axiom 2023.1 Release Notes.

# Axiom Rolling Forecasting

Axiom Rolling Forecasting includes the following new features and enhancements in this release:

## 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.

# Axiom Strategy Management

While no new functionality has been added or enhanced in Axiom Strategy Management, this product does deliver enhancements from Axiom Version 2023.1. For more information, see Axiom 2023.1 Release Notes.

# Axiom Treasury Management

New features for 2023.2 include the following:

**Added report for Earnings Credit Rate (ECR)**

Added a new reporting page to enter variables for the Earnings Credit Rate (ECR) calculation, which quantifies the minimum balance required to offset fees. This calculation helps you understand the recommended option of either hard interest or offset fees.

Enhancements in this release include:

**Updated user interface (UI)**

- Applied the latest design standards to improve the layout of all pages in Treasure Cash Management for better usability, consistency, and clarity.

- Modified menu option names to be clearer, more intuitive, concise, and easier to navigate.

- On the Working Capital dashboard, added functionality to toggle between **Main** analysis (to view the lag analysis, sensitivity analysis, and average cash balance by month) and **Activity** analysis (to view debits, credits, dispersions, and net activity).

- Categorized groups of columns on the Exclusion Rules page.

**New date range viewability on Cash Forecast page**

Implemented a date range selection on the Cash Forecast page to view overall data within a specified time.

**Included Default Interest Rate field**

Added a **Default Interest Rate** field in Cash Flow/Working Capital (CFWC) Settings to be used on the Yield Opportunity page.

**Improvement to data imports**

Exclusion rules are now applied to the imported data and existing data as part of the daily CFWC import process.

# 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 2023.2

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.

# Technical considerations

No technical considerations are necessary for this release.