**Release Notes** Axiom Healthcare Suite Version 2023.3



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## About the Release Notes

Syntellis is pleased to announce the 2023.3 release of 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

**TIP:** Periodically, the release notes are updated when new information is available, including patch release fixes. To view the latest release notes, we encourage you to view them in the Axiom Healthcare Suite online help. On the help home page, click the Release Notes link at the top of the page.

Accessing current and older release notes for Axiom Healthcare and Axiom Financial Institutions 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**.

Release Notes	
Rolling Forecasting 2022.2	
All Axiom products	-
	-

## New features summary

The following enhancements are included in this release.

In the Healthcare Suite 2023.1 release, we validated six Paytype columns, which also required manual steps post upgrade. This feature and manual instructions are well documented in the Budget Planning/Performance Reporting release notes.

The Paytype table and these six columns belong to Common Data/Items. This means, regardless of which product you upgrade, these changes occur. In some cases, this has surprised you, or went unnoticed (so the manual steps did not get performed) and/or generated phone calls to Support.

If you use any of these six columns (GLAcct, HrAcct, Jobcode, Staffing, Employee, Provider), you must perform the manual steps after the upgrade.

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
- 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 2023.3 includes the following enhancements:

### **Budget Planning**

#### Enhanced Lump Sum Calculation workflow

Improved the user experience and flow of data from the drivers that assign configurations and budget rates:

- Corrected and improved the calculation of the Lump Sum Payout on the Jobcode, Employee, Staffing, and Employee\_List tabs within the template:
  - ° Recognized the Max Cap rate when met.
  - Added a date selection dropdown to improve date configuration in the 14 Budget Labor Limits Driver.
  - ° Applied Merit and Market rate increases in the applicable periods.
  - Corrected the calculation of the Lump Sum Payout to be the incremental result, which recognizes when the Max Cap rate is met subsequent to when Merit and Market increases are applied.

#### Budget Provider Configuration driver updates

The following updates were made to the 29 Budget Provider configuration driver:

- Added the BudgetGroup function. After this update, you can assign specific configurations to various provider groups instead of as being limited to the previous single Global option.
- Updated the Master and Provider templates to recognize this enhancement to the driver.
- Added refresh variables to select budget groups as an option, similar to other drivers.

#### Statistics and Revenue: Input Monthly calculation method update

Modified the following calculation methods on the Stat\_Rev tab to function the same as the Input Monthly calculation method on the Expense tab:

- Input Monthly
- Add New Input Monthly
- Add Detail Input Monthly

#### Database table enhancements

This release also provided the following enhancements to the database tables:

- Created the following budget and reporting database tables for the year 2025:
  - \Axiom\Table Library\Budgeting\Flex Budget\FLX2025
  - ° \Axiom\Table Library\Management Reporting\Actuals\CY Forecast\CYF2025
  - ° \Axiom\Table Library\Management Reporting\Actuals\Financial\ACT2025
  - ° \Axiom\Table Library\Management Reporting\Actuals\Payroll\ACT\_PAY12\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Payroll\ACT\_PAY27\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Payroll\EMPLOYEE\_ROSTER\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Physician\ACT\_PROV\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Rev Usage\ACT\_RU\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Transactions\GLTRANSACTIONS\_ 2025
  - \Axiom\Table Library\Management Reporting\Actuals\Health Plan\ACT\_HP\_2025
  - \Axiom\Table Library\Management Reporting\Actuals\Service Line\ServiceLine\_2025
- Updated the Employee\_Roster\_[YEAR] table to store Jobcode/Step as a string value with a limit of 50 characters.

**NOTE:** This update changes the Jobcode/Step data type from numeric to string, so if the Employee\_Roster\_[YEAR] table was updated historically, the Step data type is updated from numeric to string within the data import.

• Updated 10-Load Employee Master to account for the changed Step data type.

Miscellaneous enhancements

- Updated the following Labor tabs so that the hours used to calculate FTEs reference what is set in the 02 Labor Config driver:
  - ° Jobcode
  - ° Employee
  - Staffing
  - ° Provider
  - Empl\_List
- Updated the 'Change Payroll 27 Tables Current Period' link in the Budgeting Admin task pane to launch the form in the Desktop Client.
- Added a dropdown to input an average hourly rate when you add a new Jobcode block with no historical data on the Employee tab.

### Performance Reporting

Visual Insights: Seed Additional Data

Created a data model that provides a starter set of General Ledger (GL) tables for Actual and Budget and related fields from the DEPT and ACCT tables. You can use the data model to process this information in a visualization in the Intelligence Center.

### **Clinical Analytics**

Clinical Analytics 2023.3 includes the following new features and enhancements:

#### 'Group by' added for readmission DRG

You can add 'readmits group by' to the following sections to determine readmission diagnosis-related group (DRG) analytics:

- Details
- Easy Patient Download
- Readmission Analytics for forward-looking readmission DRG. If a patient does not have a readmission, this field is blank.

Group Options	I		×
Filter Values:			
New Grouping:	Readmit - MS-DRG	~	
Add Columns:	ZAII Readmit - MS-DRG		
● At End ○ At Be	ginning 〇 After		
Facility ID	~		
	OK Cancel		

#### Updates for quarterly 2023 Q1 CPT/PLA

Current Procedural Terminology (CPT)/Proprietary Laboratory Analyses (PLA) code sets and descriptions were updated quarterly 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.

#### MDC added to AHRQ grouper

You can use the Major Diagnostic Category (MDC) in the Agency for Healthcare Research and Quality (AHRQ) grouper.

#### Unreleased Control Reports made visible

You can review both unreleased and released control reports to determine when to release data.

#### Physician Level MIPS measures added

The following Merit-Based Incentive Payment System (MIPS) measures were created so that data containing MIPS can be reported against:

- MIPS 001 Diabetes: Hemoglobin A1c Poor Control
- MIPS 005 Heart Failure (HF): Angiotensin-Converting Enzyme (ACE) Inhibitor or Angiotensin Receptor Blocker (ARB) or Angiotensin Receptor-Neprilysin Inhibitor (ARNI) Therapy for Left Ventricular Systolic Dysfunction (LVSD)
- MIPS 006 Coronary Artery Disease (CAD): Antiplatelet Therapy
- MIPS 007 Coronary Artery Disease (CAD): Beta-Blocker Therapy Prior Myocardial Infarction (MI) or Left Ventricular Systolic Dysfunction (LVEF < 40%)</li>
- MIPS 039 Screening for Osteoporosis for Women Aged 65-85 Years of Age
- MIPS 093 Acute Otitis Externa (AOE): Systemic Antimicrobial Therapy Avoidance of Inappropriate Use
- MIPS 110 Preventive Care and Screening: Influenza Immunization
- MIPS 111 Pneumococcal Vaccination Status for Older Adults
- MIPS 112 Breast Cancer Screening
- MIPS 113 Colorectal Cancer Screening
- MIPS 130 Documentation of Current Medications in the Medical Record
- MIPS 185 Colonoscopy Interval for Patients with a History of Adenomatous Polyps Avoidance of Inappropriate Use
- MIPS 236 Controlling High Blood Pressure
- MIPS 326 Atrial Fibrillation and Atrial Flutter: Chronic Anticoagulation Therapy
- MIPS 331 Adult Sinusitis: Antibiotic Prescribed for Acute Viral Sinusitis (Overuse)
- MIPS 438 Statin Therapy for the Prevention and Treatment of Cardiovascular Disease
- MIPS 444 Medication Management for People with Asthma

### **Axiom Contract Management**

Axiom Contract Management 2023.3 includes the following features and enhancements:

#### Calculated Columns in Drill-Down Reports

The Calculated Column user interface (UI) in Drill-Down Reports is now available for users to add and edit Calculated Columns.

#### Multiple code types in Global Limit Exclusions

Both Revenue Code and Line-Item Codes can now be applied simultaneously to a Limit Exclusion.

#### New calculation for Inpatient Stop Loss

- Added new ability to calculate Inpatient Stop Loss using average daily charges and calculated per diem days.
- The new Inpatient Stop Loss calculation results are displayed on the voucher, along with the standard reimbursement.

### **Axiom Comparative Analytics**

Axiom Comparative Analytics 2023.3 includes the following new features and enhancements:

#### Department Peer Group Fit Analysis report

The Department Peer Group Fit Analysis report provides a mathematical approach to measure each department's fit into its assigned peer group. This measurement helps determine if a peer group change is needed.

#### Statistic Classification report

The Statistic Classification report utility displays department information related to the volume classification assigned to the ACCT (Account) dimension. This report allows changes upon review and saves those changes to the ACCT dimension.

#### Practice Audit report

The Practice Audit report provides a data audit for Budget Provider clients to highlight their readiness and completeness of physician billing data for Comparative Analytics and provider budgeting. This audit improves data integrity by showing where to make updates or corrections.

#### Global Workforce Opportunity report

The Global Workforce Opportunity report provides a facility-level view by department, reflecting the current state of the workforce versus the next two deciles of peer group benchmark comparisons. The comparisons result in quantifiable FTE and dollar opportunity estimates that potentially could be achieved if the departments were assigned and met the peer group benchmarks.

## Axiom Capital Planning and Capital Tracking

Axiom Capital Planning and Capital Tracking 2023.3 includes the following enhancements:

#### Capital Transfer utility

Updated the Capital Transfer utility so that it completes the sequence of formulas in the Transfer calculation method column CO. After this update, you will not receive the duplicate TRX error when you add more than three transfers.

#### Project Tracking report

Updated the Excel version of the Project Tracking report so that it can open a purchase request plan file.

#### 2025 file group

Added the Capital Planning 2025 file group to the file group library.

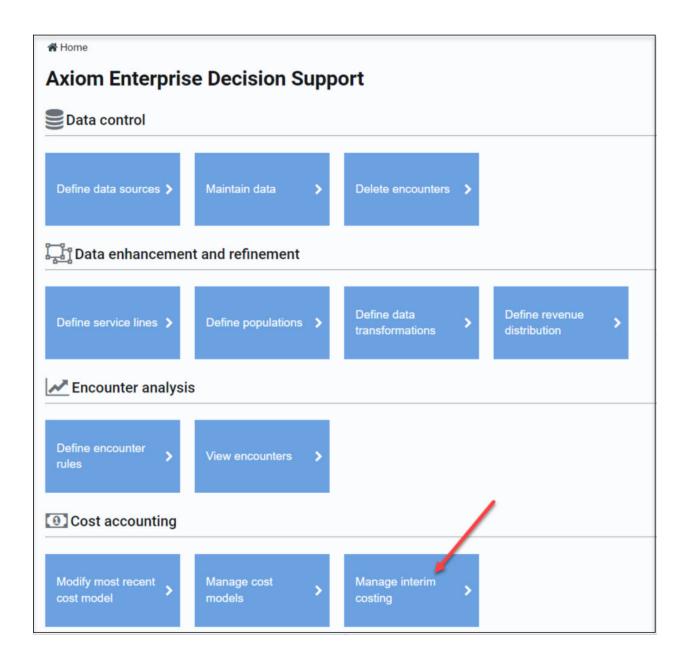
## **Axiom Enterprise Decision Support**

Axiom Enterprise Decision Support 2023.3 includes the following new features and enhancements:

### Interim costing

Use interim costing to leverage previously costed cost models and assign those costs to newly loaded data without having to process a cost model. This feature is helpful when you do not plan to run costing for a while, but continue to load data.

Applying interim costs to your new data lets you run analysis on the most current data and avoid waiting until you run the cost processing analysis again. For example, if you load data nightly, you could configure interim costing and schedule it to run as the last step of your nightly load. That data would have costs associated with it by the next morning versus waiting until it is time to run monthly costing.



### Revenue distribution

Use revenue distribution to include non-adjudicated payments and adjustments (such as payor quality incentives, cost report settlements, and so on) in your decision-support reporting. This feature provides a user interface-standardized process for managing these payment and adjustment definitions and eliminates the need for historically created customized approaches.

Create targeted distribution rules that identify the applicable encounter population to receive these payments or adjustments, along with a basis for spreading the amount.

Edit revenue distribution					×	
Name		Table to filter				
Medicare DSH		Encounter		~		
Description (optional)		Transaction type				
Medicare Disproportionate Share	Hospital payment	Payments	🔵 Adjustr	ments		
1 Population filter Encounter Encounter.InsurancePlan.FinClass	.Description = 'M 🔇	2 Aggregation settings Basis table Encounter	•	3 Revenue information Revenue to be distributed 750000.00		
and Discharge date		Basis column				
From To		LengthOfStay	~			
01/01/2019	3/31/2019	Aggregation methods				
		SUM	~			
				Cancel	Save	

The **Define revenue distribution definition** page provides key information about existing definitions. From this page, you can:

- Select a definition and move it to the edit page to review or update it.
- Modify the revenue amount to be distributed.
- Modify the discharge date.

This page simplifies ongoing maintenance of the most common inputs and allows multiple definition changes from one location by clicking **Save**. You can also select which definitions to process from this page.

🛱 Hanes Order revenue distribution												
Define revenue distribution												
Revenue distribution Q. Search Edit distributions 🚥 Process solution Add revenue distribution												
	Transaction c	Name	Transaction type	Filter table	Basis table	Basis column	Revenue to be distributed	Discharge date range	Last modified date	Date completed	Job status	Actions
0	RD_000001	Medicare DSH	Payments	Encounter	Encounter	LengthOfStay	\$750,000.00	01/01/2019 - 03/31/2019	07/13/2023 03:56 F	M 07/13/2023 03:57 P	M	
н н [	э н										10 👻 items per pa	ge 1-1 of 1 items

During processing, the calculated amounts distributed to encounters are saved in the EncounterPayments table as new transactions. To simplify auditing and review, the transaction IDs in the table are prefaced with "RD\_" and tie directly to the transaction ID displayed on the **Revenue Distribution definition** page.

Transactions that are posted to Encounter Payment include the applicable payment type (PAY or ADJ). If you rerun any previously published revenue distribution transactions, transactions that overlap with the population filter discharge date range are deleted.

N	8 C	• 85714.28571 D	t	F	G	н		1	K	L	м	N	0	P	Q	R	5	
Det	Type	Integer	String	Integer	Numeric	String	Integer 32	String	String	DateTime	DateTime	String	integer 32	Integer 16	Integer 32	String		
trik	g Length		50			50		5	5			50				32		
				d account.		Charge transaction ID								2=secondary, etc.				
				to the		associated with the			Payment,					Must be an integer				
			payment	transactio	Transaction	Payment or Adjustment	Insurance		Adjustment, or	Post Date of	Date payment	Account Number from	<b>Detailed Transaction</b>	equal to or greater		Code assigned by payor to		
es	ription		transaction id	n	total	Transaction	Plan	Insurance or Patient Payment	others	payment	was received	Source System	Code	than 1.		identify this payment.		
		Encounteril *	Transactionh	- Acet -	Amoun *	ChargeTransactionIE *	Instia	InsuranceOrPatientPaymen *	PaymentType	PostDate -	ReceivedDate *	SourceAccountNumbe	TransactionCodel	· PMCOBSesvensi	PMPayerIC	PMRemittanceAdviceCode •		
		7979432	RD 000001	0	85714.25		0		PAY	7/13/2023 12:57 PM				2				
		7716294	RD 000001	0	64285.71		0		PAY	7/13/2023 12:57 PM				2				
		7737661	RD 000001	0	85714.25	>	0		PAY	7/13/2023 12:57 PM				2				
			RD 000001	0	21428.57	1	0		PAY	7/13/2023 12:57 PM				2				
			RD 000001	0	107142.80	5	0		PAY	7/13/2023 12:57 PM				2				
			RD 000001	0	128571.43		0		PAY	7/13/2023 12:57 PM				2				
			RD 000001	0	42857.14		0		PAY	7/13/2023 12:57 PM				2				
	_		RD 000001	0	42857.14	L	0		PAY	7/13/2023 12:57 PM				2				
	_		RD 000001	0	85714.25		0		PAY	7/13/2023 12:57 PM				2				
	_		RD 000001	0	21428.57	1	0		PAY	7/13/2023 12:57 PM				2				
	_		RD 000001	0	21428.57	1	0		PAY	7/13/2023 12:57 PM				2				
	_	7725266	RD 000001	0	42857.14		0	1	PAY	7/13/2023 12:57 PM				2				

Additionally, each revenue distribution definition generates a new record in the TransactionCode reference table for report writers to reference the revenue distribution name. This record is stored in the **LongDescription** field.

	Transact	tionCode (R/O) ×				
2   A	B C	D	E	F	G	Н
2 	Data Type String Length	Identity 32	String 25	String 15	String 150	String 20
2	Description	TransactionCodel[ 🔻	Descriptio 🔻	TransactionCod	LongDescription	TransactionType▼
2		2	Medicare DSH	RD_000001	Medicare Disproportionate Share Hospital payment	

**NOTE**: EncounterDirty.LastUpdate is updated for any encounter with a new transaction record added to EncounterPayment. This record makes the encounter eligible for any processes that reference the EncounterDirty table to identify encounters with recent changes.

### Relative Value Units (RVU) maintenance

The reimagined **Maintain RVU** page provides more flexibility when selecting which cost items to review and offers multiple options for incorporating updates.

You are no longer restricted to view only items within a single department. Using standard Axiom filter wizard behavior, you can select precisely what to review (for example, you can view the same cost item or cost item revenue code across all departments).

The page provides a default view of all cost categories that are sorted by costcat ID. You can select which cost categories are visible by clicking **Select cost categories**, and then clicking one or more cost items. By sorting the values in the cost category columns, you can view which cost items have similar RVUs or no RVUs.

You can modify the RVUs directly on the page by leveraging the new mass-save functionality. Click in the RVU cells, make changes or delete values for one or multiple items and cost category columns, and then click **Save**.

You are no longer restricted to edit only one line at a time.

You can also download filtered data into Excel to modify and upload these changes.

Home > Mode	l group management > M	anaging cost mode	els > Methods > RVU Maintenance					
Method	s							
2022 - 9 month	IS							
Direct to encour	nter Maintain RVU	Cost method	exclusions Define markup grou	ups Maintain	RCU			
RVU Maintena	ance – Base Sav	e Upload tabl	e Download table 🌣 Selec	ct cost categorie	CostDetail.De	pt.Description IN ('Sur	rgery ORMH', 'S	8
Department	Departmecription	Cost item	Cost item description	Rev code	Volume	Charges 💌	RNSal 🔻	TechSal
400066000	Surgery ORMH	I_36000100	HC LEVEL I-30 MIN BASE	R0360	34,721	\$7,590,925.58	30.00	30.00
400066000	Surgery ORMH	I_36000101	HC LEVEL I EACH MINUTE	R0360	90,925	\$7,734,721.50	1.00	1.00
400066000	Surgery ORMH	I_36000200	HC LEVEL II-30 MIN BASE	R0360	20,069	\$21,248,678.44	40.00	5
400066000	Surgery ORMH	I_36000201	HC LEVEL II EACH MINUTE	R0360	48,678	\$12,120,069.95		
400066000	Surgery ORMH	I_36000300	HC LEVEL III-30 MIN BASE	R0360	15,027	\$13,548,001.46		
400066000	Surgery ORMH	I_36000301	HC LEVEL III EACH MINUTE	R0360	48,001	\$22,415,027.63		
400066000	Surgery ORMH	I_36000400	HC LEVEL IV-30 MIN BASE	R0360	50,291	\$26,350,291.44		
400066000	Surgery ORMH	I_36000401	HC LEVEL IV EACH MINUTE	R0360	72,090	\$56,072,090.64		
400066000	Surgery ORMH	I_36000500	HC LEVEL V-30 MIN BASE	R0360	8,680	\$4,559,167.29		
400066000	Surgery ORMH	I_36000501	HC LEVEL V EACH MINUTE	R0360	9,167	\$4,768,680.00		

### Delete encounters

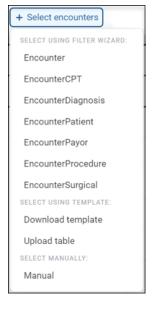
Use the new interface to delete unwanted encounters from Axiom.

A Home	> Delete encounters								
Delete encounters									
Staging view - Last updated: 07/14/2023 10:07 AM									
Save	+ Select encounters	Delete encounters							
	Encounter	▼ Total charges	Total payments						

You can select encounters by:

- Using the filter wizard.
- Downloading a template, and then uploading it when complete.
- Manually entering encounters. Use the manual entry option to enter encounter numbers or paste copied data from an external source.

You can also use multiple options to compile the staging view on the Delete encounters page.



After you save the staging list, the grid displays total charges and payments for the encounters. You can start the deletion process immediately or schedule it to start later. You can use either option to cancel at this point, if necessary. If you schedule the deletion, you can still edit the staging list up to 10 minutes before the start of the scheduled job. After that time, the **Delete encounters** page is locked and a prompt notifies you that the job is in progress.

AX101	Enterprise Decision 1 💿 Encounters deletion job has been scheduled	×									
<b>#</b> 11	e > Delinte encounters										
De	Delete encounters										
0	counter deletion is scheduled for 07/14/2023 11:17 AM. You can add items and save them to the table up to 10 minutes before the scheduled date and time for processing.										
_	Staging view - Last updated: 07/14/2023 10:07 AM										
	Encounter Total charges Total payments										
	10000482 \$3,194.09 \$2,968.77										

**NOTE**: Encounter deletion is irreversible. For auditing purposes, deleted encounter numbers are saved in a table named EncounterDeleteArchive, which includes the date and time of the deletion. However, you cannot reinstate the data associated with those encounters after the deletion is processed; you must reload any encounters that were mistakenly deleted.

## **Axiom Financial Planning**

No new features or enhancements were made in Axiom Financial Planning 2023.3, released on July 24, 2023.

### **Axiom Rolling Forecasting**

Axiom Rolling Forecasting 2023.3 includes the following new features and enhancements:

#### Report enhancements

Updated cell E25 in the Consolidated IS & Key Metrics report to allow both text and numeric refresh variables.

#### Utilities enhancements

Disabled the Quarterly option on the Rolling Forecasting System Settings page (RF System Settings Utility). This option no longer appears on the page.

**NOTE:** To continue using the Quarterly option, you can configure it on the RF Planning Configuration page.

- Plan file enhancements
  - Modified the Patient Revenue calculation method to allow a selected volume driver.
  - Updated the RFSummarizationMap table to prevent a plan file's previous RFCode from interfacing after the RFCode is remapped in the RFSummarization table. After this update, only remapped RFcode data can interface into the plan files.

Database table updates

Created Forecast, Integration, and Deduction database tables for the year 2027:

- \Axiom\Table Library\Rolling Forecasting\Data\RF\_Forecast\_2027
- \Axiom\Table Library\Rolling Forecasting\Integration\RF\_Integration\_2027
- \Axiom\Table Library\Rolling Forecasting\RollingForecastingDeductions\RF\_Deductions\_2027

## **Axiom Service Line Planning**

No new features or enhancements were made in Axiom Service Line Planning 2023.3, released on July 24, 2023.

## **Axiom Strategy Management**

No new features or enhancements were made in Axiom Strategy Management 2023.3, released on July 24, 2023.

### **Axiom Treasury Management**

Axiom Treasury Cash Management 2023.3 includes the following new features and enhancements:

#### TCM GL Integration

The new General Ledger (GL) Integration feature improves efficiency in posting GL journal entries using bank transaction data by tagging specific transactions and assigning GL account codes, reversal of signs, and optional secondary GL accounts based on an allocation percentage.

- Identify transactions to export to GL A rules-based table helps users identify specific bank transactions in the Cash Flow/Working Capital (CFWC) table to export to the GL system. The options to identify transactions includes filters for the following fields:
  - Bank accounts
  - ° Search text in the description field
  - Date range
  - BAI2 cash codes
  - Flow amount
  - Detail rollup
  - Reportable fields
- Define GL mapping for each rule A new page was added to the CFWC settings page to define a
  primary GL account code and an optional secondary GL account code based on an allocation
  percent for each rule. Users also have the option to reverse the signs on the amounts to conform
  to the GL system requirements.
- Create GL export file New functionality was added to define a transaction date range in the export file and define the folder path and filename to create the export file.

#### Yield opportunity – addition of investment tiers

Provides an enhanced method of estimating investment yield opportunity using three tiers of investment types. This method provides the ability to define an allocation percent and yield rate for each tier. The daily excess cash value for historical and forecast days is allocated to each tier, and the yield amount is based on the respective yield rates for each tier. The investment tier allocation percentages and yield rates are defined on the CFWC Administration / Settings page.

## 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:

- Any Syntellis report that was moved to a new location is automatically returned to its original location.
- 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.

## 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.
- 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 instructorled courses.
- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.
- Review open Software Service project status and details.

☆

Click to launch the product online help site

# Issues fixed in 2023.3

No client-facing issues were addressed in 2023.3 specific to the Healthcare Suite, released on August 28, 2023. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

# Issues fixed in 2023.3.2

No client-facing issues were addressed in 2023.3.2 specific to the Healthcare Suite, released on September 14, 2023. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

# Issues fixed in 2023.3.3

No client-facing issues were addressed in 2023.3.3 specific to the Healthcare Suite, released on October 9, 2023. See the release notes for each of the Axiom Healthcare products for a list of addressed issues.

# Issues fixed in 2023.3.5

No client-facing issues were addressed in 2023.3.5 specific to the Healthcare Suite, released on November 6, 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.