

## **Release Notes**

Axiom Budgeting and  
Performance Reporting  
Version 2023.3

**AXIOM**

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# About the Release Notes

Syntellis is pleased to announce the 2023.3 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:

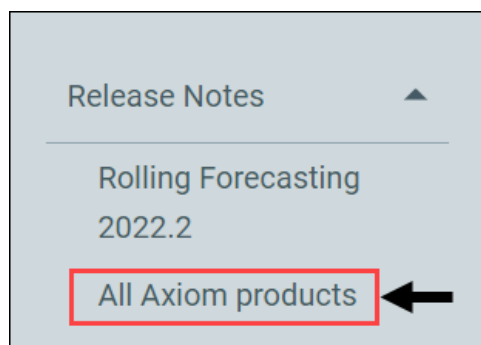
- Suite-wide feature additions and changes
- Security changes
- Key platform changes

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 2023.2 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**.



# What's new in version 2023.3

Welcome to Version 2023.3 of Axiom Budgeting and Performance Reporting!

This release of Axiom Budgeting and Performance Reporting includes the following new features and 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 Budget Labor Configuration 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.

# What to know before upgrading

**IMPORTANT:** You must apply the latest Axiom upgrade before applying any 2023.3 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 2023.3 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.



# Prepare and schedule 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 case to request a Preferred Upgrade Window:
  - Log in to [Syntellis Central](#).
  - Click **Support Cases**.
  - Click **Schedule an upgrade**.
  - Enter your Preferred Upgrade Window information.
  - Click **Submit**.
3. **Complete manual configuration updates** – After installing the upgrade, review any manual setup steps to enable features for this version.

# Get 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.
- Ask a question in the peer-to-peer Syntellis Community.
- Submit a Support issue, find suggested content, and manage any outstanding issues directly with Support.

# Issues fixed in 2023.3

The following table lists the resolutions for issues addressed in 2023.3, released August 28, 2023:

Budgeting: templates, plan files, and drivers

Issue Description	Description
BP Update Lump Sum Global Reference in 02 Labor Configuration Driver [#59169]	<p><b>Summary:</b> The PayType selection did not reference the last saved update in row 89 in the Global section of the 02 Budget Labor Configuration Driver.</p> <p><b>Resolution:</b> Updated the calculation method formula to the following:</p> <p>=IF (OR (BA89="", BA89=0) , "NotUsed", BA89)</p>

Issue Description	Description
Budget Provider Config Driver 29 - Monthly FTE Spread for Providers inputs not responding to Monthly Default Spread for Providers Source dropdown. [#59164]	<p><b>Summary:</b> When <b>Budget Config Driver</b> was selected in the Monthly Default Spread for Provider row, the hour values did not link to the inputs made in the 02 Budget Labor Configuration driver.</p> <p><b>Resolution:</b> Updated the hour links to pull from the 02 Budget Labor Configuration driver when <b>Budget Config Driver</b> is selected on the dropdown.</p>
BP Budget Configuration driver - BudgetGroup refresh variable not filtering displayed output [#59180]	<p><b>Summary:</b> On the Budget Configuration driver, the BudgetGroup refresh variable was not recognized.</p> <p><b>Resolution:</b> Updated the query filter references from E19 to A29 to accept the BudgetGroup refresh variable.</p>
Case Number 00488834 - Provider plan file Drivers tab AQ. [#59178]	<p><b>Summary:</b> With the index formula in columns HP to IB in the Global Provider row, if the provider was not found in column B on the Drivers tab, column HN = 0. However, the row of the formula was still used in the index formula, which caused an improper lookup.</p> <p><b>Resolution:</b> Integrated conditional logic to default to 0 (zero) when the row lookup value is 0 (column HN):</p> <pre>@IF(\$HN213=0,0,INDEX(Drivers!\$C:\$Q,\$HN213,HP\$27))</pre>
BP Stat_Rev tab - Multiple CMs - Incorrect determination for Revenue Adjustments driver prioritized exceptions code. [#59183]	<p><b>Summary:</b> An incorrect determination for the Revenue Adjustments driver prioritized the exceptions code.</p> <p><b>Resolution:</b> Added a new Fixed Revenue calculation method on the Stat_Rev tab.</p>
PFB-09144 - Adding new jobcode is not picking up LaborLimit Midpoint rate as start rate. [#59195]	<p><b>Summary:</b> When a new jobcode was inserted in the JOBCODE tab, the Start Rate did not pick up the Midpoint rate in the LaborLimits driver.</p> <p><b>Resolution:</b> Added the following to the reference driver instead of defaulting to \$0:</p> <pre>GetData(Variables!\$P\$55&amp;".Mid", "code='"&amp;A397&amp;"'")</pre>

Issue Description	Description
PFB-09037 - Need to round SUM () function in column Z of ProviderDetail16 row in calc method. [#59202]	<p><b>Summary:</b> An error occurred when a small decimal value (for example, .00000000000001) was entered in Column CY of the ProviderDetail16 row.</p> <p><b>Resolution:</b> Applied a function to round the value to six decimal places.</p>
Case Number 00507639 - Target budget adjustment not saving as expected on Employee tab. [#59160]	<p><b>Summary:</b> 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 database table. This issue caused various reports to show different budget values for salaries.</p> <p><b>Resolution:</b> Copied hour and dollar cell references from FE109:GE109 to FE107:GE107.</p>
Case Number 00509016 - Staffing tab: The Input Monthly calc method paytypes, the NYB monthly spread columns producing incorrect results. [#60823]	<p><b>Summary:</b> The NYB (Next Year's Budget) monthly spread columns referenced columns GH:GS. These columns then referenced non-value columns K:L instead of the YTD and Projected columns of O:P.</p> <p><b>Resolution:</b> Changed cell GH[row] formula in the Input_Monthly calc method from</p> <p>=SUM(K[row]:L[row])</p> <p>to</p> <p>=SUM(O[row]:P[row])</p>

## Performance Reporting

Issue Description	Description
Case Number 00488132 - Flex Budget Calculator Primary Table. [#58545]	<p><b>Summary:</b> An account with a flex percent of 100% in the ACCT (Account) dimension returned 0% in column Q of the Flex Calculator.</p> <p><b>Resolution:</b> Updated the cell reference for AQ1 to the Bud table name instead of the Act table name.</p>
Case Number 00492700 - Executive Monthly Package missing entity filter for refresh variable. [#58546]	<p><b>Summary:</b> The Executive Monthly Package report did not apply the Entity refresh variable filter.</p> <p><b>Resolution:</b> Modified the primary filter reference for all sheets to include Entity as a refresh variable.</p>

# Issues fixed in 2023.3.3

The following table lists the resolutions for issues addressed in 2023.3.3, released October 9, 2023:

Budgeting: templates, plan files, and drivers

Issue Description	Description
Benefits rows on Initiative tab are not shown as approved and not appearing on Summary tab. [#73976]	<p><b>Summary:</b> When new initiatives with Benefit account details were added to the budget plan file, the Benefit account detail was saved only to the BUD20XX_Detail table. The data was not saved to the BUD20XX table after the initiative was approved.</p> <p>This issue affects the following calculation methods:</p> <ul style="list-style-type: none"><li>• Add Salary</li><li>• Salaries</li><li>• Add Deductions</li><li>• Deductions</li><li>• Add Detail Benefits w Percent</li></ul> <p><b>Resolution:</b> For these five calculation methods, the formulas were changed in columns Z:AK to reference the corresponding monthly values in columns I:T, multiplied by the anchored value in column AL. The value in AL is 1 when initiative is "Approved" and 0 (zero) when the initiative is excluded.</p>