Release Notes for *PGM Anywhere*
Release Date: 10/8/2016

Enhancements

Actuarial Calculations chart added
The Actuarial Calculations chart familiar to *Planned Giving Manager* users is now available in *PGM Anywhere*. This chart shows, step-by-step, how the deduction is calculated for every gift type and, in the case of gift annuities, how the fraction of each payment that is tax-free or capital gain income is determined. The chart includes formulae and legal citations, where appropriate. Many of our clients include this chart among the documents they provide to planned gift donors after a gift is made to help these donors substantiate their charitable deduction.

Non-Charitable Interest Actuarials chart added
The Non-Charitable Interest Actuarials chart familiar to *Planned Giving Manager* users is now available in *PGM Anywhere*. This chart shows, step-by-step, how the value of the non-charitable interest in a planned gift is calculated. The chart includes formulae and legal citations, where appropriate. It is useful for determining the value of an income beneficiary's life interest in a gift annuity, charitable remainder trust, or pooled income fund, a person's retained life interest in a home, and other non-charitable interests. Determining the value of a non-charitable interest becomes important when a life interest must be valued for a gift tax return or estate tax return or when the income beneficiaries are considering an early termination of their life interest by giving it to charity or cashing it in for a lump sum payment.

Security improved

> **Password reset**
> A *PGM Anywhere* user's password can be reset by an administrator or by the user clicking Forgot Password on the login screen. In the previous versions, the administrator entered the new password and so necessarily knew what it was until the user logged in and changed it. In addition, the reset password remained valid until it was used, at which point the user had to set a new password to login.
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> Now, *PGM Anywhere* generates a random 8-character password automatically and emails it to the user. Only the recipient knows what the password is. Also, this password expires after the number of hours set under Users>Security (default 72 hours). This way, there's a limited time during which someone other than the user who gets access to the email can use it to login to *PGM Anywhere.*
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> **Improved notification of user account changes**
> *PGM Anywhere* now sends an email automatically under the following conditions:
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> - Whenever the email associated with a user account is changed, whether by the user or by an administrator, *PGM Anywhere* sends an email to the former address notifying the recipient that the email on the account has been changed.
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> - When PG Calc changes the primary administrator's name, username, or email address, which we would do only at the request of the client, an email is sent automatically to the former address notifying the recipient of the change(s).
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> **Client can have PG Calc disable Forgot Password**
> If a client wishes, PG Calc can disable the Forgot Password feature available on the login screen so that users cannot reset their own passwords. Disabling this feature means that only someone with administrator rights would be able to reset passwords for any of the client's users.
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> **Forgot Password requires Clientname, Username, and email**
> When you click Forgot Password to reset your password, you must enter a valid Clientname, Username, and Email combination in order to proceed. Previously, you had to enter a valid combination of a Clientname and only one of the other two values.

Font size used in diagram labels matches font size used elsewhere
We have increased the size of the font used to label icons in the Summary of Benefits – How It Works and Summary of Benefits – Numbers diagrams so that it matches the font selected for the rest of the text on the page. The diagram labels are far more legible as a result.

Layout of graphs improved
We have improved the layouts of the Income Projection Line Graph and Dollar Deductions Bar Graph. Specifically, the graph area in the Income Projection Line Graph is taller and its vertical scale corresponds better to the values graphed. The changes to the Dollar Deductions Bar Graph involve minor tweaks to line spacing and location of the graph area.

IRS discount rate election note added to charts
When the IRS discount rate used to compute a charitable deduction for a planned gift is not the rate for the month of gift, the donor must include with the tax return in which the deduction is declared an explicit election of the rate used to compute it. A note describing this requirement now appears at the bottom or the following charts whenever the IRS discount rate selected is not for the month of gift: Summary of Benefits, Taxation of Gift Annuity Payments, and Actuarial Calculations.

Date control changes the day faster
There was a noticeable delay whenever you clicked a new day while entering or modifying a date using the date control. This delay is about half what it once was, making it almost unnoticeable on some devices and half as long on the rest.

Fixed Bugs
The issues listed below were present in the 5/6/2016 release of *PGM Anywhere*, but are now fixed.

Life Expectancy and Present Value of Future Bequest values could be wrong
Actuarial aging was not implemented properly in the Life Expectancy tool and Present Value of Future Bequest tool. As a result, the ages shown on their respective charts could be one year off. In the case of the Present Value of Future Bequest tool, the present value was computed based on these ages, so it could be off as well. Now, the charts produced by the Life Expectancy tool and Present Value of Future Bequest tool display the correct actuarial ages in every case and present values are computed accordingly. Note: the life expectancy computation of the Life Expectancy tool and actuarial ages determined in all presentations (such as the Summary of Benefits chart) were not affected.

Narrative export to Word improvements

Numbered and bulleted paragraphs indented and spaced properly
When you export to Word a narrative that includes numbered paragraphs, such as the Description and/or Example or Gift Annuity Agreement, the exported numbered paragraphs are now properly indented and spaced. Similarly, bulleted paragraphs, such as those found in the Gift Annuity Disclosure Statement and Comparative Description, are indented properly and a hanging indent is properly applied.

Times Roman font preserved
When you export to Word narratives for which the Times Roman font has been selected, the Times Roman font is preserved in the Word document. This was not the case previously. No other font was affected by this bug.

Error text appearing in place of charity icon in diagrams
PGM Anywhere can now upload and display custom images that have spaces in their filename. Previously, when you uploaded a filename containing spaces as the charity icon for diagrams under Customize > Organizations, you would see text with slashes in place of the charity icon when viewing a

Summary of Benefits – How It Works or Numbers diagram. Now, the charity icon appears correctly in these diagrams.

Formatting of certain default values fixed
The default values listed below lacked proper formatting until you clicked in the field. Now, they are all formatted properly from the outset.

- The Lead Unitrust's payout rate value lacked a "%" on the end.
- The Pooled Income Fund's highest return of last three years and current payout rate to quote both lacked a "%" on the end.
- The Bargain Sale's price of property and debt or mortage in property values both lacked a "$" at the beginning and were formatted without ","s where needed.

Enter key on last question of Date-Lives-Term and Personalization no longer cancels
Pressing the Enter key on the last question in the Date-Lives-Term screen or Personalization screen had the same effect as clicking Cancel, which meant losing all your entries in the screen and returning to the Assumptions screen. Now, pressing the Enter key on the last question in either of these screens leaves your cursor on the last question with all your current entries preserved. To close the screen, you must click a choice outside the screen, such as in the left navigation.

Thumbnail and sample image for Detailed Cash Flow Analysis chart corrected
The thumbnail and sample images for the Detailed Cash Flow Analysis chart found under Select Presentations in the Presentations screen were of the Summary of Benefits Projection chart. Now, they are of the Detailed Cash Flow Analysis chart.

Issues

Formatting issues when a narrative is exported to Word
A number of formatting issues can appear after exporting a narrative to Microsoft Word. The issues we have identified are listed below. To read guidance on how to fix these issues, see the "Export/Fixing narrative formatting after export to Word" topic in the PGM Anywhere Help Index.

Margins
Right margin needs adjusting (for example, text is cut off on the right)
Left margin needs adjusting
Text is cut off on the bottom

Numbered paragraphs
Reset to (1) at top of second page
Split across two pages and numbered twice

Bulleted items
Bulleted item split across two pages and bulleted twice

Footers
Too much space between "Prepared by" name and disclaimer text

"Font is not available. Select another font from the list"
This message appears when you attempt to select a different font (while viewing Results) if the requested font is not resident on the device on which you are running *PGM Anywhere.*

In Firefox on a Samsung Galaxy (an Android-based tablet), this message appears anytime you attempt to change the font, regardless of whether the font is resident on your device. In this case, try changing the font while running *PGM Anywhere* in a different browser or on a different device.

Field value doesn't highlight when tapped on an iPad
This is standard browser behavior on the iPad. There is an expectation that tapping a field will highlight the entire field in future versions of Chrome and Safari.

User must click Done twice to make action occur
In Firefox only, there some actions that can be completed only when you tap twice in a row rather than the usual once. The solution is either to tap twice in these situations or to run *PGM Anywhere* in a different browser. Instances where this happens include:

- If you edit a Gift Annuity or Deferred Gift Annuity gift option, typing in new date of first payment for GA or DGA under Gift Options requires clicking Done twice.

- When you edit or add a Pooled Fund or Disclaimer under Customize and click Done

- When you change the gift date or birth dates in the Date - Lives – Term window and then click another item in the left navigation bar, such as Results, you have to click twice in the left navigation bar to move on. This behavior occurs when you type your date change into the field, but not if you use the calendar control to revise the date.

Disclaimer text is cut off on the right
Disclaimer text can get cut off on the right when the font is too big. Try reducing the font size. Choosing a different font without changing the size might also help.

Calendar control does not display numbers for the days
We have seen this behavior on one machine when running *PGM Anywhere* in Internet Explorer 9. Try running *PGM Anywhere* in a later version of Internet Explorer or a different browser.

Results doesn't work on iPad 1
We have found that *PGM Anywhere* hangs up indefinitely when your run it on an iPad 1 (the original iPad) and tap Results. Try running *PGM Anywhere* on a different device: a later version of the iPad, on an Android-based tablet, or in a laptop or desktop browser.

iPad sometimes doesn't display second age in Date-Lives-Term window
If you are working on an iPad and enter a second age or birth date in the Date-Lives-Term window, open a different window (tap Results, for example), then open Date-Lives-Term again, the second age/birth date is not visible. If you then tap Results, the second age will still appear on the chart and the calculations will be based on two ages.

In the case of entering birth dates, the second birth date disappears as described only if you type in the complete birth date. If you use the date control to enter the birth date or enter the birth date in mm/dd/yy format rather than mm/dd/yyyy format, the date will not disappear when you leave and then return to the Date - Lives- Term window.

Printing requires PDF download on some browsers
When you choose print in the Results screen, a PDF should open in your browser window and the print dialog should appear. In some browsers, such as FireFox in our testing, the browser instead treats the PDF file as a download. In order to finish sending the print job to the printer in this situation, you will need to go to the downloads screen in your browser and open the file, at which point the print dialog should appear.