

Release Notes for PGM Anywhere
Release Date: 11/17/2022

Bug Fixes

Entered gift annuity rate displayed on presentations when the rate is rounded

When *PGM Anywhere* rounded the annuity up or down so that it would be evenly divisible by the payment frequency, it would show the annuity rate expressed to four decimals on almost all presentations (such as 5.5002%). Now, it shows the annuity rate exactly as entered, which ordinarily means showing the rate expressed to one decimal (such as 5.5%).

Payment period start date correct for all gift annuity dates of first payment

There were a few combinations of date of first payment and payment frequency where the first day of the first payment period was being set one day too early. For example, if the date of first payment of a quarterly paying gift annuity was 4/30/2022, the first day of the first payment period was being set to 1/31/2022 rather than 2/1/2022. The Taxation of Gift Annuity Payments chart shows this date and uses it to compute the first partial payment. The first day of the first payment period is now set correctly for all combinations of date of first payment and payment frequency.

Narrative follow-up windows scrollable when necessary

When a narrative follow-up window was too short to display all its contents, a scroll bar was not appearing on the right side of the window. Now one does, so you can scroll down using your mouse as well as by tabbing through the fields.

Password reset emails show correct password length requirements

We increased the maximum length of passwords from 15 to 64 in a recent release. The email sent when you reset your password now indicates that your new password must be 8-64 characters, not 8-15 characters.

Password label clarified

When you reset your *PGM Anywhere* password, you are emailed a temporary password to use the next time you login. Once logged in, a Change Password window opens. The first question asks for your "Old password." Some clients found this label confusing, since it is expecting the temporary password to be entered. The label now says "Old/temporary password."

Online Help Changes

Tax tables in online Help updated for 2023

PGM Anywhere Help includes numerous federal income, estate, and gift tax tables for reference. Where appropriate, these tables have been updated to include indexed values for 2023. See Help>Contents>Tables>Federal Income Tax and Help>Contents>Tables>Federal Gift and Estate Tax to review these tables.

Narrative Changes

None.