Release Notes for *PGM Anywhere*

Release Date: 1/28/2016

Enhancements

Narratives added
All narratives available in *Planned Giving Manager* (*PGM*) have been added to *PGM Anywhere*. The Acknowledgement Letter/Gift Summary in *PGM* has been split into separate Acknowledgement Letter and Gift Information Summary narratives.

The same source code underlies Narratives in *PGM* and *PGM Anywhere*. As a result, existing custom narratives from *Planned Giving Manager* can be copied to *PGM Anywhere* and new custom narratives can be created for use in *PGM Anywhere*.

To choose a narrative, open Presentations, then choose under Select Presentations the narrative you want. A window containing the follow-up questions specific to the narrative will open immediately.

The ten standard narratives available in *PGM Anywhere* are:

Proposal Cover Page
This page serves as a cover page for a gift proposal that contains a number of charts, diagrams, graphs, or descriptions.

Proposal Letter
This letter serves as a gift proposal letter. After thanking the prospect for showing interest, the letter contains an example of a specific gift and a description of each of the gift's benefits.

Description and/or Example
This document provides a concise description of the specific gift type you are examining and/or a specific example illustrating the benefits of such a gift.

Long Description and/or Example
This document describes each type of planned gift in fuller detail than does the document produced in *Description and/or Example*.

Comparative Description
This document lets you compare the benefits of up to three life income gifts at once. Descriptions of how each chosen gift type works are included, one after the other, followed by a list of benefits that compares the differing deductions, payment amounts, and capital gains consequences of each gift, based on the specific case you have entered.

Gift Annuity Disclosure Statement
This disclosure statement for gift annuities fulfills all of the requirements of the Philanthropy Protection Act of 1995 regarding the disclosure of information to potential gift annuity donors. This statement should be provided to each gift annuity donor prior to the completion of his or her annuity agreement.

Acknowledgment Letter
This letter serves as an official acknowledgment of a completed gift. It thanks the donor for the gift, states the donor's deduction and designation for the gift, and, at your option, can include a paragraph about reporting the gift on Form 8283.

Gift Information Summary
This document summarizes the details of a completed planned gift, including the names and addresses of the beneficiaries, the assets given, the designation, and the specifics of the gift.

IRS Discount Rate Election Statement
This statement provides all of the information the IRS requires of a donor who elects to compute her

charitable deduction using an IRS discount rate that is for either of the two months prior to the month of gift.

Gift Annuity Agreement
This narrative produces gift annuity agreements that meet the requirements of all 50 states and the District of Columbia. The agreements are available for immediate payment and deferred gift annuities. This narrative also produces prototype gift annuity agreements that are suitable for filing with a state as part of the annuity registration process.

Customize > Narratives window added to support Narratives
A Narratives window has been added under Customize. This window enables you to adjust margins and the tab setting for all narratives, as well as add (or edit) custom narratives.

Customize > Organizations window greatly expanded to support Narratives
The Organizations window under Customize has been greatly expanded to collect information used in Narratives. Most of the information collected is used in gift annuity agreements and the gift annuity disclosure statement. Do not use *PGM Anywhere* to produce either of these documents until all of the information in the Charity Names in Narratives, Gift Annuity Agreements, and Gift Annuity Disclosure Statement sections under Customize > Organizations have been completed.

Fixed Bugs
The issues listed below were present in the 11/21/2014 release of *PGM Anywhere*, but are now fixed.

Birth dates not always displayed correctly in Assumptions screen
When two birth dates were entered and the second birth date then deleted, both birth dates would still appear on the Assumptions screen. Only the one remaining birth date entry should have been displayed.

Also, when one birth date was entered, and then Tools, Customize, or Users opened, the Assumptions screen would list the birth date, but also "Age 2:" after Tools, Customize, or Users was closed. "Age 2:" should not have appeared in this case.

Both issues fixed.

Improve title bar labels in some Users and Customize windows
Title bar labels in a number of places were incorrect. For example, when Forgot Password on the Login screen was tapped, the Forgot Password window opened with "Planned Giving Manager" in the title bar. It should have said "PGM Anywhere." Title bar label errors also occurred in Customize > Disclaimers, Customize > Pooled Funds, Users > User Management, and Users > Roles. All are fixed.

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
Not indented properly
Reset to (1) at top of second page
Split across two pages and numbered twice

<u>Bulleted items</u>
Not indented properly
Bulleted item split across two pages and bulleted twice

<u>Footers</u>
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.

Export to Excel button doesn't work
The Export to Excel button that appears in the Results window toolbar is not active in the initial release of *PGM Anywhere*. The Export to Excel button is grayed out to indicate that it is inactive, although this may not be obvious on some screens. We plan to activate the Export to Excel button in a future release.

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.