

Release Notes for *PGM Anywhere*

Release Date: 11/21/2014

Enhancements

Heading area for charity images can be up to 3" wide

We have tripled the width of the area for displaying charity images in presentation headings to three inches. This means that charity images with an aspect ratio of up to 1:4 (four times wider than tall) will now render well in presentation headings.

Date–Lives–Term window issues gift annuity message only once

Whenever you change a value in the Date-Lives-Term window that triggers a reset of annuity payout rate information for all selected gift annuities and deferred gift annuities, a message alerting you to the reset is issued just once when you leave the Date-Lives-Term window. Previously, this message was issued each time you changed a relevant value within the window.

Login credential emails sent automatically when a new user is added

When a new user account is added in Users-User Management, *PGM Anywhere* now sends two emails to the email address associated with the new account. One email contains the user's temporary password; the other email contains all other information the user will need to login. The user will be forced to change the temporary password to one of his own choosing the first time the user logs in.

In addition, when the password for an existing user account is reset in Users-User Management, *PGM Anywhere* now sends an email to the email address associated with the new account that informs the recipient of the new password. Similar to new users, the user will be forced to change the temporary password to one of his own choosing the next time the user logs in.

Previously, *PGM Anywhere* did not send any emails in either situation.

Year capital gain reportable added to Comparison of Benefits chart

When a donor is not the annuitant of an immediate payment or deferred gift annuity and the property type is appreciated property, all reportable capital gain must be reported in the year of the gift. Likewise for a bargain sale funded with appreciated property. In these cases, the Comparison of Benefits chart now includes in parentheses below the Total Reportable Gain value for each gift the year in which the capital gain must be reported.

The primary administrator is identified in the Users – User Management window

Information on all user accounts area displayed in a grid at the top of the Users – User Management window. The primary administrator is now identified in this grid by "Primary" appearing in the User Role column.

Customize-Calculation Options-Start payment period on a little smarter

In the Customize-Calculation Options screen, when you set *Start payment period on* to *Date annuity is credited*, the *Prorate first payment to reflect partial period* question below it is now set to No and is not editable. We've made this change to minimize the likelihood that a user will choose to prorate the amount of the first payment for an annuity whose first payment is a full payment period after the date of gift.

Default and reloaded values refined in two Tools functions

We have refined the default values in the Life Expectancy and PV of Future Bequest tools to match the defaults in *Planned Giving Manager*. In particular, we have changed the gender defaults in the Life Expectancy and PV of Future Bequest tools from male to female and the default mortality table in the Life Expectancy tool from Annuity 2000 to 1983 Basic.

Likewise, we have made adjustments in these same functions so that the effect of tapping the Reload button matches *Planned Giving Manager*.

Selections after tapping *Reload* button in PV of Future Bequest

	11/20/2014 Release	10/9/2014 Release
Mortality table	2000CM	Entry not changed
Bequest amount	\$0	Entry not changed
Interest rate	0%	Entry not changed
Valuation date	Date of gift	Date of gift
Ages or birth dates	Choice in Date-Lives-Term	Choice in Date-Lives-Term
Age/Birth date #	Entry in Date-Lives-Term	Entry in Date-Lives-Term
Gender	Female	Entry not changed

Selections after tapping *Reload* button in Life Expectancy

	11/20/2014 Release	10/9/2014 Release
Mortality table	1983 Basic	Entry not changed
Determination date	Date of gift	Date of gift
Ages or birth dates	Choice in Date-Lives-Term	Choice in Date-Lives-Term
Age/Birth date #	Entry in Date-Lives-Term	Entry in Date-Lives-Term
Gender	Female	Entry not changed

Fixed Bugs

The issues below were present in the 10/9/2014 release of *PGM Anywhere*, but are now fixed.

The ages when deferred payments will start are missing from certain presentations

The deferred gift annuity (DGA) label that appears at the top of the Detailed Cash Flow Analysis chart, Dollar Deductions Bar Graph, and Income Projection Line Graph show the payout rate of the DGA, but should also include the age(s) of the annuitant(s) when payments start. Fixed.

Ages and years in projection can be wrong for RLE and Bargain Sale in Summary of Benefits Projection chart

When you enter birth dates, the ages in brackets and the number of years in the projection shown in the Assumptions section of the Summary of Benefits Projection chart are wrong for retained life estates and bargain sales. "Projection runs for" always says "1" years and the first age in brackets is always "0" and the second age in brackets, if there is one, is always "-1". These errors occur only when a retained life estate or bargain sale is the first or only gift option selected. Fixed.

Regular CRUT projected payout is wrong when payout rate > net investment return

When the payout rate of a regular charitable remainder unitrust (CRUT) is greater than its net investment return, its projected payments to beneficiaries are being limited to its net investment return amount for each year. They shouldn't be. In the case of a regular CRUT (Unitrust Type = Regular), the payments to beneficiaries should ALWAYS be the unitrust payout rate multiplied by the then principal value of the CRUT (unitrust payout amount), regardless of the net investment return amount for the same year.

This error affects the values in the Payments to Beneficiary column of the Summary of Benefits Projection chart, the Total Benefit to Payment Recipient value in the Summary of Benefits Projection chart, and the line drawn in the Income Projection Line Graph. Fixed.

Breakdown of Annuity years on Taxation of Gift Annuity Payments chart could be wrong

When a gift annuity's date of first payment is not in the year of gift, the years shown in the Breakdown of Annuity section of the Taxation of Gift Annuity Payments chart are wrong. The year of gift is always shown as the first year of payments, even when the first payment is in the year following the gift. All other years in the section are also one year too early.

For example, with if you select a Gift Annuity, enter 11/10/2014 as the gift date and enter 1/5/2015 as the date of first payment, the first row in the Breakdown of Annuity section reads "2014 to 2014," but should read "2015 to 2015," and all other rows are also off by 1 year. Fixed.

New doesn't reset values correctly after Tools, Customize, or Users is opened

The New button at the top of the PGM Anywhere window is supposed to reset all default values to the default case stored in the application database (\$10,000 gift annuity for a 72 year-old). It does this correctly unless you open and close Tools, Customize, or Users. In this case, instead of resetting to the default case in the application database, tapping New resets the defaults to the values they had at the time you most recently opened Tools, Customize, or Users. Fixed.

Diagram icon default color incorrect when adding an organization

When you add an organization under Customize - Organizations, the default entry for "Color of icons in diagrams" is #738c57, which is a shade of green. This default code should be #de5900, which is a shade of orange that exactly matches the color of the default "Charity icon for diagrams" provided by PG Calc.

The default color for diagram arrows is #babcbf, which is a light gray. It is correct when adding an organization. Fixed.

PDF, Word, Excel, and Send Email icons are missing from Results toolbar

When you view Results in Safari on iOS8 (e.g., on an iPad running iOS8), the PDF, Word, Excel, and Send Email icons may be missing from the toolbar at the top of the Results window. Fixed.


Space missing between words in Summary of Benefits – How It Works diagram for DGA

On the Summary of Benefits - How It Works diagram for a deferred gift annuity, a space is missing between the charity short name and "pays" at the start of the second paragraph in step 2 of the *How it works* section. Fixed.


Non-specific strange behavior in PGM Anywhere

You can get a variety of strange behaviors in *PGM Anywhere* if you have run a previous version of *PGM Anywhere* on your device and then run a newer version of *PGM Anywhere* without first clearing all cached files from your browser. We have made some adjustments in the 11/20/14 release that should fix this issue, but browsers can be unreliable in this regard, so it is possible that clearing cached files could still be necessary in some instances.

To clear the cache in Chrome:

1. In Chrome, tap  and choose History.
2. Tap [Clear browsing data].
3. Check “Cached images and files” and choose how far back to delete them (from “the beginning of time” is safest)
4. Tap [Clear browsing data]


To clear the cache in FireFox:

1. In FireFox, tap  and choose History.
2. Choose “Clear Recent History”.
3. Check “Cache” and choose how far back to delete them (clear “everything” is safest)
4. Tap [Clear now].

To clear the cache in Safari (on iPad):

1. Tap the Settings icon on the iPad home screen.
2. Tap “Safari” in the left pane (you will need to scroll down).
3. Tap “Clear Cookies and Data” in the right pane (you may need to scroll down).
4. Tap [Clear].

To clear the cache in Internet Explorer 9, 10 or 11:

1. In Internet Explorer, tap  and choose Safety > Delete browsing history.
 2. Uncheck “Preserve Favorites website data” and check “Temporary Internet Files” and “Cookies”.
 3. Tap [Delete].
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The items described below are known issues that may be encountered in the current release of *PGM Anywhere*.

Error Messages

“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.

“An error has occurred while processing DetailSection 'detail': Object reference not set to an instance of an object.”

This message may appear when you try to view diagrams for the first time. If this is the case, close Results, then choose Customize, edit an Organization, and tap Done to save your Organization settings (you don’t need to make any edits before tapping Done). Now, try viewing your diagrams and other selected presentations again.

Other Issues

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 are 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 you 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.