

What's New! ProAdmin[®]

ProAdmin version 2.04

July 2009

ProAdmin version 2.04 introduces redesigned service screens, enhanced repository maintenance, and new payment form and annuity factor options. You'll find details about these and other enhancements below.

415 Mortality

- ◆ “Dynamic” mortality is now permitted to be specified for 415 limit adjustments under Plan Definition > Regulatory Data > U.S. Maximum Benefits. WREBA '08 changed the mortality to be the same “applicable mortality” used for 417(e). The default mortality table for new Plan Definitions is now the “IRS 2008+ Applicable Mortality Table for 417(e) (dynamic),” which automatically recognizes the year of decrement. A warning message will be issued for all calculations using this table for Section 415 calculations to clarify which year is used for the factors.

Salary Definitions

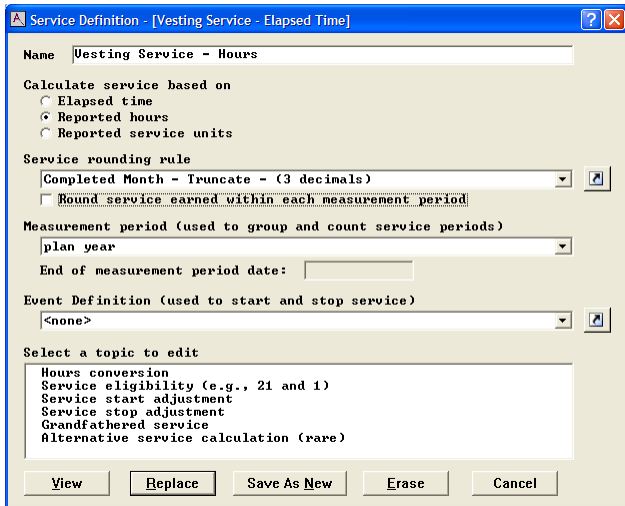
- ◆ The projection of data field arrays in salary transformations has been corrected. The projection of the most recent value depends on the salary projection assumption (checkbox "Allocate difference between the projected value and the most recent value over remaining measurement period"). Previously the projection of the most recent value was based on the wrong parameter: whether salaries were allocated and projected based on nearest half-months or service weighted measurement periods.

Service Definitions

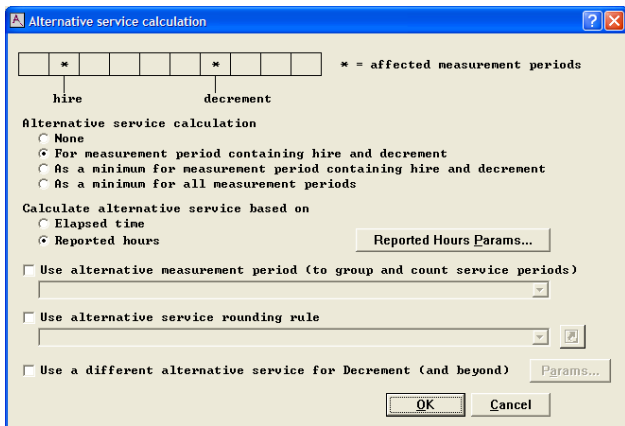
- ◆ The Service Definition screens have been changed from a “tabbed approach” to a “topics approach.” The service parameters have been re-organized into a more concise and logical order. This will make it much easier to understand what parameters you need to modify or review, and what the parameters actually do or control. Here is a general comparison of the old and new approaches:

Old Screens	New Screens
Organized by tabs where dependent parameters were buried on additional tabbed dialogs; it wasn't always obvious where you should go next.	Organized by function (topic) where the most frequently used parameters are on a single dialog. Parameters that are rarely used are organized on an additional dialog (one layer down) if they didn't fit on the bottom of the first dialog.
Organized by event. There is a default event, and then you override the behavior for each event whose behavior is different than the default.	Organized by defaults with overrides. You specify the default behavior and optionally create overrides and indicate which events will have this behavior.
	The parameters have been organized to show you the order in which they are applied.
	Clarified which parameters are actually used (vs. those that don't apply).

Below is a sample of the new main Service Definition screen for service based on reported hours. The list of available topics to edit will change as the service calculation approach changes. While the previous main dialog asked if service was based on elapsed time or reported hours/service, now there is a distinct choice for reported hours versus reported service so that the other service topic choices will be more clearly labeled.



Below is a sample of the new *Alternative Service Calculation* screen (for reported hours). Note that graphics have been added to the dialog to provide a visual reminder of the period(s) of service that is(are) being parameterized.

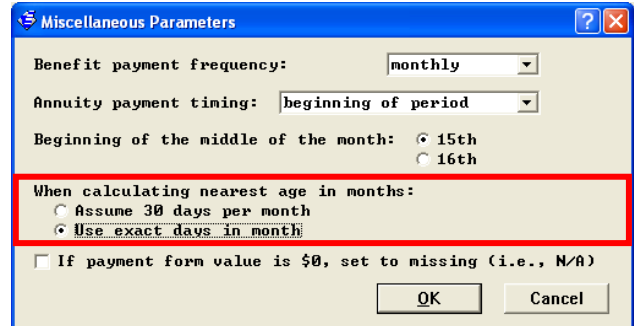


- ◆ The “Apply 1000 hour participation rule” check box has been moved to the Service Eligibility dialog box for Reported Hours service calculations. When checked, service will start accruing on the first day after the date on which 1000 hours is first earned. This date is determined as the earlier of the anniversary of the Census Specifications date of hire or the end of the annual measurement period (either plan or calendar year). This option is not available for measurement periods more frequent than annual. Previously this was treated as a minimum service accrual and not an eligibility requirement.

Plan Definitions

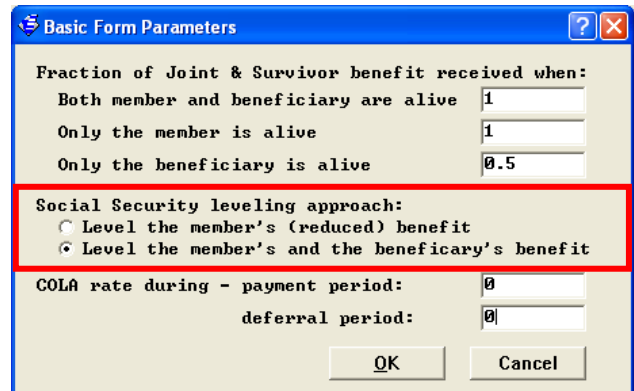
- ◆ The Plan Attributes topic has been enhanced to add a new parameter for the calculation of

nearest age. The new topic is accessed through the Misc. Parameters... button. It allows you to define the number of days used for “borrowed months” when doing a date subtraction. ProAdmin’s default is to use 30 days per month. This new parameter allows you to reflect the actual number of days in the “borrowed” month.

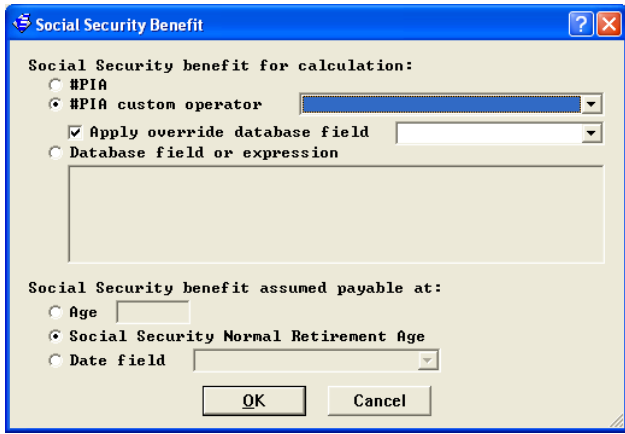


Payment Forms

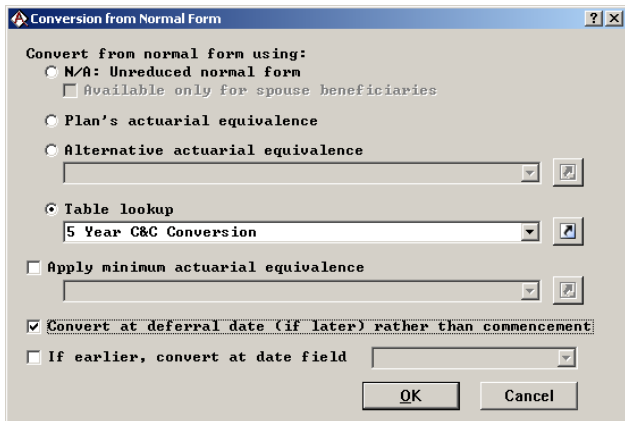
- ◆ ProAdmin now supports a Joint & Survivor Level Income Option where the beneficiary amount differs before and after the members benefit amount change date. Previously, a single beneficiary amount was always associated with a Joint & Survivor Level Income Option payment form.



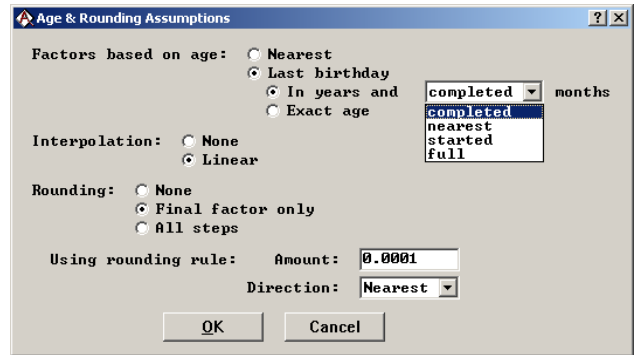
- ◆ The presentation of the Social Security PIA override options for Level Income payment forms has been modified. Now the dialog box is clear that if you choose either the standard #PIA operator or a custom #PIA operator, you can override the results of that operator with a single database field if an alternative PIA amount is available. Any expression that may be needed to define the override database field would be defined in the Census Specifications > Data Defaults.



- ◆ The Conversion from Normal Form topic has been enhanced to allow the check box Convert at deferral date (if later) rather than commencement for Age Difference table types.

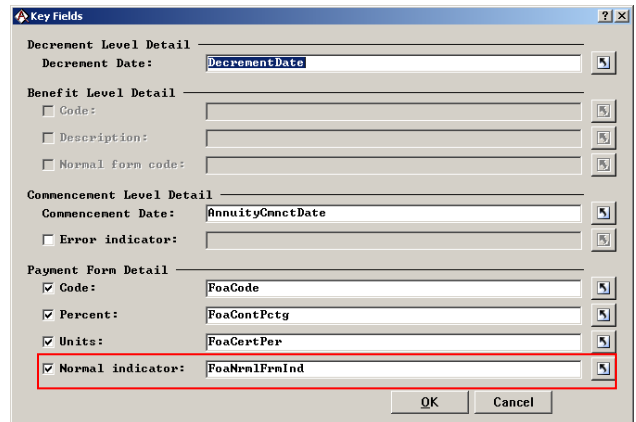


- ◆ The Age and Rounding Assumptions topic has been enhanced to allow for three (3) new age assumptions when using age last birthday and linear interpolation. Previously the only choice was completed months. You can now select from started, nearest, and full months as well.



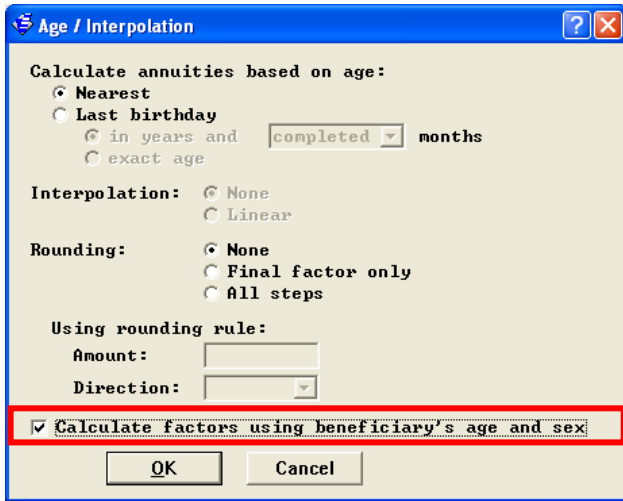
XML Output Linkage

- ◆ A new optional Normal Form Indicator tag has been added to the Key Fields | Payment Form Detail. If selected, the referenced tag for each payment form will have a 1 if it is a normal form of payment (if there are multiple Benefit Definitions, there may be multiple normal forms) or a 0 if it is not.



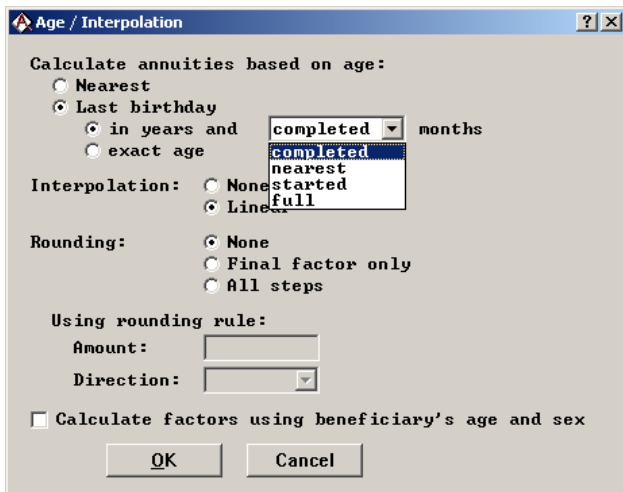
Annuity Factor Components

- ◆ Annuity Factors (Benefit Formula Components and Accrual Basis Components) can now be determined using the beneficiary's age and sex.



When an annuity factor is evaluated using the beneficiary's age and sex, if there is no actual beneficiary (i.e., the beneficiary type is "none"), then the annuity is defined to be zero.

- ◆ The Age / Interpolation topic has been enhanced to add a new age assumptions when using age last birthday and linear interpolation. The new choice is full months.



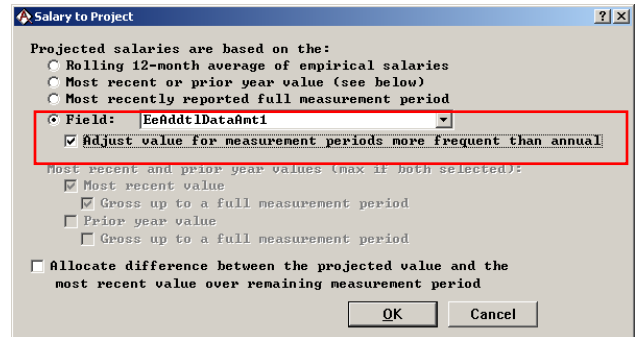
Sample Life Reports

- ◆ Added a Transformed Salary column to the detailed Salary Definition Set Exhibits when applicable. This column shows the salary calculated after applying the transformation expression from the Salary Definition

Projection Assumptions

- ◆ A checkbox, "Adjust value for measurement periods more frequent than annual", has been added to the Salary to Project topic when using a Data Dictionary field for the projected salary.

This new checkbox allows you to use a single database field value for multiple salary definitions with different measurement periods. In the past, ProAdmin always expected this field to contain a salary based on the measurement period selected in the Salary Definition.



Calculator Testing

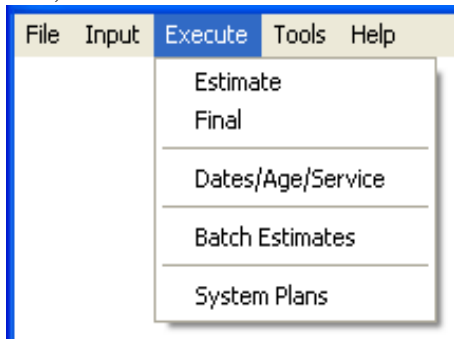
- ◆ You are now able to use uniform naming convention (UNC) to specify the path to the folders that contain the repository files and input XML records as well as to the folder that the output XML and audit reports should be written.

Output Definitions

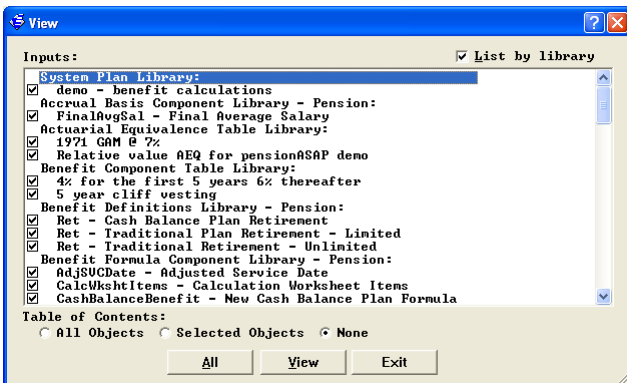
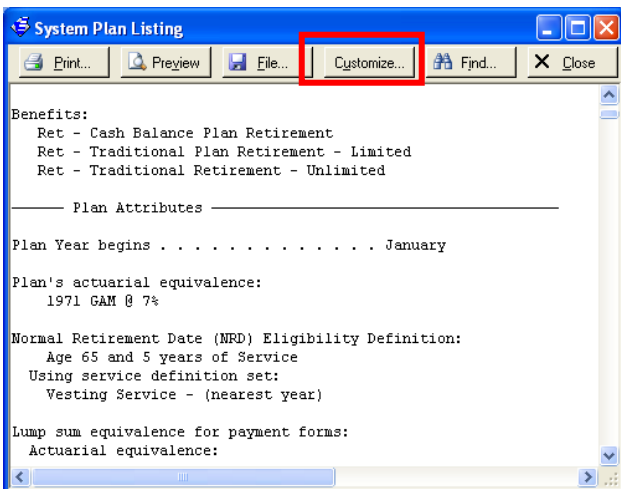
- ◆ All decimals (up to 8) are now included when Output Definition output is viewed and saved to file. Previously only two decimal places were available except when the data was saved to an Access Database file (which continues to include all decimals that exist in the underlying data).
- ◆ Correct the descriptors included with Final Average Salary detail output.
- ◆ Clarify on the dialog box and in the view that Final Average Salary detail output does not use an XML output field (the standard XML tag FASDETAIL is used instead), and does not require special treatment in the case of multiple values.

System Plans

- ◆ System plans are now the last, rather than the first, command on the Execute menu.



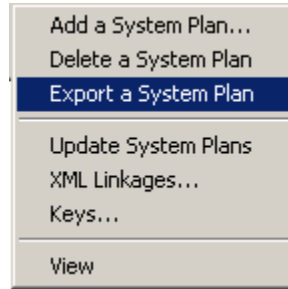
- ◆ Allow the user a customized view of System Plans. The new Customize button allows you to control which library entries are displayed, whether they are displayed in order of reference or in order of library name, and what should be included in the table of contents when the view is printed.



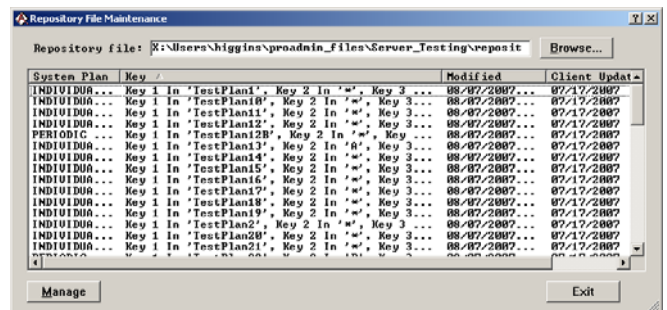
Repository File Maintenance

- ◆ Added the ability to export a System Plan from the Repository into a ProAdmin Client. This will populate all of the appropriate ProAdmin

libraries with the plan coding that was added to the Repository for that System Plan.



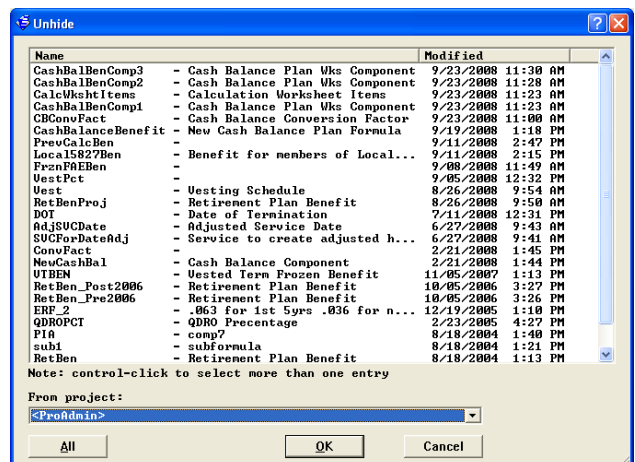
- ◆ Improved the display of the System Plans within the Plan Repository. Each System Plan is now on one row with the ability to resize the columns.



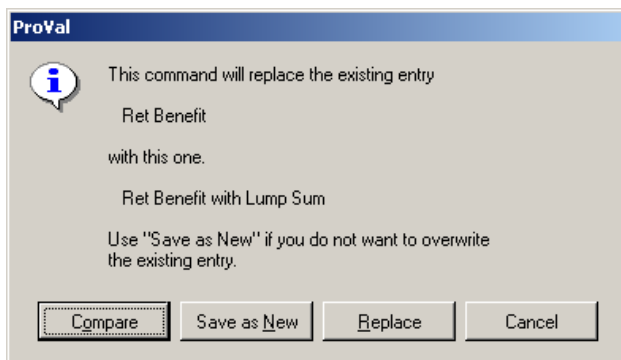
- ◆ Eliminated potential APL errors by disallowing the Manage > View command when one or more of the System Plans in the Repository have not been updated for the current version or ProAdmin. Similarly, only allow view of XML Linkages if the client update level is consistent with the current version of ProAdmin

System

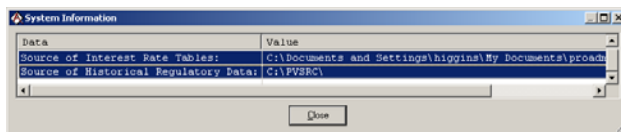
- ◆ When un hiding library entries, the list of entries now includes the date last modified. This makes it easy, for example, to sort the list chronologically to find the most recent entries.



- ◆ When copying from (or pasting to) ProAdmin spreadsheets such as reference tables, accrual rates, or increase rate tables, ProAdmin now assumes numbers on the Windows clipboard are (to be) formatted using the numeric format specified in Windows Regional Settings (e.g., “1.234,56” vs. “1,234.56”). This makes it possible, for example, to copy and paste values between Excel and ProAdmin for locations with different formats than “English (United States).”
- ◆ When replacing an object and ProAdmin prompts you to confirm (because both the name and some parameters changed), you can now compare the old and new object before deciding between Replace and Save as New.



- ◆ When you click on the System Info... button on the About ProAdmin dialog box, you can now see the path to the source for the Historical Interest Rate tables and Regulatory Data.



- ◆ The version of APL underlying ProAdmin has been upgraded. There was the potential to encounter an APL crash during a long running calculation either through Batch Estimates or Calculator Testing. This problem was rare but longstanding. Listed below are the potential messages from most to least probable.

1. APL crashes with this error

System FailurePlease report the following information. File:
D:\WruPlay\aplw\dev\src\INTERP\s\Sxtabs.cpp
Line : 340 Unexpected internal state ...

2. DOMAIN ERROR
3. RANK ERROR

4. NOT giving an error but returning a wrong result value

Changes Log

- ◆ Be sure to read the changes log (see What’s New in Help or the Changes Log (ProAdmin).Doc document in the ProAdmin directory) about updates to certain calculations that may change results. In particular, these changes are included:
 - Fix the “rolling 12-month average of empirical salaries” salary projection for measurement periods more frequent than monthly.
 - Changed the way ProAdmin applies the 1000 hour participation rule.
 - Various fixes to the alternative service calculations.
 - Fixes when service is calculated based on events.
 - Fix to frozen final average salary calculations.
 - Fix Covered Compensation calculation when wage base increases are reflected only through the year prior to the year of decrement

New Members of the Team

Jim Pavlat recently joined the WinTech team. Jim joins us from Accenture. He has a B.S. in Computer Science from WPI and has over 10 years experience in developing software application solutions. Jim will be largely supporting our ProAdmin Online product.

WinTech

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