
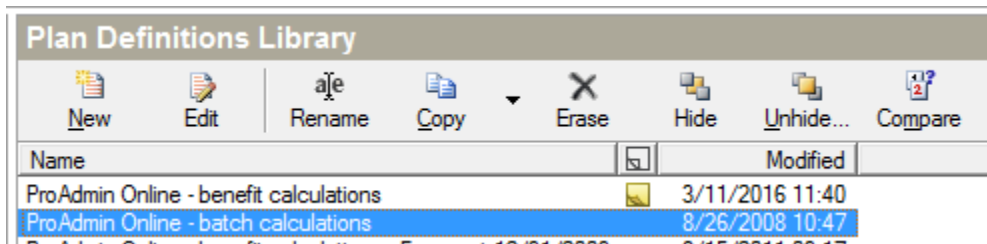


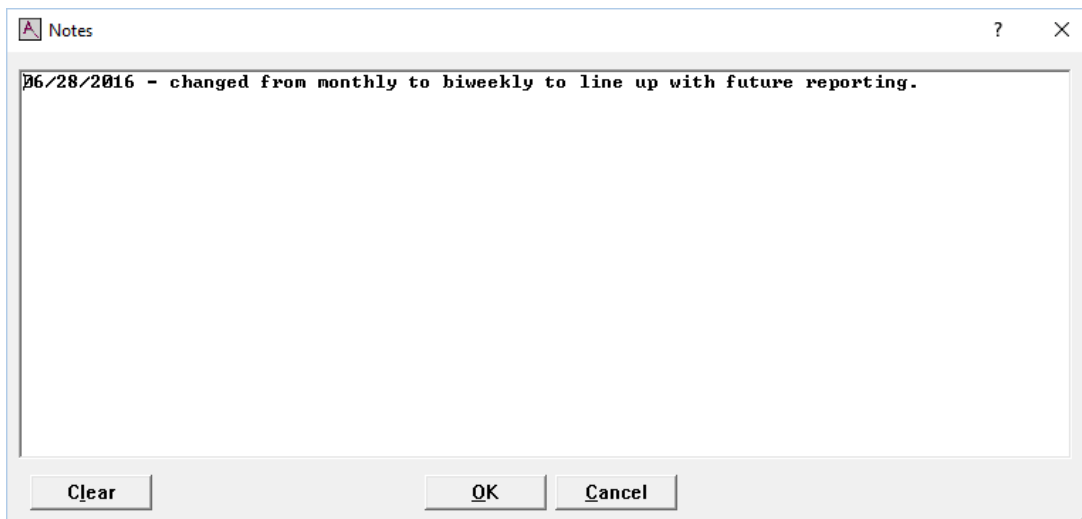
ProAdmin version 3.09 introduces a notes feature for documenting your work, a change history for library entries, data default detailed exhibits, input pass thru array fields, expanded age and rounding parameters, and many other features listed below.


Interface

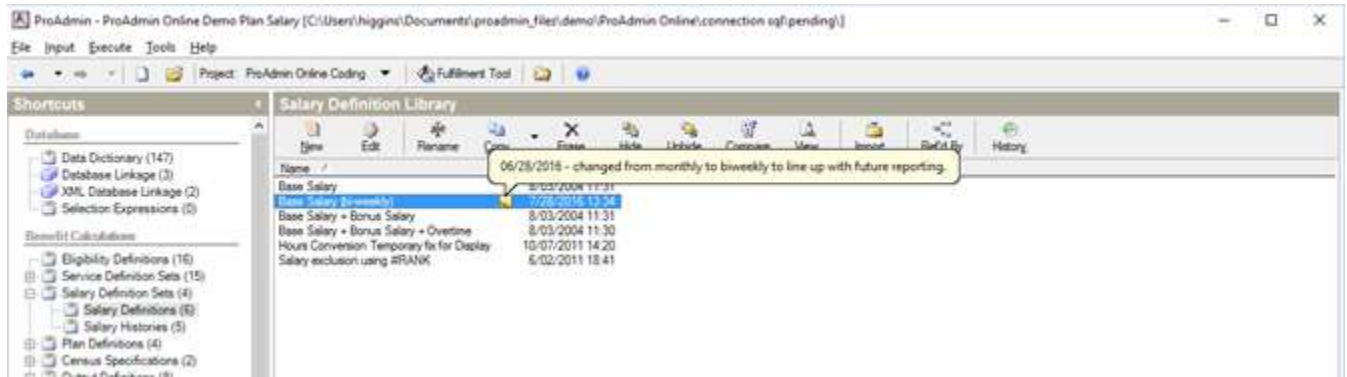
- ◆ **Notes.** Do you write long entry names because you're trying to document some essential detail? Now you can enter notes instead. They are separate from the name and there's plenty of space to describe the details. Simply click the  button and enter a note.



When used in conjunction with the new Change History feature (discussed under "Reviewers" below), this new feature allows you, for example, to track library changes and tag them back to client requests.

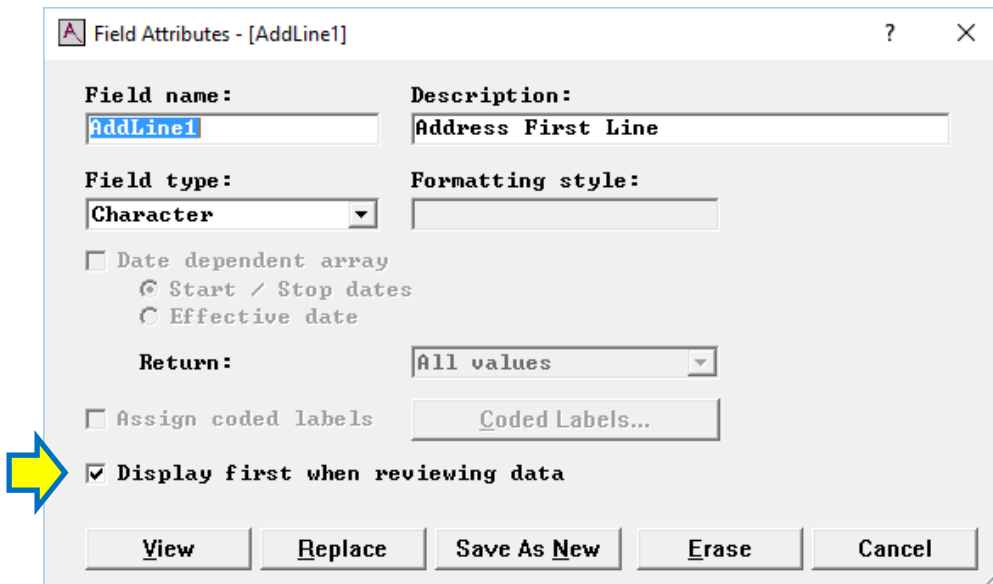


In the library, you can hover your mouse over the  image to read the note without having to edit the entry.

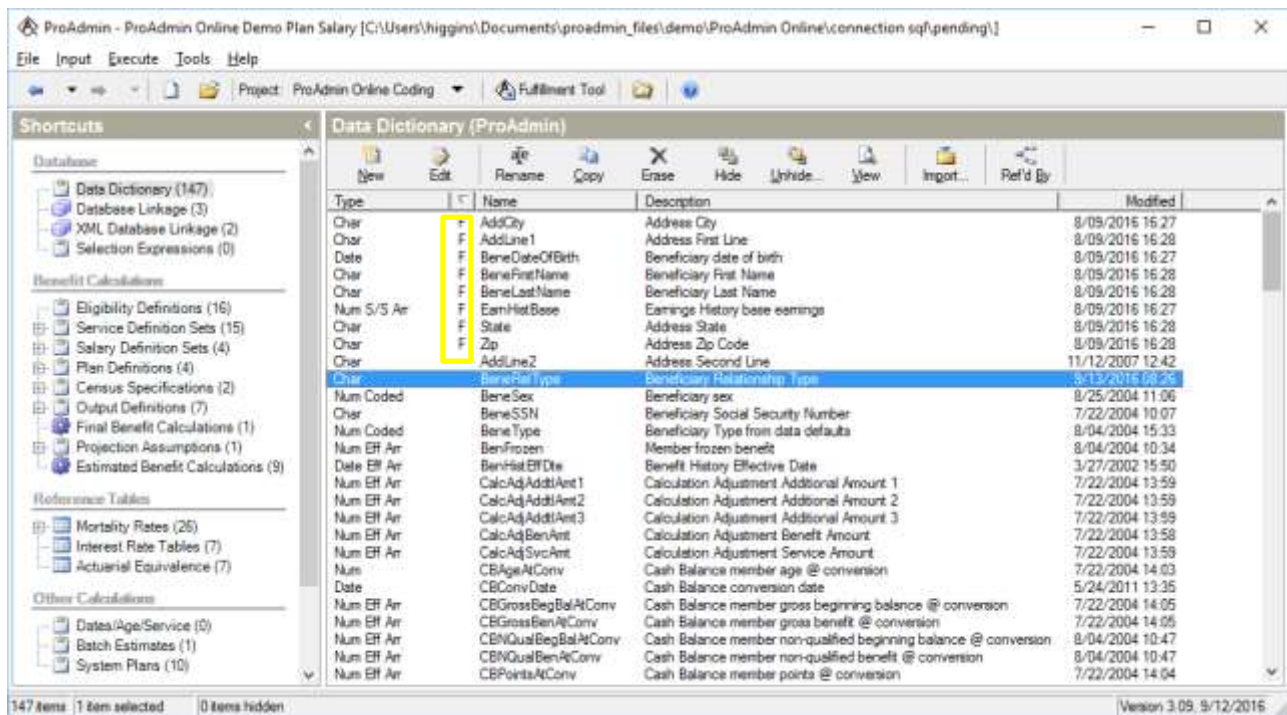


Data Dictionary

- ◆ **Display first.** Allows you to indicate fields that, when reviewing data prior to running a calculation, should be shown first, before ProAdmin's traditional alphabetic sort of referenced fields. You no longer need to search through the review data tabs, for example, to set the beneficiary type and date of birth. To use this new feature, open the field attributes dialog box for the data dictionary field and check the **Display first when reviewing data** box at the bottom of the dialog.



The Data Dictionary library now has a sort column that will contain F for those fields to show first.



When reviewing data for a calculation, any fields with the new check box set will show alphabetically prior to all other fields.

Data Review ×

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Person ID: 111-11-1122 Jump to field:

AddCity:

AddLine1:

BeneDateOfBirth:

BeneFirstName:

BeneLastName:

* EarnHistBase:

Start Date	Stop Date	Value	
1/01/1993	12/31/1993	9,000.00	^
1/01/1994	12/31/1994	9,000.00	
1/01/1995	12/31/1995	10,000.01	
1/01/1996	12/31/1996	12,000.00	v

State:

Zip:

AddLine2:

BeneSex:

BeneType:

CBCConvDate:

* Values are reset when defaults are applied.

Database Linkage

- ◆ **Global WHERE clause.** This new feature allows you to set a global condition that will be applied to all fields that are linked on the Data Field Links tab. For example, if you need to add a condition that the data should be selected for a specific plan in addition to the Person ID, you can now set this once rather than having to specify it as a condition for each individual field.

The screenshot shows the 'Database Linkage - [Excel Data Linkage]' dialog box with the 'Data Field Links' tab selected. The 'Default Person ID Column' is set to 'SSN'. A note states: 'Note: This column will be used unless overridden within an individual field link definition.' Below this, the 'Include global WHERE' checkbox is checked, and the text 'PlanCode=12345' is entered in the adjacent text box. A note below the text box reads: 'Note: This expression will be added to the WHERE of every data field linkage, except SQL overrides (where you need to manually add it).' At the bottom, there are buttons for 'View', 'Replace', 'Save As New', 'Validate...', 'Erase', and 'Cancel'.

Plan Definitions

- ◆ **Payment form rounding.** A new option under Plan Definition > Plan Attributes > Miscellaneous Parameters allows you to round monthly payment form amounts up to the next cent (rather than the default rounding to the nearest cent) for both the member and beneficiary, or only for the beneficiary.

The screenshot shows the 'Miscellaneous Parameters' dialog box with the 'Payments' section expanded. The 'Benefit payment frequency' is set to 'monthly', and the 'Annuity payment timing' is set to 'beginning of period'. The 'Round monthly benefit up for:' checkbox is checked, and the dropdown menu is set to 'member & beneficiary'. The entire 'Round monthly benefit up for:' section is highlighted with a yellow box.

Age Parameters

- ◆ **Age rounding.** All places in ProAdmin that potentially perform an interpolation based on age – payment form conversions, benefit formula components, accrual basis components and relative value calculations – now provide the option to limit the number of decimals used for the age when interpolating. For example, for a member age 60y2m on a calculation date, previously an interpolated annuity factor would have been calculated as 10/12ths of the age 60 factor plus 2/12ths of the age 61 factor. Now, if age is rounded to 3 decimals, the calculation will be 0.833 times the age 60 factor plus 0.167 times the age 61 factor.

Age / Interpolation ? X

Calculate annuities based on age:

Nearest

Last birthday

In years and months

Exact age

Interpolation: None

Linear

Round age to decimal places

Rounding: None

Final factor only

All steps

Using rounding rule:

Amount:

Direction:

Calculate factors using beneficiary's age and sex

- ◆ **Relative value age and interpolation.** The same age and interpolation options are now available under Plan Definition > Relative Value Calculations as for all other payment form calculations.

Relative Value Calculations

Calculate lump sum equivalent for payment forms

Actuarial equivalence interest & mortality:
 Relative value AEQ

Factors based on age: Nearest
 Last birthday
 In years and completed months
 Exact age

Interpolation: None
 Linear
 Round age to 4 decimal places

Custom Operators

- ◆ **Age methodology.** A new parameter has been added under the Computation Age and Law Year topic of PIA custom operators to allow use of the Social Security Administration (SSA) age methodology. When checked, the calculation mirrors the behavior of the SSA's Detailed Calculator "Anypia" by: (1) treating participants born on the first day of the month as if they were born on the preceding day, and (2) ignoring the day of birth when calculating early retirement reductions.

Computation Age & Law Year

Computation Age
 SSNRA
 Age y m
 Decrement age if later

Reduce (increase) PIA for early (late) commencement
 Allow CPI increases after decrement
 Assume computation age attained at decrement

Law Year
 Current law
 Current law frozen in year
 Current law frozen in year of date field

Reflect Social Security Administration age methodology

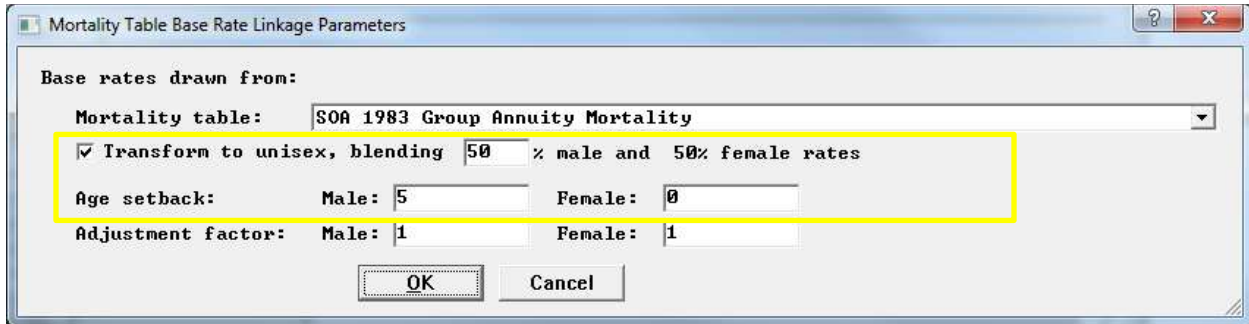
Perform a disability PIA calculation
 Freeze PIA at disability date

Do not round final PIA

OK Cancel

Mortality Rates

- ◆ When linking a mortality table to the base rates of another table, if the user checked "transform to unisex" but set age setback or adjustment factors to be sex-distinct, a message will be displayed to confirm parameter selection.



Mortality Table Base Rate Linkage Parameters

Base rates drawn from:

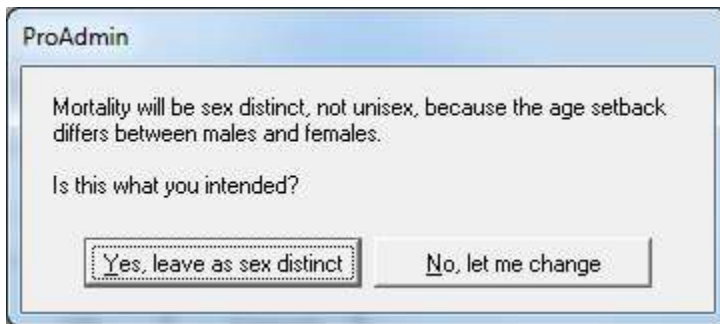
Mortality table: SOA 1983 Group Annuity Mortality

Transform to unisex, blending 50% male and 50% female rates

Age setback: Male: 5 Female: 0

Adjustment factor: Male: 1 Female: 1

OK Cancel



ProAdmin

Mortality will be sex distinct, not unisex, because the age setback differs between males and females.

Is this what you intended?

Yes, leave as sex distinct No, let me change

Output Definitions

- ◆ **Input Pass Thru arrays.** Database fields that are arrays are now available as input pass thru's as long as they are written above the decrement level within an XML linkage. When writing Output Definition results to Access, all array values are written to a new table called InputPassThruArrays.
- ◆ **Codes or labels.** Coded fields input pass thru's, whether scalar or array fields, now allow for the output of either the codes or the labels.
- ◆ **Date output.** Components whose name ends in `_DT`, and database fields the reference date Data Dictionary fields, will now display and be written to file as dates rather than numbers. However, for XML and Server Output Definitions, the type of the XML element in the Schema still controls whether you see a number, date, or string.

- ◆ **Beneficiary age standard output.** The beneficiary age is now available as a Standard Result for XML and Desktop Output Definitions. In the case of Server Output Definitions, beneficiary age can be mapped to an XML Output Tag on the Standard tab of the XML Output Linkage .

Standard Result


Description: Beneficiary Age

Output Field Name: BeneAge

Calculation Value:

- Age at decrement
- Age at commencement
- Beneficiary age at commencement
- Lump sum equivalent interest rate
- Normal Retirement Date
- Social Security normal retirement age
- User ID

Buttons: Replace, Save As New, Omit, Cancel

- ◆ **Tag lookup.** The  button for looking up XML paths in Desktop XML Output Definitions, as well as the XML Input Database Linkage and XML Output Linkage, has been enhanced to include sortable columns of (where applicable) tags, the data type of the element, the node name, and the XML path.

XML Schema Document

Select an XML container path or tag name/path:

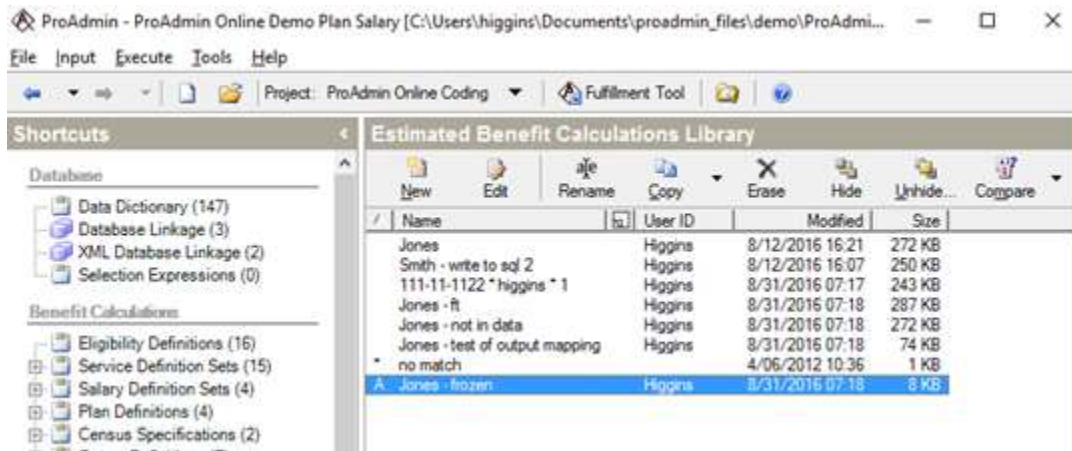
Type	XML Path
Num	BeneficiaryID
Char	LastName
Char	Title
Char	Initials
Char	FirstName
Date	DateOfBirth
Num	Sex
Char	SocialSecurityNumber
Char	RelationshipType
Num	RelationshipTypeCode
Date	LegalStartDate
Date	LegalEndDate
Num	NominatedAmount
Num	NominatedPercentage

Buttons: OK, Cancel

- ◆ **Pretty XML.** Pretty Print XML format is now used when saving Desktop (XML) Output Definition results to a file.
- ◆ **Sort by name.** Benefit level output, details of final average salaries, benefit formula components and interest rates, and the list of server input pass thru's not included in the Output Definition are now sorted by name within Output Definition results and XML files.

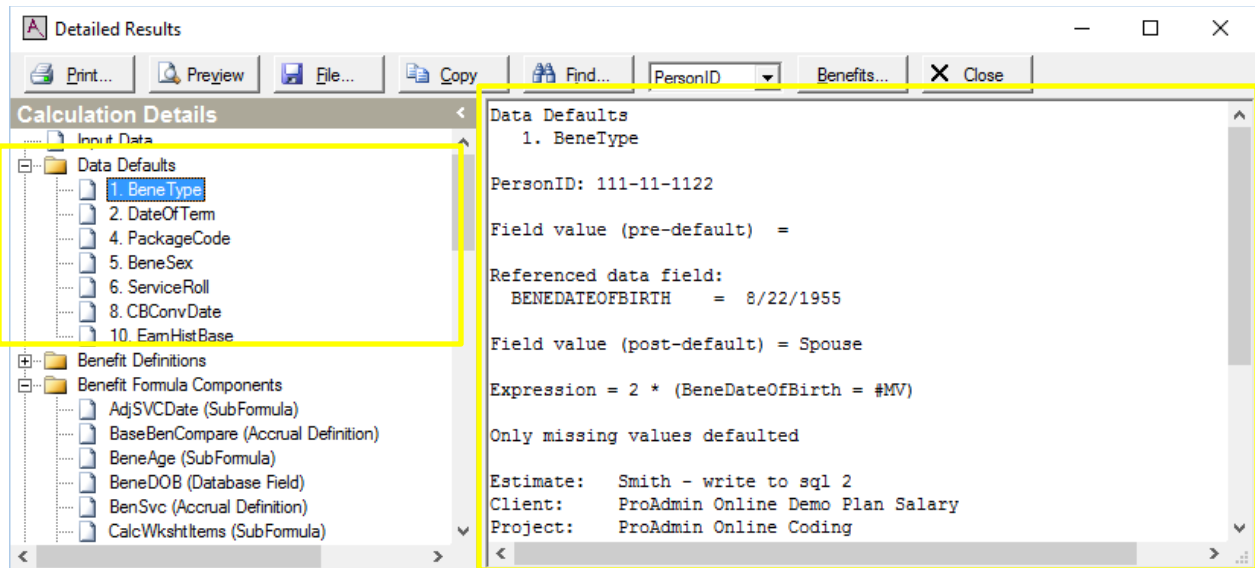
Calculations

- ◆ **Smarter exclusions.** Calculations are no longer aborted for missing data if that data does not apply to them. For example, a calculation for a member in location "A" will no longer abort because data needed for a Benefit Definition applicable only to members in location "B" is missing. This reduces the need to set data defaults.
- ◆ **Aborted calculations can now be saved.** Calculations that aborted during a run can now be saved. This is helpful for verifying user-defined error conditions. Such calculations will now show in the Final, Estimated and Dates/Age/Service Calculations Libraries with a type of "A". In addition, clicking the View button will allow display of the processing messages at the time of the abort. Any change in the processing messages of a calculation that aborts will also be included in any Run & Compare evaluations.

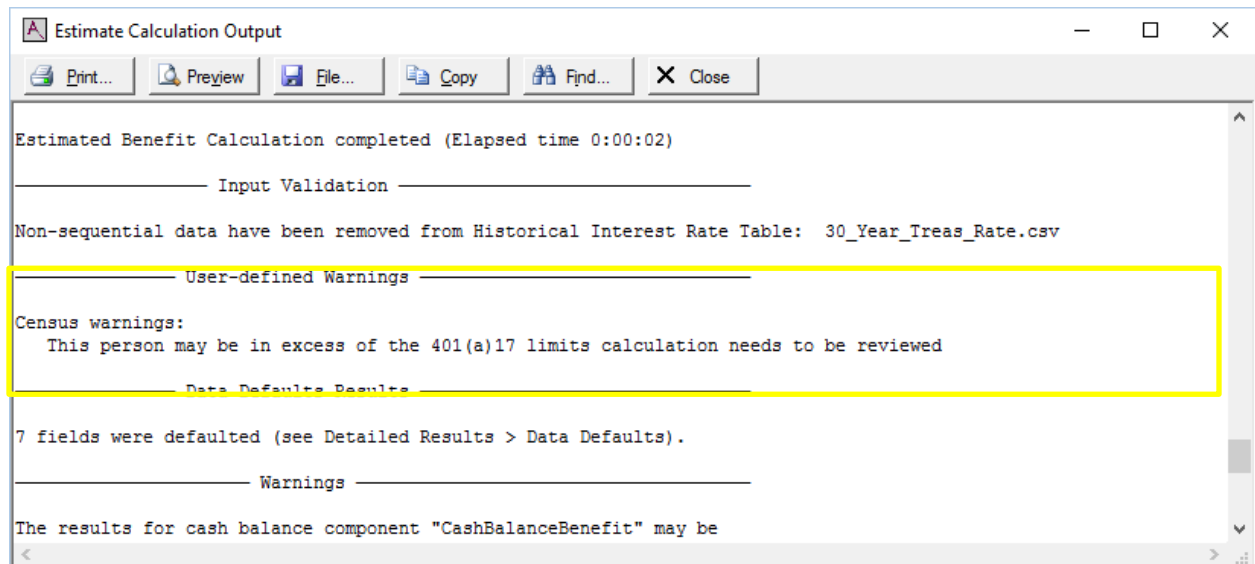


Detailed Results

- ◆ **Data defaults exhibits.** A new "Data Defaults" node, displayed directly under the Input Data node when data defaults were applied, details the calculation of each database field that was defaulted.

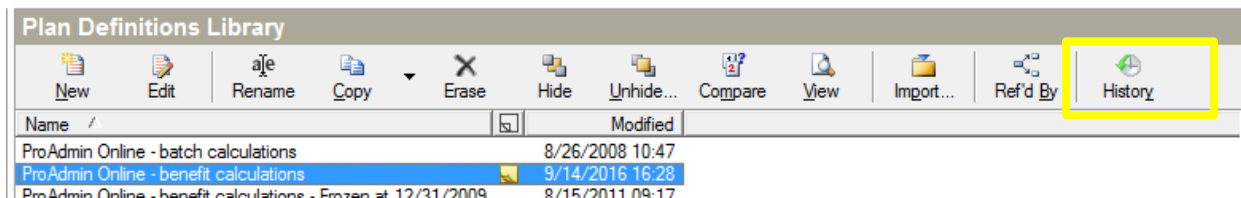


- ◆ **Count of fields defaulted.** When more than 6 fields are defaulted for a calculation, the processing messages will now display a count of the number of fields defaulted rather than a list of field names. This cuts down the "clutter" in the processing messages for plans with a substantial amount of data defaults. The new Detailed Results feature above provides full information on the defaults applied if needed.

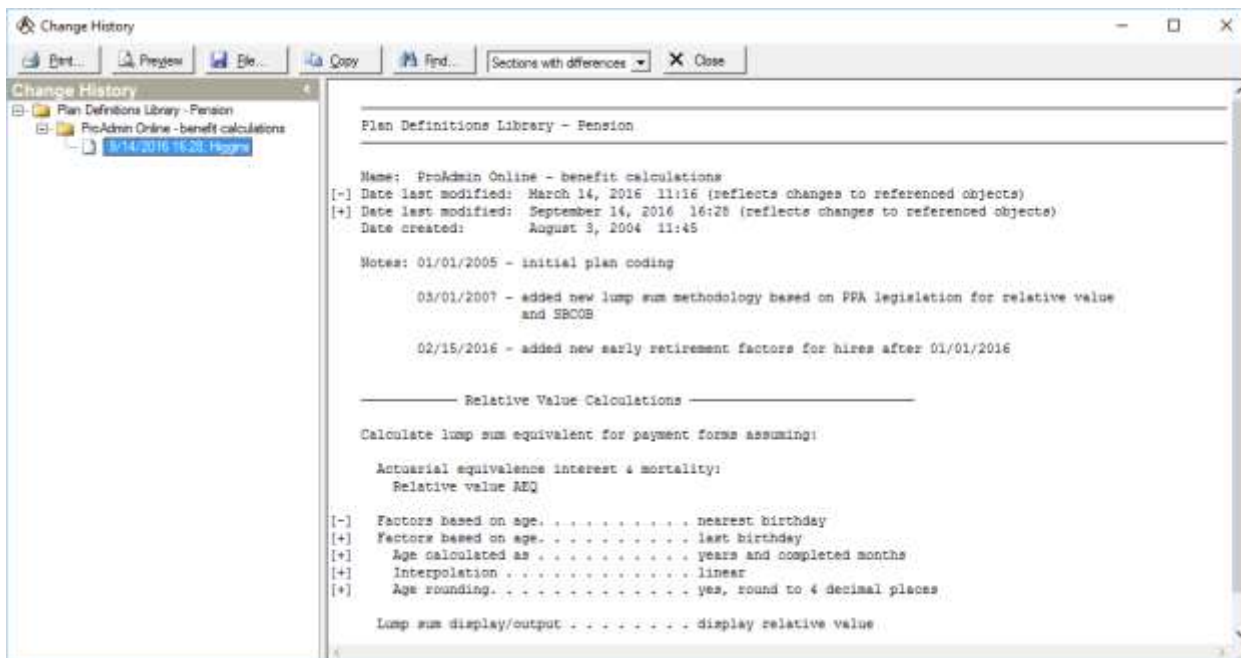


Reviewers

- ◆ **Change history for library entries.** Changes are now logged every time you edit an existing entry and click Replace. To see the changes, select one or more entries and click History.



This displays the entire history for the selected entries, from the most recent change to the original change. Selecting a particular change, you can see the details of what changed in a format similar to comparing two library entries, including the option to switch the view between "Sections with differences" and "All sections".



To view the complete change history across all libraries in a client, use File > Change History.

Help

- ◆ **New FAQs.** The following articles have been added to the FAQs section of the help:
 - Cash balance accrual when no service is earned
 - Coding Service for early & late retirement factors
 - Computing final average earnings in the past
 - Determining final average earnings when plan year is not the first of any month
 - How can I protect a data field from user edits?
 - How do I project hours at different rates?

Changes Log

- ◆ Be sure to read the changes log (see "changes log.doc" in the ProAdmin installation folder) about updates to certain calculations that may change results.



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