ProAdmin

What's New in version 3.13 May 2019

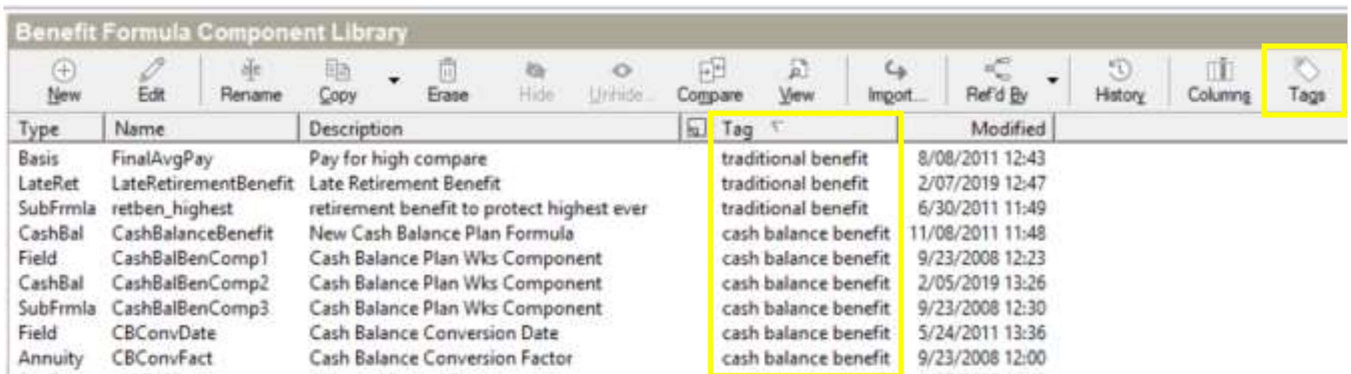
ProAdmin version 3.13 introduces tools for managing large libraries, smarter client merging with fewer duplicates, a joint life refund annuity payment form, several batch estimate improvements and many additional features listed below.

Please note that several of these features (denoted with *) were released in 3.12 patches, but are included here in case you missed them.

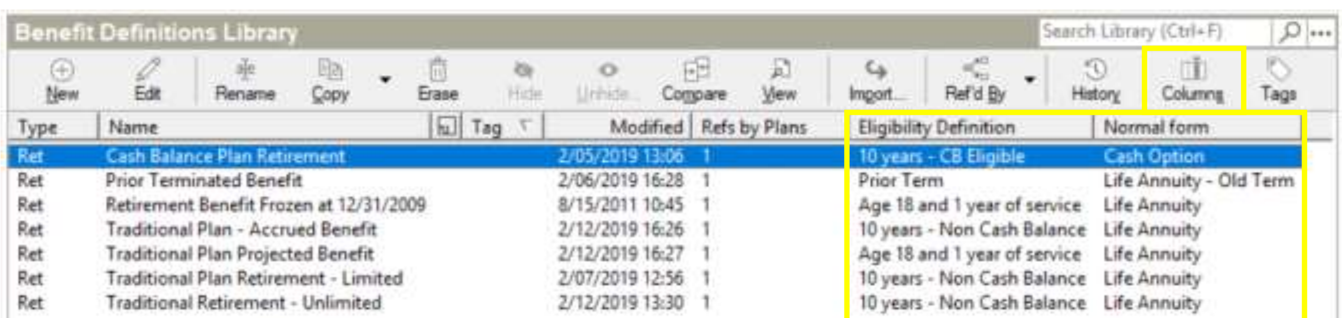
Managing Large Libraries

New tools help you organize, group, and control large libraries for complex cases.

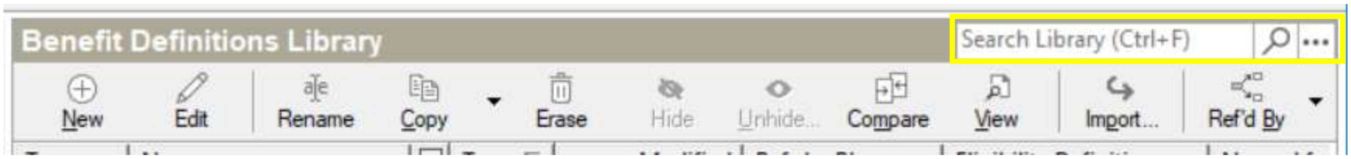
- **Tags.** You can now tag library entries, effectively organizing them into groups. For example, you might tag 3 benefit formula components as "traditional benefit", another 5 as "cash balance benefit", then sort by tag to easily select the relevant components for a specific benefit definition, etc. Tags have numerous uses – like initialing entries with the person responsible for updating them or marking the status of entries in the do/review cycle. Tagging is low touch – it does not modify the date last modified, erase results, etc.



- **Additional columns for benefits.** You can now view additional columns in benefit, benefit formula component, and accrual basis component libraries. For example, you can display the eligibility conditions and normal form for benefits. These settings are stored separately for each user, client, and library.

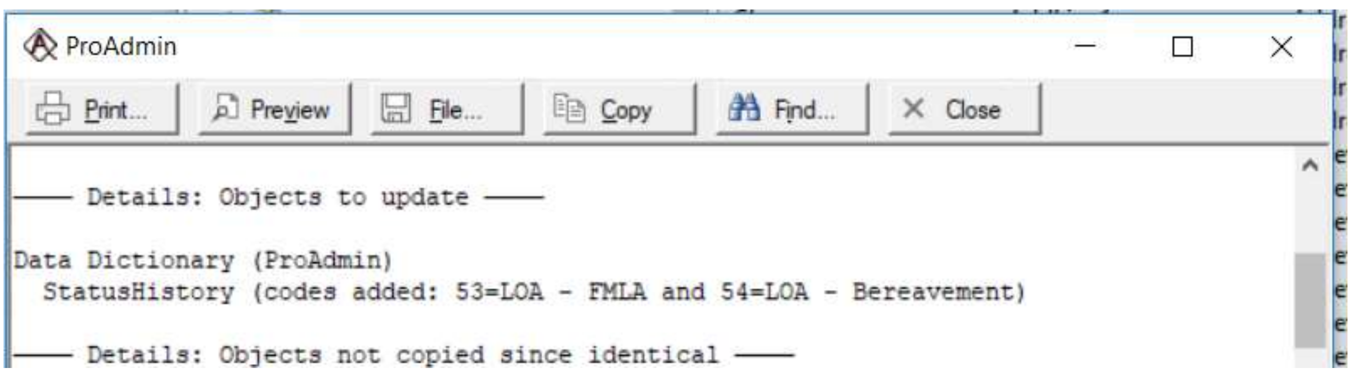


- **Search.** You can now filter a library by searching entry names or using a more advanced search on other characteristics or with multiple criteria. For example, you could search for benefits that contain "Age 65" in the Eligibility conditions.



Import from Client & Client Merge

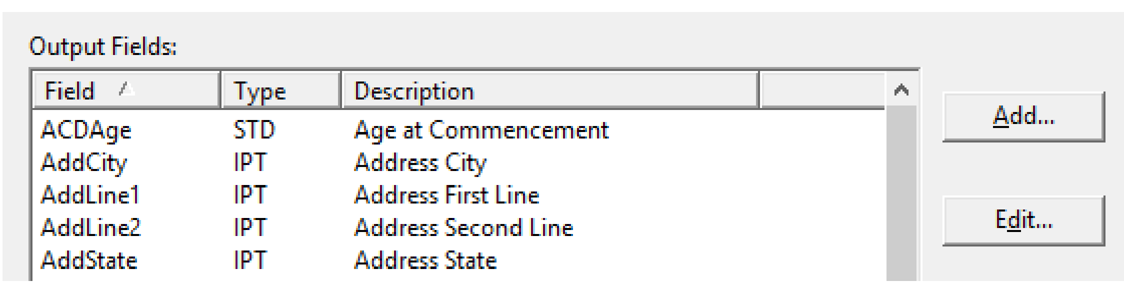
- **Smarter imports with fewer duplicates.**
  - Coded fields with compatible codes will be merged rather than creating a duplicate field (_2). The target client will include the superset of codes from the two clients, as long as there isn't a conflict (e.g., 12=active vs 12=retired).



  - ProAdmin will now avoid making duplicates of objects (#2) that are logically equivalent, even if not identical. For example, it will ignore changes in date created, date last modified, descriptions, and change history.

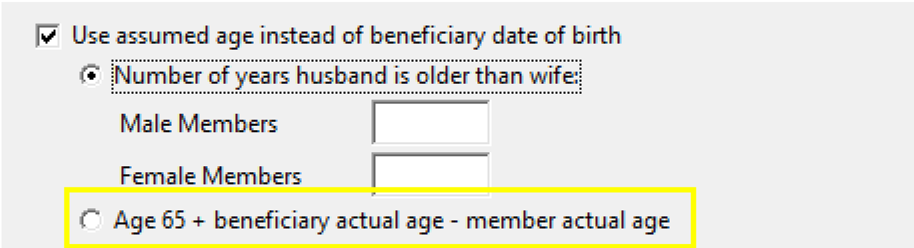
Interface

- **Copy and paste for dropdowns.** You can now copy and paste items in dropdown lists. For example, you can copy the annuity factor component member mortality to the joint & survivor annuity beneficiary mortality assumption.
- **Output Definition listview.** The fields contained within output definitions are now displayed in listview format, allowing for a more organized view and column sorting.

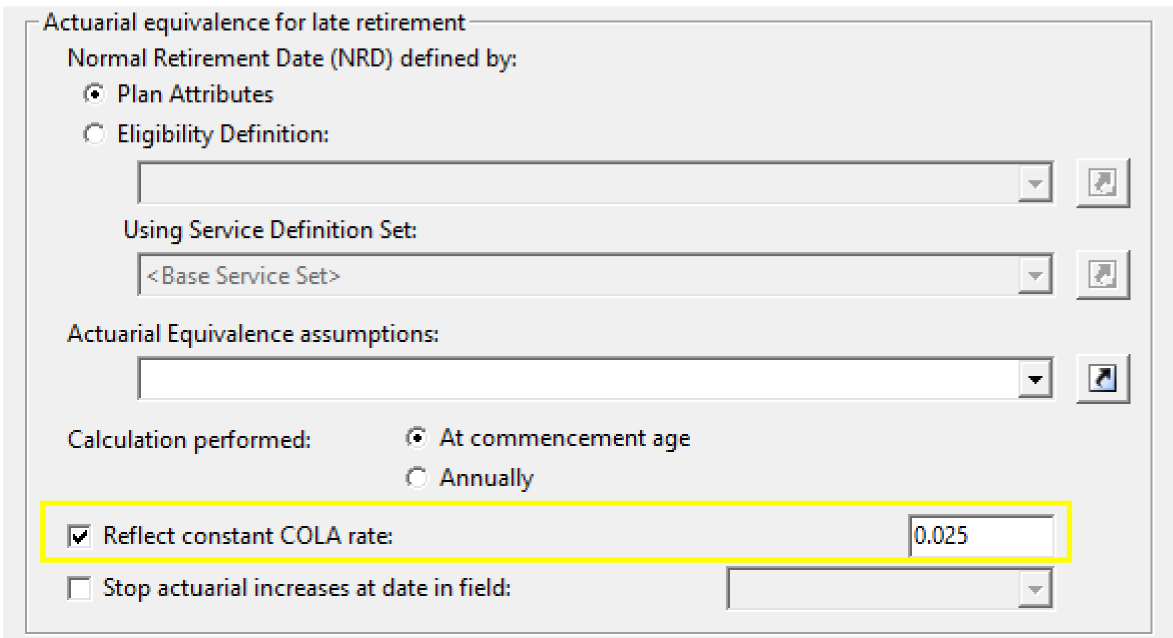


Benefit Formula Components

- **New assumed beneficiary age method for Joint & Survivor annuity factors.** In addition to using the actual beneficiary age or an age setback assumption, you can now calculate assumed age for the beneficiary as: age 65 + beneficiary actual age – member actual age.

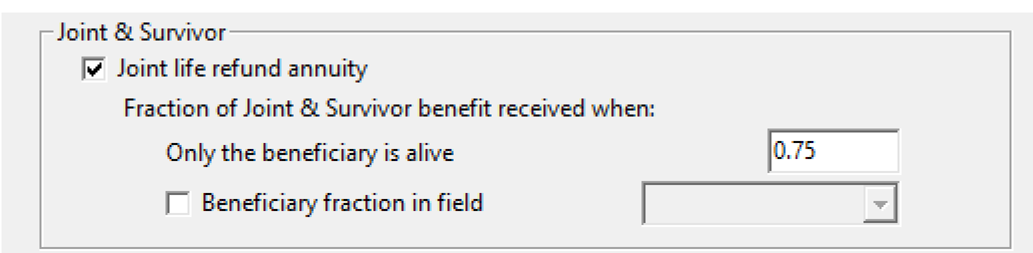


- **COLA for Late Retirement.** You can now reflect a constant COLA rate for Late Retirement components.

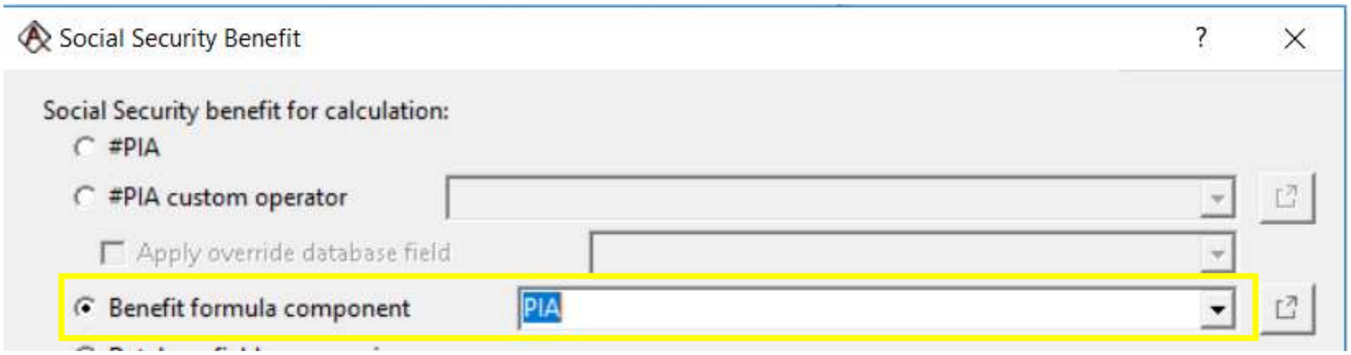


Payment Forms

- **Refund Annuity for Joint Life.** Refund Annuity payment forms now allow for Joint Life payments.



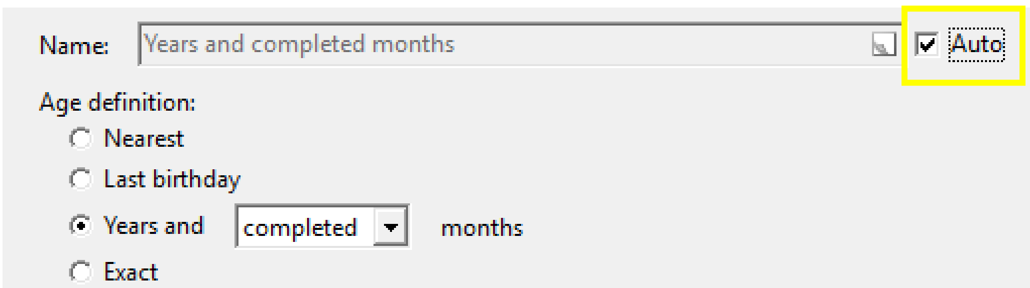
- **Benefit Formula Components in Social Security Level Income.** Benefit Formula Components can now be used as the Social Security benefit for Level Income Options.



- **Improved messaging.** Clarify validation messages for payment forms that use age difference tables for conversion.*

Age Definitions

- **Automatic naming.** You can now initialize or update the description of an Age Definition based on the parameters selected by checking the **Auto** box to the right of the Name.



Mortality Tables

- **Updated tables.** Update "most recent applicable mortality" to use the IRS 2018-2020+(MP16-18) Applicable Mortality for 417(e) (dynamic) for commencement dates in 2020 and later per IRS Notice 2019-26.
- **Default behavior.** The "Use the current applicable mortality for 417(e)" checkbox will now default to checked for new actuarial equivalence and annuity component library entries.
- **Improved messaging.** A warning is now issued when editing or processing Actuarial Equivalence, annuity factor benefit formula component or Plan Definition library entries that reference a mortality table eligible to use the current 417(e) table but for which the option has not been selected.

Calculations

- **Improve speed.** The calculation of hours/reported service calculations is now faster (by as much as 50%) when using the "Allocate reported hours by days" option and there are a large number of hours/service units reported. *
- **Improved messaging.** The following calculation processing messages have been added:
    - Expanded validation messages when checking the Event Definition.*
    - Expanded error messages when populating data from an XML record.*
    - If a calculated date field is used to define the oldest recognized age for an annuity factor component and the eligibility condition is never met, issue a warning message and ignore the oldest age parameter.*

Output Definition

- **Sorting of payment forms.** When processing a calculation, payment form results are now sorted alphabetically by Benefit Definition name and then user-defined order. Accordingly, users can control the order of display of payment form information within the Output Definitions by editing the Benefit Definition name and the order of payment forms within those Benefit Definitions.

Batch Estimates

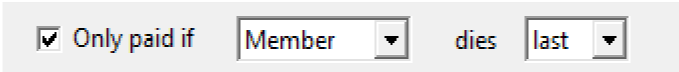
- **Beneficiary Information in CSV file for Batch Estimates.** When using a CSV file for Batch Estimates, the beneficiary date of birth and type can now be optionally entered after the required first three elements of Person ID, date of decrement and commencement date. For example,

  123-45-6789, 12/31/2018, 1/1/2019, 3/5/1968, 1
  111-11-1111, 12/31/2018, 6/1/2019, 10/17/1970, 2
  123-45-6790, 12/31/2010, 1/1/2012
  123-45-6900, 12/31/2010, 1/1/2013, 3/5/1968

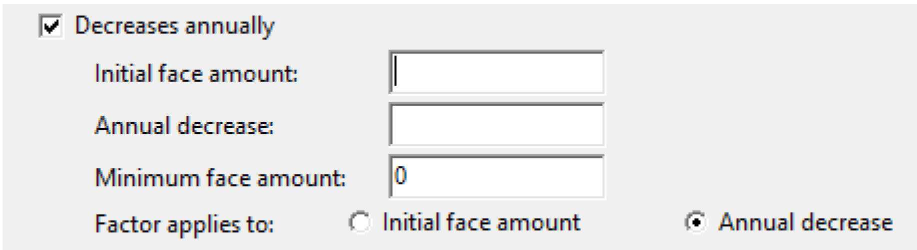
- **Input file validation.** Batch estimate calculations referencing an external input file now capture and report on the following:
  - Clarify that invalid data is really missing required input fields.
  - Records with invalid decrement date.
  - Records with invalid benefit commencement date/age.
  - List input file line numbers that did not include the three required input fields to help users track down errors.
- **Smarter database connections.** When running batch calculations, ProAdmin now opens one connection per thread instead of opening and closing the connection for each calculation. This should speed up calculations and minimize ADO connection errors.
- **ADO connection issue improvements.** MS Access is not multi-threaded and can have problems if trying to read data from more than one thread. Now if the ProAdmin batch calculator encounters certain ADO connection errors, another run of these calculations will be attempted. In this situation, the following will be identified:
  - If there are any reruns, the number of reruns and successes.
  - If there are any aborts (after all reruns), the (first 50) IDs of the aborts will be displayed and any calculations that were reruns that are still aborting because of an ADO connection error will be asterisked.
  - If there are duplicate IDs, then file row numbers will be added to any IDs being displayed.
- **Improved messaging.** The following batch calculator processing message have been added:
  - If there are errors, a new summary table will show the first 50 IDs of calculations that encountered errors.
  - Messages are now included for any errors that are encountered during a Date Calculation run to determine decrement and/or benefit commencement dates for a Batch Estimate.
  - When saving results to a database with pre-existing batch results, if the user chooses to "Replace File" and the file includes tables from the Fulfillment Tool, a warning message will be issued indicating that this action cannot be undone and asking for confirmation of the action.
  - If running in the cloud (local processors or grid processors) and there is an ADO connection error, the processor id and name of the machine will now be appended to the error message.

Administration factors

- New options in life insurance payment forms support:
  - Joint life insurance payable upon last survivor or first to die.



  - Decreasing life insurance.



These features can be used to help check the decreasing life/joint life insurance details for refund annuities.

Grid Processing

- Errors due to calculations trying to access ProAdmin.ini when using GRID processors have been eliminated. Now any calculation related-ProAdmin.ini setting is determined before accessing the GRID.
- The Command Reference help has been clarified regarding certain ProAdmin.ini settings, such as RegPath or HirtDir, that may differ depending on whether the calculation is being processed on the local drive, the server or the GRID. Overriding settings of such parameters can now be specified in the [Server] and/or [Grid] sections of ProAdmin.ini.

System

- Known explanations for system errors now appear in plain text rather than as an error code, as in "Unable to open file: *The system cannot find the file specified*."

Changes Log

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

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