

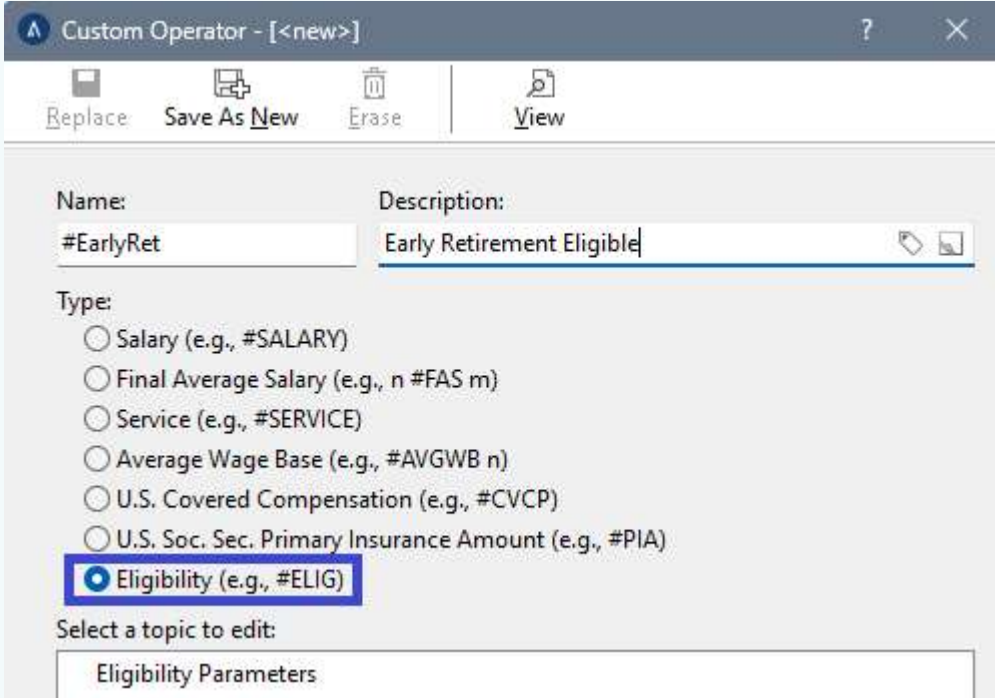
What's New in version 3.22

January 2026

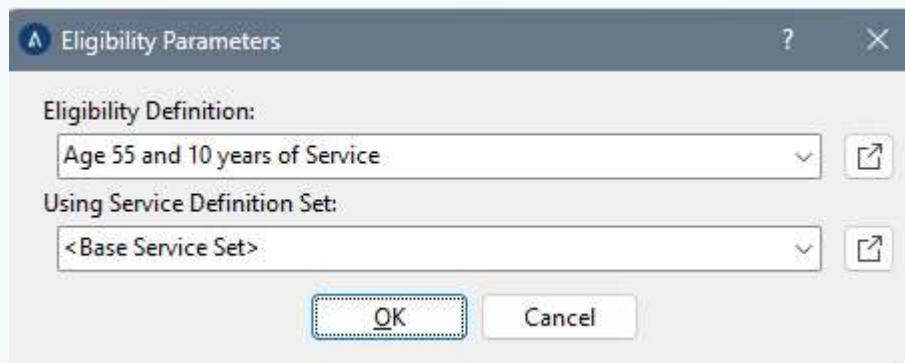
ProAdmin version 3.22 introduces several feature enhancements, including an Eligibility custom operator, saving up to 20 batch estimates to the Estimate library for detailed review, showing only key dates in Calculation Results, and more. Full details on all new features are listed below.

Eligibility

Eligibility Custom Operator. ProAdmin now offers a new custom operator which can be used in Benefit Definition formula expressions. The default operator, #ELIG, is based on the Plan Definition normal retirement date eligibility parameters. Other custom operators for eligibility can be created referencing other predefined eligibility and service definition set combinations. This new operator returns a Boolean array indicating whether or not eligibility was met for each calculation date.



The screenshot shows the 'Custom Operator - [<new>]' dialog box. It has a toolbar with 'Replace', 'Save As New', 'Erase', and 'View' buttons. The 'Name' field contains '#EarlyRet' and the 'Description' field contains 'Early Retirement Eligible'. Under the 'Type' section, several radio buttons are listed: 'Salary (e.g., #SALARY)', 'Final Average Salary (e.g., n #FAS m)', 'Service (e.g., #SERVICE)', 'Average Wage Base (e.g., #AVGWB n)', 'U.S. Covered Compensation (e.g., #CVCP)', 'U.S. Soc. Sec. Primary Insurance Amount (e.g., #PIA)', and 'Eligibility (e.g., #ELIG)'. The 'Eligibility (e.g., #ELIG)' option is selected and highlighted with a blue box. At the bottom, there is a 'Select a topic to edit:' label and a text box containing 'Eligibility Parameters'.



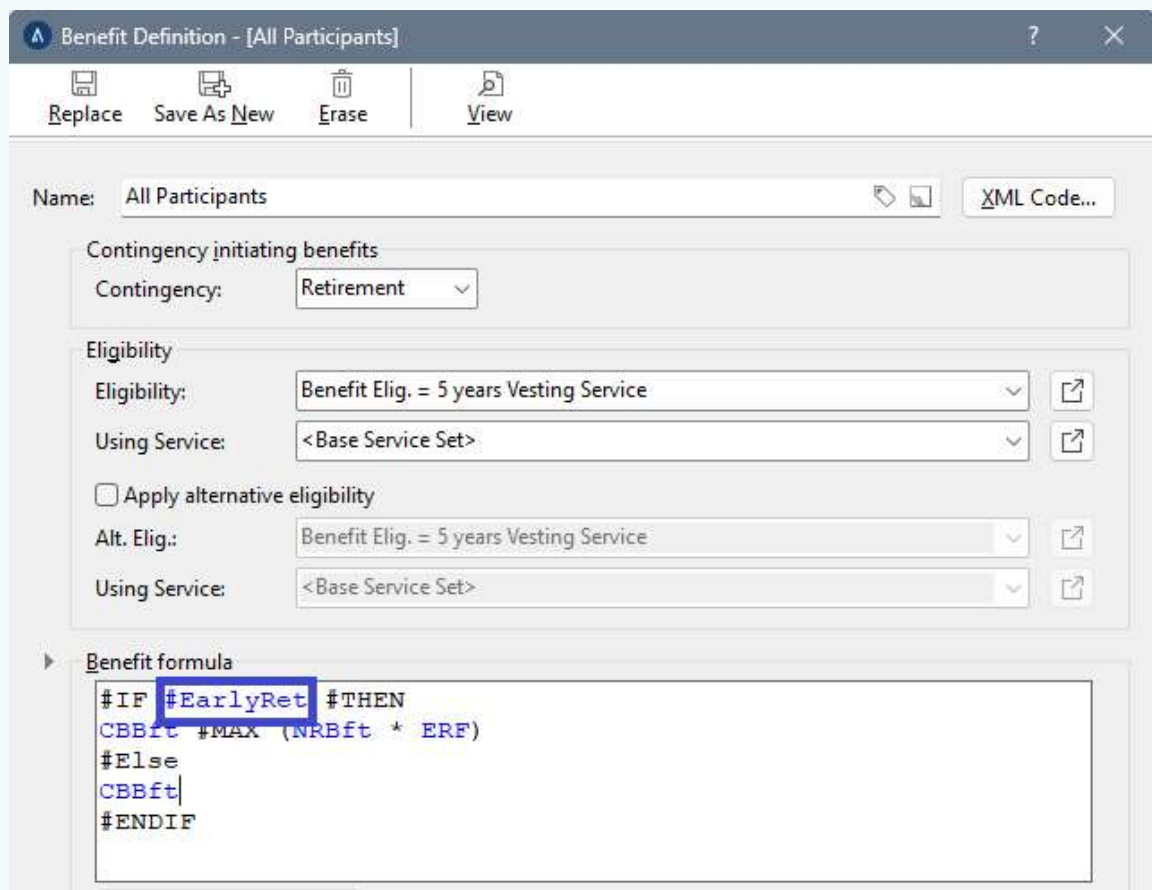
Eligibility Parameters

Eligibility Definition:
 Age 55 and 10 years of Service

Using Service Definition Set:
 <Base Service Set>

OK Cancel

This operator can be used to embed complex eligibility criteria within the Benefit Definition benefit formula. This can eliminate the need to create multiple Benefit Definitions when the formula is the same, but the early retirement factor component varies by eligibility.



Benefit Definition - [All Participants]

Replace Save As New Erase View

Name: All Participants XML Code...

Contingency initiating benefits
 Contingency: Retirement

Eligibility
 Eligibility: Benefit Elig. = 5 years Vesting Service
 Using Service: <Base Service Set>

☐ Apply alternative eligibility
 Alt. Elig.: Benefit Elig. = 5 years Vesting Service
 Using Service: <Base Service Set>

Benefit formula

```
#IF #EarlyRet #THEN
CBBft #MAX (NRBft * ERF)
#Else
CBBft
#ENDIF
```

Additionally, results of this component will be listed in Calculation Results exhibits for your review.

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Benefit Definitions

Benefit: Ret - All Participants

PersonID: XXXXX6789

Date	Age	Eligible?	Salary	#EARLYRET Component	CBBFT Component	NRBFT Component	ERF Component	Formula Benefit
12/31/2024	61y 8m	Yes	106,700.99	1.000000	36,696.66	42,751.25	0.880000	37,621.10
12/31/2025	62y 8m	Yes	110,969.03	1.000000	38,531.49	44,461.29	0.920000	40,904.39
1/01/2026	62y 8m	Yes	0.00	1.000000	38,531.49	44,461.29	0.920000	40,904.39

Benefit formula = #IF #EARLYRET #THEN
CBBFT #MAX (NRBFT * ERF)

Age definitions. Eligibility definitions have been enhanced to include the selection of an Age Definition.


Eligibility Definition - [Earliest Possible Retirement Date] ? X

Replace

Save As New

Erase

View

Name: Earliest Possible Retirement Date 

Determine based on conditions:

Conditions (no less than):

Age	Service	Points
@ERAge	@ERSvc	@ERPts
65		

or earlier of <none> and <none>

Exceptions (no more than):

Age	Service	Points

or earlier of <none> and <none>

Age Definition:

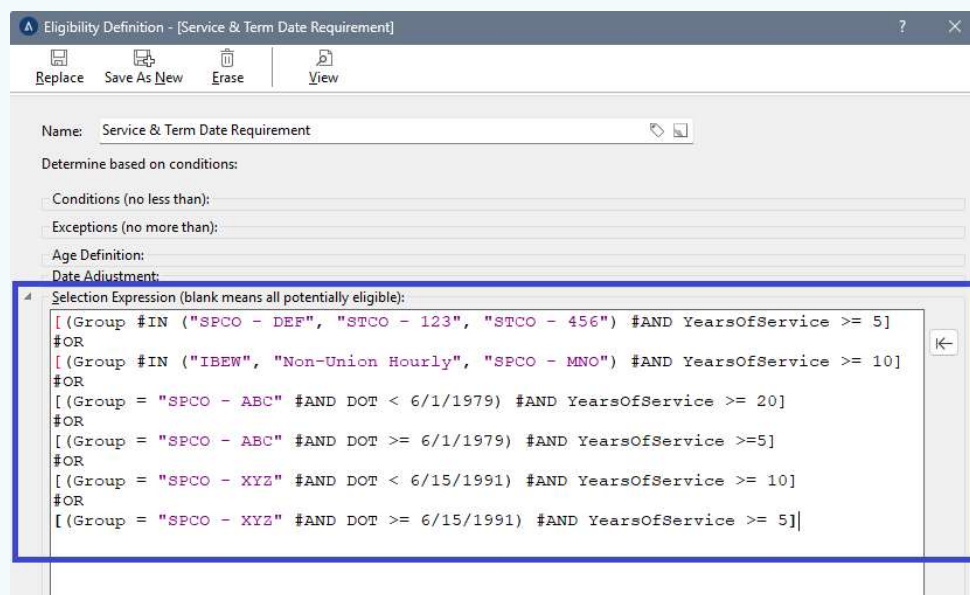
Exact

Date Adjustment:

Including an age definition selection in the Eligibility Definition specifies which method is used to determine age (e.g. age in years and months or age at last birthday) when assessing whether eligibility criteria are met. This age definition is also applied in calculating points referenced by the eligibility definition. An age definition defining "exact" age was created, if necessary, for all pre-existing entries to reflect prior behavior. The default for new entries is the <Plan Age Definition>. An alternative selection only needs to be made when you wish a different age to be utilized.

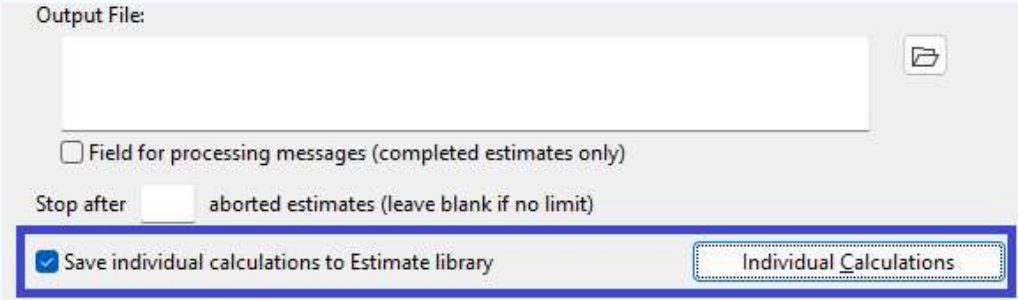
Eligibility definitions are referenced throughout ProAdmin. The new age determination selections can be applied in various areas, including calculated dates used to identify dates such as earliest retirement date.

Eligibility Definition. The Selection Expression parameter can now be expanded to improve the visibility of large expressions. Should the expression extend beyond the expanded box, a scroll bar will be available.



Batch Estimate Benefit Calculation

Saving individual calculations. Estimate library entries for up to 20 individual calculations can now be processed within a batch estimate benefit calculation. Select “save individual calculations to Estimate library” to enter the Selection Expression to be used to identify the estimates to be saved.



Output File:

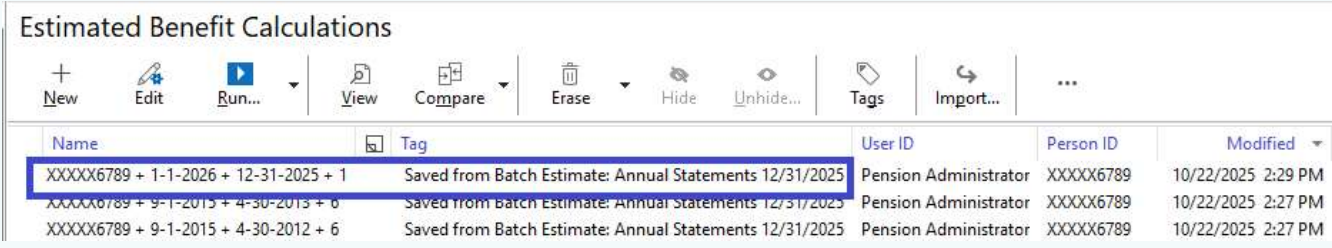
☐ Field for processing messages (completed estimates only)

Stop after aborted estimates (leave blank if no limit)

☒ Save individual calculations to Estimate library

Individual Calculations

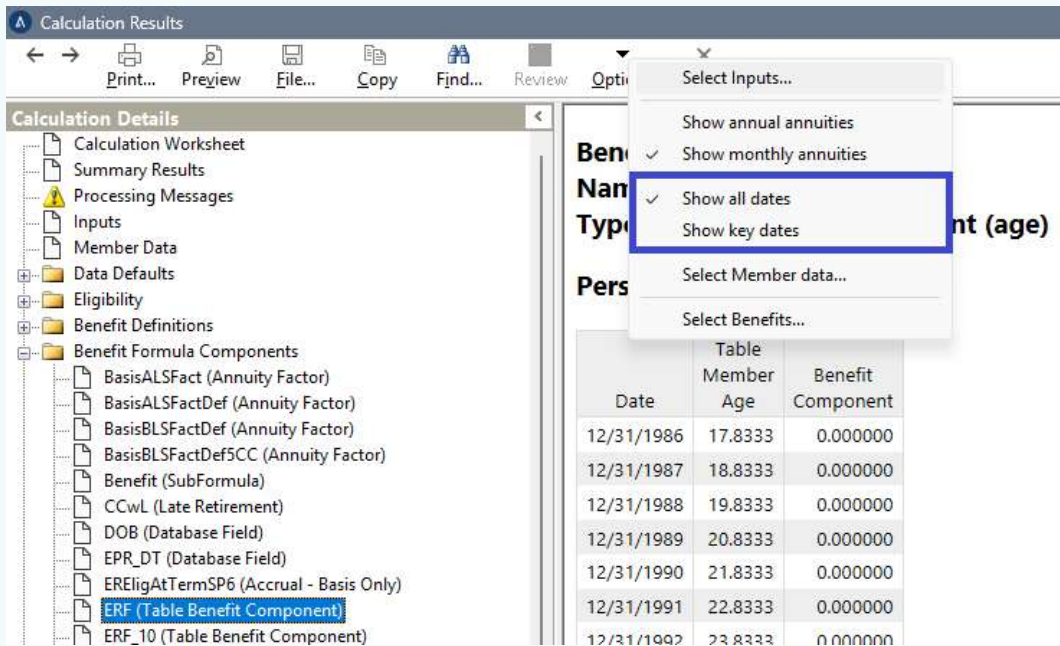
Once saved to the Estimate library, these entries will follow the naming convention, [Obscured PersonID] + [Commencement Date] + [Decrement Date] + [Sequence #] and include a Tag indicating the batch which generated this calculation.



Name	Tag	User ID	Person ID	Modified
XXXXX6789 + 1-1-2026 + 12-31-2025 + 1	Saved from Batch Estimate: Annual Statements 12/31/2025	Pension Administrator	XXXXX6789	10/22/2025 2:29 PM
XXXXX6789 + 9-1-2015 + 4-30-2015 + 6	Saved from Batch Estimate: Annual Statements 12/31/2025	Pension Administrator	XXXXX6789	10/22/2025 2:27 PM
XXXXX6789 + 9-1-2015 + 4-30-2012 + 6	Saved from Batch Estimate: Annual Statements 12/31/2025	Pension Administrator	XXXXX6789	10/22/2025 2:27 PM

Calculation Results

Show key dates. You can now select to display all dates or just key dates under Options on the Calculation Results toolbar. These key dates are end of plan year prior to decrement, decrement dates, and benefit commencement dates. Your preferred view will be saved in your ProAdmin.ini file settings but can be changed under Options at any time. Displaying only key dates will make reviewing results more efficient.



Benefit Formula Components

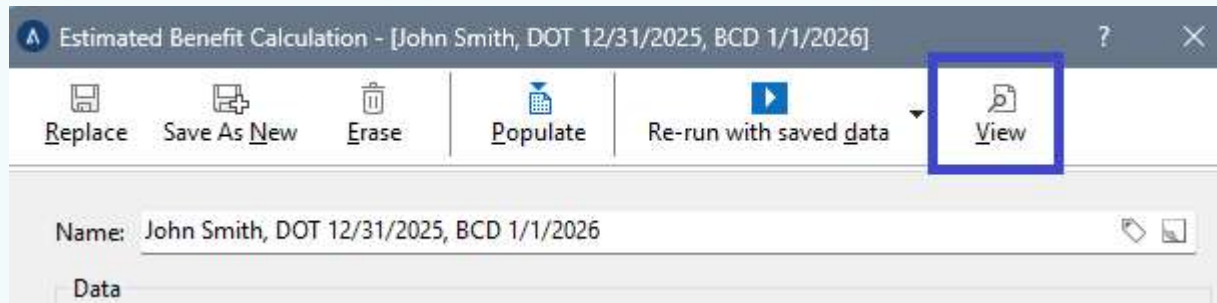
Name: ERF 

Type: Table Benefit Component (age)

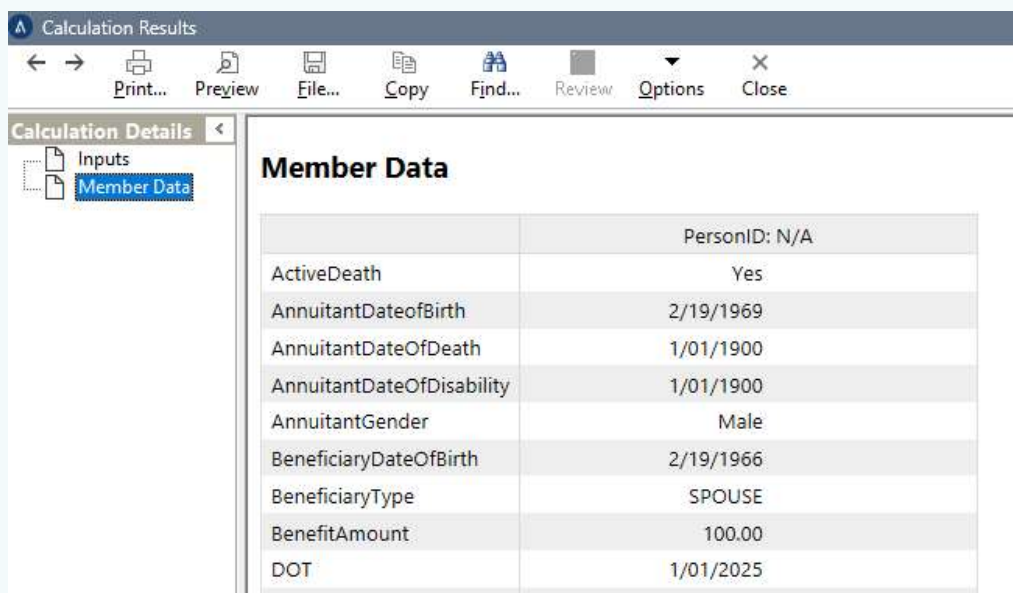
PersonID: GA60136352

Date	Table Member Age	Benefit Component
12/31/2024	55.8333	0.691665
1/01/2025	55.8333	0.691665
1/09/2025	55.8333	0.691665

Member data. Saved member data can now be reviewed without completing an Estimate, Dates/Age/Service or Final calculation. After loading or reviewing the data, selecting the View option displays Member Data in addition to Inputs.



This information can be viewed and exported, as needed.



Benefit Definitions

Plan reduction factors by coded database field. Maximum pension Plan reduction factors now have the option to vary the table by a coded database field.

The screenshot shows a dialog box titled "Maximum pension Limit:". It has three radio buttons: "None", "U.S. 415(b)" (which is selected), and "Canadian ITA". Below the "U.S. 415(b)" option is a checkbox labeled "Adjust for" followed by a dropdown menu. To the right of these options is the text "payment forms". Below this section is a section titled "Plan reduction factors:". It contains two rows. The first row is "Table:" followed by a dropdown menu showing "<by coded database field>" and a "Params..." button. The second row is "Service:" followed by a dropdown menu showing "<Base Service Set>" and a "Params..." button. A blue rectangle highlights the "Table:" dropdown and its associated "Params..." button.

Benefit Formula Components

Actuarial Equivalence Library. Annuity and Insurance factor components now reference an actuarial equivalence library selection instead of separate mortality and interest parameters. This will streamline parameterization and minimize potential discrepancies in selections.

The screenshot shows a dialog box titled "Mortality, Interest & COLAs". It has a section titled "Actuarial Equivalence" with a dropdown menu. Below this is a checkbox labeled "Use alternative interest rate in the deferral period". If checked, there are two options: "Constant" (selected) and "Based on Interest Rate Table". A blue rectangle highlights the "Actuarial Equivalence" dropdown menu.

Accrual rates. Age for determining the accrual rates, when accruals vary by age or points, now reference an age definition library selection. This will allow for rounding in age or points used to determine accrual rates.

The screenshot shows a dialog box titled "Accrual Rates: Age". It has a section titled "Age for determining the accrual rate:". Below this is a radio button labeled "Age Definition:" (which is selected) followed by a dropdown menu showing "<Plan Age Definition>" and a "Params..." button. Below this is the text "at" followed by a radio button labeled "calculation / crediting date" (which is selected). A blue rectangle highlights the "Age Definition:" radio button and its associated dropdown menu.

Actuarial Equivalence

Freeze interest. Actuarial equivalence library entries that reference an interest rate table now have the option to freeze the interest rate at a date in a selected database field. This can be useful when freezing interest rates as of a member's normal retirement date.

Actuarial Equivalence - [Basis A]

Replace Save As New Erase View

Name: Basis A

Interest

☐ Static rate:

☒ Constant:

☐ Database field:

☐ Segment rates: 1st 2nd 3rd

☒ Based on Interest Rate Table

417(e)(3) for September preceding the calendar year of commencement

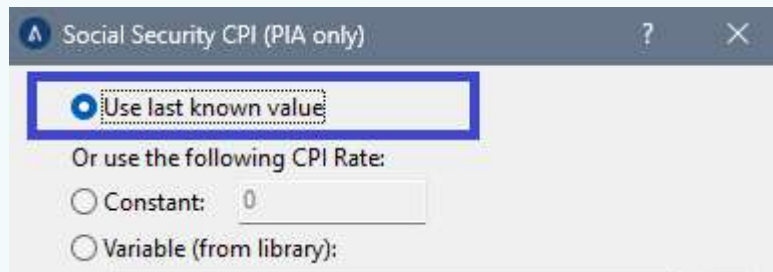
Params...

☐ Apply PPA phase-in from this GATT Interest Rate Table

☒ Freeze interest at date in field: NRD_DT

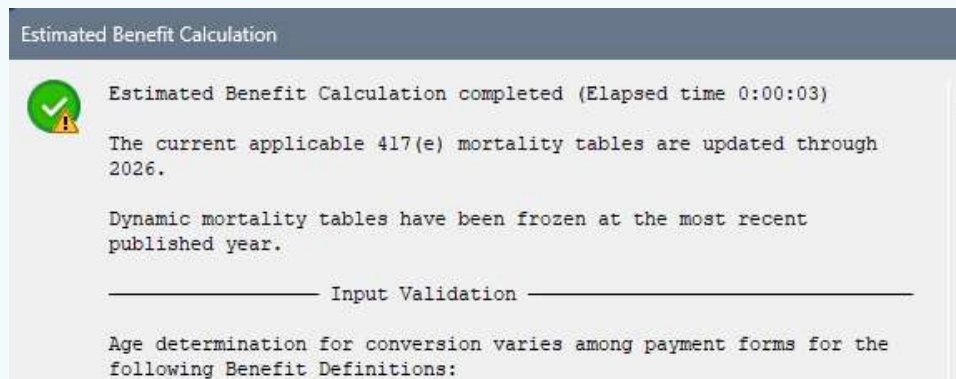
Projection Assumptions

Use last known value. The option to use last known value is now the default across all Future Regulatory Data projection assumptions. Additionally, Social Security CPI (PIA only) now allows for projection based on last known value directly, instead of entering an increase rate of 0%. This is consistent with how all other Future Regulatory Data can be projected. This will allow for external files to be referenced more easily in projection scenarios.

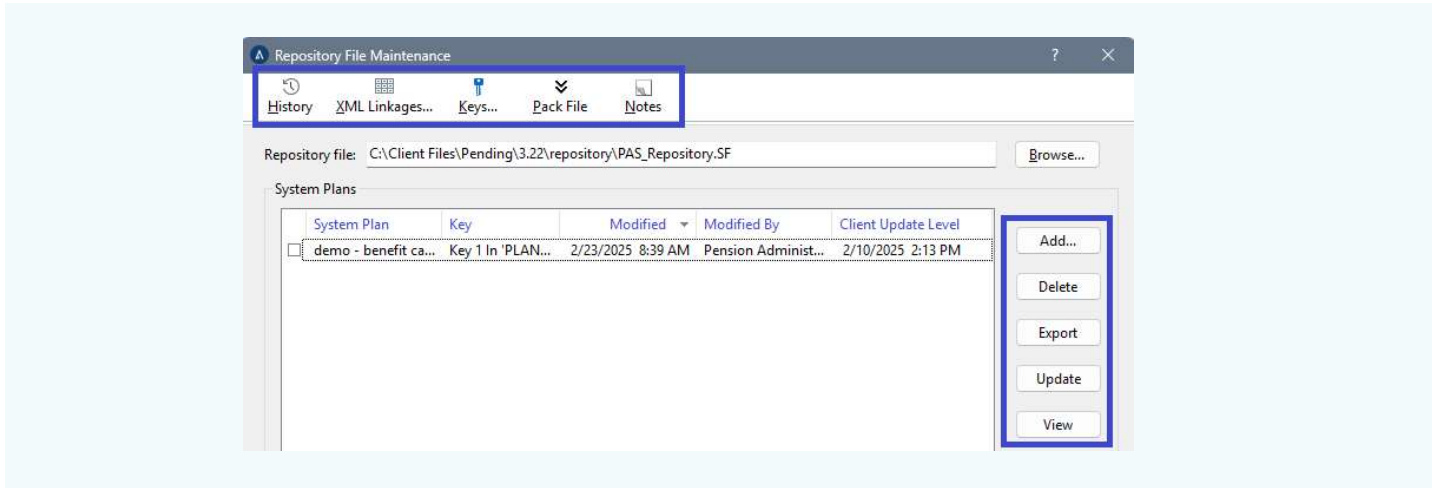


Interface

Run completion icons. Processing messages will now be displayed with run completion icons displayed when you run a calculation, batch, or data load in ProAdmin.



Repository File. The dialog box was reorganized to move the commands specific to the repository file to the top. The commands that remain on the right are those related to the system plans.



Server Tools


Colossal repository files. Repository files can now be converted to colossal/hi-capacity format. When a non-hi-capacity repository file is opened thru Repository File Maintenance, and the hi-capacity indicator within your ProAdmin.ini file is set to 1 ([CONFIG] HICAP=1), that repository file is now converted to the colossal/hi-capacity format. This allows for files in excess of 4GB.

System

System Info. When SysInfo is run from ProAdmin Server, the returned information now includes the "Repository File" and "Repository file last updated." (This was previously provided in a patch to ProAdmin 3.21, but included here in case you missed it.)

Excel performance. Reading from and writing to Excel from within ProAdmin (e.g., importing data from Excel or saving Data Questions to Excel) is now much faster. As a bonus, you no longer need to have MS Office installed. This is especially useful for servers such as those used to access ProAdmin's API, which generally do not have MS Office installed.

Help

Intro videos. ProAdmin now includes a short intro video () that describes the difference between various Accrual Definitions.

Changes Log

Be sure to read the changes log (see the “changes log.pdf” file in the ProAdmin directory) about updates to certain calculations that may change results.

New WinTech Team Member!

We are pleased to introduce **Madison Edwards** who recently joined our team. She is an experienced calculation analyst with degrees in Mathematics and Secondary Education. Among other responsibilities, Madison will be working on customer support and testing ProAdmin enhancements. Please say hello to Madison if you reach her at ProAdmin support.