

Release Notes

Release 18.15

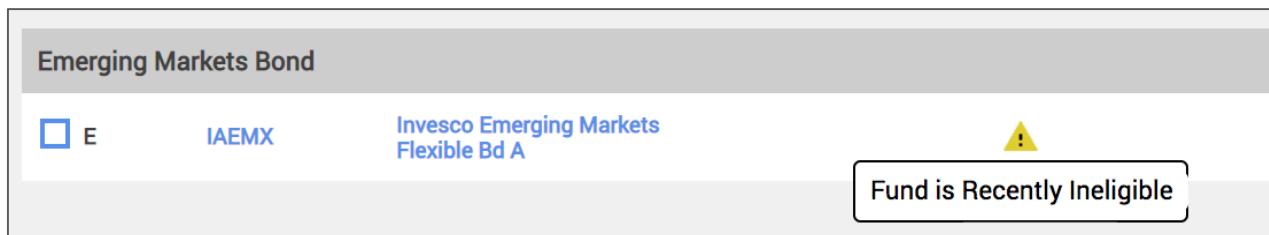
Enhancements

Custom Funds – Eligibility Status

Previously when adding Custom Funds to a Plan’s fund lineup, the fund would display as “Ineligible” online and in reports. Custom Funds will now always display as eligible in generated reports and online within the FirmPlus toolset.

Recently Ineligible Funds – Online Display

Funds that are new to the ineligible list (meaning they were not on the ineligible list the last time it was updated / processed) will now be flagged as “Recently Ineligible”. This new flag will display as a yellow icon on the Fund Lineup page and has also been implemented in the Executive Summary report section (see below).



Recently Ineligible Funds – Executive Summary Report

Funds that are flagged as “Recently Ineligible” will now appear in the Executive Summary denoted with a superscript 3 (e.g. Vanguard Windsor³). This indicator is explained by a new addition to the footer language at the bottom of the report section:

“(3) Since your last Report, this investment option has been removed from the UBS fund eligibility list and is no longer available through UBS.”

Emerging Markets Bond	Invesco Emerging Markets Flexible Bd A ³	IAEMX	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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Score and Criteria Legend: Meets Does Not Meet

(1) Fund was re-categorized following UBS assessment of investment style.
 (2) This investment or strategy is not available through UBS. Please see the Important Information About this Report section for details.
 (3) Since your last Report, this investment option has been removed from the UBS fund eligibility list and is no longer available through UBS.
 Criteria and Weighting Factors were defined by the plan sponsor. Refer to the Definitions and Disclosure section for definitions. Scoring Methodologies can be found in the Important Information About This Report section of this report.

Do Not Score in Previous Quarter

When using the “Do Not Score Fund” feature, the prior quarter score that displays in the Executive Summary report section will now display a dash “-”. This is consistent with how the current quarter score displays.

CATEGORY	INVESTMENT	TICKER	1Q18 SCORE	2Q18 SCORE	FUND ACTION	QTRS ON WATCH
Large Value	American Century Equity Income A	TWEAX	-	-		
Large Blend	Principal Large Cap S&P 500 Index R3	PLFMX	-	-		
Large Growth	American Funds Growth Fund of Amer R3	RGACX	-	-		
Mid-Cap Blend	JPMorgan Mid Cap Value A	JAMCX	-	-		

Bug Fixes

Plan Info – Recordkeeper (Provider) Dropdown

In the Recordkeeper (Provider) selection field on the Plan Info page, the sort order has been corrected to always display the “—Select Provider —” option at the top of the list.