

2023 COATS SQL TAX UPDATES UPDATING SQL DATABASE(S) SQL Server Management Studio

08/17/2023

2023 MI TAX TABLE UPDATE

BEFORE performing the following updates **ENSURE** you have done the following:

- 1.) You have successfully backed up your data.
- 2.) You have updated ALL user machines/users to 13.5.0.
- 3.) ALL users are out of COATS.

STEPS to update MI State Table update for 2023

- 1.) Log into the Customer's Only section of the COATS website.
- 2.) Download and save **Taxes_SQL_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).
- 3.) **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**
- 4.) Access the location where the files were saved (i.e. c:\temp OR desktop).
- 5.) Double click on **Taxes_SQL_2023.exe**.
- 6.) The WinZip self-extracting window will appear wanting to extract the files to c:\COATS_sql_tax_2023 folder.
- 7.) Click **Unzip**.
- 8.) You will be prompted that '**4 files unzipped successfully**'.
- 9.) Click **OK** and **Close**.
- 10.) From the SQL server, open **SQL Server Management Studio**.
- 11.) Click **File**.
- 12.) Click **Open/File**.
- 13.) Navigate to c:\COATS_sql_tax_2023 folder.
- 14.) Double click **STATE_Tax_Table.sql**.
- 15.) Change the default database showing at the top of the screen from **master** to **coats2000** by clicking on the down arrow and selecting **coats2000**.
- 16.) Click **Execute**.
- 17.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 18.) IF YOU HAVE MULTIPLE INSTANCES, Log into each server and perform steps 5-17.
- 19.) **X** out **SQL Server Management Studio**.

To confirm the update was successfully performed:

- 1.) Go to **Maintenance / COATS Setup / Tax Table / State Tax Table**.
- 2.) Locate MI state in the top left Grid and select to see the state in the top right and bottom grids.
- 3.) In the **Tax %** column, should now read **.0405**.

**IRS AND STATE RULES CHANGE FREQUENTLY
CONSULT YOUR TAX ADVISOR FOR THEIR GUIDANCE AND ASSISTANCE**

08/02/2023

2023 ND TAX TABLE UPDATE

BEFORE performing the following updates ENSURE you have done the following:

- 4.) You have successfully backed up your data.
- 5.) You have updated ALL user machines/users to 13.5.0.
- 6.) ALL users are out of COATS.

STEPS to update ND State Table update for 2023

- 20.) Log into the Customer's Only section of the COATS website.
- 21.) Download and save **Taxes_SQL_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).
- 22.) **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**
- 23.) Access the location where the files were saved (i.e. c:\temp OR desktop).
- 24.) Double click on **Taxes_SQL_2023.exe**.
- 25.) The WinZip self-extracting window will appear wanting to extract the files to c:\COATS_sql_tax_2023 folder.
- 26.) Click **Unzip**.
- 27.) You will be prompted that '**4 files unzipped successfully**'.
- 28.) Click **OK** and **Close**.
- 29.) From the SQL server, open **SQL Server Management Studio**.
- 30.) Click **File**.
- 31.) Click **Open/File**.
- 32.) Navigate to c:\COATS_sql_tax_2023 folder.
- 33.) Double click **STATE_Tax_Table.sql**.
- 34.) Change the default database showing at the top of the screen from **master** to **coats2000** by clicking on the down arrow and selecting **coats2000**.
- 35.) Click **Execute**.
- 36.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 37.) IF YOU HAVE MULTIPLE INSTANCES, Log into each server and perform steps 5-17.
- 38.) **X** out **SQL Server Management Studio**.

To confirm the update was successfully performed:

- 4.) Go to **Maintenance / COATS Setup / Tax Table / State Tax Table**.
- 5.) Locate state in the top left Grid and select to see the state in the top right and bottom grids.

- 6.) Locate the NDHH in the bottom grid.
- 7.) In the **Tax Max** column of the 1st NDHH, it should now read **70,350.00**.
- 8.) In the **Tax Max** column of the 2nd NDHH, it should now read **260,950.00**.

IRS AND STATE RULES CHANGE FREQUENTLY

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07/17/2023

2023 IL TAX TABLE UPDATE

BEFORE performing the following updates ENSURE you have done the following:

- 1.) You have successfully backed up your data.
- 2.) You have updated ALL user machines/users to 13.5.0.
- 3.) ALL users are out of COATS.

STEPS to update IL State Table update for 2023

- 1.) Log into the Customer's Only section of the COATS website.
- 2.) Download and save **Taxes_SQL_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).
- 3.) **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**
- 4.) Access the location where the files were saved (i.e. c:\temp OR desktop).
- 5.) Double click on **Taxes_SQL_2023.exe**.
- 6.) The WinZip self-extracting window will appear wanting to extract the files to c:\COATS_sql_tax_2023 folder.
- 7.) Click **Unzip**.
- 8.) You will be prompted that '**4 files unzipped successfully**'.
- 9.) Click **OK** and **Close**.
- 10.) From the SQL server, open **SQL Server Management Studio**.
- 11.) Click **File**.
- 12.) Click **Open/File**.
- 13.) Navigate to c:\COATS_sql_tax_2023 folder.
- 14.) Double click **STATE_Tax_Table.sql**.
- 15.) Change the default database showing at the top of the screen from **master** to **coats2000** by clicking on the down arrow and selecting **coats2000**.
- 16.) Click **Execute**.
- 17.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 18.) IF YOU HAVE MULTIPLE INSTANCES, Log into each server and perform steps 5-17.
- 19.) **X** out **SQL Server Management Studio**.

To confirm the update was successfully performed:

- 1.) Go to **Maintenance / COATS Setup / Tax Table / State Tax Table**.
- 2.) Locate state in the top left Grid and select to see the state in the top right and bottom grids.
- 3.) Locate IL02 in the bottom grid.
- 4.) In the **Tax Option** column, it should now read **4,850.00**.
- 5.) Locate IL05 in the bottom grid
- 6.) In the **Tax Option** column, it should now read **12,125.00**.

IRS AND STATE RULES CHANGE FREQUENTLY

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12/30/2022

2023 FEDERAL & STATE TAX UPDATE

BEFORE performing the following updates ENSURE you have done the following:

- 1.) You have successfully backed up your data.
- 2.) You have updated ALL user machines/users to 12.0.0.
- 3.) ALL users are out of COATS.

STEPS to update Federal Tax Tables for 2023

- 1.) Log into the Customer's Only section of the COATS website.
- 2.) Download and save **Taxes_SQL_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).
- 3.) **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**
- 4.) Access the location where the files were saved (i.e. c:\temp OR desktop).
- 5.) Double click on **Taxes_SQL_2023.exe**.
- 6.) The WinZip self-extracting window will appear wanting to extract the files to c:\COATS_sql_tax_2023 folder.
- 7.) Click **Unzip**.
- 8.) You will be prompted that '**6 files unzipped successfully**'.
- 9.) Click OK and Close.
- 10.) From the SQL server, open **SQL Server Management Studio**.
- 11.) Click **File**.
- 12.) Click **Open/File**.
- 13.) Navigate to c:\COATS_sql_tax_2023 folder.
- 14.) Double click on **FED_Tax_Table.sql**.
- 15.) Change the default database showing at the top of the screen from **master** to **coats2000** by clicking on the down arrow and selecting **coats2000**.
- 16.) Click **Execute**.

- 17.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 18.) IF YOU HAVE MULTIPLE INSTANCES, Log into **each** server and perform steps 11-17.

STEPS to update State Taxes for 2023

- 1.) You have performed steps 1-9 above in '**STEPS to update the Federal Tax Tables for 2023**'.
- 2.) From the SQL server, open **SQL Server Management Studio**.
- 3.) Click **File**.
- 4.) Click **Open/File**.
- 5.) Navigate to **c:\COATS_sql_tax_2023** folder.
- 6.) Double click **STATE_Tax_Table.sql**.
- 7.) Change the default database showing at the top of the screen from **master** to **coats2000** by clicking on the down arrow and selecting **coats2000**.
- 8.) Click **Execute**.
- 9.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 10.) Click **File**.
- 11.) Click **Open/File** (should still be looking in the **COATS_sql_tax_2023** folder).
- 12.) Double click **STATE_Tax_Formula.sql**.
- 13.) Click **Execute**.
- 14.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 15.) Click **File**.
- 16.) Click **Open/File** (should still be looking in the **COATS_sql_tax_2023** folder).
- 17.) Double click **AZ_Code_Update.sql**.
- 18.) Click **Execute**.
- 19.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 20.) Click **File**.
- 21.) Click **Open/File** (should still be looking in the **COATS_sql_tax_2023** folder).
- 22.) Double click **COPL_Local_Update.sql**.
- 23.) Click **Execute**.
- 24.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 25.) Click **File**.
- 26.) Click **Open/File** (should still be looking in the **COATS_sql_tax_2023** folder).
- 27.) Double click **ORPL_Local_Update.sql**.
- 28.) Click **Execute**.
- 29.) You should see '**(X row(s) affected)**' show up in the message box several times.
- 30.) IF YOU HAVE MULTIPLE INSTANCES, Log into **each** server and perform steps 3-29.
- 31.) Proceed with the additional steps below.

To confirm the update was successfully performed:

- 1.) Go to **Maintenance / COATS Setup / Tax Table / Federal Tax Table**.
- 2.) Scroll down and locate the **FICA** code (Employee Portion).

- 3.) In the **Tax Max** column, it should now read **160,200.00**.
- 4.) Scroll down and locate the **FIEM** code (Employer Portion).
- 5.) In the **Tax Max** column, it should now read **160,200.00**.

*Please visit ‘**States with Special Tax Considerations**’ from the **Customer’s Only Site** for the following states that have additional steps and/or information that are **REQUIRED**:*

**California
Connecticut
Colorado
Massachusetts
New Jersey
New York
Oregon
Washington**

*****FUTA AND SUTA RATES****

AFTER RUNNING THIS UPDATE: You **MUST** verify your FUTA and SUTA rates to ensure they are current for **2022**. **THE IRS AND STATE RULES CHANGE FREQUENTLY**. Consult your **TAX ADVISOR** for their guidance and assistance with your rates.

NOTE: As of November 2022, the Department of Labor has provided the updated outstanding UI federal loans. As a result, employers in the following states will pay extra FUTA taxes that are effective *retroactively* to January 1, 2022. https://oui.doleta.gov/unemploy/futa_credit.asp.

CA, CT, IL, NY

We have also provided a White Paper on the Customer’s Only site providing the steps on how to update the FUTA and SUTA rates.

STATE	2022 Retroactive Credit Rate	2022 COATS FUTA RATE
California	0.3	0.9
Connecticut	0.3	0.9
Illinois	0.3	0.9
New York	0.3	0.9

Please note that the actual 2023 rates will not be published by the U.S. Department of Labor until **November 2023**. Once published, they will *retroactively* be effective to 1/1/2023. Depending your state’s ability to repay their loan to the Federal government will dictate an increase or a decrease. We recommend that you use the above 2023 COATS FUTA Rate.

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