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

08/17/2023
2023 MI TAX TABLE UPDATE
<u>BEFORE</u> performing the following updates ENSURE you have done the following:

1.) **You have successfully backed up your data.**
2.) **You have updated <u>ALL</u> user machines to 15.5.0.0.**
3.) **<u>ALL</u> users are out of COATS.**

STEPS to update the MI Tax Table for 2023

1.) Log into the Customer's Only section of the COATS website.

2.) Download and save **Taxes_Visual_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_Visual_2023.exe**.

6.) The WinZip self-extracting window will appear wanting to extract the files to *c:\COATS_Visual_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_Visual_Tax_2023* folder.

1.) Double click **State_Tax_Table.sql**.

14.) Change the default database showing at the top of the screen from *master* to *coats2000* by clicking on the down arrow and selecting *coats2000*.

15.) Click **Execute**.

16.) You should see ***'(X row(s) affected)'*** show up in the message box several times.

17.) **X** out of **SQL Server Management Studios**.

To confirm the update was successfully performed:

1.) Go to **Maintenance / Tax Table / State.**

2.) Locate MI state in the left grid.

3.) In the **Tax %** column on the right, should now read **-0405**.

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IRS AND STATE RULES CHANGE FREQUENTLY

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 to 15.5.0.0.
6.) **ALL** users are out of COATS.

STEPS to update the ND Tax Table for 2023

18.)   Log into the Customer's Only section of the COATS website.

19.)   Download and save **Taxes_Visual_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).

20.)   **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**

21.)   Access the location where the files were saved (i.e. c:\temp OR desktop).

22.)   Double click on **Taxes_Visual_2023.exe**.

23.)   The WinZip self-extracting window will appear wanting to extract the files to *c:\COATS_Visual_Tax_2023* folder.

24.)   Click **Unzip**.

25.)   You will be prompted that '***4 files unzipped successfully***'.

26.)   Click **OK** and **Close**.

27.)   From the SQL Server, open **SQL Server Management Studio.**

28.)   Click **File**.

29.)   Click **Open/File**.

30.)   Navigate to *c:\COATS_Visual_Tax_2023* folder.

2.)   Double click **State_Tax_Table.sql**.

31.)   Change the default database showing at the top of the screen from ***master*** to ***coats2000*** by clicking on the down arrow and selecting ***coats2000***.

32.)   Click **Execute**.

33.)   You should see ***'(X row(s) affected)'*** show up in the message box several times.

34.)   **X** out of **SQL Server Management Studios**.

To confirm the update was successfully performed:

4.)   Go to **Maintenance / Tax Table / State.**

5.)   Locate state in the left grid.

6.)   Locate the NDHH on the right 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**.

07/17/2023
2023 IL TAX TABLE UPDATE
<u>BEFORE</u> performing the following updates ENSURE you have done the following:

7.) **You have successfully backed up your data.**
8.) **You have updated <u>ALL</u> user machines to 15.5.0.0.**
9.) **<u>ALL</u> users are out of COATS.**

STEPS to update the IL Tax Table for 2023

35.) Log into the Customer's Only section of the COATS website.

36.) Download and save **Taxes_Visual_2023.exe** to your SQL Server (i.e. c:\temp folder OR desktop).

37.) **THE COATS PROGRAM MUST BE CLOSED BY ALL USERS BEFORE PROCEEDING.**

38.) Access the location where the files were saved (i.e. c:\temp OR desktop).

39.) Double click on **Taxes_Visual_2023.exe**.

40.) The WinZip self-extracting window will appear wanting to extract the files to *c:\COATS_Visual_Tax_2023* folder.

41.) Click **Unzip**.

42.) You will be prompted that '***4 files unzipped successfully***'.

43.) Click **OK** and **Close**.

44.) From the SQL Server, open **SQL Server Management Studio.**

45.) Click **File**.

46.) Click **Open/File**.

47.) Navigate to *c:\COATS_Visual_Tax_2023* folder.

3.) Double click **State_Tax_Table.sql**.

48.) Change the default database showing at the top of the screen from *master* to *coats2000* by clicking on the down arrow and selecting *coats2000*.

49.) Click **Execute**.

50.) You should see *'(X row(s) affected)'* show up in the message box several times.

51.) **X** out of **SQL Server Management Studios**.

To confirm the update was successfully performed:

9.) Go to **Maintenance / Tax Table / State.**

10.) Locate and select the state in the left grid.

11.) Locate IL02 on the right grid.

12.) In the **Tax Option** column, it should now read **4,850.00**.

13.) Locate IL05 on the right grid

14.) In the **Tax Option** column, it should now read 12,**125.00**.

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12/31/2022
2023 FEDERAL & STATE TAX UPDATE
<u>BEFORE</u> performing the following updates ENSURE you have done the following:

1.) You have successfully backed up your data.
2.) You have updated <u>ALL</u> user machines to 14.0.0.0.
3.) <u>ALL</u> users are out of COATS.

STEPS to update the Federal Tax Tables for 2023

1.) Log into the Customer's Only section of the COATS website.

2.) Download and save **Taxes_Visual_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_Visual_2023.exe**.

6.) The WinZip self-extracting window will appear wanting to extract the files to *c:\COATS_Visual_Tax_2023* folder.

7.) Click **Unzip**.

8.) You will be prompted that '***7 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_Visual_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 <u>*each*</u> server and perform steps 11-16.

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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_Visual_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_Visual_tax_2023* folder).

12.) Double click **State_tax_formula_VS.sql**.

13.) Click **Execute**.

14.) You should see ***'Command(s) completed successfully'***.

15.) Click **File**.

16.) Click **Open/File** (should still be looking in the *COATS_Visual_tax_2023* folder).

17.) Double click **State_tax_formula.sql**.

18.) Click **Execute**.

19.) You should see ***'Command(s) completed successfully'***.

20.) Click **File**.

21.) Click **Open/File** (should still be looking in the *COATS_Visual_tax_2023* folder).

22.) Double click **AZ_Code_Update.sql**.

23.) Click **Execute**.

24.) You should see ***'Command(s) completed successfully'***.

25.) Click **File**.

26.) Click **Open/File** (should still be looking in the *COATS_Visual_tax_2023* folder).

27.) Double click **COPL_Local_Update.sql**.

28.) Click **Execute**.

29.) You should see ***'Command(s) completed successfully'***.

30.) Click **File**.

31.) Click **Open/File** (should still be looking in the *COATS_Visual_tax_2023* folder).

32.) Double click **ORPL_Local_Update.sql**.

33.) Click **Execute**.

34.) You should see ***'Command(s) completed successfully'***.

35.) IF YOU HAVE MULTIPLE INSTANCES, Log into ***each*** server and perform steps 3-34.

36.) Proceed with the additional steps below.

To confirm the update was successfully performed:

1.) Go to **Maintenance / Federal.**

2.) 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 **<u>REQUIRED</u>**:

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

***FUTA AND SUTA RATES**

<u>AFTER RUNNING THIS UPDATE</u>: You <u>MUST</u> verify your FUTA and SUTA rates to ensure they are current for 2023. 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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**IRS AND STATE RULES CHANGE FREQUENTLY
CONSULT YOUR TAX ADVISOR FOR THEIR ASSISTANCE**

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