

COATSSQL VERSION 11.0.0

- If on 4.3.8, update to 10.5.0
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

Employees:

- **Tax/Standard Occupational Classification (SOC)** – added a field in the employee record for the Federally assigned 6-digit code (not to include the hyphen) that identifies the employee's highest level of work role for the quarter. This code will be used within the quarter reports to meet certain state's Q4 requirements. (11/10/22)

Reports

DISCLAIMER: When reports are enhanced/ updated, All COATS Clients with customized or adjusted reports need to contact COATS Technical Support to see if these adjustments can be applied to their report.

- **Employee Reports/GA New Hire mag Media** – Updated the date fields to match format requirements (11/10/22)

DID YOU KNOW:

Resume Parsing – added feature allows users to parse and create employee records from the resume docs.

COATS Supports 1099-MISC forms with the employee and AP 1099 form printing.

KNOWN ISSUES

Virtual Store:

- Users need full rights / security 'allowed' in their Window's Profile to all COATS-related folders and files to utilize COATS. If the 'allow' box is not checked in the Window's Profile, the user may be blocked from logging-in (causing other users sharing a Terminal Server to be denied access to COATS), processing payroll, or numerous other tasks that are components of the COATS program.

Orders:

- **Note field** – If the user right clicks the system will throw an error. If the user wants to enter a date/time stamp they need to set up the Function Keys in Maintenance/User Preferences.

PREVIOUS VERSION UPDATES

COATSSQL VERSION 10.5.0

- If on 4.3.8, update to 10.0.0
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

System

Quarterlies

- 941 for quarter 2 of 2022 available.

Employees:

- **Tax/Non Resident Alien** – The Non Resident Alien Box was moved to the FICA/Medicare/Pay Cycle area to prevent mistakenly checking or unchecking in the Federal Withholding area. (5/20/22)

COATSSQL VERSION 10.0.0

- If on 4.3.8, update to 10.0.0
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

System

Quarterlies

- 941 for quarter 1 of 2022 available. This will be used for only 1st quarter; an update will be provided with updated form for 2nd quarter 2022.
- OH Quarterly Adjustments

ACA

- Updated ACA Electronic 1095C corrected filing has been updated for the 2022 Filing Year/2021 Tax Year; previously users were receiving an error when correcting 1095C electronic files.
- HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!

COATSSQL VERSION 9.0.1

- If on 4.3.8, update to 9.0.1
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

System

Quarterlies

- NE Quarterly Adjustment
- OH Quarterly Adjustments

ACA

- **** The 1095C's are due by March 2nd, 2022 ****
- **** The 1094C, electronic file, is due by March 31st, 2022 ****
- Updated ACA Forms included in release.
- Updated ACA Electronic Reporting updated for the 2022 Filing Year/2021 Tax Year included in release.
- HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!

COATSSQL VERSION 9.0.0

- If on 4.3.8, update to 9.0.0
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

System

- 2021 year added to Year-end Processing list.

Quarterlies

- NE Quarterly Adjustment
- NY Quarterly Adjustment
- SC Quarterly Adjustment

YearEnd

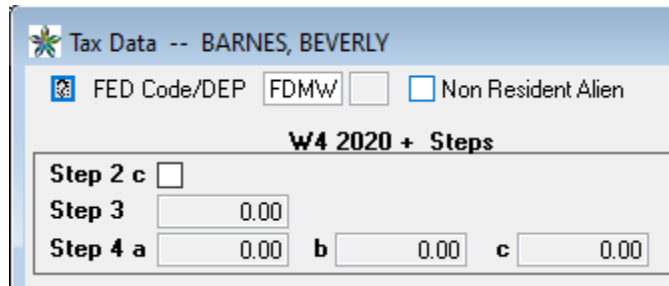
- COATS supports 1099 MISC for 1099 printing.
- W2's requires the form to print as the background is not included. COATS supports Form L4UP for printing W2's.

ACA

- **** The 1095C's are due by March 2nd, 2022 ****
- **** The 1094C, electronic file, is due by March 31st, 2022 ****
- Updated ACA forms and XML filing to meet the updated specifications are **pending a future update**
This version users can begin the process for 2021 Tax year by creating the year and going through the forms so they are ready to print when the version is released.
- HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!
- The IRS electronic portals are being updated for the 2022 Filing Season.

Employees:

- **Federal Taxes:** If the user enters codes for the W4 2020 and beyond they will be able to access Step 2c, Step 3 and Step 4a, b and c. If the user is using codes prior to the W4 2020, these steps will not be active and should not be used. (9/18/21)



Tax Data -- BARNES, BEVERLY

☒ FED Code/DEP ☐ Non Resident Alien

W4 2020 + Steps

Step 2 c ☐

Step 3

Step 4 a b c

Remote Hire Features:

- **Employee Portal Paystub:** Stub details updated to include Total Hours and Work Site Header. (8/27/21)

DID YOU KNOW:

EPAY Integration – the **Job Title** in the **Job Order** must be present in COATS for the **Order** and **Assignment** to properly transfer to the EPAY staging database. (12/4/20)

W2, PA – W2 does not reflect the entire 6-digit PSD code but rather the two digit taxing authority.

COATSSQL VERSION 8.3.0

- If on 4.3.8, update to 8.3.0
- If on earlier version, Contact Technical Support.

Taxes:

- 941 Form update for 2021 year
- 7200 Form update for 2021 year.

COATSSQL VERSION 8.2.0

- If on 4.3.8, update to 8.2.0
- If on earlier version, Contact Technical Support.

New Features!

ACA:

- **1094c XML** updated to include HRA plan requirements.
 - HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!
- **1094c XML TEST** updated to include Government requirements.
- **1095c Form** updated to include HRA plan requirements.
 - HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!

Taxes:

- If your Agency does business in the state of **ARKANSAS**, the Version update will update AR. If you have questions, contact COATS Support.

COATSSQL VERSION 8.1.0

- If on 4.3.8, update to 8.1.0
- If on earlier version, Contact Technical Support.

Quarterlies

- Part 4 of 941
- MD Quarterly Adjustment
- OR Quarterly Adjustment
- NY Quarterly Adjustment

COVID Statement

- **Payroll/COVID Statement** – COATS created a **COVID Statement** to accompany the W2 for employees who received COVID PAY in 2020 (1/21/21)
 - **Access COATS/Payroll/COVID Statement** - Enter 12/31/20 date, Click **Print**, **Screen**, or **Cancel**; the statements will print per employee to accompany their W2.

COATSSQL VERSION 8.0.0

- If on 4.3.8, update to 8.0.0
- If on earlier version, Contact Technical Support.

New Features!

Employee:

- **TAX** – Edit buttons have been added to each heading in order to eliminate users from accidentally modifying information when tabbing and entering through the window. Click the EDIT icon in order to edit the area. (11/10/20).

Compute	Pay Cycle
☒ FICA ☒ Medicare	☐ Daily
	☒ Weekly
	☐ Bi Weekly
	☐ Semi-Monthly
	☐ Monthly
Edit	

COATSSQL VERSION 7.X.X

- If on 4.3.8, update to 7.15.5
- If on earlier version, Contact Technical Support.

New Features!

Integrated Solutions:

- **Upload Account # Paycard Data** – Global Cash Card/ADP/Wisely is now using the Account # on the outside of the envelope. If the user uses these cards and enters the Account #, the user should send the **Upload Account # Paycard data** file from under Integrated Solutions. (8/7/20)

KNOWN ISSUES

Virtual Store:

- Users need full rights to all files to access COATS otherwise items are created in Virtual Store which affect payroll process regarding withholding.

Orders:

- **Note field** – If the user right clicks the system will throw an error. If the user wants to enter a date/time stamp they need to set up the Function Keys in Maintenance.

COATSSQL VERSION 7.15.0

- **If on 4.3.8, update to 7.15.0**
- **If on earlier version, Contact Technical Support.**

New Features!

System:

- **ZipWhip** – COATS has integrated with ZipWhip as a texting vendor. Clients will be able to text Employees, Client Department Contacts, Employees via Client EMPL, Employee via a Job Order, Mass Employee Text, Mass Client Text, all without the need of a carrier. Contact COATS Sales for more information.

Time and Attendance:

- **EPAY** – COATS has integrated with EPAY as a Time & Attendance vendor. Job files are sent to EPAY via an EPAY installed database. Time imported by pulling data from the EPAY server. Contact COATS Sales for more information.

Payroll:

- **941**- Fields added on second tab for COVID information. (6/25/20)
- **COVID Pay** - COATS created the ability for users to pull multiple batches holding COVID payroll transactions and to sort by COVID Sick or COVID Child in order to review those transactions for tax credits.
- **Form 7200** - COATS created the ability for users to enter data and to post to Form 7200 in order to print and submit for Advance Payment of Employer Credits (4/17/20)
- **Payroll/Quarterly Reports/IL Schedule P** - Beginning with the 2020 tax year, Schedule P, Illinois Withholding Schedule, must be filed with every Form IL-941, Illinois Withholding Income Tax Return, and Form IL-941-X, Amended Illinois Withholding Income Tax Return, to verify Illinois income and withholding records. Since 2018, Schedule P has been required to be filed with Form IL-941-X.
COATS has reviewed the IL Schedule P and has added it to the Quarterly Menu.
- **Payroll Register by Date Range** – This report has been added to the Payroll menu with Employee count to help clients with calculations during COVID for reporting. (5/8/2020)

COATSSQL VERSION 7.11.5

- **If on 4.3.8, update to 7.11.5**
- **If on earlier version, Contact Technical Support.**

ACA 1094c XML - Electronic file due to the IRS on March 31st, 2020 has been updated and is ready for export.

Employees

- **CONT** – If the user right clicks to add a document it will default to the folder listed under **Maintenance/User Preferences/Scanner/Word/COATS Word Document and Resume Path** (02/18/20)

Payroll

- **Quarterly Reports/Schedule B** – Zeros removed from Schedule B where 0.00 was shown, now “.” shows. (02/27/20)
- **Quarterly Reports/941** – Updated date to reflect 2020. (02/27/20)

Integrated Solutions

- **Resumes Parsing/Sovren License** – updated for 2020 (02/07/20)

KNOWN ISSUES

Virtual Store:

- Users need full rights to all files to access COATS otherwise items are created in Virtual Store which affect payroll process regarding withholding.

Orders:

- **Note field** – If the user right clicks the system will throw an error. If the user wants to enter a date/time stamp they need to set up the Function Keys in Maintenance.

COATSSQL VERSION 7.11.4

- If on 4.3.8, update to 7.11.4
- If on earlier version, Contact Technical Support.

W4 Updates:

- **FD2S FD2J** updated to use correct tax tables when Step 2c is not checked. (1/27/2020)

Quarterly Updates:

- **MAPL** Quarterly processing created (01/28/20)

Year End Updates:

- **WV** Year0End to include RV record (01/28/20)
- **HI** Updated field to include 20 spaces for Employer ID (01/29/20)

Client:

- **EMPL** – updated to include 3 options. Start Date, End Date or Date range of Start and End date in the parameters as well as ignoring if the dates are null (empty) (1/28/2020)

Payroll:

- **Employee W4**– added employee email, non-resident alien, FICA and MEDICARE to the options to review.

COATSSQL VERSION 7.11.3

- If on 4.3.8, update to 7.11.3
- If on earlier version, Contact Technical Support.

W4 Update:

- New white papers have been updated to the website instructing users how to enter the codes. **FDSW and FDMW should NO LONGER BE USED for any NEW W4s entered in 2020 and beyond.** See **W4 Federal Tax Code White paper** for more details. (1/13/2020)
- **Step 3:** If the employee had an amount in Step 3 but did not make enough for Federal Withholding it would skip Step 4c and not withhold any Additional Withholding. This has been updated. (01/13/2020)

Quarterly Updates:

- **PA** Extra spaces are no longer present in the Quarterly electronic media. (1/15/2020)

Year End Updates:

- **PA** - Philadelphia Local Year End electronic media updated (1/15/2020)
- **PA** - HR_Total error removed, and electronic media updated (1/15/2020)

Client:

- **EMPL** – updated to include Start and End date in the parameters as well as if the dates are null (empty) (1/10/2020)

COATSSQL VERSION 7.11.2

- If on 4.3.8, update to 7.11.2
- If on earlier version, Contact Technical Support.

Quarterly and Year-End Updates:

- **Quarterly**
 - PA Quarter includes the FEIN on the E record required this reporting quarter
- **Year End**
 - DC Quarter format adjustments – with updated specifications
 - AZ Year End updated to replace blanks with zeros in the S record for other state data section
 - HI Year End mag media option available to create MMREF format
 - IA Year End file name updated to reflect 2019
 - OH Quarter format adjustments – with updated specifications
 - PA Year End updated to no longer pull 2018 data vs the 2019 data in certain parts
- **ACA**
 - ACA forms added for 1094C and 1095C printing abilities (Due 3/2/2020)
 - 1094C XML file the Electronic reporting is coming in a future update. (Due 3/31/2020)

Payroll:

- **W4 List** – If an employee claims exempt in a previous year, they must fill out a new W4 each year to claim exempt within that year. The W4 List allows the user to see all the employee who had claimed exempt by picking a date and looking forward. If the user wanted to see all of 2019 and forward, the user would pick 1/1/2019. The user can filter “fedded” by 99 to see who did claim exempt. The user may also filter by the “status” to see by Global Status who is currently CON. (12/31/19)

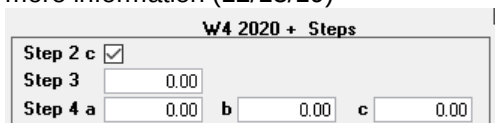
COATSSQL VERSION 7.11.

- **If on 4.3.8, update to 7.11.0**
- **If on earlier version, Contact Technical Support.**

The following fixes/enhancements have been made:

Employees:

- **Tax/Gender** – added X to accommodate new California law for tracking gender. (11/21/19)\
- **2020 W4** – There are 4 new codes for 2020 and forward as well as **Step 2c, Step 3 and Step 4 a, b, and c available if needed for new calculations. See white paper, Federal Tax Codes** for more information (12/13/19)



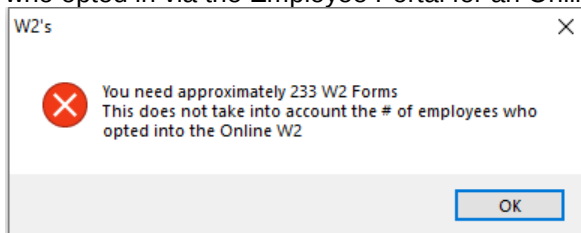
W4 2020 + Steps

Step 2 c	☒
Step 3	0.00
Step 4 a	0.00
b	0.00
c	0.00

- **Adjustment/HSA Reporting** – HSA Reporting check box added for those agencies who provide HSA Health insurance to their employees. (12/27/19)

Payroll:

- **W2 Count** – added alert so that employees using the COATS Employee can remember to take into account this total number is not subtracting from the total # of W2s needed, the employees who opted in via the Employee Portal for an Online W2. (12/13/19)

**Integrated Solutions:**

Resume Parsing – adjusted parsed name to show as last name, first name middle initial. (12/17/19)

COATSSQL VERSION 7.8.0

- **If on 4.3.8, update to 7.8.0**
- **If on earlier version, Contact Technical Support.**

The following fixes/enhancements have been made:

Employees:

- **CLER/TESTING** – system updated to only allow 3 digits, not 5 and the screen was enlarged to show more of the scores. (07/01/19)
- **CLER/TESTING** - system updated to additional testing to be added, previous 3 digit fix caused issues, updated. (07/24/19)

Payroll:

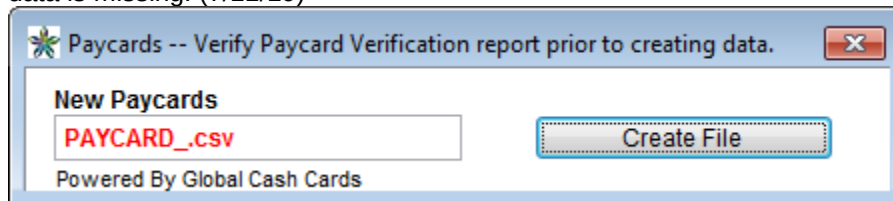
- **Deductions not taken** – system updated to not mark purge/use if there was a one-time adjustment that was too large to be withheld. System will keep the deduction active until the entire amount can be taken. (07/23/19)
- **Paycycle Processing/Check Processing/Export Files/Paystub Remittance File/Create File** – the file has been updated to remove the middle initial (07/24/19)
- **Paycycle Processing/Check Processing/Export Files/Paystub Remittance File/Create File CA** – the file has been updated for clients who need to include the Company Name and Address See the white paper **Handling Paycards** (08/13/19)
- **Advances** – updated Advances so if checks were deleted and recreated, the advance remains connected to the payroll. Previously advances were taken but not apparent to end user. Now connected and apparent. (08/05/19)
- **Quarterlies** – Updated AZ, HI, IN, PA, UT and WAPL requirements. (09/30/2019)

Reports:

- **ACA/ACA Year End Forms and Mag Media/ALE Member Information** – updated the “Yes” boxes to show as a solid black when selected; easier for the user to view what is chosen as yes and what is chosen as no. (08/19/19)

Integrated Solutions:

- **Upload Paycard data** – the user will need to review the Paycard verification report prior to creating the Upload Paycard data for any missing data as the file will create, without errors, if data is missing. (7/11/19)



- **Online Applications** – does not keep the apostrophe (') in the last name field as it will affect future reporting in COATS. (08/05/19)
- **Maintenance/Purge Applicants**- Updated to simplify the purge applicants. (08/02/19)
- **Web Ad Approval** – the **Send File** has been separate into **Create File** and **Send File** so clients who needed to edit the file prior to sending are able to do so (09/12/19)
- **Client Portal via Client/Sales**– when a new order is added via the portal, the contact defaults to the Client/Sales and the button allows the user to jump to the specific job order. (08/26/19)
- **Client Portal**– when a new order is added via the portal, the job status defaults to Pending. (08/26/19)
- **Portal Contacts/Client Portal Contacts** – report added to reflect the changes entered into COATS via the Client Portal. When the department contacts modifies their phone, cell or email and/or information regarding new job orders added. (08/26/19)

COATSSQL VERSION 7.2.0

- If on 4.3.8, update to 7.2.0
- If on earlier version, Contact Technical Support.

The following fixes/enhancements have been made:

Payroll:

- **Advances** – if the advance spans over more than one payroll batch, the advance when taken will be connected to the payroll batch from which it was withheld. (07/01/2019)
- **Quarterlies** – NY updated electronic filing. (05/15/19)

Integrated Solutions:

- **Mobile Applications** – mobile applications have been reformatted for users on a mobile device vs. on a PC. The formatting has been removed and reformatted for Android users who were having issues entering phone, zip codes and pay rates beyond auto-fill. (05/29/19)
- **Download Online App Web Server** – mobile applications that were downloaded now show the correct date/hour, minute, second in the Employee/CONT note. (05/29/19)
- **Download Online App Web Server** – mobile applications that were downloaded now auto add the preemploy 2 for the Employee file; end users were previously experiencing a grey box when first entering the INTV screen and TAX screen. (05/29/19)
- **Essential StaffCARE File** – If the agency is filing both MEC and Indemnity they will need to create a file based on each deduction code. The Essential StaffCARE File creation has been updated to allow the user to select the Payroll batch and then the Deduction code per file prior to creating and sending data. See White paper for steps and more details (05/20/19)

COATSSQL VERSION 7.1.4

- **If on 4.3.8, update to 7.1.4**
- **If on earlier version, Contact Technical Support.**

The following fixes/enhancements have been made:

Payroll:

- **Quarterlies** – KY, IN, GA updated electronic filing. (04/24/19)

Maintenance:

- **User Preferences/Function Keys:** the function keys have been rewritten to become more user-friendly for data entry. (04/8/19)

Integrated Solutions:

- **Wed Ad Approval** – updated file to include “\$” and “,” in pay rates. i.e. \$45,000 (04/24/19)

Previous Versions below

COATSSQL VERSION 7.1.0

ACA:

- **ACA YEAR END ITEM REQUIRES:** .NET Framework 4.5.1 or higher, windows server 2008 or higher and SQL Server 2008 or higher.
- **1094c XML Export** - The 1094c XML file has been updated to reflect correct headers for submission. (03/15/19)

Employees:

- **Interview/Assignment notes/Performance Notes** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. They will need to go back into the record to enter their changes. (3/18/19)

Clients:

- **Client note field** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. They will need to go back into the record to enter their changes. (3/18/19)

Orders:

- **Job Order Notes** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. They will need to go back into the record to enter their changes. (3/18/19)

COATSSQL VERSION 7.0.9**ACA:**

- **ACA YEAR END ITEM REQUIRES:** .NET Framework 4.5.1 or higher, windows server 2008 or higher and SQL Server 2008 or higher.
- **1094c XML Export** - The 1094c XML export button has been activated. Be sure to see the ACA White papers on how to send your 1094c XML file to the IRS site. (02/26/19)

Employees:

- **Interview/Assignment notes/Performance Notes** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. User can Ctrl + V to copy all changes back into record.
 - Updated to allow for special characters (02/20/19).

Clients:

- **Client note field** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. User can Ctrl + V to copy all changes back into record.
 - Updated to allow for special characters (02/20/19).

Orders:

- **Job Order Notes** – the memo field was updated to allow the user to save their changes and overwrite another user changes; OK. Or save the other user changes abandoning any changes the user made. User can Ctrl + V to copy all changes back into record.
 - Updated to allow for special characters (02/20/19).

Integrated Solutions:

- **Online Applications/exists** – if the online application has a similar first and last name, address or email the system will mark them as exists alerting the user that they may already have an application in the system. (02/15/19)
- **Mobile applications** – users using Mobile Applications will see a Visual Studio.net interface when download online applications and should contact support for corresponding white papers (02/15/19)

COATSSQL VERSION 7.0.1

Payroll

DISCLAIMER: When reports are enhanced/ updated, All COATS Clients with customized or adjusted reports need to contact COATS Technical Support to see if these adjustments can be applied to their report.

Tax Update: Please see Tax Documentation

Reports

- **Email Clients** - After sending email via Outlook the comments will now go to the Client record without an MRecord_ID error. (1/3/19)

Did You Know

DISCLAIMER: When reports are enhanced/ updated, All COATS Clients with customized or adjusted reports need to contact COATS Technical Support to see if these adjustments can be applied to their report.

- **Maintenance/ Applicant Purge** – Being revamped to be more robust and is currently disabled. (09/26/2018).

Known SQL Issues:

Look for fixes in future updates

- **Employees/ Print/ Formal Applications** - After printing the formal applications errors will come forth when printing other reports.

Current Work around steps below:

1. "X" out of **Download Web Application Server**.
2. **Quit** out of **COATS**.
3. Log back into **COATS**.
4. Rerun desired report.

- COATS does not create DOCX and XLSX files.

- **Payroll / Pay Cycle Processing / Create Cards Tab**

When importing time, will reflect with default mark up until user scrolls through. Scrolling through refreshes the window and updates with any mod rates entered.

- **Payroll / Pay Cycle Processing / Create Cards Tab**

The user enters regular hours and then clicks COPY card to enter a separate timecard (either OT, NTX, OPY, etc). Once the second timecard transcode is entered and NEXT card or tab/enter is pressed it sometimes jumps to the Regular card rather than the next timecard in the payroll.

We are working hard to resolve this issue; until then, please keep an eye out when entering time through the timecard or FIND window.

- **Payroll/ Pay Cycle Processing/ Check Processing/ Pay Register Grand Totals** displays only the total for the employees listed in the selected payroll. To see Totals including all payrolls pull

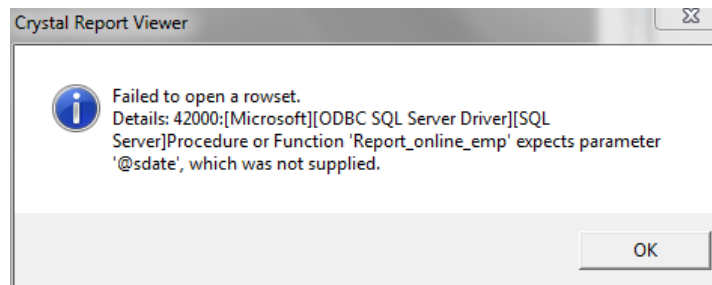
the summary report. We are working hard to resolve this issue so that the report doesn't slow down the entire system.

- **Integrated Solutions/ Download Web Application Server** whites out and brings forth no data. COATS has lost connection to the server.

Current Work around steps below:

1. **"X"** out of **Download Web Application Server**.
2. **Quit** out of **COATS**.
3. Log back into **COATS**.
4. Access **Download Web Application Server**.
5. Server will connect and produce data.

- **Integrated Solutions/ Online Applicant Report** errors with below message.



Current Work around steps below:

1. **"X"** out of **Download Web Application Report**.
2. **Quit** out of **COATS**.
3. Log back into **COATS**.
4. Access **Online Application Report**.
5. Select desired date range.
6. Click **Screen** to view or **Printer** to print.