**COATS VISUAL VERSION 13.0.0**

COATS Visual Payroll/Billing was released with Version 6.0.0. To use Visual Payroll/Billing the client *must* complete a SQL/Visual review.  See the Payroll Steps under the COATS Visual Version 6.0.0 11/16/2017 in the What's New COATS Visual 2017 Summary and/or contact COATS Technical Support.

# New Features!

## System Notes

**Visual Studio.net Update – COATS Visual Studio (the underlying graphics program) was updated allowing for more API integrations and functionality throughout the system. Users may need to reset the "Look and Feel" theme, grids, and settings to activate all updates.**
**SCREEN RESOLUTION - This varies with monitors, example 1680x1050 OR 1920x1080 or greater and are required in order to view some entire windows.**
**Users will need to ensure they are on .NET Framework 4.8 or higher.  Clients with Custom Programs questions, please contact tech support.**

## Employees

- **Search**
    - Users can search Minimum Rate from the Employee Master Record.
    - Users can search First Check Date for Anniversary options form the Employee Master Record (11/3/22)
- **Tax/Standard Occupational Classification (SOC)**
    - Added field for the Standard Occupational Classification (SOC).  This field is 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)
- **Photo**
    - Users can delete a photo. The users will click Delete, Say OK. Exit.  If they returned to the Photo button the image is gone. (09/19/22)
- **Assignments**
    - Users can access an Employee's Assignment with no Assignments and click on Related Assignment information. (09/19/22).

## Clients

- **Search**
    - Last Invoice Date was added to the SEARCH grid. (09/30/22)
    - First Invoice Date (for Anniversary options) was added to the SEARCH grid (11/3/22)
- **AR/Emailing Invoices**
    - Users can now select and send multiple invoices to clients.  The users will place a check under the **OK** column or will select **All 10,** or **20** and then click **Email Invoices**.  The invoices and attachments will be grouped and sent to the client. (7/12/22)
- **EMPL**
    - Shifts are now an option for column(s) under EMPL. (7/12/22)

## Orders

- **Multi**
    - Users can search Minimum Rate from the Employee Master Record.

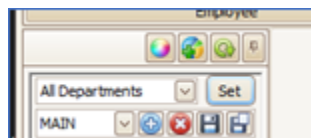## Integrated Solutions

- **The Work Number**
    - Agencies have the free option to offer Employment verification – coming soon. (11/4/22)
- **Efficient Hire**
    - Users have another option for Electronic New Hire Onboarding with Integrated WOTC – coming soon. (11/4/22)
- **Text Request**

o   Users can add images to text. (09/30/22)

## DID YOU KNOW

**Resume Parsing – Added feature allows users to create employee records using parsed Employee Resume Docs.**

**Adding new COATS users –** In COATS Visual when adding new users, the new user must access COATS using their user name and password and first click the [set] button to establish their **View** in order to see all approved **Region/Branches/Departments**.



The user can also create multiple custom views by **Region**, **Branch** or **Department in this same field**. (03/16/21)

**COATS Users –** The Admin User can mark other users as "INACTIVE:, however a user should never be deleted.  The user profile is crucial for records retention, reporting, tracking statistics and financials for historical data.  On the grid, the unintentional option allowing a user to be deleted by clicking the minus symbol ("-"), has been removed (12/10/2020)

**Electronic Onboarding –** within the Onboarding platform, the user can go into Employee details and Notify User if the employee didn't receive the email or is they need the email instructions resent.

**Global Cash Card/ADP/Wisely –** If using the # of the physical card, the user should send the **Upload Paycard Data** file under Integrated Solutions.  If using the # on the envelope, the account #, the user should send the **Upload Account # Paycard Data** file.

**Custom Skill Screens –** When the user first creates the first **Custom Skills** Screen, they must first click **ADD AN ADDITIONAL SKILL SCREEN**. While the default is blank and will hold text, it isn't adding to the system until a record is first created.

**Vacation or Sick Pay Calculator –** When the user first creates the first templates for either Vacation or Sick, they must first click **ADD A FORMULA**. While the default is blank and will hold text, it isn't adding to the system until a record is first created.

**ACA – ACA Year End Forms and Media -** when the user deletes an employee COATS will sometimes error. Click OK to the error. Log back in. Delete the employee.  This error typically only happens once.

**Printing from COATS –** If the client is using Visual and Server 2019, the 'local' default printer is noted when users login to the server, this will be their printer while using COATS.  With Server 2019 and COATSsql, clients must set the default printer in each session after they login.  It only keeps it for that session while they are logged in.

**Invoices:**
**Emailed PDF Invoices –** previously would round the term statement for the %, now list them as exact % within the client file. (05/16/19)

**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)

**Maintenance/Users/Function keys**; Should the user choose to use the **Date** feature for a hot key, without using any characters in the field, the user must still type a space in the field, prior, to clicking **Date**, **On** in order for the Function key to work properly. (12/4/20)

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

## PREVIOUS VERSION UPDATES

• For updates/White paper prior to 2022, please refer to the **What's New COATS Visual 2021 Summary.pdf**

## COATS VISUAL VERSION 12.3.0.0

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# New Features!

## Front Office
- **Callback Calendar**
  - Added **Get All Appointments**. Users with security can see all user appointments and not just their own. (5/18/22)

## Employees
- **Search**
  - Mail Code added to Employee Search (6/17/22)
- **Bonus Paid**
  - The user will need security now to be able to check or uncheck Bonus paid. (4/28/22)
- **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)

## Clients
- **AR/Transfer Details**
  - Users can transfer invoice detail transactions from one invoice to another. Users will need access to **Maintenance/Branches/Users/Edit Security Profile/GL/Edit GLTransactions** in order to access the **Transfer Details** under **Client/AR**. (7/8/22)
- **Invoicing**
  - The user cannot check off **Email PDF** unless an email is added in the **To:** address. (4/6/22)
- **EMPL**
  - Invoice Reference is now an option for a column under EMPL. (5/18/22)
- **Dept**
  - Users can add a new Department Contact without having notes listed in comments from other contacts. (6/6/22)

## Payroll
- **Year End/Quarterlies:**
  - 941 for 2$^{nd}$ Quarter 2022 available.

## AR
- **Invoices**
  - Users can now group to send invoices by **ALL, 10 or 20** to send in batches of emailed Invoices. This helps to prevent issues with agencies spam filters. (4/62/22)

## GL
- **P&L**
  - Users can now see Region and Branch added to each line item. (6/14/22)

## Reports
- **New Hire Once**
  - The employee will only appear once on the New Hire report, from first CON start date. (7/8/22)
- **New Hire Each**
  - The employee will only each time on the New Hire report, from every new CON start date. (7/8/22)
- **Temp Experience**
  - If there is data entered in TEMP under Employee, data will appear on this report (7/8/22)
- **Temp Experience All**
  - Regardless of TEMP data entered, all employees will appear on the report within the date range. (7/8/22)

## Maintenance

- **Branches/Tree**
  - Users can rename Region, Branch, Departments (6/3/22)
- **Transfer Details**
  - Users will need access to **Maintenance/Branches/Users/Edit Security Profile/GL/Edit GLTransactions** in order to access the **Transfer Details** under **Client/AR**. (7/8/22)
- **Global Preferences/Textrequest**
  - Client API Key field has been added to be entered when client partners with Textrequest (4/62/22)
- **Employees/Bonus Paid**
  - Security added to Bonus paid, users who are able to check bonus paid will need this security.(4/28/22)
- **Callback Calendar/Get All Appointments**
  - With this security access user can see all user appointments, not just their own. (5/18/22)

## Integrations

- **Textrequest**
  - Textrequest has been the chosen vendor to replace Zipwhip. Users will see both a Text Request and Zipwhip logo until a further update. The users can see the sent and received texts in the Employee, Client, Orders, Mass Employees and Mass Clients. Users can print conversation from sent and received messages by Employee and Clients. (4/62/22)

## COATS VISUAL VERSION 11.1.0

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# New Features!

## Payroll

- **Year End/Quarterlies:**
  - 941 for 1st Quarter 2022 available. This form applies to only 1st quarter of 2022; there will be a new form in 2nd quarter.

- **ACA Reporting:**
  - Updated ACA Electronic corrected 1095C filing for Tax Year 2021/Filing Year 2022. Previously users whom were correcting their 1095C files were receiving errors.
  - HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!

## COATS VISUAL VERSION 11.1.0

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# New Features!

## Employees:

- **Search Employee/Check Optional Skills:** The user can search for missing or expired Optional Sills by specific skill. See Employee SEARCH – Optional Skills.doc for more information (1/31/22)

# Payroll

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

- **Year End/Quarterlies:**
  - COATS supports Form 1099 MISC form for printing 1099.
  - W2's requires the form to print as the background is not included. COATS supports Form L4UP for printing W2's.
  - NE Quarter updated
  - OH Quarter updated

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