

**COATS**

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**Handling Global Cash Card W2's  
With COATSql****Handling Global Cash Card W2 with COATSql**

**SITUATION:** The User is allowing employees to view their W2 online via Global Cash Card. The below steps will instruct the user on uploading the W2 file to Global.

**STEPS:****I. Setup access using below instructions:**

In order to send the file via the user's secure log in via the Global Cash Card site the user will need access, perform the following steps:

1. Click **COATS**.
2. Click **COATS Set Up**.
3. Click **Branch Preferences**.
4. Click **Users**.
5. Click **Find**.
6. Select **Desired User**.
7. Click **Edit Security**.
8. Click **Integrated Solutions** tab.

The screenshot shows the 'COATS Security Settings' window. At the top, there are fields for 'Name' (DEMO) and 'Initial' (DEM). Below these are tabs for 'Employee', 'Client', 'Joborders', 'Payroll', 'AP/Banks', 'AR', and 'GL'. Under the 'Employee' tab, there are sub-tabs for 'Reports', 'Maintenance', and 'Integrated Solutions'. The 'Integrated Solutions' sub-tab is selected, showing a list of checkboxes: 'Resume Parsing', 'Web Ad Approval', 'Download Web Applications', 'Online Applicant Report', 'Upload Paycard Data' (checked), 'Upload Paycard W2 Data', 'Essential Staffcare', and 'Tax Credit Reporting'. At the bottom, there are two sections: 'Template' with 'Create' and 'Apply' buttons, and 'Select' with 'All' and 'None' buttons.

9. Be sure that **Upload Paycard Data/ Upload Paycard W2 Data** is check.
10. "X" out.
11. "X" out.
12. "X" out.

13. **Quit** out of COATS and re-sign in for the changes to be effective.

**Federal guidelines state that the employer must have permission from the Employee to post their W2 information online so the user will need designate those that have authorized this through the Employee Master Record. The user will perform the following steps:**

1. Click **COATS**.
2. Click **Employees**.
3. Click **Find**.
4. Select **Desired Employee**.
5. Click **Tax**.

**Tax Data -- WHITE, SYDNEY**

**Compute** ☒ FICA ☒ Medicare

**Tax Settings**

☐ FED Code/DEP ☐ FDMW ☐ ☒ Non Resident Alien

**Pay Cycle**

☐ Daily

☒ Weekly

☐ Bi Weekly

☐ Semi-Monthly

☐ Monthly

**Miscellaneous**

Gender ☐

Marital Status ☐

DOB

**State Tax Info**

CODE	#Ded	#Exemp	Not Res
VA	0	0	<input type="checkbox"/>

**Unemployment Tax Info**

CODE	#Ded	#Exemp	Not Res
VA	0	0	<input type="checkbox"/>

**Local Tax Info**

CODE	#Ded	#Exemp	Not Res
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**County Tax Info**

CODE	#Ded	#Exemp	Not Res
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**School Tax Info**

CODE	#Ded	#Exemp	Not Res
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**Local Services Tax Info**

CODE	#Ded	#Exemp	Not Res
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**Direct Deposit**

☒ Direct Deposit

☐ Paycard

☐ Online W2

Local Resident Code will be in addition to Assignment Tax  
School Resident Code will replace Assignment Tax

6. Check **Online W2**.
7. **"X"** out of the Tax Window.
8. **"X"** out of the Employee Record

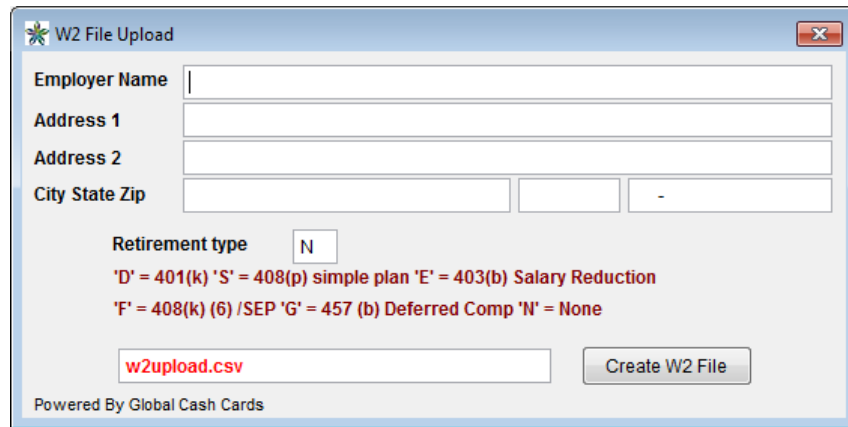
## II. Send File using below instructions:

The user will need to have setup an account with Global Cash Card to have access for their employees to view their W2's online. This file will need to be uploaded to Global Cash Card's site. Please refer to Global Cash Card's white papers for instructions on how to upload this file.

**In order to send the file via the user's secure log in via the Global Cash Card site, perform the following steps:**

1. Click **COATS**.
2. Process **COATS Year-end Processing** procedures to Create the Federal and State Data.
3. Click **Integrated Solutions**.
4. Click **Upload Pay Card W2 Data**.

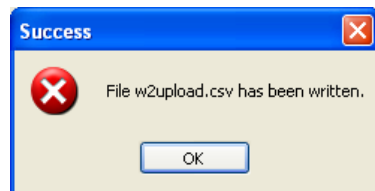
The default will create the w2upload.csv within the \Program Files\COATS\COATS2000 folder. The user may change the path of where the w2upload.csv is saved, such as C:\temp\w2upload.csv. This is recommended if the user will be sending a file more than once or if they need to refer back to a previously created file and would not like to over write the existing file. The file could be created as C:\temp\gccw2\_YYYY.csv.



The image shows a 'W2 File Upload' dialog box. It contains several input fields: 'Employer Name', 'Address 1', 'Address 2', and 'City State Zip' (which is split into three sub-fields). Below these is a 'Retirement type' dropdown menu currently set to 'N'. A red text line provides a legend: 'D' = 401(k) 'S' = 408(p) simple plan 'E' = 403(b) Salary Reduction 'F' = 408(k) (6) /SEP 'G' = 457 (b) Deferred Comp 'N' = None. At the bottom, there is a text field containing 'w2upload.csv' and a 'Create W2 File' button. The footer of the dialog says 'Powered By Global Cash Cards'.

5. Input Company information in appropriate fields.
6. Enter in appropriate retirement type.
7. Click **Create W2 File**.
8. Within **Choose a Date** Screen, enter 12/31 of current W2 year.

(This file works for the year 2012 and future years; previous years do not have the healthcare requirement and cannot be recreated.)



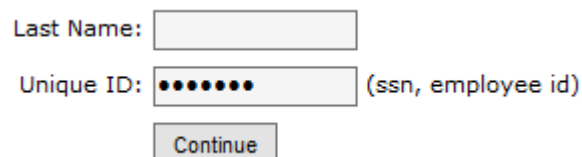
9. Click **OK**.
10. The file was saved to the c:\program files\coats\coats2000 folder of the computer running coats locally or to the modified folder the user requested. This file needs to be uploaded to the Global Cash Card secured website with a user name and password given by Global Cash Card.
11. **"X"** out.

### III. Employee Log In.

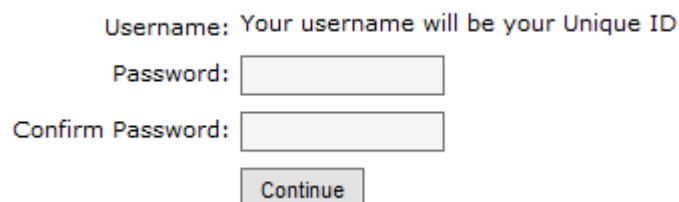
1. To establish a Paystub Login access your Agency's Website for viewing your Paystub or click [www.GlobalCashcard.com](http://www.GlobalCashcard.com).
2. Place your cursor in the Activate MY Paystub field and press, GO.



3. On the next page, enter your last name in the field Last Name. Enter your SSN in the Unique ID field. Click Continue.

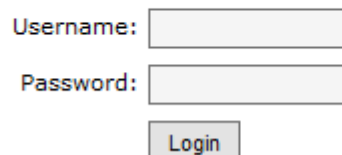


4. On the 3rd page establish a password and confirm it. The password needs to be 6 to 8 characters and it is case sensitive. At this point, the user name is your SSN as stated on the page. Enter your Password, Confirm your Password, click Continue.



5. On the last page create a unique username. This username and password will be used to access the paystub account now and in the future.

**Your account has been successfully created.  
Please login below.**



6. For future sessions you will access your information via your Agency's site or you can click [www.globalcashcard.com](http://www.globalcashcard.com). You will enter your Login (User Name) and Password to see your information.

