COATS
(757) 499-7652 (757) 490-2888 Fax

Handling Global Cash Card W2 with COATSsql

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.

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**.

6. Check **Online W2**.

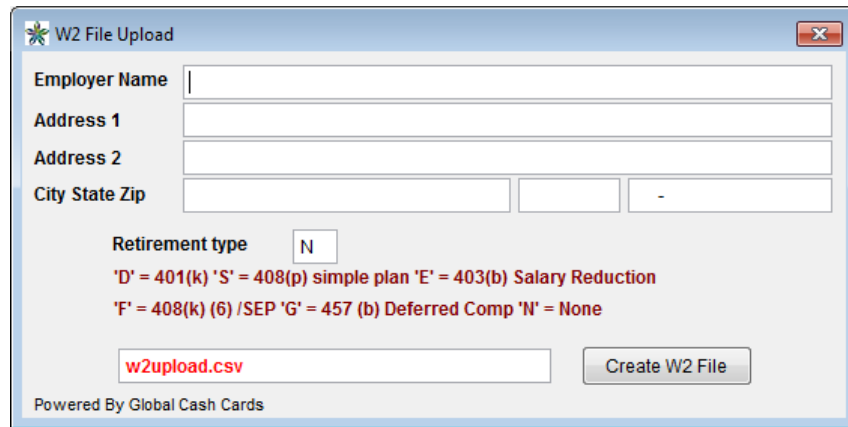7. **"X"** out of the Tax Window.

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**.
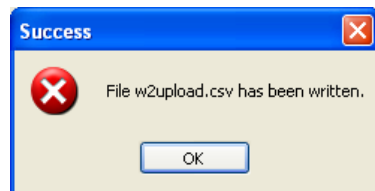
4. Click **Upload Pay Card W2 Data**.

   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.

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.)
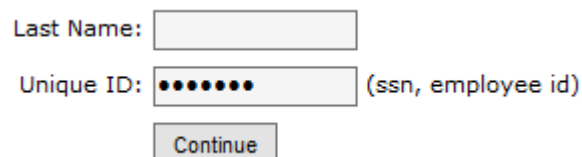

9. Click **OK**.

10.   The file was saved to the c:\program files\coats\coats2000 folder of the computer running coats locally or to or 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.
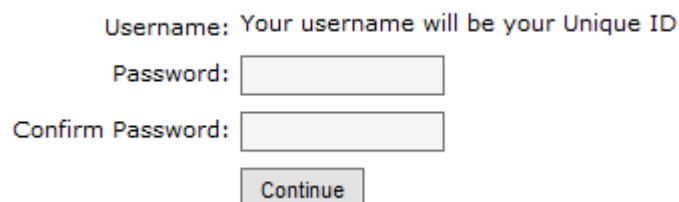
11.   **"X"** out.

III. Employee Log In.

1. To establish a Paystub Login access your Agency's Website for viewing your Paystub or click www.GlobalCashcard.com.

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.
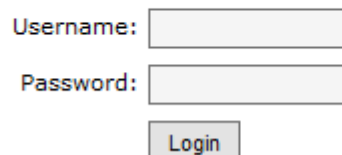

4. On the 3rd page establish a password and confirm it. The password needs to be 6 to 8 characters and it is case sensitive. At this point, the user name is your SSN as stated on the page. Enter your Password, Confirm your Password, click Continue.

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.

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