

## **COATS VISUAL VERSION 15.1.0.0**

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!**

### **Coming Soon**

- **Complete integration with Efficient Hire Onboarding**
- **SONAR/Marchex texting**
- **TX Quarterly Updates – releasing in 2023**
- **WA Quarterly Updates for WA Cares Fund withholding starting July 1 2023. Reporting update for 3 quarter reporting.**

### **Reports**

- **Quarterly Reports**
  - OR Quarterly updated to include BIN, OR Paid Leave (ORPL) and Transit Taxes (OR Local Codes), as listed in the updated requirements. (3/31/23)
  - 941 for 2023 1<sup>st</sup> Quarter Reporting (3/31/23)

### **Integrated Solutions**

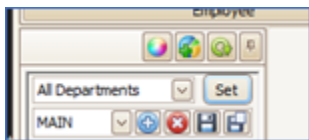
- **Integrated Partners**
  - Update for files and correcting errors.

## **DID YOU KNOW**

**Employee Name –** Currently the Employee First name will hold 15 characters and the last name will hold 24 characters.

**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 COATSql, 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 2023, please refer to the **What's New COATS Visual 2022 Summary.pdf**

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## New Features!

### Coming Soon

- Complete integration with Efficient Hire Onboarding
- SONAR/Marchex texting

### Employees

- Call-Out**
  - User can add **Call-Out** comment from Main screen (1/18/23)
  - Client Name added to the **Call-Out** comment (1/25/23)
- Check Search**
  - Users can search **FUTA SUTA Met**. If the employee met the FUTA or SUTA limit, a check box with show in the Employee Master Record under SEARCH (1/5/23)
  - User can search **Last Check Date** to the Employee Search in order to filter by **Last Check date**. (1/5/23)
  - User can search **First Check Date** to the Employee Search in order to filter by **First Check date**. (1/5/23)
- CONT**
  - When a User merges an employee under the **Online Applications Download** section a Contact note will be left under the Employee **CONT**. (1/23/23)
- Search**
  - FUTA SUTA Met, Last Check Date, First Check Date** removed from main search and move to **Check Search**. New filters were slowing down the **SEARCH** button for existing users (1/5/23)

## Reports

- **Management Reports – Staffer Contacts, Staffer Job Contacts**
  - The title has been updated to Staffer Job Contacts as it lists the contacts created by a staffer via an employee's assignment with a job. (2/10/23)
- **KPI Client – By Staffer**
  - When a User merges an employee under the **Online Applications Download** will count as 1 APPS downloaded on **KPI - Key Client, By Staffer Report**. (1/23/23)
- **KPI Client – By Staffer Contacts**
  - Users can now pull a report by Staffer listing all contacts made to an employee by a date range. The grid includes employees that have been texted, emailed, contacted via a job, called in Available, Called Out and manual entries. (2/8/23)
- **ACA – ACA Year End Forms and Media**
  - Updated to include the updated 2022 TY specifications for online filing and updated Test files. (3/1/23)

## Integrated Solutions

- **Online Apps**
  - When a User merges an employee a Contact note will be left under the Employee **CONT**, the note will appear on the **Online Applicant report** and it will count as 1 APP downloaded on the **KPI - Key Client, By Staffer Report**
- **Online Applicant Report**

When a User merges an employee under the **Online Applications Download** the note will appear on the **Online Applicant report**. (1/23/23)

## COATS VISUAL VERSION 14.0.0.0

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## New Features!

### System

#### Taxes

- **OR Paid Leave Added to system. ORPL Local code available to attach to employees.**
- **CO Paid Leave Added to system. COPL Local code available to attach to employees.**
- **WACF code available to attach to employees. The Premium is documented as starting Mid 2023 year.**
- **Review Tax Updates to ensure all other Special Tax considerations are reviewed.**

#### Quarterlies

- **WA Quarterly Adjustment** SOC has been added to the file. This pulls from the Employee Tax window. Users enter the highest SOC that applies for the employee.
- **WV Quarterly Adjustment.** SOC has been added to the file. This pulls from the Employee Tax window. Users enter the highest SOC that applies for the employee.

#### YearEnd

- **1099 MISC is the default form used within COATS.** NEC form options will be available in a future update, please contact COATS support if desired before next update.
- **W2's requires the form to print as the background is not included. COATS supports Form L4UP for printing W2's.**
- **Employee Portal Users please ensure W2's are ready to print from COATS before asking for Query to load to the portal.**

#### ACA

- **\*\* The 1095C's are due by March 2<sup>nd</sup>, 2022 \*\***
- **\*\* The 1094C, electronic file, is due by March 31<sup>st</sup>, 2022 \*\***

- Updated ACA forms are available in this version for printing.
- Updated XML filing to meet the 2022 Tax Year specifications are **pending a future update**
- HRA features are available but not programmed to display. If your agency uses an HRA plan, contact COATS asap!

## Coming Soon

- **XML updates for ACA 2022 Tax Year Reporting**
- **NEC 1099 Form option**
- **OR Quarter Changes for 1<sup>st</sup> quarter reporting changes**
- **TX Quarter Changes for Mid 2023 reporting changes**

## Employees

- **Search**
  - Users can search how the employee was **Referred** from the Employee Master Record. (12/5/22)
  - Users can search **FUTA SUTA Met**. If the employee met the FUTA or SUTA limit, a check box with show in the Employee Master Record under SEARCH (12/5/22)
  - User can add **Last Check Date** to the Employee Search in order to filter by **Last Check date**. (12/21/22)
- **Call-Out**
  - Users can now add a default **Call-Out** comment related to the assignment when an employee calls out for work. (For example: CALL-OUT OF WORK for Job Title: Assignment#: 30375) (12/16/22)
- **CONT/Call-Out**
  - Users can now add a default **Call-Out** comment related to the assignment when an employee calls out for work. Notes can be added to the end of the comment if desired. (For example: CALL-OUT OF WORK for Job Title: Assignment#: 30375 Frank said he was sick and unable to come in today.) (12/16/22)

## Clients

- **Search**
  - **Region, Branch** and **Department** have been added option to add from the Column Chooser within the SEARCH grid. (12/5/22)
- **AR/PO# Update**
  - The user may now update an entire invoice with a PO#. See PO# Update White paper. (12/8/22)

## Reports

- **Call-Out Grid**
  - Users can now add a default **Call-Out** comment related to the assignment when an employee calls out for work. Notes can be added to the end of the comment if desired. (For example: CALL-OUT OF WORK for Job Title: Assignment#: 30375 Frank said he was sick and unable to come in today.) Under Reports/Call-Out the user can pick a date range to pull forward any comments per employee, beginning with CALL-OUT OF WORK. (12/16/22)

## Integrated Solutions

- **Timerack**
  - The user may now access Timerack from the Integrated Solutions menu. (12/15/22)