

**COATS VISUAL VERSION 17.4.0.0**

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

**COATS VISUAL users still using COATSql: Please note it is not recommended to have some users use Visual and other users use COATSql. Or for users to sometimes use COATSql and then other times use COATS Visual. *Data integrity is and will continue to become an issue, requiring billable Support time.* Please contact COATS should you have Visual questions, errors. Contact Karen Connor with concerns and contact Jessie Sierra for training.**

**New Features!****Payroll**

- **Create Cards** – If an employee appears with a net check in **Check Processing** and has unpaid timecards in **Create Cards**, if the user clicks **PAY**, the user will be alerted, in a grid, the employees in **Check Processing** with a Net pay. This will only show employees with unpaid timecards AND net pay. In the past it listed every employee with net pay. (02/26/24)
- **Export Files** – Added MJA WOTC. (02/29/24)

**Quarterly**

- **941** – Updated with March 2024 form. This Form no longer includes COVID figures. (04/03/24)
- **CO Local** – File updated for a create of type CSV and few header misspellings. (04/03/24)
- **IL Monthly** – File updated for SSN field. (04/03/24)
- **WV Quarterly** – Updated for March 2024 Format changes.  
New Fields: SOC code entered on employee tax window, skill text used and the Company County must be entered on the Personal ID field for the WV state information. (04/03/24)
- **AL OT Report** – Available for setup as Custom Report selection, please contact tech support.

**Reports**

- **Payroll/ IL Pay Export** – Details from the EEO for assistance in the new IL annual reporting. This requires users to have EEO for federal government attached to the employee and the state of IL to be attached to be included in results. (04/04/24)

**Integrated Solutions**

- **Miscellaneous/MJA WOTC** – Added MJA WOTC. (02/29/24)
- **Sovern Parsing Key** – key updated for 2024-2025 (03/01/24)
- **Zipwhip** – all icons have been removed as Zipwhip is no longer in business (03/04/24)
- **Global W2 paycard** – Updated retirement types (04/05/24)

**Maintenance**

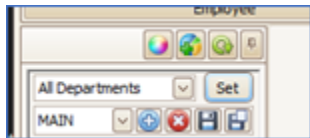
- **Global Preferences/MJA WOTC Settings** – **User Id** and **MJA Password** added for SFTP credentials for the MJA WOTC Export. (02/29/24)

**DID YOU KNOW**

- **Printing Reports Options** – Includes a Show All Detail check box to drill entire report in to max vs individually drilling a report.

## System

**Adding new COATS users** – In COATS Visual when adding new users, the new user must access COATS using their username 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)

## Taxes

Additional Federal Adjustment should only be used for 2019 and prior adjustments, employees requesting additional withholding for 2020 and after should fill out a new W4 and that total should be added to Step 4 c. Should an adjustment be added to the Federal Adjustment withholding it will still be withheld regardless of data entered after 2020.

## Employees

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

## Orders

**Re-Assignments** - When the user Re-Assigns an employee to a job, the new start date should not be the same date as the Week-ending Date. I.e., if the Weekending is a Sunday, pick the previous Saturday. If not, the timecard will not generate when Generating Timecards.

## Payroll

**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 added to the system until a record is first created.

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

## AR

**Printing from COATS** – If the client is using Visual and Server 2019, the 'local' default printer is noted when user's 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.

**Emailed Invoice** – if the user modifies the program form in an instance, it needs to be modified in each instance on the same server to properly work.

## Reports

**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.

## Integrated Solutions

**Employee Portal** – If the user has an Employee Portal and an employee updates data, this may cause an issue creating “?” in the Middle Initial in the Employee Master Record. If the user notices “?” in the Employee Master Record, in Middle Initials of Employees, contact COATS Support.

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

**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 if 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.

**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

**Maintenance/Branches/Miscellaneous Fields/Message, Emailed Invoices & Statements and Miscellaneous 3** – each field is limited to 400 characters.

**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 added to the system until a record is first created.

**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)

## PREVIOUS VERSION UPDATES

- For updates/White paper prior to 2023, please refer to the **What's New COATS Visual 2022 Summary.pdf**

### COATS VISUAL VERSION 17.3.0.0

## New Features!

### Coming Soon

- 941 1<sup>st</sup> Qtr 2024 are pending a future update.

### ACA

- HRA features added are pending a future update.

## Log in

**Window Alert** – Fixed the extra space in "**Please wait while COATS is working!**" log in screen. (02/16/24)

## Contact areas

**Contact areas** – To create an Outlook Appointment; Department is required, Contact name added to Master Screen is required. Callback Date is required. (02/14/24)

## Integrated Solutions

- Efficient Hire** – **Contact** – A Contact note is added to the Employee CONT after the Employee has been registered and the user has approved the comment. In the past this was added too early in the process. (02/12/24)
- Online Applications** – **Check Existing Records/Merge**- Updated to search First name, last name, city and email address. (02/16/24)

### COATS VISUAL VERSION 17.2.0.0

## New Features!

### Coming Soon

- 941 1<sup>st</sup> Qtr 2024 are pending a future update.

### ACA

- \*\* The 1095C's are due by March 1<sup>st</sup>, 2024 \*\*
- \*\* The 1094C, electronic file, is due by April 1<sup>st</sup>, 2024 \*\*
- ACA forms for 2023 are now available.
- Updated XML filing to meet the 2023 Tax Year specifications is now available.

- HRA features added are pending a future update.

## Payroll

- **Yearly/Employee W2s – Print Icon** – The individual print icon pulls the same form as the Print W2s icon. (1/10/24)
- **Yearly/Employee W2s – Create W2 Data From Selected Year** – moved to the top of the window as users often missed this step and had to contact Support for assistance. (01/16/24)
- **CADI** – Cadi no longer has a tax limit, the formula has been updated to ignore any entered limits. This is Tax Query, clients may receive an EXE update without this limit and local clients will need to run the query separately from the exe. (01/12/24)

## Integrated Solutions

- **Efficient Hire – Email Address** - A Valid email is required, if the employee doesn't have a valid email, COATS will post messages in the window and will not allow the employee to be registered until corrected. (01/11/24)
- **Efficient Hire – Direct Deposit** - A Valid routing # is required for Direct Deposit or Paycard, if the employee doesn't have a valid routing #, COATS will not enter Direct Deposit nor Pay Card information nor check off Direct Deposit or Pay Card box under Tax. (01/18/24)

## COATS VISUAL VERSION 17.0.0.0

## New Features!

### Coming Soon

- **941 1<sup>st</sup> Qtr 2024** are pending a future update.

### ACA

- **\*\* The 1095C's are due by March 1<sup>st</sup>, 2024 \*\*** ○ **\*\* The 1094C, electronic file, is due by April 1<sup>st</sup>, 2024 \*\***
- ACA forms for 2023 are pending a future update.
- Updated XML filing to meet the 2023 Tax Year specifications are pending a future update.
- HRA features added are pending a future update.

**Employees** □ **Contact Initials** Read-Only unless you are a System administrator. (10/11/23) □ **Search – Pay Card** and **Direct Deposit** added to column chooser. (10/20/23) □ **HRA box** added to **TAX** window for Essential StaffCARE ICHRA (10/24/023) □ Check Search – **Unemployment Flag** added to column chooser. (11/1/23)

## Payroll

- **Pay Cycle Processing Create Cards – Pay Card** – A **pay card** column has been added to the Create Cards section. (10/25/23)

## Reports

- **KPI Reports – KPI Clients by Staffer– All Total** –Employees attached to an Order, regardless of date range regardless of Employee Status. (11/7/23)
- **KPI Reports – KPI Clients by Staffer– All Total Paid** – Distinct employees paid, at the client, within the date range, with the Staffer name. Note: If the employee worked for more than one client in the same date range, they count for each client in the total of the staffer but only once for the client. (11/7/23)

## Integrated Solutions

- ☐ **Efficient Hire** – **I9 Verified** check box becomes checked after **Update ADMIN Data**, and **Update Fed, Admin, I9 and DD to COATS**, **W4 Verified** check box becomes checked after **Update COATS with Federal Data**, **Onboarded Verified** Check box becomes checked after **Update Fed, Admin, I9 and DD to COATS**. (10/23/23)
- ☐ **Efficient Hire** – Employee **CONTACT** note added when the user registers an employee. (11/24/23)
- ☐ **Efficient Hire** – Employee CONTACT note automatically added when user registers and employee. When the user returns to the Efficient Hire window, they will see who registered the employee under the registration button (12/19/23)

12/31/23 ☐ **Efficient Hire** – Pay card details show when the user downloads the EHX data. The user will need to enter the Bank Account # but the Name and Routing # will be imported from EHX. (12/19/23)

☐ **ADP Wisely** – ADP file updated to accommodate SSN changes (12/9/23)

## **COATS VISUAL VERSION 16.0.0**

### **New Features!**

#### **Employees**

- **Pay/ Pay Register** – Updated to Visual Report. (9/29/23)

#### **Clients**

- **Search** – Users can click Search, click the Client Icon, view the client, and return to Search screen or can continue to search as normal. (8/28/23)

#### **Payroll**

- **Pay Cycle Processing Open/Close** – Open/Close buttons added to allow users with Payroll Maintenance Security to Open/Close payrolls within the Pay Cycle Processing window. The default is to show all open payrolls. The user can click the Closed Column header to see all Closed payrolls, again to see all payrolls, again to see Open. (09/22/23)
- **Yearly** - Updated to allow Users with Employee Portal Added feature to update their W2 details. Users will update the Federal details and select a retirement under the admin prior to updating the portal company details. (7/6/23)

#### **Quarterly**

- **COPL – CO Paid Leave Reporting file updated.** When entering the company information for COPL Quarterlies, only Sole Proprietors will fill in the Contact name. (09/29/23)
- **WAPL – WA Paid Leave Reporting file updated.**
  - Hardcoded that all employees listed are not Exempt, users will manually update for those listed whom are Exempt
  - Ensure Employees Date of Birth is entered on employee Master record. (09/29/23)
- **NC – NC Quarter Reporting Updated with new specs for new reporting site.** (09/29/23)
- **OR – OR Quarter Reporting Updated with new specs.** (09/29/23)

#### **AP**

- **Payable Account – Transactions – Deduction Register** – Users can print the deduction register related to the check. Previously the user would have to select each invoice in the check to see the register. All reports open over top and will need to be printed/reviewed before closing. (7/13/23)
- **Check Processing – Check Register** – Will reflect manually updated check numbers. Previously would only reflect the check numbers from the printed checks. (7/13/23)
- **Pay Outstanding invoices with overpaid** – Users can add the most recent date associated to the invoices in the grids on the left by using the column chooser. Also, when posting these overpayments invoices from and to will list in the explanation of the transaction. (7/21/23).

#### **Reports**

- Staffing Reports – **Assignment Review Fill Ratio - All Clients** added. (7/13/23)

#### **Integrated Solutions**

- **Essential StaffCARE file** – **Create Data** pulls Deduction Code based on **ID#** rather than **Code**. (8/8/23)
- **Miscellaneous – CTI – ERC File** – Payroll data pulls by check date now rather than Weekending Date. If CTI mentions the 941 doesn't match the Payroll Data, reach out to Support for the latest **COATS\_CUSTOM\_CTI\_ERC Program.exe**.
- **The Work Number (TWN)**– COATS integrates with TWN with our clients for FREE! The user will send a 2021, 2022, 2023 YTD and weekly Payroll File to TWN. TWN service can simplify your workload over manual Employment verifications. The Automated Service is faster and more informed decisions can import opportunities for credit and aid. (08/08/23)

- **Text Request** – Contact details are sent to the Text Request app when sending texts. Users will now see the Contact Name in Text Request. (09/18/23)

## Maintenance

Utility/Purge Applicants/ **Global Status** - The purge list now includes the employee's global status. (09/22/23)

## COATS VISUAL VERSION 15.5.0.0

## New Features!

### Coming Soon

- **TX Quarterly Updates** – releasing in 2023.
- **Quarterly Updates for WA Cares Fund withholding.**

## System

### Login

- The login screen will now display the connected SQL Server Data source.

## Employee

- Assignment Window – **Valid/Invalid** button has been moved up so users can see at different resolutions. (05/19/23)
- **Middle Initial** -Users were experiencing a blank when manually adding an employee name. This has been updated (05/04/23)
- Search – **Middle Initial** has been added to the Employee SEARCH window (05/22/23)
- **Tax/Onboarding/Efficient Hire**
  - Efficient Hire Onboarding is now available to all users.
  - The user can register the employee.
  - The user can retrieve the employee forms.
  - The user can see additional attachments.
  - The user can download Efficient Hire data into COATS.

## Payroll

- **Export Files**
  - **CTI Payroll File Export** added as **CTI WOTC** to **Export files**.
  - **The Work Number** export added to **Export Files**.
  - **Efficient Hire WOTC** added to **Export files**.
- **IA** – State taxes updated due to rounding issues. Employees may notice a minute change.
- **Reports – CA Pay Export** – Client can pull data by Agency, By Client for details for the SB 1162 reporting. See CA Pay Export White Paper for more details. EEO must be filled out under Employee/**TAX/EEO** for employees to show. (04/28/2023)
- **WACF – Washington Cares Fund – White Paper** instructions for setup available via Visual\_Updating\_WACF\_2023.pdf

## Quarterly

- **COPL – CO Paid Leave Reporting file created and on the Quarterly Menu.** When entering the company information for COPL Quarterlies the user must enter First name (space) Last name. The file separates First Name in a separate column from Last name. (06/29/23)

## Reports

- **GL/Spreadsheets-** Update to GMGP Compare on the GL (No longer errors if a month had no data to show.) (06/14/23)
- **Text Request Mass Email Employees** – State has been added to the filter grid. (05/19/23)
- **Quarterly Reports**
  - CO Paid Leave Mag Media Creation. (6/29/23)

## Integrated Solutions

- **CTI Payroll File Export** added as **CTI WOTC**.
- **Efficient Hire WOTC** added.



- **Efficient Hire** data import finished. See Efficient Hire Integration White Paper (06/14/2023)

## Maintenance

- **Email Address:** Users can enter email addresses up to 60 characters vs. 40. (0518/23)

## COATS VISUAL VERSION 15.1.0.0

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## 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 3rd 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.

## COATS VISUAL VERSION 15.0.0.

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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

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

#### 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.**
- **Please review Tax Updates to ensure all other Special Tax considerations for your state(s) are processed.**

#### 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)