



WinStabs-NMR Release Notes

Version 2.08 Released 2/17/2021

- Meeting Report – Calculations for variances have been removed from the Receipts.
- LM and 990 – Reviewed and updated Beginning balance issues. (2-07 code failed to run on certain machines)
- Process eBill
 - Local Owes TD – Print Issue Resolved
 - Added confirmation message when LCA's are posted.
- Utilities – Beginning balances show upon starting a new year.
- TAR – Trustee page updated EFTPS comment to the correct exhibit.
- Ledgers
 - LCA unpaid taxes do not display as disbursements.
 - LCA names being duplicated corrected.
- Bank Reconciliation
 - Savings – Items not classed as savings do not display anymore.
 - Reconciliation – Required date to be entered with date picker added.
- Links- Department of Labor link has been updated to match the OLMS new website.
- Task list – updated the process to minimize duplicate shell entries. this requires the task list to be opened. All prior data will be included in the new format with the exception of the completion date of Dues Receipts.
 - Changed Dues Receipts due date to January 31st.
- Worksheets
 - CT1 – worksheet has been updated to match the 2020 IRS form. The fraction of cents also generates automatically.
 - 941 – worksheet has been updated to match the 2021 drafted IRS form.
 - 944 – worksheet has been updated to match the 2020 IRS form.
 - W2 – Rail version box 14 has been updated to display RRTA in box 14.
 - W2 also has a process to catch payees that either had a state code or did not have a state code through the entire year. This will minimize duplicate w2 forms from WinStabs.

Version 2.07 Released 01/06/2021

- Removed
 - Upload to Field Audit Process – This Process used Google Drive and was removed.
 - Rescue Session – SMART TD Field Support no longer uses logmein123.com
- Additions
 - Treasurer’s Annual Report Reprint Menu – Allows user to reprint certain parts of the report as needed.
 - Local Presidential Oversight Report Reprint added to Menu Ribbon – Made the form accessible all year long if a new Treasurer or President is seated in office.
 - Replacement Check Process for Payroll Checks – Voids original check and replaces all payment and tax information to new check number.
 - Ability to change the fund on a Payroll Check – if a payroll record is entered and debited from the wrong fund this will allow it to be changed without deleting and reentering the check.
 - Workers Compensation Menu
 - Look Back Period
 - Payments on policy
 - Refunds from policy
 - All payments and refunds in this menu use the percentage of wages from the look back period to determine how the funds should be divided between the Local and LCA Funds.
 - Report of Payments
- Updates
 - Process Ebill – redesigned form to include Prior Month Returns on the same page as the LCA Entry.
 - Meeting Report – Meeting Report pulls information from 1/1 of the year that is selected through the date that is entered in the “Meeting Date” field. This allows for Treasurers to pull past reports.
 - Payroll Vouchers – YTD Earnings by date. Historically the YTD fields pulled a sum of the data entered. Example – if a January 2020 voucher was reprinted in December 2020 for the officer, the YTD would still show all payments through December. Now the YTD will be capped by the Check Date when the report generates.
 - Fica Tax Rate Storage – Fica Rates follow data import and export
 - Fica State Quarterly Tax Worksheet YTD – Added YTD Earnings to assist in Filing State Taxes.
 - Rail State Quarterly Tax Worksheet – Updated Page
 - Treasurer Annual Report – Added LCA Summary page.
 - Meeting Dates – Added Note Field
 - Updated W2 Worksheets to match SSA BSO Lines
 - Tax Payments
 - EFTPS/Electronic Payment option Check Number population updated
 - Tax Adjustments updated to account for crossing to previous year
 - Tax Period – Defaults to Default Report Year