

Go to 5500 Forms.

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After selecting a Plan from the "Home" screen and by clicking on "Edit Plan", the user will be directed to the "Edit Plan" screen. In the "Plan Modules" box, the user will be able to select the 5500 Plan Year (1988 - present) the user would like to work on before clicking the "5500 Forms" button.

The screen shown below displays what it looks like if the user has an IRS Forms, 5500, 1099, Portal and Distributions subscriptions with ftwilliam.com. Depending upon the subscription(s) the user has with ftwilliam.com, the "Edit Plan" screen may appear differently.

The screenshot displays the 'Edit Plan' interface for 'Example Company (ID: PlanID) (Plan Number: 001)'. The header includes the Wolters Kluwer logo and user information. The main content area is divided into several sections:

- Company Information:** Fields for Company (Example Company), ID (CustID), Plan (Example Company), and ID (PlanID). A checklist is set to 'Misc (1099, 5500 or Compliance)' with details: EIN: 25-1533392 • PN: 001 • PYE: 12-31.
- Plan Menu:** A list of actions: Convert Plan, Clone Plan, Delete Plan, Show History, and Document History.
- Plan Modules:** A row of buttons for Plan Documents, IRS Forms, 5500 Forms, 1099-R, Compliance, Portal, Proposal, and Distributions. Each button has a 'Yes' dropdown. The '5500 Forms' button is highlighted with a red box, and its dropdown menu is open, showing years from 2003 to 2022.
- Plan Checklist:** A section with expandable items, currently showing 'A. General Information'.