

5500 > [Year] Screen

10/22/2024 2:26 pm CDT

The 5500 > [Year] screen is the "Homepage" for the 5500 return/report for the plan.

Near the top of the screen you will find information showing the Company, Plan Name and checklist type for the plan.

Wolters Kluwer

Example Company (ID: PlanID) Go ExampleUser

Home > Edit Company > Edit Plan > 5500 > 2022 Help

Company:	Example Company	ID: CustID
Plan:	Example Company	ID: PlanID
Checklist:	Misc (1099, 5500 or Compliance)	
Details:	EIN: 86-7530932 • PN: 001 • PYE: 12-31	

Edit Status:	Unlocked
Signed Status:	Not Signed
Acceptance Status:	Not Submitted

5500 Menu

- SAR/AFN Print Settings
- Batch/WorkFlow
- Upload and Download Center
- View 5500 FAQs
- 55AutoFill
- Bring forward 2021 data to 2022 for this plan only
- Bring forward 2021 portal users to 2022 for this plan only
- Clone 2022 Return/Report within 2022 for this plan only

Portal Menu

- Work With Signers/Portal Users
- Portal Manager
- Portal Link I

Just below that is information regarding the Edit Status (Locked, Unlocked), Signed Status (Signed or Not Signed) and Acceptance Status from the DOL (Not Submitted, Submitted, Rejected - rare, In Process, Accepted, Not Accepted). These statuses are related to the signing and completing of a 5500 form discussed in more detail in the [Signing a 5500 Filing](#) section of this guide.

Below the status information are links for [5500 Forms Settings and Batch Features](#) (Work With Signers/Portal Users, Batch/WorkFlow, Portal Settings, and Portal Link).

In the center of the screen are links to 5500 forms and schedules. See [Completing 5500 Forms and Schedules](#) for more information.

In general, new users will first want to address [Completing the 5500 Forms and Schedules](#), review the [5500 Forms Settings and Batch Features](#) for the software and finally, [Signing a 5500 Filing](#).