

Enter Information on a Form 5500 schedule

07/10/2025 4:16 pm CDT

To enter information in a schedule, click on the schedule under the "DRAFT - EDIT" heading in the "5500 - Year" box (or on the link under "Active Schedules" once you are already editing a form/schedule). The actual speed to open a form/schedule is dependent upon the speed of your Internet connection. If you are using a high-speed Internet connection, the schedule should open immediately.

Once the schedule is open you may enter data as you wish.

Wolters Kluwer

Return
Run Edit Checks
Clear Edit Checks

Active Schedules

Form 5500	???	Final
Schedule A-New P2	???	Final
Schedule A-New	???	
Schedule A-New P2	???	Final
Schedule C-New	???	Final
Schedule C-New	???	

Print All FINAL Schedules

Add Schedules
Form 5500-EZ
Form 5500-SF
Schedule A-New
Schedule C-New
Schedule D-New
Schedule G-New
Schedule H
Schedule I
Schedule MB
Schedule R-New
Schedule SB
Annual Funding Notice
Summary Annual Report
Form 5558

Form 5500
Department of the Treasury
Internal Revenue Service

Annual Return
This form is required to be filed with the Department of Labor and 4065 of the Employee Benefits Security Administration sections 6057(b) and 6058(b) of the Employee Retirement Income Security Act of 1974.

General Information
Begin/end year: []

Part I Annual Report Identification Information
For calendar plan year 2022 or fiscal plan year beginning []

A This return/report is for: [] a multiemployer plan
[] Lines A-D [] a single-employer plan

B This return/report is: [] the first return/report
[] an amended return/report

C If the plan is a collectively-bargained plan, check here: []

D Check box if filing under: [] Form 5558
[] special extension (enter []) []

E If this is a retroactively adopted plan permitted by SECURE []

Part II Basic Plan Information—enter all required information

1a Name of plan
Example Company

Note that you can jump to different schedules and add schedules without having to return to the "Form 5500 - Year" screen (See red arrow above).

There is no need to click on update buttons in the software. Changes are automatically saved once they are entered.