

Consulting Official DOL Instructions

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There are two methods of consulting the official DOL instructions.

1. On the main "Form 5500 - Year" screen, you may click on the "I" link next to the appropriate schedule under the "DRAFT - EDIT" heading in the "5500 - Year" box. This will display a page with the full text of the instructions for the applicable schedule. There will also be "View General DOL Instructions" links on this page to the general Form 5500 instructions.
 2. When you are entering data on a schedule, you may click on the blue buttons with question marks next to the line item on the form to read the help materials related to that line item.
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