

Batch/Workflow

09/11/2024 4:40 pm CDT

Clicking on the "Batch/Workflow" link within the "5500 Menu" box from the "Form 5500 - Year" screen, brings you to the "5500 Batch/Workflow" menu. You will see the options to Bring forward (prior year) data to (current year) for all plans, Bring forward portal users to (current year) for all plans, Batch Invite 5500/SF, 5500 Workflow Grid, Admin Summary Status, Batch SAR, Batch Annual Funding Notice, Batch Local Sign, 8955-SSA Batch/Fulfillment, Batch 5558, and Batch Lock 5500.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500](#) > [2022](#) > [5500 Batch/Workflow](#)

5500 Batch/Workflow

Options
Bring forward 2021 data to 2022 for all plans
Bring forward 2021 portal users to 2022 for all plans
Review/Assign Detail Status/Extensions
5500 Workflow Grid
Batch Invite 5500/SF
Admin Summary Status
Batch SAR
Batch Annual Funding Notice
Batch Local Sign
Edit Check All 8955's (Export CSV)
8955-SSA Batch/Fulfillment
Batch 5558
Batch Lock 5500

Each is discussed below. The options of Batch Invite 5500/SF, 5500 Workflow Grid and Admin Summary Status work similarly, as do the options to Batch SAR, Batch Annual Funding Notice, Batch 5558, and Batch Lock 5500, so those items will be discussed together.
