Batch 5558

04/04/2025 12:27 pm CDT

Batch printing Form 5558 allows for efficient processing by grouping selected plans into batches. Follow the steps below to get started:

Accessing the 5558 Batch Feature:

There are two paths to accessing the Batch 5558 feature:

Option 1:

• On the Home screen, choose the Wolters KluwerLogo > Batches > 5500 Batch/Workflow.

🔕 Wolters Kluwer 🝷	and a factor
🚮 Home	
🚨 Edit Profile	
Company / Plan	
Batches •	ACA
Distribution Tracking	5500 Batch / Workflow
Plan Design Summary	1099

- Select the desired Plan Year.
- Click Batch 5558.

5500 Batch/Workflow

Options
Review/Assign Detail Status/Extensions
5500 Workflow Grid
Admin Summary Status
Batch Local Sign
Edit Check All 8955's (Export CSV)
8955-SSA Batch/Fulfillment
Batch 5558
Batch Lock 5500
5558 Report

Option 2:

- Select a Company/Plan and open the 5500 Module.
- Click Batch/Workflow.
- Click Batch 5558.

😟 Wolters Kluwer 🝷		A. Demo	401(k) Plan (ID: a.demo plan)) (Plan Number: 117) 🔻 Go 🔻 🔮 Allison Bailey 🔻				
		Select a P	lan From History	*				
Home > Edit Con	<u>npany</u> > <u>Edit Plan</u> > <u>5500</u> > 20	24		Help				
Company:	A. Demo Corp	*	ID: a.demo 🥒	5500 Menu				
Plan:	A. Demo 401(k) Pla	ı 🔻	ID: a.demo plan 🥒	SAR/AFN Print Settings <i>i</i> Batch/WorkFlow				
Checklist:	Non-Standardized POST	401(k) (Adop	tion Agreement Format) -	Upload and Download Center Attachment Templates				
Details:	EIN: 86-7530932 • F	N: 117 • PYE:	12-31	View 5500 FAQs 55AutoFill				
				 Bring forward 2023 data to 2024 for this plan only Bring forward 2023 portal users to 2024 for this plan 				
Edit Status: Unlocked Lo		lock		only <i>i</i>				
Signed Status: Not Signed		l i		only <i>i</i>				
Acceptance	e Status: Not Submi	tted		Portal Menu				

Home > Edit Company > Edit Plan > 5500 > 2024 > 5500 Batch/Workflow

5500 Batch/Workflow

Options
Bring forward 2023 data to 2024 for all plans
Bring forward 2023 portal users to 2024 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
5558 Report

Creating a Batch

• Click **Create New Batch** and enter a name for the batch. Tip: Use a descriptive name, such as the plan year-end (e.g., 12/31/2024 or 12/31 PYE).

Home > Edit Company > Edit Plan > 2024 5558 Extensions Batches											
Create New Batch Download History											
Batch Name	Batch ID	Count	Error	Printed	Completed	Change Status					
No Batches Found											
	New Batch ×										
Enter batch name: Demo Batch 12/31 PYE											
	ОК										

- Click Add Plans to view a list of all available plans. The plans may be filtered or sorted by:
 - Company Name
 - Company ID

- Plan Name
- Plan ID
- EIN
- Plan Number
- Year-End Date (MM/DD)
- Admin
- Plan Type
- Signed Status (of 5500/EZ/SF)
- Division
- Select plans individually (1) or use the Select All option (2), then click Add Plans (3).

Batch Type	: Demo : 5558	Batch1 Extensi	2/31PYE Edit Name		Batch ID: 341261 Edit Check Status: 🛕	C	Printed: ompleted:
				You must a	dd plans to the batch.		
Plans Add Plans		Check E	Ext. Ind				
Plan Name	Ad	d Plan	s			х	5500 Ext. I
		6	ompany Name	Company ID	Plan Name	Plan ID	
			Company Name	Company ID	Plan Name	Plan ID	
			A. Demo Corp	a.demo	A. Demo 401(k) Plan	a.demo plan	
			ACNH Residential Services		ACNH Residential Services LLC		
			Final Fantasy LLC 123		Advent Children Profit Sharing Plan Test		
			The Four Nations		Air Nomad Profit Sharing Plan		
			AVALANCHE		AVALANCHE 401(k) Plan		
	_ []		BeBop	111	BeBop Bounty Hunters Profit Sharing Plan	111	
			DCG Example Company		DCG Example Company		
			The Four Nations		Earth Kingdom 401(k) Plan		
			1 Example Company	CustID123	Example Company 401(k) Plan		

Batch Options

Once plans have been added to a batch, the following **Batch Options** are enabled:

Bato	h Options										
	Name: DemoBatch12/31PYE Edit Name				Batch ID: 34126	1	Printed: -				
	Batch Type: 5558 Extensions			Edit Ch	eck Status: 🔺	Completed: -					
Pri	Printing Options:										
Add	ress Labels Print 5558s (zip) Print single 5558 file										
	· · · · · · · · · · · · · · · · · · ·										
4 F	Plans Add Plans Check Ext. Ind @ Export	Plan List Down	load Histor	<u>y</u>							
	Plan Name	EIN	Plan #	Error	Year End	Extension	5500 Ext. Ind.				
Ŵ	Air Nomad Profit Sharing Plan	86-7530930	002	4	12/31/2024	10/15/2025	N/A				
Ŵ	Earth Kingdom 401(k) Plan	86-7530930	003	0	12/31/2024	10/15/2025	Y				
Ŵ	<u>Moe's Tavern 401(k)</u>	25-1533849	002	3	12/31/2024	10/15/2025	N/A				
Ŵ	Springfield Bus Drivers Union	25-1533849	103	0	12/31/2024	10/15/2025	N/A				

- Edit Name Rename the batch.
- Edit Check Status- Runs edit checks on all forms in the batch to ensure required criteria are met.
 - Status icons indicate:
 - A Yellow triangle Edit checks not run
 - Green check Filing is OK
 - 1 Red X One or more plans have errors
- Address Labels Download a CSV file with plan sponsor names and addresses. Useful for mailing paper copies.
- Print 5558s (ZIP) Download a ZIP file containing individual PDF files for each plan in the batch.
- Print Single 5558 File Generate one PDF file containing all plans for quick printing.
- Export Plan List Save a CSV file listing all plans in the batch, including:
 - Plan Name
 - EIN
 - Plan Number
 - Errors (if any)
 - Year-End Date
 - Extension Date
 - 5500 Extension Indicator

NOTE: Adding plans to a batch also adds the Form 5558 at the plan level. If a Form 5500/EZ/SF is present, the 5558 extension box is automatically selected when the Form 5558 is added. The **5500 Ext. Ind** button will check the 5558 box on the 5500/SF/EZ if the plan is locked and invited but not e-filed, avoiding the need to unlock the filing.

Show Batches

Once a batch has been created, it will populate on the 20XX 5558 Extension Batches Screen with the following details:

Home > 5500 Batch/Workflow > 2024 > 2024 5558 Extensions Batches

Create New Batch | Download History

Batch Name	Batch ID	Count	Error	Printed	Completed	Change Status
DemoBatch12/31PYE	341261	3	٢	04/04/2025	04/04/2025	Locked Unlock
9/30PYE	341262	6	<u> </u>	-	-	👕 Delete

- Batch Name Displays the name assigned to each batch.
- Batch ID System-generated ID for reference.
- **Count** Total number of plans in the batch.
- Error Status icons:
 - A Yellow triangle: Edit checks not run
 - Green check: Filing is OK
- I Red X: One or more plans have errors
- Printed Date when 5558s were printed (ZIP or single file).
- Change Status Update batch status.
- Delete Remove the batch (plans remain available for other batches).
- **Completed** Marks the batch as completed; date stamp will appear.

NOTE: Mark a batch Completed when forms are sent to the IRS or the client.