

Batch 5558

09/11/2024 4:44 pm CDT

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Batch Name	Batch ID	Count	Error	Printed	Completed	Change Status
12/31ExtendedBatch	325631	2		-	-	Delete

Batch printing the Form 5558 will allow you to be more efficient by setting up batches to select which plans you want to work on at this time. To get started, you have two options:

Option 1

1. You can choose "5500" from the "Batches" drop-down list on the "Select Company" screen.
2. Select a plan year.
3. Click on "Batch 5558."

Option 2

1. You can select a company/plan and go to the 5500 Module.
2. Click on "Batch/Workflow."
3. Click on "Batch 5558."

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After you click on "Batch 5558," you have to click on "Create New Batch" to name your batch. The batch name can be whatever you choose. Now that you have your batch created, you will need to click on "Add Plans." You will see a list of all plans that are in the system, the plan's EIN, plan number and year end (MM/DD). You are able to select all the plans at once, or check them off one by one, then click on "Add Plans."

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Batch Options

Name: 12/31ExtendedBatch Edit Name	Batch ID: 325631	Printed: -
Batch Type: 5558 Extensions	Edit Check Status:	Completed: -

You must add plans to the batch.

0 Plans [Add Plans](#) [Check Ext. Ind](#)

Plan Name	EIN	Plan #	Error	Year End	Extension	5500 Ext. Ind.
No plans selected						

Tip. If you only want plans with a specific plan year end in your batch, you could title it 12/31 or 12/31/20XX.

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- **Edit Name.** You are able to re-title your batch name.
- **Address Labels.** Download a .csv file containing the plan sponsor's name and address. This is useful when sending a paper copy of the 5558 to your client.
- **Print 5558s (zip).** Save a zip folder to your hard drive that will contain a separate .pdf file of each plan that is in your batch.
- **Print single 5558 file.** Generate a .pdf file for all the plans that are in your batch to quickly print them off and send them to your client or the IRS.
- **Export Plan List.** Save a .csv file to your hard drive listing all the plans that are in your batch. The file will contain the plan name, EIN, plan number, error, year end date, extension date and if the 5500 extension indicator is marked on the 5500.

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- **Batch Name.** Indicates the batch names you have created.
 - **Batch ID.** ftw generates a batch id for each Batch Name created.
 - **Count.** The number of plans listed in the batch.
 - **Error.** A yellow triangle means that edit checks have not been run. A green circle with a check mark means the filing is OK. A red circle with an X means some 5558s may have errors.
 - **Printed.** The date that you clicked on Print 5558s (zip) or Print single 5558 file will display.
 - **Change Status.**
 1. **Delete.** You may delete a batch, which will remove all the plans within the batch so that you may select them for a different batch. This will not remove the 5558 from the plan level.
 2. **Completed.** A date will appear in the 'Completed' column once clicked on. **TIP.** Mark a batch 'Completed' on the day you send the Form 5558s to the IRS or your client.
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