

Batch Lock 5500

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The 5500 module allows for users to mass edit check as well as lock or unlock 5500/EZ/SF filings. To access this feature, navigate to the Wolters Kluwer Logo > Batches > 5500 Batch/Workflow.

From here, select the applicable year from the dropdown menu. **Please note, this feature is only available starting with the 2021 form year.** Once the year is selected, click on “Batch Lock 5500”.

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From within the Batch Lock 5500 screen, select the “Create New Batch” button from above the grid and enter in a naming convention for your batch.

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This will redirect to the specific batch where users are able to add plans by selecting the “Add Plans” button above the grid.

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NOTE: The Batch screen is year specific and will only allow you to create batches on the selected form. For example, if the 2022 year was selected from the Batch Lock 5500 menu, only filings populated on a 2022 form, that have not already been filed, and have the responsibility field as ‘Yes’ on the Edit Plan screen will be available to add to the batch.

The “Add Plans” window allows for user to filter plans by one or more search entries above each column header.

Users may select individual plans or click on the checkbox to the left of the Company Name header to select all available plans. (If a filter is utilized, the select all will only select the plans in the filtered view). The current plans available and the number of selected plans populate at the bottom of the window.

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Once the plans are added to a batch, user are able to run edit checks, lock/unlock the filings, or remove the plans from the batch through the “Do with Selected” option at the bottom of the screen. To use these features, select the checkbox to the left of each plan, or select all plans in the batch by selecting the checkbox to the left of the Company Name header.

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When an option is selected from within the “Do with Selected” menu, a pop-up window will populate confirming the request. When running edit checks or locking/unlocking the forms, a progress bar will populate. Once completed, edit checks and lock statuses may be viewed from within the grid by scrolling to the right:

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Clicking on the hyperlinks under the Edit Check will redirect you to the specific plans edit checks and draft forms to make the alterations. Once alterations are completed and the forms are locked, you can mark the batch completed on the individual batch screen or from within the batch landing screen. **Note:** This is for record keeping purposes only and does not stop users from making further alterations to the batch or to plans within the batch but will prevent the batch from being deleted.
