

Adding Multiple 5330 Forms

02/03/2025 7:55 pm CST

To add Form 5330, begin by navigating to the 5500 Module for the specific plan year being filed. The 5330 option is located on the right side of the screen, under the 8955-SSA section. Select the **+Add 5330** link in the Draft-Edit column.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500](#) > 2023

[Hi](#)

Company:	Sample Example Co 2	ID:	
Plan:	Example Co.	ID:	
Checklist:	Misc (1099, 5500 or Compliance)		
Details:	EIN: 86-7530955 • PN: 001 • PYE: 12-31		

Edit Status:	Unlocked
Signed Status:	Not Signed
Acceptance Status:	Not Submitted

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- [Clone 2023 Return/Report within 2023 for **this plan only**](#)

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5500 - 2023			
DRAFT-EDIT	STATUS	FINAL	DEL

May Not Print All FINAL Schedules

[Edit Check All 5500 Schedules](#)

[5500 Review Summary](#)

Add Schedules
Form 5500
Form 5500-EZ
Form 5500-SF
Schedule A-New I
Schedule C-New I
Schedule D-New I
Schedule DCG-New I
Schedule G-New I
Schedule H I
Schedule I I
Schedule MB I
Schedule MEP-New I
Schedule R-New I
Schedule SB I
Annual Funding Notice I

8955-SSA			
FAQs for 8955-SSA - Batches/Fulfillment - Upload			
Form 8955-SSA E-File FAQs			
DRAFT-EDIT	STATUS	FINAL	DEL
Add Form 8955-SSA I			
-STATEMENT DATA-			
DRAFT-EDIT	STATUS		

5330			
I - FAQs for 5330 - E-File Status - Upload			
DRAFT-EDIT	STATUS	FINAL	DEL
+Add 5330			

After clicking the **+Add 5330** link, the form will be added to the plan year, and the system will redirect you to the draft screen for Form 5330. Any available indicative data will automatically populate in the first section of the form.

Once a single 5330 has been added to the plan, the option to add supplemental pages or attachments to the filing will be enabled and a new **+Add 5330** link will appear.

Please Note: The attachments link is only available for 5330 Add-On subscribers.

5330			
I - FAQs for 5330 - E-File Status - Upload			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5330 (1st)		Form 5330	
+Add p4/5			
Attachments		Attachments	
		Form 8453-TE	
+Add 5330			

The software will automatically assign an identifier to each Form 5330 added (e.g., Form 5330 (1st), Form 5330

(2nd)). This identifier can be updated to any 5-characters by altering the description in the upper left-hand corner of the Form 5330 draft screen.

5330

I - FAQs for 5330 - E-File Status - Upload

DRAFT-EDIT	STATUS	FINAL	DEL
Form 5330 (1st) +Add p4/5 Attachments	⚠	Form 5330	🗑
Form 5330 (2nd) +Add p4/5 Attachments	⚠	Form 5330	🗑

+Add 5330

Enter a 5 character description
2nd

Form **5330** | R