

# Upload and Download Features

02/04/2025 12:46 pm CST

To upload one or multiple Form 5330s, select the **Upload** link within the 5330 Box in the 5500 Module.



In the Form 5330 Upload/Download window, users can:

- Download a sample template and schema CSV files.
- Download existing Form 5330s for one or multiple plans.
- Upload a template file to import data for one or multiple plans simultaneously

Form 5330 Upload/Download

Before creating your file to upload, here are a few important items to keep in mind:

1. To upload Form 5330 data, you must use one of the following Company/Plan identifiers as the first two column headers per plan before uploading:
  - CustomerID (customer-assigned value) & PlanID (customer-assigned value),
  - CompanyEmployerID (Employer's EIN) & PlanNumber, OR
  - FTWCustomerID & FTWPlanID
2. To upload multiple Form 5330s for one plan via the IRS Forms Module, you must repeat the Company/Plan identifiers, described above.
3. Any column which is invalid (e.g. because of a misspelling) will be silently skipped.
4. The system will not perform data integrity edits on uploaded data. Be sure you run all appropriate edit checks after performing the import.
5. Data not relevant to the upload must be listed above column headers.
6. Data that does not meet the character limitation requirements will be silently updated (i.e. If the FilerName is greater than 100, it will be limited to 100 characters).
7. Any columns that have system calculations are not on the sample file. Be sure to review the draft and run all appropriate edit checks after performing the upload.
8. Section A, Schedule C, Lines 2 and 5 allow up to 100 entries. If more than 100 entries are included on the file, they will be skipped starting with the 101st entry.

Download a sample file here: [Sample Form 5330](#)  
Download the schema file here: [Form 5330 Schema](#)

**Note: If the spreadsheet contains data for an active Form 5330, then it will be overwritten with the new data provided in the csv.**

Upload file name:  No file chosen

Number of rows to ignore before header row:

[Download 5330 - Single Plan \(csv\)](#) | [All Plans \(csv\)](#)

Once the template is completed return to the upload page, select the file, and specify the **Number of rows before header row**. The upload process will automatically generate any needed supplemental pages (P4/5) for the filing.

Using the sample file provided as an example:

- Choose the CSV file
- Enter 14 in the Number of rows to ignore, as the official headers start at row 15
  - If using the **Download 5330-Single Plan** or **All Plans** CSV template, this value is "0" unless additional rows were added manually

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Upload file name:

5330\_Sample\_File correct.csv

Number of rows to ignore before header row:

[Download 5330 - Single Plan \(csv\)](#) | [All Plans \(csv\)](#)