

Running Edit Checks for Form 5330

02/03/2025 8:01 pm CST

Edit checks can be performed on any form or schedule at any time. There are two ways to run and review edit checks:

Visual Edit Checks

While editing a form or schedule, click **Run Edit Checks** at the top left of the screen.

- This highlights fields with issues, using yellow for failed edit checks and red for invalid entries (e.g., an incorrect date format like 13/31/2023).
- Double-click any highlighted field for details; close the information window by selecting **close**.





Note: Radio dial edit checks will not highlight, however hovering over the item will provide the warning or error notations.

The screenshot shows the Wolters Kluwer interface. On the left, there is a sidebar with the 'Run Edit Checks' button highlighted in red. Below it, there are options for 'Form 5330 (1st)', 'p4/5 (1)', '+Add p4/5 Attachments', and '+Add 5330'. A 'Final' button with a yellow warning triangle is also visible. On the right, a preview of Form 5330 is shown, including the title 'Return of Excise Taxes Related to Employee Benefit Plans' and the filer's name 'The Sample Employer A'. The 'Filer tax year beginning' field is highlighted in yellow, and the date '13/31/2023' is highlighted in red.

Edit Checks in List Form

To view a list of edit checks, select the triangle next to the form on the top left of the draft form screen, or click the icon under the **STATUS** heading in the **5330** box. A separate page will open with the edit check list.

The screenshot shows the Wolters Kluwer interface. On the left, there is a sidebar with the 'Final' button highlighted in red. Below it, there are options for 'Form 5330 (1st)', 'p4/5 (1)', '+Add p4/5 Attachments', and '+Add 5330'. A 'Final' button with a green checkmark is also visible. On the right, a preview of Form 5330 is shown, including the title 'Return of Excise Taxes Related to Employee Benefit Plans' and the filer's name 'The Sample Employer A'. The 'Filer tax year beginning' field is highlighted in yellow, and the date '13/31/2023' is highlighted in red.

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

Edit Check Codes




Edit checks have codes to help identify the level of the issue detected.

- Codes that begin with **FW** are edits that have been drafted by ftwilliam.com.
- All other edits have been supplied by the IRS.

Edits are also coded as either **Error** or **Warning**.

NOTE: Any filing containing a non-FW error will not be accepted by the IRS.

The following is a description of the status codes:

-  A status code of a **green** check indicates that the edit checking was successfully completed, and no errors or warnings were detected.
-  A status code of a **yellow** caution symbol indicates that the information entered on the schedule has changed since the last edit check.
-  A status code of **red x** indicates that the edit checking detected one or more errors or warnings. You may click on the icon to reference those edits.

Immediately before printing the final version of all the schedules, it is a good idea to rerun all edit checks even if all status shows with a green checkmark. The status of the edit checks is reflected under the "STATUS" heading in the "5330" box.

We strongly discourage filing if there are errors/warnings appearing for a filing until you are certain that the filing is correct.

NOTE: The edit checks are NOT intended to check for the accuracy, correctness, or completeness of every response.