# Running Edit Checks for Form 5330

02/03/2025 8:01 pm CST

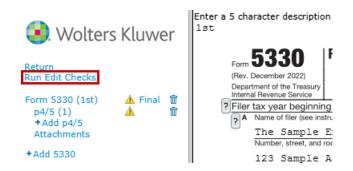
Edit checks can be performed on any form or schedule at any time. There are two ways to run and review edit checks:

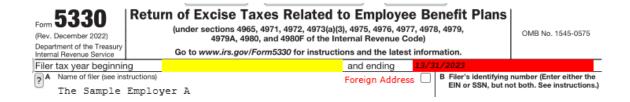
#### Visual Edit Checks

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.

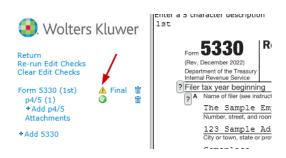
**Note:** Radio dial edit checks will not highlight, however hovering over the item will provide the warning or error notations.





## **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.





#### **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 **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.