How Do I Complete the 5500?

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1. You can edit the 5500 by either clicking the 'Fill in selected fields' item in your ToDo list for the plan you wish to complete.

2. Or by clicking the 'Edit 5500' link / button on the left side of the page. If you have more than one plan, you may need to select your plan from the plan dropdown at the top of the page before clicking the edit link.

3. Fill out the colored fields on the edit form. Changes made on this form are saved automatically. You may view the help materials for a question by clicking the blue question mark button next to the question. You may only edit the questions / fields that were selected by your plan administrator.

4. While editing the 5500, you may click the 'Run Edit Checks' link at the top left of the page. This will visually show you the edit checks by highlighting the fields where there are errors or warnings. Errors are coded yellow for a failed edit check and red for an invalid entry. You can double-click on any highlighted field for more information on the edit check and close the window that appears by clicking on "close".

You can also clear the edit check highlighting by clicking the "Clear Edit Checks" link under the "Run Edit

Checks" link at the top left of the page.

Note: The purpose of the edit checks is to look for missing and / or inconsistent data. The edit checks do NOT check the accuracy, correctness, or completeness of every response.

5. When you have completed editing the 5500, click the "I'm Done" button in the upper left corner.

6. This will bring you to the confirmation form. Click the "Confirm 'I'm Done'" button to confirm that you are done editing the 5500.

Confirm 'I'm Done' Editing XYZ Company ABC Plan 5500 - 2011

You have indicated that you are done working with this 5500.
You will no longer be allowed to make changes to this 5500 and Attachments will be locked once you click 'Confirm'.

Click 'Back to Edit 5500' to continue working with this 5500.

Back to Edit 5500   Confirm 'I'm Done'

7. Depending on your permissions, you may be able to sign the 5500 immediately once you are done editing.