

Form 5558

02/05/2025 10:55 am CST

Form 5558 Edit Status and Filing Status

As of the 2024 filing year, Form 5558 can be e-filed through the EFAST2 system. This feature is not available for prior years or off-calendar plans using the 2023 Forms.

Please Note: The filing of form 5558 is a separate filing feature included in the 5500 Module. The form 5558 will not be included when filing 5500 Forms and Schedules.

Once Form 5558 has been added to the Draft forms the **5558 Edit Status** and **5558 Filing Status** details will appear. **If the Form 5558 is removed, the 5558 status sections will also be removed.*

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500](#) > 2024

Company:	Example Company	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

5558 Edit Status:	Unlocked Lock
5558 Filing Status:	Not Submitted

5500 - 2024			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5558 I	???	Form 5558	Del

5558 Edit Status: There are two possible statuses.

- **Unlocked:** indicates the draft Form 5558 is editable and not ready for e-file.
- **Locked:** indicates the draft Form 5558 has an 'OK' edit check status, is no longer editable, and is ready to be e-filed.
 - This link is disabled until the Form 5558 is passing edit checks and no critical errors are present.
 - If a Form 5500/SF/EZ is added after the Form 5558, and the filing has not been submitted, users will be required to re-run edit checks and re-lock the form before submitting.

5558 Filing Status: There are three possible statuses.

- **Not Submitted**
 - **Not Submitted:** indicates the Form 5558 is **unlocked** has not been e-filed.

5558 Edit Status:	Unlocked Lock
5558 Filing Status:	Not Submitted

- **Not Submitted | E-File:** indicated the Form 5558 is **locked** and enabled for E-file.

5558 Edit Status:	Locked Unlock
5558 Filing Status:	Not Submitted E-File

- **Submitted:** indicates the From 5558 has been successfully submitted to the EFAST2 system for the IRS to review and determine eligibility of extension. **Once the 5558 is submitted and accepted it may not be amended, unlocked, or altered.**

5558 Edit Status:	Locked
5558 Filing Status:	Submitted Check Status

The **Check Status** link allows users to view the filing details including status, Date submitted and the AckID.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500](#) > [2024](#) > [5558 Status](#)

5558 Status	
Acceptance Status:	Submitted
Plan Name:	Example Company 401(k) Plan
Plan Number:	001
Plan Year:	2024
Plan Year End Date:	12/31/2024
Date Submitted:	12/11/2024
AckID:	20241211163821NAL0008473299001

[Return to Previous Page](#)

- **Rejected:** EFAST2 rejected the filing and the form data needs to be reviewed and updated if applicable. Selecting the 'Details' link next to the Rejected status will indicate what issues were present that caused the rejection. When a rejection occurs the form is automatically unlocked for edits to be made.

5558 Edit Status:	Unlocked Lock
5558 Filing Status:	Rejected Details

- When the Rejected Filing is relocked, the link to 'E-File' will populate once more

5558 Edit Status:	Locked Unlock
5558 Filing Status:	Rejected Details E-File

Please Note: Processed Form 5558 will not be accessible after submission on EFAST2 nor is it available by phone with EFAST2. Contact the IRS for any questions about the Form 5558.

E-filing Form 5558

As of the 2024 filing year, Form 5558 can be e-filed through the EFAST2 system. This feature is not available for prior years or off-calendar plans using 2023 Forms.

Please Note: The filing of form 5558 is a separate filing feature included in the 5500 Module. The form 5558 will not be included when filing 5500 Forms and Schedules. A form 5500/5500SF/5500EZ does not need to be present to file the Form 5558.

To e-file, select Form 5558 from the "Add Schedules" box. This will add the form to the Draft Edit Section of the 5500 Module.



Once added, the "5558 Edit Status" and "5558 Filing Status" details will appear.

Note: if the Form 5558 is removed, the 5558 status sections will also be removed.

Company:	Example Company	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

5558 Edit Status:	Unlocked Lock
5558 Filing Status:	Not Submitted

5500 - 2024			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5558 I	???	Form 5558	Del

Once the Form 5558 has been completed and passes edit checks, it is ready for e-file. The filing will need to be locked by selecting the "**Lock**" link from the "5558 Edit Status" line. Locking the filing will disable any further edits to the Form 5558 and enable the **E-File** option on the "5558 Filing Status" line.

Note: The **Lock** link is enabled once the edit check status shows **OK**, if the edit checks are **Not-OK** there is an error present with the filing that needs to be corrected prior to e-filing. Please see [Form 5558 Edit Status and Filing Status](#) for additional details on the Lock and E-file options and definitions.

5558 Edit Status:	Unlocked Lock
5558 Filing Status:	Not Submitted

5558 Edit Status:	Locked Unlock
5558 Filing Status:	Not Submitted E-File


5500 - 2024			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5500 I	???	Form 5500	Del
Attachments		Attachments	
Form 5558 I	OK	Form 5558	Del

5500 - 2024			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5500 I	???	Form 5500	Del
Attachments		Attachments	
Form 5558 I	OK	Form 5558	DEL

Once the E-File option is selected a warning will populate on the screen confirming you wish to submit the form.

Only select "Ok" if the filing is ready to be sent to the IRS. Once the 5558 is submitted and accepted it may not be amended, unlocked, or altered.

5558 E-File x

 You are about to submit Form 5558 to EFAST2.
Once e-filed, it may not be unlocked or amended.
Press OK to continue or Cancel to stop.

If the filing is received by EFAST2, the 5558 Filing Status will update to **Submitted**.

Selecting the **Details** link will provide the date of e-filing and Acknowledgement ID provided by EFAST2. If the filing is "Rejected" the form will need to be unlocked, and any errors corrected before resubmitting.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500](#) > [2024](#) > [5558 Status](#)

[Help](#)

5558 Status	
Acceptance Status:	Submitted
Plan Name:	A.Demo 401(k) Plan
Plan Number:	001
Plan Year:	2024
Plan Year End Date:	12/31/2024
Date Submitted:	12/09/2024
AckID:	20241209145233NAL0006732483001

Note: Processed Form 5558 will not be accessible after submission on EFAST2 nor is it available by phone with EFAST2. Contact the IRS for any questions about Form 5558.

Uploading Form 5558




As of the 2024 filing year, users are now able to upload the Form 5558 in mass.

Note: This feature is only available for 2024 filing years forward and will not populate in prior years.

To access this feature:

- Navigate to the 5500 Menu Upload and Download Center from within any plan:

5500 Menu

- [SAR/AFN Print Settings](#) 
- [Batch/WorkFlow](#)
- [Upload and Download Center](#)
- [Attachment Templates](#)
- [View 5500 FAQs](#)
- [55AutoFill](#)
- [Bring forward 2023 data to 2024 for **this plan only**](#)
- [Bring forward 2023 portal users to 2024 for **this plan only**](#) 
- [Clone 2024 Return/Report within 2024 for **this plan only**](#) 

- From the **Upload** Menu, select the **Upload Form 5558 (csv)**.



Bulk import:

Using the [Sample Form 5558 \(csv\)](#) provided on the upload screen, users may mass import Form 5558. The import must include information in the one of the data sets outlined below:

Note: only enter information into **one pair** of data sets when using this upload feature.

- CustomerID
- PlanID

OR

- CompanyEmployerID
- PlanNumber

OR

- FTWCustomerID
- FTWPlanID

Uploaded data will replace existing data, and create a new 5558 filing for plans if one doesn't already exist.

The file must be in comma-delimited format (e.g., "Filename.csv"). The system will not perform data integrity edits on uploaded data. Be sure you run all appropriate edit checks after performing the import.

Once the sample file has been completed, return to the upload page and select the **Choose File** option and **Submit**.

Note: Users may enter one of the above identifying methods **Per Plan** but each plan listing can use a different identifier. For example, the following **Sample Form 5558** upload has 3 plans listed, with each plan uses a different identifying method and will still successfully import.

Instructions:

- To upload Form 5558 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
- The system will not perform data integrity edits on uploaded data. Be sure to review the draft and run all appropriate edit checks after performing the upload.

CustomerID	PlanID	CompanyEmployerID	PlanNumber	FTWCustomerID	FTWPlanID
				9876543210	2297468854
Ex.Co	Ex.Plan	25-1533849	104		

Accessing the Form 5558 Filing Status Report

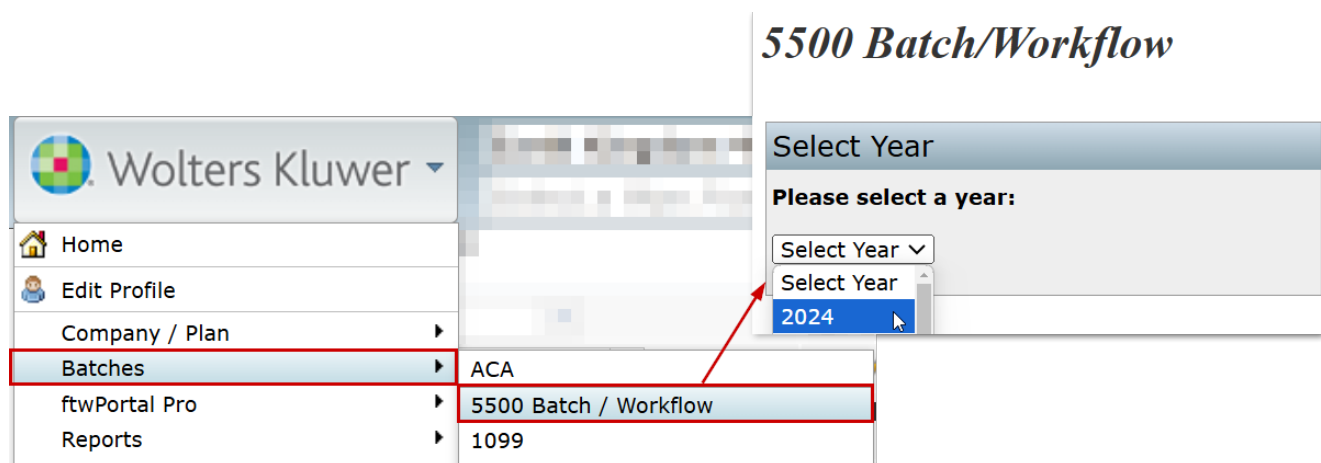
Starting with filing year 2024, the **5558 Report** is now available in the **5500 Batch/Workflow** menu. This report provides a comprehensive overview to help users track and manage Form 5558 submissions effectively. Selecting the **5558 Report** link will automatically download a .csv file.

There are two ways to access the 5558 Report:

Option 1: From the Main Menu Wolters Kluwer Logo > Batches > 5500 Batch Workflow

- Go to **Wolters Kluwer Logo > Batches > 5500 Batch Workflow**
- Select the filing year (2024 or later)
- Click the **5558 Report** Link to download the .csv file.

Note: The 5558 Report is only available for filing years 2024 and beyond, as e-filing was not available before 2024.



5500 Batch/Workflow

Options

- Review/Assign Detail Status/Extensions
- 5500 Workflow Grid
- Admin Summary Status
- Batch Local Sign
- Edit Check All 8955's (Export CSV)
- 8955-SSA Batch/Fulfillment
- Batch 5558
- Batch Lock 5500
- 5558 Report**

Option 2: From a plans 5500 Module

- Navigate to 5500 Module>5500 Menu>Batch/Workflow
- Click the 5558 Report Link to download the .csv file.

Note: The 5558 Report is only available for filing years 2024 and beyond, as e-filing was not available before 2024.

5500 Menu

- SAR/AFN Print Settings *i*
- **Batch/WorkFlow**
- Upload and Download Center
- Attachment Templates
- View 5500 FAQs
- 55AutoFill
- Bring forward 2023 data to 2024 for **this plan only**
- Bring forward 2023 portal users to 2024 for **this plan only** *i*
- Clone 2024 Return/Report within 2024 for **this plan only** *i*

5500 Batch/Workflow

Options

[Bring forward 2023 data to 2024 for **all plans**](#)
[Bring forward 2023 portal users to 2024 for **all plans**](#)
[Review/Assign Detail Status/Extensions](#)
[5500 Workflow Grid](#)
[Batch Invite 5500/SF](#)
[Admin Summary Status](#)
[Batch SAR](#)
[Batch Annual Funding Notice](#)
[Batch Local Sign](#)
[Edit Check All 8955's \(Export CSV\)](#)
[8955-SSA Batch/Fulfillment](#)
[Batch 5558](#)
[Batch Lock 5500](#)
[5558 Report](#)

5558 Report Contents

Selecting the **5558 Report** will download a .csv file that contains the following details for active Form 5558s for the filing year.

- **ftwID/ ftwPlanID**
 - These are [ftwilliam.com](#) assigned fields
- **Customer ID/ Customer Plan ID**
 - User defined fields as entered on the Edit Company/Edit Plan screen
- **Admin**
 - Administrator assigned to the plan, as listed on the Edit Plan screen. If this column is blank and Administrator has not been assigned.
- **Company Name**
- **Plan Name**
- **EIN**
- **Plan Number**
- **Plan Year End**
- **Extension Date**
 - The 15th day of the 3rd month after the return/report's normal due date. (10/15 for calendar year end plans.)
- **Edit Check Status**

- ???- indicates the Edit checks have not been run
 - **OK**- the Edit checks are clear and the form is in good order
 - **Not-OK**- there are errors that will prevent the form from being filed.
 - **Filing Status**
 - *Blank entry*- indicates the form has not been e-filed
 - **Submitted**-the form has been e-filed and has received and Acknowledgement ID
 - **Date Submitted**
 - Date the form was e-filed.
 - **AckID**
 - 30 character Acknowledgement ID of receipt provided by EFAST2 as confirmation of filing.
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