E-filing Form 5558

04/14/2025 10:05 am CDT

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.

Home > Edit Company > Edit Plan > 5500 > 2024

DRAFT-EDIT

Form 5558 I

Attachments

Form 5558 I



STATUS

5558 and enable the **E-File** option on the "5558 Filing Status" line.

???

OK

FINAL

Form 5558

Attachments

Form 5558

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

DEL

Del

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.



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

Del

Attachments

Form 5558 I

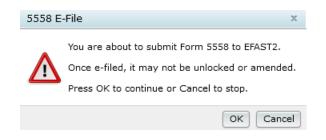
Attachments

DEL

Form 5558

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



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.

 $\underline{\mathsf{Home}} > \underline{\mathsf{Edit}} \ \mathsf{Company} > \underline{\mathsf{Edit}} \ \mathsf{Plan} > \underline{\mathsf{5500}} > \underline{\mathsf{2024}} > \underline{\mathsf{5558}} \ \mathsf{Status}$

Help

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.