

Uploading Form 5558

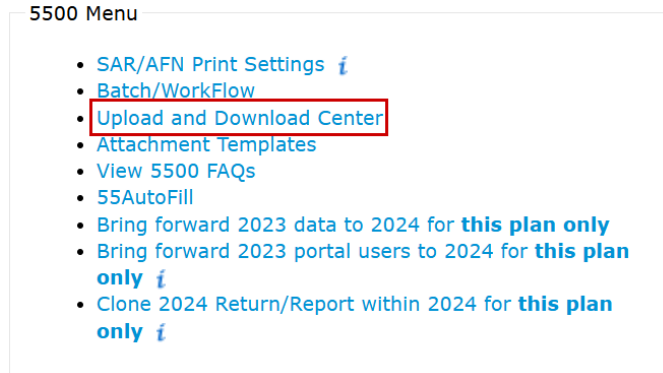
01/10/2025 2:37 pm CST

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

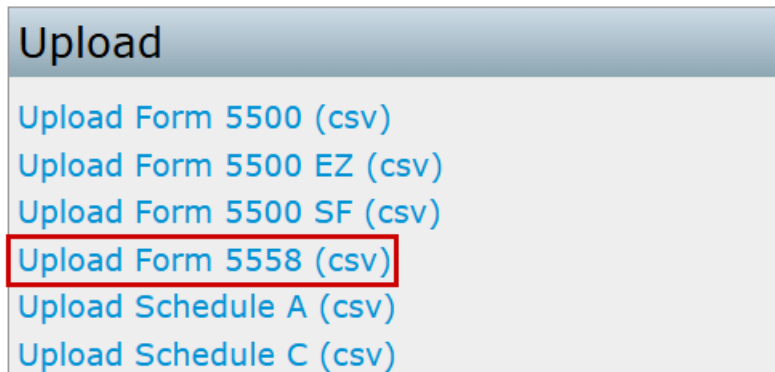
Note: This feature is only available for 2024 filing years forward and will not populate in prior years.

To access this feature:

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



- 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:					
1. 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:					
a. CustomerID (customer-assigned value) & PlanID (customer-assigned value),					
b. CompanyEmployerID (Employer's EIN) & PlanNumber, OR					
c. FTWCustomerID & FTWPlanID					
2. 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
		25-1533849	104		
Ex.Co	Ex.Plan				