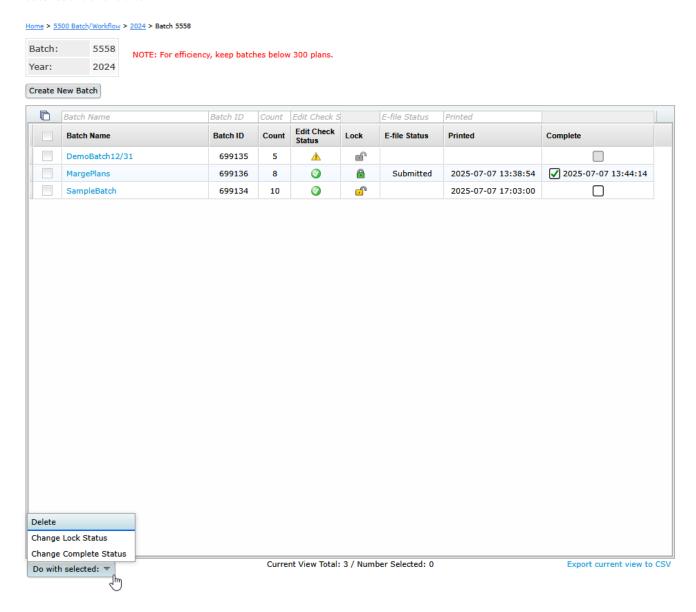
## **Batch 5558 Dashboard and Navigation**

07/07/2025 5:06 pm CDT

The main **Batch 5558 screen** provides a quick view of batch statuses. From the **Select a Batch** screen, the following features are available:



Batch Name- All existing batches will populate with a hyperlink to select and view individual batch details.

Batch ID- Is an FTW assigned id number for easy referencing.

**Count-** Displays the number of plans in the batch.

Edit Check Status- Shows the overall edit checks status of the plans within the batch.

- Status icons indicate:
  - A Yellow triangle Edit checks have not been performed.

- Green check Plans are clearing all edit checks
- Pred X One or more plans have errors
  - Errors must be corrected before e-filing

Lock- Displays the Locked or Unlocked status of all forms in the batch.

- If users hover over the padlock icon, a timestamp of when the batch was locked will populate.
- Locked filings cannot be edited unless unlocked.

E-file Status- Indicates if the batch has been e-filed with EFAST2

- Blank- the column will remain blank until it has been sent to EFAST2.
- **Submitted** the forms within the batch have been sent to EFAST2. Once submitted the batch may <u>not</u> be unlocked.

**Printed-** This is a user selected field that indicates if the forms have been printed to PDF with a date and timestamp.

Completed- This is a user selected field that means all work for this batch has been completed.

- This option is only enabled if users have either printed or e-filed the batch.
- If selected on a batch that has been **e-filed** the action may **not** be undone.

## Do with Selected

From below the grid on the left-hand side there is a **Do with Selected** menu option. From here users are able to:

**Delete** selected batches

- Batches that have been locked may not be removed unless they are unlocked.
- Plans in a deleted batch may be added to a new batch.

**Change Lock Status:** batches may be altered to **Lock or Unlock** in mass.

- Batches may <u>not</u> be locked unless all plans within the batch are passing edit checks and reflect a green check mark
  (
   ).
- Batches that have been e-filed may **not** be unlocked.

Change Completed Status: batches may be altered to Completed in mass

- This option is only enabled if users have either printed or e-filed the batch.
- If selected on a batch that has been **e-filed** the action may **not** be undone.