

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:

[Home](#) > [5500 Batch/Workflow](#) > [2024](#) > [Batch 5558](#)

Batch:









5558

Year:

2024

NOTE: For efficiency, keep batches below 300 plans.


Create New Batch

	Batch Name	Batch ID	Count	Edit Check S		E-file Status	Printed	
<input type="checkbox"/>	Batch Name	Batch ID	Count	Edit Check Status	Lock	E-file Status	Printed	Complete
<input type="checkbox"/>	DemoBatch12/31	699135	5					<input type="checkbox"/>
<input type="checkbox"/>	MergePlans	699136	8			Submitted	2025-07-07 13:38:54	 2025-07-07 13:44:14
<input type="checkbox"/>	SampleBatch	699134	10				2025-07-07 17:03:00	<input type="checkbox"/>

Delete

Change Lock Status

Change Complete Status

Do with selected: 

Current View Total: 3 / Number Selected: 0


[Export current view to CSV](#)



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:
 -  **Yellow triangle** – Edit checks have not been performed.

-  **Green check** – Plans are clearing all edit checks
-  **Red 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 not 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 **not** 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.
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