Add Forms and Schedules

10/30/2025 11:12 am CDT

Before accessing any form or schedule, the form must first be added to the **5500 - Year** box. The following methods are available:
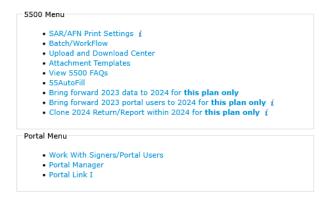
Quick Links:

- Manual Entry
- 55Autofill
- Bring Forward Prior Year Data
- Adding Pages and Additional Schedules

Manual Entry

Add a Form or Schedule

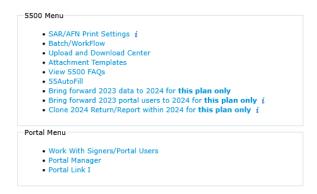- Select the appropriate form from the **Add Schedules** box.

- The form will appear under the **DRAFT-EDIT** column on the left.
    - If the form exists for a prior year, the system will copy the most recent data.
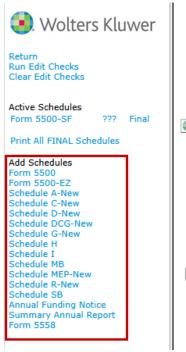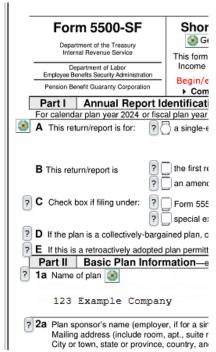   - If no prior data exists, a blank version will be added.

Adding Additional Schedule

Additional schedules can also be added from the draft-edit screen of any form using the link options on the left. (See more information pertaining to Adding Pages and Additional Schedules, later.)

- Navigation between forms is available within the data entry screen.

55Autofill (Return to top)

Step 1: Import DOL Data

Click the **55Autofill** link at the top-right of the screen from within the **5500 Menu** box.
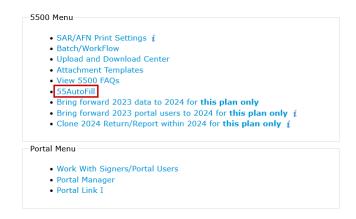- This imports Department of Labor (DOL) data from prior Form 5500 filings using the plan's **EIN** and **Plan Number.**
- 55Autofill will **not** import:
  - 5500-EZ filing
  - Any filing that received a status other than **Accepted**
  - Filings older than 4 years (Example in 2025 only forms 2021-2024 are available.)

> **Important:** Importing DOL data will overwrite any existing 5500 data for that year in ftwilliam.com.

Step 2: Bring Forward Imported Data

After importing, data must be brought forward into the account to complete setup. (See Bring Forward Prior Year Data, later.)

Please see the below video of the individual 55Autofill process.

Batch 55Autofill

Batch 55Autofill enables the automatic import of Department of Labor (DOL) data for multiple plans at once. This process can be used to populate all available forms and schedules for when adding new plans to the software or to add 5500s to existing plans already set up in ftwilliam.com.

Add New Plans:
This option will create new plan listings within the software for each EIN provided and import all available Form 5500 data from the Department of Labor (DOL).
- Submit a list of **EINs** to **support@ftwilliam.com** to autofill all available forms and schedules for each EIN.
- Support will connect you with our conversion specialist to provide you with a timeline for completion.

Update Existing Plans:
 If plans are already configured in ftwilliam.com and need additional 5500s, users may request batch autofill for those

plans.

- Submit a list of **EINs** and **Plan Numbers** to **support@ftwilliam.com** to autofill all available forms and schedules for each plan specified.
- Support will connect you with our conversion specialist to provide you with a timeline for completion.

NOTE: This service is available at **no additional charge**.

Bring Forward Prior Year Data

The Bring Forward feature allows Form 5500 data from the previous year to be carried into the current year, streamlining the setup process for recurring plans. This option is available for individual plans or in batch for all plans on the system.
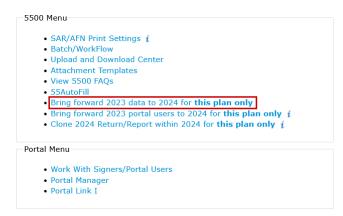
Options:

Bring Forward for Individual Plans:

Found within the 5500 Menu at the top right hand side of the screen, this option copies prior year data for a specific plan, assuming the plan exists in ftwilliam.com for the previous year.

- Data will be brought forward from the prior year to the current year, and only updated fields will need to be modified.
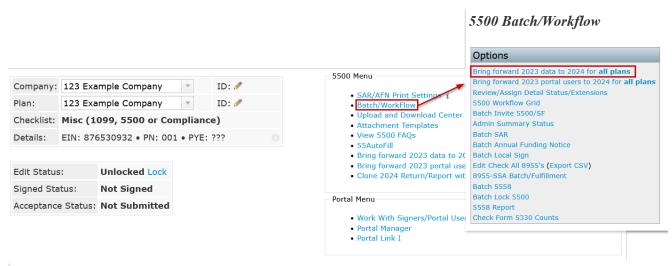- Available to all users with access to the plan and 5500 module.

Company:	123 Example Company	▼	ID: ✏
Plan:	123 Example Company	▼	ID: ✏
Checklist:	**Misc (1099, 5500 or Compliance)**		
Details:	EIN: 876530932 • PN: 001 • PYE: ???		ⓘ

Edit Status:	**Unlocked** Lock
Signed Status:	**Not Signed**
Acceptance Status:	**Not Submitted**

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*

Portal Menu
- Work With Signers/Portal Users
- Portal Manager
- Portal Link I

NOTE: Form and schedule structures may change year to year. Review all brought-forward data to ensure accuracy and completeness.

Batch Bring Forward for All Plans:
Found within the 5500 Menu, and selecting the Batch/Workflow link, this option copies prior year data for **ALL** 5500 plans on the account.

- Available only to **Designated Admins** and the **Master User**.
- Automatically brings forward data from the prior year to the current year for all eligible plans in the system.

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
Check Form 5330 Counts

NOTE: Form and schedule structures may change year to year. Review all brought-forward data to ensure accuracy and completeness.

Adding Pages and Additional Schedules (Return to top)

Additional pages and entries may be required for certain schedules, including **Schedules C, D, DCG, G**, **MEP** and **Schedule A**. These can be added and customized to support multiple entries and improve clarity across filings.

Schedules C, D, DCG, G and MEP

These schedules may require multiple pages to report all necessary information.

- **Add Pages**
  Click the schedule name in the **Add Schedules** box to insert a new page. Each new page will be labeled **New** by default.

- **Rename Page Descriptions**
  Click the schedule under **DRAFT-EDIT** in the **5500 - Year** box. Hover over the word **New** at the top of the page to

access the editable field. Enter a custom **5-character description** to identify and differentiate the page. *Schedule DCG and MEP allow for an 8-character description.*

Schedule A

Schedule A filings support multiple entries and additional pages to accommodate multiple insurance providers or contracts.

- **Add Multiple Schedule A Filings**
  Click **Schedule A-New** in the **Add Schedules** box to create an additional Schedule A.

- **Add Additional Page 2**
  Click the **p2** link next to the Schedule A form under **DRAFT-EDIT** to insert additional pages to an individual Schedule A.
  - The **p2** link may be selected multiple times to add as many additional entries necessary to complete the Schedule A.

5500 - 2024

DRAFT-EDIT	STATUS	FINAL	DEL
Form 5500 I	???	Form 5500	Del
Attachments		Attachments	
Schedule A-New I p2	???	Schedule A-New	Del
Schedule A-New I	???		Del
Schedule A-New I p2	???	Schedule A-New	Del
Schedule C-Ex123 I	???	Schedule C-Ex123	Del

- **Rename Page Descriptions**

  Like the other forms and schedules, each Schedule A and its pages can be labeled with a distinct **8-character name** to differentiate entries and pages.

Enter a 8 Character description ABC

SCHEDULE A

(Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

5500 - 2024

DRAFT-EDIT	STATUS	FINAL	DEL
Form 5500 I	???	Form 5500	Del
Attachments		Attachments	
Schedule A-ABC p2	???	Schedule A-ABC	Del
Schedule A-ABC-1 I	???		Del