

Adding Multiple 5330 Forms

02/26/2025 4:51 pm CST

To add Form 5330, begin by navigating to the 5500 Module for the specific plan year being filed. The 5330 option is located on the right side of the screen, under the 8955-SSA section. Select the **+Add 5330** link in the Draft-Edit column.

Home > Edit Company > Edit Plan > 5500 > 2023

Help

Company: 1 Example Company

ID: CustID123

Plan: Example Company 401(k) Plan

ID:

Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

Details: EIN: 86-7530932 • PN: 001 • PYE: 12-31

Edit Status: Unlocked

Signed Status: Not Signed

Acceptance Status: Not Submitted

5500 Menu

- SAR/AFN Print Settings
- Batch/WorkFlow
- Upload and Download Center
- Attachment Templates
- View 5500 FAQs
- 55AutoFill
- Bring forward 2022 data to 2023 for this plan only
- Bring forward 2022 portal users to 2023 for this plan only
- Clone 2023 Return/Report within 2023 for this plan only

Portal Menu

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

5500 - 2023

DRAFT-EDIT

STATUS

FINAL

DEL

May Not Print All FINAL Schedules

Edit Check All 5500 Schedules

5500 Review Summary

Add Schedules

Form 5500

Form 5500-EZ

Form 5500-SF

Schedule A-New I

Schedule C-New I

Schedule D-New I

Schedule DCG-New I

Schedule G-New I

Schedule H I

Schedule I I

Schedule MB

Schedule MEP-New I

Schedule R-New

Schedule SB

8955-SSA

FAQs for 8955-SSA - Batches/Fulfillment - Upload

Form 8955-SSA E-File FAQs

DRAFT-EDIT

STATUS

FINAL

DEL

Add Form 8955-SSA I

-STATEMENT DATA-

DRAFT-EDIT

STATUS

5330

I - FAQs for 5330 - E-File Status - Upload

DRAFT-EDIT

STATUS

FINAL

DEL

+Add 5330

After clicking the **+Add 5330** link, the form will be added to the plan year, and the system will redirect you to the draft screen for Form 5330. Any available indicative data will automatically populate in the first section of the form.

Once a single 5330 has been added to the plan, the option to add supplemental pages or attachments to the filing will be enabled and a new **+Add 5330** link will appear.

NOTE: The attachments link is only available for 5330 Add-On subscribers.

5330

I - FAQs for 5330 - E-File Status - Upload

DRAFT-EDIT	STATUS	FINAL	DEL
Form 5330 (1st)		Form 5330	
*Add p4/5 Attachments		Attachments Form 8453-TE	
*Add 5330			

The software will automatically assign an identifier to each Form 5330 added (e.g., Form 5330 (1st), Form 5330 (2nd)). This identifier can be updated to any 5-characters by altering the description in the upper left-hand corner of the Form 5330 draft screen.

5330

I - FAQs for 5330 - E-File Status - Upload

DRAFT-EDIT	STATUS	FINAL	DEL
Form 5330 (1st)		Form 5330	
*Add p4/5 Attachments		Attachments Form 8453-TE	
Form 5330 (2nd)		Form 5330	
*Add p4/5 Attachments		Attachments Form 8453-TE	
*Add 5330			

Enter a 5 character description
2nd

Form **5330** | F