Completing Form 8955-SSA, Uploads, Batch Features

06/25/2025 9:53 am CDT

Completing an 8955-SSA

To complete an 8955 -SSA, look for the "8955 - SSA" box in the upper-right hand corner of the "Form 5500 - Year" screen (shown below). Along the top of the box are options for IRS FAQs for 8955 - SSA, "Batches/Fulfillment" (allows you to upload data for multiple plans) and "Upload." In the middle of the box are options to help you complete the 8955 - SSA for the particular plan and filing year and along the bottom of the box are options to complete the statement data.



Note: You may enter data directly into the forms or upload data to complete the forms and/or participant statements via a spreadsheet. See How to Start for more details.

Note: Participant statements are entirely optional. You may choose to batch print the participant statements or use ftwilliam.com's fulfillment service to print/mail the participant statements on your behalf. You also have the option to print/mail the Form 8955 - SSA, e-file the Form 8955 - SSA or use ftwilliam.com's fulfillment service to e-file the Form 8955 - SSA (fee applies) for you. See our 8955 - SSA FAQs for more information.

Тор

There are three ways to add the Page 1 data:

- 1. Click on "Add 8955 SSA" within the "8955 SSA" box.
- 2. Click on "Upload" within the "8955 SSA" box. See Uploading Data to 8955 SSA Single Plan for more details.
- 3. Click on "Batches/Fulfillment" within the "8955 SSA" box. See Uploading Data to 8955 SSA Batch (for multiple plans) for more details.

8955-SSA			
FAQs for 8955-	SSA - Batches/F	ulfillment - I	Upload
Form	n 8955-SSA E-Fi	le FAQs	
DRAFT-EDIT	STATUS	FINAL	DEL
Add Form 8955-S	SA I		
-	STATEMENT DA	TA-	
DRAFT-EDIT	STATUS		

If you click on "Add 8955-SSA" most of the basic plan information should populate Page 1 from the Form 5500/SF (or the basic company information on the "Select Plan" screen if no Form 5500/SF is added). While in the draft form, you will be able to add page 2s by clicking on "p2" (either from the "Form 8955 - SSA" box or along the left-hand side of the page when the form is open). Page 2 will contain the participant data and there is no limit on the number of Page 2s a form may have. To add multiple Page 2s, click on "p2" again.

The description of each new page will be "New." You may change the description at the top of the schedule by clicking on the schedule under the "DRAFT - EDIT" heading in the "Form 8955-SSA" box. You will see the text "Enter a 5 character description New" at the top of the schedule/page. Hover your cursor over the word "New" and you will find it is a data entry field that may be modified. You may use any 5 character description to assist you in differentiating the multiple pages of a schedule. You may manually type in the participants on page 2 or you may upload the data by using a .csv file (see 8955- SSA Participant Upload). After you are done completing Page 1 and/or Page 2, click on "Run Edit Checks" on the left-hand side of the screen. Double-click on any field that may highlight in yellow to see the specific edit check. Clicking on the "???" or "Not-OK" status will also run the edit checks for you.

Note: You must pass all edit checks in order to e-file via IRS FIRE and/or ftwilliam.com's fulfillment service.

How to Create and Submit an 8955-SSA Batch

After the 8955 data has been entered, the data verified and edit checks have been run, the filing may be added to a batch.

Access the Batch Screen:

• From within the 8955-SSA window of the 5500 module, click on the **Batches/Fulfillment** hyperlink.

8955-SSA				
FAQs for 8955-SSA - Batches/Fulfillment - Upload				
Form 8	955-SSA E	-File FAQs		
DRAFT-EDIT	STATUS	FINAL	DEL	
Form 8955-SSA I p2	ОК	Form 8955-SSA	Del	
Page 2 (New)	ОК		Del	
Client Letter	???			
Edit Check All				

Create a New Batch:

• From the Batches screen, click the **Create New Batch** button in the upper left corner.

Curre	nt 895	55-SS	A Batches	5									
🕂 Cr	eate Ne	w Batc	h									Batch List Rep	oort
Batch Name	Batch ID	Plan Count	Participant Count	Edit Check Status	Batch Lock Status	Batch Locked Date	E-File Status	E-File In Process Date	E-File Completion Date	Statement Edit Check Status	Statement Lock Status	Statement Locked Date	Sta S
								No Batches			_		

• Enter a batch name for sorting and reference purposes, then click **Create New Batch**.

Note: The Amended Batch checkbox, when selected will only allow those filings with Part I Line B of Form 8955-SSA marked as an amended to be added to the batch. If this is an original filing please do not check this box.

Home > Edit Company > Edit Plan > 5500 Batch/Workflow > 2023 > 8955-SSA Batches > New Batch

8955-SSA New Batch - 2023

Return	
8955-SSA New Batch	
Enter batch name: Example Batch	Amended batch?*
Create New Batch	
* An amended batch includes ONLY corrected submissions that were previously submitted via batch process. Amended records can only be submitted via an amended batch.	

Adding Plans to the batch:

• In the new batch, click the **Select Plans** hyperlink. This will show all plans in the company code with an 8955-SSA present and not yet included in another batch.



• Select the plans to add to the batch, then click **Update** (above or below the grid). Users may also choose to **Select All** or **Unselect All** in the upper right hand corner to quickly add all plans to the batch or remove the plans from the batch.

📄 Update

Ba	Batch: Example Batch ID: 972555				
Note: Only plans with an 8955-SSA record that are not already part of a different batch are shown.					Select All Unselect All
	Select	Sponsor Name	Plan Name	Edit Check Status	Statement Edit Check Status
		123 Example Co	123 Example Co	0	<u> </u>
		5500 test	5500 test	<u> </u>	<u>^</u>

• After adding the plans, click the batch name link at the top of the breadcrumbs list.

Home > Edit Company > Edit Plan > 5500 Batch/Workflow > 2023 > 8955-SSA Batches > Example Batch > Select Plans



- Once the plans are added users are redirected to the Batch screen that provides printing and fulfillment options.
 - In the upper right, the number of plans and participants in the batch will be displayed.
 - Below that is the **Batch Lock** status. The batch may only be locked if passing edit checks indicated by the green edit check icon beside the **Batch Edit Check Status**.
 - A batch must be locked in order to e-file.

Note: The Statement Edit Checks do not need to be run or locked for e-filing the 8955-SSAs. ftwilliam.com does not offer a print and mail service. The statement batching feature checks for missing data and generates PDF files for printing outside the software. All plans in the batch will be compiled into a single file for each report type: Form 8955-SSAs, participant statements, and client letters (in .rtf or .pdf format).

🥱 Return

Batch: Example Batch Batch ID: 972555		
Batch Setup	Plans in Batch: 1	
Select Plans Upload Menu Cover Letter	Participants in Batch: 1	
	Batch Edit Check Status: 📀	
Batch Reports 🕱 (.csv)	Batch Lock Status: 👘	
Plans In Batch Participants In Batch	Statement Edit Check Status: 🛕	
	Statement Lock Status:	
Printing		
Print 8955-SSA's 🗾 (.pdf)		
Print 8955-SSA's - Masked SSN 🧾 (.pdf)		
Download 8955-SSA's to ZIP 🌉 (.pdf)		
Download 8955-SSA's to ZIP - Masked SSN 🧏 (.pdf)		
Print Cover Letters 💹 Adobe (.pdf) 🗸		
Print Statements 📙 Adobe (.pdf) 🗸 - SSN Masking		
Download Statements to ZIP 🛃 Adobe (.pdf) 🗸 - SSN Masking		
Fulfillment		
FIRE E-File (Batch must be locked)		
Download FIRE Files		
You must obtain a TCC and submit it to FTWilliam.com before you can download the FIRE file.		
If using our fulfillment service to submit batches (fees apply) or to have your client portal e-file (fees apply), your batch must be in "Pending" status by 12 PM CT two business days prior to the filing deadline to ensure the filing is fulfilled timely.		
Note: If you are attempting to upload the ZIP file itself and getting a bad status, you must extract the .txt file from the ZIP file and submit each .txt file separately to the FIRE site.		

Lock and E-file

- Click the padlock next to Batch Lock Status to lock the batch and enable fulfillment options.
- Once locked, click FIRE E-file:
 - Clicking FIRE E-file does not automatically submit the order. A confirmation popup will appear, showing the user agreement and fees associated with the filing. By selecting Submit, the firm agrees to the terms provided, and the batch will be placed in a Pending status. A paper invoice from CCH Inc. will be sent in the first business week of the following month.

IMPORTANT NOTICE: Once you submit your returns, they are processed through an automated system. We cannot make any changes to your forms once they are submitted.

• If your account has its own TCC, and the details are entered in the Account Profile, the **Download FIRE Files** option will show either a **TXT** hyperlink (for one plan) or a **ZIP** hyperlink (for multiple plans). Clicking this will download a file to be saved and imported into the IRS FIRE site. The ZIP file contains individual .txt files for each plan; these must be uploaded separately to the FIRE site, as there is no batch upload option for Form 8955-SSA.

Note: To obtain a TCC for Form 8955-SSA, the IRS requires completing an online IR Application. Once assigned, the Master User for the ftwilliam.com account can enter the 8955-SSA TCC in the **Edit Company Profile** section under the Admin Menu. Enter the TCC, Contact Name, EIN, and State, then click **Update** at the bottom of the screen.

🥎 Return

Batch: Example Bat	tch Batch ID: 972555			
Batch Setup		Plans in Batch: 1		
View Plans I Upload Menu	L Cover Letter	Participants in Batch: 1		
field fields (opload field		Batch Edit Check Status: 📀		
Batch Reports 🕱 (.csv)		Batch Lock Status: 🔒		
Plans In Batch Participa	nts In Batch	Statement Edit Check Status: 🛕		
		Statement Lock Status:		
Printing		-		
Print 8955-SSA's 💹 (.pdf))			
Print 8955-SSA's - Maske	d SSN 📕 (.pdf)			
Download 8955-SSA's to	ZIP 🧏 (.pdf)			
Download 8955-SSA's to	ZIP - Masked SSN 🗾 (.pdf)			
Print Cover Letters 💹 🗛	dobe (.pdf) 🗸			
Print Statements 💹 🗛	Print Statements 📕 Adobe (.pdf) 🗸 - SSN Masking			
Download Statements to	ZIP 📕 Adobe (.pdf) 🔻 - SSN Masking			
Fulfillment				
FIRE E-File (\$17.75)				
Download FIRE Flies				
ZIP				
If using our fulfillment ser your batch must be in "Pe the filing is fulfilled timely.	vice to submit batches (<mark>fees</mark> apply) or to hav ending" status by 12 PM CT two business day	e your client portal e-file (fees apply), /s prior to the filing deadline to ensure		
Note: If you are attempting to upload the ZIP file itself and getting a bad status, you must extract the .txt file from the ZIP file and submit each .txt file separately to the FIRE site.				

Uploading Data to 8955 - SSA - Single Plan

Тор

Select Upload Type Generic XML Upload (Page 1 & Page 2) Page 1 CSV Upload (Page 1 Only) Participant CSV Upload (Page 2 Only) (No Page 1 exists)

Do not click on "Add Form 8955 - SSA." First, within the "8955 - SSA" box, click on the "Upload" link. You will be directed to the "8955 - SSA Upload Menu" screen where you would click on "Page 1 CSV Upload (Page 1 Only)." Now you are on the "8955 - SSA Page 1 Upload" screen. Next, save the sample .csv file to your hard drive. Once you have your data entered and saved to the .csv file, browse for the saved file and click "Submit." **Note:** You may only upload one plan at a time using this spreadsheet (ftwilliam.com only looks at the first row containing data).

Select Upload Type

Generic XML Upload (Page 1 & Page 2) Page 1 CSV Upload (Page 1 Only) Participant CSV Upload (Page 2 Only)

Before you are able to upload participant data (Page 2), you would either have to manually click on "Add Form 8955 - SSA" or follow the steps above for the 8955 - SSA Page 1 Upload. After a Page 1 has been added manually or via upload, click on the "Upload" link. You will be directed to the "8955 - SSA Upload Menu" screen where you would click on "Participant CSV Upload (Page 2 Only)."

When you are on the "8955 - SSA Participant Upload" screen, save the sample .csv file to your hard drive. Once you have your data entered and saved to the .csv file, browse for the saved file and click "Submit."

Home > Edit Company > Edit Plan > 5500 > 2022 > 8955-SSA Upload > Participant Upload

8955-SSA Participant Upload

Company: Example Company Plan: Example Company Year: 2022

*** Caution ***

This will replace all of the Participant data on ALL Page 2's of the 8955-SSA.

The file must be in comma-delimited format (e.g., "Filename.csv"). Do not rearrange or remove columns from the sample files.

Download a sample file here: 8955Sample.csv (right-click to download) Download the schema file here: 8955Schema.xls (right-click to download) Download your existing data here: Existing Plan Participants (.csv)

The system will not perform data integrity edits on uploaded data. Be sure your data complies with SSA/DOL requirements before uploading.

Example Company	
Upload file name:	Choose File No file chosen
Number of rows to ignore before header row:	0
	Submit

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The column headers for the .csv file must remain in the file that you upload and there is also a schema file that you may download, which provides you with details on how to format the .csv file. **Note:** You are able to upload participant addresses for the participant statements at the same time you upload the participant data. If you do not wish to use ftwilliam.com's statements, then you do not need to complete these columns.

Uploading Data to 8955-SSA - Batch (for multiple plans)

The following guide will walk through how to batch import 8955 forms to multiple plans.

Please Note: to use this feature plans must already exist in the software.

Step 1: Create a New 8955-SSA Batch

• From the Batches screen, click the Create New Batch button in the upper left corner.



• Enter a batch name for sorting and reference purposes, then click Create New Batch.

Home > Edit Company > Edit Plan > 5500 Batch/Workflow > 2023 > 8955-SSA Batches > New Batch

8955-SSA New Batch - 2023

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8955-SSA New Batch					
Enter batch name: Example Batch	Amended batch?*				
Create New Batch					
* An amended batch includes ONLY corrected submissions that were previously submitted via batch process. Amended records can only be submitted via an amended batch.					

Note: The Amended Batch checkbox, when selected will only allow those filings with Part I Line B of Form 8955-SSA marked as an amended to be added to the batch. If this is an original filing, please do not check this box. Original and amended filings may not be submitted in the same batch.

Step 2: Accessing the Upload Features

Select the Upload Menu hyperlink

Home > Edit Company > Edit Plan > 5500 Batch/Workflow > 2023 > 8955-SSA Batches > Sample Name

8955-SSA Sample Name Batch Menu - 2023

Return
Batch: Sample Name Batch ID: 973834
Batch Setup Select Plans Upload Menu

- From here, select the Page 1 CSV upload option.
 - The Participant CSV Upload is unavailable until a Form 8955-SSA is added to the plan.

Select Upload Type			
Generic XML Upload (Page 1 & Page 2 Data)			
Page 1 CSV Upload (Page 1 Data Only)			
Participant CSV Upload (Page 2 Data Only) (No plans in batch)			
Participant Address Data Only CSV Upload (No participants in batch)			



Step 3: Upload Page 1 Data

• Users can download a sample file or all existing page 1 data in the software or download the starter file by either EIN/PN or FTW supplied IDs

Once the template is completed:

- Select the .CSV file for upload.
- Specify the number of rows to ignore before the header row (default is "0" if no rows exist above the header).
- Click **Submit** to complete the upload.
- After completing Page 1, click **Return** at the bottom left of the screen.

Note: Ensure the .csv file includes the unedited column headers when uploading. A schema file is available for download to provide detailed formatting instructions.

8955-SSA Batch Page 1 Upload

Batch Name: SampleName Batch ID: 973834 Year: 2023

The file must be in comma-delimited format (e.g., "Filename.csv"). Do not rearrange or remove columns from the sample files.

Download a starter file: Starter File (.csv) (Ider Download a starter file: Starter File (.csv) (Ider	ntifier: EIN/PN) ntifier: ftwilliam.com supplied)
Download the schema file: 8955P1Schema.xls	(right-click to download)
Download existing data: Batch Page 1 (.csv) (I Download existing data: Batch Page 1 (.csv) (I	dentifier: EIN/PN) dentifier: ftwilliam.com supplied)
The system will not perform data integrity edits complies with SSA/DOL requirements before up	s on uploaded data. Be sure your data loading.
Plan identifying information:	 EIN/PN ftwilliam.com supplied
Upload file name:	Browse No file selected.
Number of rows to ignore before header row:	0
	Submit
🥎 Return	

Step 4: Upload Participant Data (page 2)

- Once Page 1 has been added, the link to upload page 2 is enabled.
 - Select the Participant CSV Upload link.

Select Upload Type
Generic XML Upload (Page 1 & Page 2 Data)
Page 1 CSV Upload (Page 1 Data Only)
Participant CSV Upload (Page 2 Data Only)
Participant Address Data Only CSV Upload (No participants in batch)

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- Download a sample template or existing data for the plan if needed.
- Once the Participant data has been completed:
 - Select the CSV format radio dial, either using the EIN/PN or the ftw supplied IDs.
 - Select the CSV file for upload.

- Specify the number of rows to ignore before the header row (default is "0" if no rows exist above the header).
- Click **Submit** to complete the upload.
- After completing Page 2, click **Return** at the bottom left of the screen.

8955-SS	SA Batch Partic	ipant Upload			
Batch Name Batch ID:	e: SampleName 973834				
Year: This will rep	2023 *** (place all of the Participan ALL plans inc	Caution *** t data on ALL Page 2's of the 8955-SSA for luded in this upload.			
The file mus Do not rearr	The file must be in comma-delimited format (e.g., "Filename.csv"). Do not rearrange or remove columns from the sample files.				
Download a Download a Download th Download ex Download ex	starter file: Starter File (.cs starter file: Starter File (.cs e schema file: 89555chema isting data: Batch Participa isting data: Batch Participa	v) (Identifier: EIN/PN) v) (Identifier: ftwilliam.com supplied) a.xls (right-click to download) ants (.csv) (Identifier: EIN/PN) ants (.csv) (Identifier: ftwilliam.com supplied)			
The system v complies with	vill not perform data integr n SSA/DOL requirements be	ity edits on uploaded data. Be sure your data efore uploading.			
Plan identifyi	ng information:	 EIN/PN ftwilliam.com supplied 			
Upload file na	ame:	Browse No file selected.			
Number of ro row:	ws to ignore before heade	sr 0			
🥱 Return)				

Step 5: Verify Data

- Once the Plans in Batch and Participants in Batch counts will populate in the upper right-hand corner.
- Edit Checks may be run in batch by selecting the yellow triangle lcon.



8955-SSA SampleName Batch Menu - 2023

Return	
Batch: SampleName Batch ID: 973834	
Batch Setun	Plans in Batch: 3
Select Plans Unload Menu Cover Letter	Participants in Batch: 2
Selete Hans opiolatimenta cover Letter	Batch Edit Check Status: 🛛 🔺
Batch Reports 🕱 (.csv)	Batch Lock Status: 🚮
Plans In Batch Participants In Batch	Statement Edit Check Status: 🔺
Fights in Determination in Determination	Statement Lock Status:

8955-SSA Batch Features

This guide explains the features and settings available within a batch. Before proceeding, seeHow to Create and Submit an 8955-SSA Batch for batch creation instructions.

To use batch features:

- Add plans to the batch using Select Plans or Upload Menu under Batch Setup (explained in more detail below).
- Once plans are added, batch options become enabled.

Batch: ExampleBatch Batch ID: 343451772		
Batch Setup	Plans in Batch:	2
Select Plans Upload Menu Cover Letter	Participants in Batch:	5
Batch Reports 🖼 (.csv) Plans In Batch Participants In Batch	Batch Lock Status: Batch Lock Status: Statement Edit Check Status: Statement Lock Status:	
Printing		
Print 8955-SSA's 🧾 (.pdf)		
Print 8955-SSA's - Masked SSN 🧏 (.pdf)		
Download 8955-SSA's to ZIP 🧾 (.pdf)		
Download 8955-SSA's to ZIP - Masked SSN 🎩 (.pdf)		
Print Cover Letters 🎩 Adobe (.pdf) 🗸		
Print Statements 💹 Adobe (.pdf) 🗸 - SSN Masking		
Download Statements to ZIP 🛃 Adobe (.pdf) 🗸 - SSN Masking		
Fulfillment		
FIRE E-File (Batch must be locked)		
Download FIRE Files		
ZIP (Batch must be locked)		

Batch Setup

- Select Plans: Add or remove individual plans with an active 8955 for the filing year. (This will update to View Plans once the batch is locked.)
- Upload Menu: Upload bulk 8955-SSA data for pages 1 and 2, then add completed forms to the batch. See Uploading Data to 8955-SSA Batch (for multiple plans) for step by step instructions on using this feature.
- Cover Letter (optional): This link enables users to create a cover sheet that will be printed with the8955-SSA in the Printing section of the batch options. The following are the available options for Cover Sheets:
 - None: The print features will not include a cover sheet
 - **Company Default:** Uses the default template from Global Email Settings. (Global Email Settings>5500 Module>8955-SSA Cover Letter)
 - **Plan Specific:** Uses a custom template for each plan (if available). (Located under the **Draft-Edit** section of the 8955-SSA window after the last listing of Page 2.) If a custom Plan Specific template has not been created, the Company Default letter will be used in its place.
 - Batch Specific: Creates a customized letter for this batch only. The Company Default or Plan Specific cover letters will not be impacted by batch level changes.

Edit 8955-SSA Batch Cover Letter Settings

Batch Cover Letter		
Cover Letter to use:	None	
	O Company default	
	O Plan specific	
	O Batch specific (below)	
Batch Specific Cover Letter:	!@!Date	
	l@iContact	
	I@IPInsponsor	
	I @ IPIns FonsorAddress 2	
	I@IPlanSponsorCity, I@IPlanSponsorState I@IPlanSponsorZIP	
	Dear !@!ContactSalutation:	
	Enclosed is the I@IFormYear Form 8955-SSA for the I@IPlanName. As Plan Sponsor, you are required to file this return to report information about separated participants with deferred vested benefits to report participants who separated from service covered by the plan; were reported as deferred vested participants on another plan's filing if their benefits were transferred (other than in a rollover) to the plan during the covered period; previously were reported under the plan but have been paid out or are no longer entitled to those deferred vested benefits; or previously were reported under the plan but whose information is being corrected. Steps to complete:	
	* Sign and date page 1 of the Form 8955-SSA	
	* Retain a copy of your signed return for your records	
	* Send the originals no later than !@!DueDate to:	-
		11

Close

Batch Summary Section

Located in the top-right of the batch window, this section displays:

- Plans in Batch: Total plans added to this specific batch.
- Participants in Batch: Total participants across all selected plans in the batch.
- Batch Edit Check Status: Indicates if the plans in the batch are passing the required checks to be e-filed with the IRS.
 - For the batch to be locked and fulfillment options enabled, every plan must pass edit checks.
 - Selecting the lcon next to the status will run edit checks from within the batch. (Edit checks may also be run from the Current 8955-SSA Batches that lists all batches for the year.)



젡 🛛 A status code of a **green** check indicates that the edit checking was successfully completed, and no errors or warnings were detected.



A status code of red x indicates that the edit checks have either not yet been run or one or more errors or warnings.

• Batch Lock Status: Shows if the batch is locked for e-filing. Locked batches cannot be edited or modified.(May also be locked from the Current 8955-SSA Batches screen.)



indicates the batch is unlocked and fulfillment options are disabled.



indicates the batch is locked and fulfillment options are enabled.



• Statement Edit Check Status (optional): indicates if the participant statements are passing edit checks. (Not required for e-filing)

 Statement Lock Status (optional): indicates if the participant statements have been locked. Locking statements will disable editing on the plan level. (Not required for e-filing)

Batch Reports

Provide the option to download .csv files of batch details. Each report includes the Name of the Report, Filing Year, Batch Name, Batch ID as well as specific information as outlined below:

- **Plans in Batch:** provides EIN, Plan Number, Company Name, Plan Name and Plan IDs for all plans within the specific batch. **Note:** The PlanIDs are a user defined field found on the Edit Plan screen. This column will be blank if not applicable.
- Participants in Batch: provides the Plan Name, Plan Sponsor Name, as participant data for the plans in the batch.

Printing

The listing of the print options will vary if Cover letters are included.

- Print 8955-SSA's: Prints all Form 8955-SSAs in the batch to a single file.
- Print 8955-SSA's- Masked SSN: Prints all 8955-SSA forms in the batch with a water mark and masks all but the last 4 digits of the SSNs.
- Download 8955-SSA's to Zip: Downloads all Form 8955-SSAs that are in the batch to a zip file containing individual PDF files by plan.
- Download 8955-SSA's to Zip-Masked SSN: Downloads all Form 8955-SSAs in the batch to a zip file containing individual PDF files by plan. The files will include a water mark and masks all but the last 4 digits of the SSNs.
- Print Cover Letters: Print all cover letters per plan to a single file as either .rtf or .pdf format.
- Print Statements: Print all Participant Statements per plan to a single file as either .rtf or .pdf format.
 - **SSN Masking:** Options open a new window to set masking preferences. Once preferences are set, selecting the Print Statements link will provide the Participant statements with all but the last 4 numbers masked.
- Download Statements to Zip : Downloads all Participant Statements in the batch to a zip file containing individual PDF files by plan.
 - **SSN Masking:** Options open a new window to set masking preferences. Once preferences are set, selecting the Download Statements link will provide the Participant statements with all but the last 4 numbers masked

Fulfillment

Fulfillment options are unavailable until the batch edit checks have been run and the batch has been locked.

- **FIRE E-File**: this option sends the batch to ftwilliam.com for e-filing fulfillment (additional fee applies). Once submitted returns are processed through an automated system. We cannot make any changes toe the forms once submitted.
 - 1. Selecting the link will redirect users to the agreement and authorization screen which users will need to review and select the **submit** button for the batches to be submitted.
 - 2. This feature uses ftwilliam.com's TCC so customers do not need to register for their own.

Note: Accounts are not billed immediately when using this feature. The Billing Contact for the account will receive a paper invoice from CCH Inc. around the first business week of the following month after generation

Download FIRE Files

- This feature allows users to download a .TXT file to file outside of the software with the IRS FIRE site.
- To utilize this feature the account must obtain a TCC Code specifically for the Form 8955-SSA by completing an online IR Application.
 - Once obtained, the Master Admin user for the ftwilliam.com account may go to the "Admin Menu" and click on "Edit Company Profile."
 - Towards the bottom of this screen, there are fields to enter the 8955-SSA TCC Code, Accounts Company's

Contact, EIN, and State. Make sure to click "Update" at the bottom of the screen.

After the batch is locked the ZIP file link will be enabled. This link will download a ZIP file (or TXT file if only one plan is present) containing one file per Form 8955-SSA prepared and placed in your batch. Note: Users will have to upload each file within the ZIP file separately through the IRS FIRE site; unlike batch uploading as for 1099s.

How to Set Up and Allow for E-Filing of Form 8955-SSA by a Portal User

Allow 8955-SSA E-File: If "Yes" is selected within the Edit Portal User Screen AND the 8955-SSA has an "OK" status, the user will have the ability to electronically file the 8955-SSA to the IRS. When the portal user clicks on "E-File 8955-SSA" in the portal, he/she will need to do the following:

- 1. Click on "Print 8955-SSA."
- 2. Print and Review the paper Form 8955-SSA that is printed.
- 3. Click on "E-File 8955-SSA."

R Plan Home	8955s to Sign For Example Company 1
Download 8955	2022
E-FIIE 8955	
	Sign 8955 - 2022
	Step 1: Print Paper Copy of Form 8955-SSA You must print your 8955-SSA before you will be allowed to e-file. Print a hard copy of your 8955-SSA by clicking on "Print 8955- SSA" below:
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After the portal user has clicked on "E-File 8955-SSA," he/she will be directed to the main, portal "Welcome" screen and see the following message displayed in yellow:

). Wolters K	Luwer Example Company 1	*	₫	Example123	V Q Log Out
📧 Plan Home	Welcome Message				
Download 8955	Welcome to the Example Company 1 Please select an option from the left to continue working with your plan.				

From the perspective of the ftwilliam.com user, once the portal user clicks on "E-File 8955-SSA," a batch containing the plan will be created on the "8955-SSA Batches - YEAR" screen and will be displayed as "Locked" and "Pending," indicating that it has been sent to ftwilliam.com for fulfillment.

8955-SSAs E-filed by Portal Users are billed at \$7.46/filing and are not subject to the \$16.07 batch fee. **Note:** The \$7.10 fee increased to \$7.46 on 10/1/2024.

How to Amend the Form 8955-SSA

Printing

If you chose to print and mail the Form 8955-SSA plan by plan and later discover an error, then you would go back to the draft Form 8955-SSA, check the box for Part I, Item B. Make any updates necessary and file with the IRS. Or, if you wish to use the fulfillment service for the newly amended plan, then go to 'Batches/Fulfillment' to create a new batch, making sure to check the box "Amended batch?*". When you are brought to the select plan screen, you will see a listing of all plans that have the amended box checked on the 8955-SSA and that are not a part of another batch.

Fulfillment

If you chose to use our fulfillment service and later discover an error, then you will have to create a new batch. While creating the new batch, make sure to check the box "Amended batch?*". When you are brought to the select plan screen, you will see a listing of all plans that have been fulfilled. Once you have selected the plan(s) you are amending, you will be able to go to the specific plan to make changes on the draft Form 8955-SSA. Part I, Item B will automatically be checked for you.

Portal E-File

If you chose to have a portal user E-File via the portal and later discover an error, then you will have to go back to the plan to click on the draft Form 8955-SSA to click on "Amend 8955". By clicking on the button, the form will become editable, and the Amend box will be auto-checked. When the Form 8955-SSA has an OK status, the plan can be E-Filed again via the portal.



Download FIRE files

If you chose to download the ZIP file and later discover an error, then you will have to unlock your batch and remove the specific plan you need to amend. Then, go to the plan and check the box for Part I, Item B. Make any updates necessary and go back to the 'Batches/Fulfillment' to create a new batch, making sure to check the box "Amended batch?*". When you are brought to the select plan screen, you will see a listing of all plans that have the amended box checked on the 8955-SSA and that are not a part of another batch. Once the plans have been selected, lock your batch and download the ZIP file.

Printing

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Fulfillment

8955-SSA New Batch - 2022

S Return

8955-SSA New Batch	
Enter batch name:	Amended batch?*
🖶 Create New Batch	
* An amended batch includes ONLY corrected submissions that were previously submitted via batch process. Amended records can only be submitted via an amended batch.	

If you chose to use our fulfillment service and later discover an error, then you will have to create a new batch. While creating the new batch, make sure to check the box "Amended batch?*". When you are brought to the select plan screen, you will see a listing of all plans that have been fulfilled. Once you have selected the plan(s) you are amending, you will be able to go to the specific plan to make changes on the draft Form 8955-SSA. Part I, Item B will automatically be checked for you.

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Wolters Kluwer	This form was	submitted via Portal E-File and is part of a locked batch. Amend 895 General Instructions	5
This form is part of a locked batch. No changes can be made.	Form 8955-SSA	Annual Registration Statement Identifying Separated	OMB No. 1545-2187
Return	Department of the Treasury Internal Revenue Service	This form is required to be filed under section 6057 of the Internal Revenue Code. Information about Form 8355-83A and its instructions is at www.irs.gov/form8355ssa.	This Form is NOT Open to Public Inspection
Form 8955-SSA and pages	PARTI Annual Sta	tement Identification Information	
		ок	Cancel
Form 8955-SSA Department of the Treasury Internal Revenue Service	Annual Registra Participan This form is required Information about For atement Identification	ation ts Wit to be filed m 8955-55 Informa	
For the plan year beginning 0	1/01/2015		
PA Check here if plan is	a government, church, or oth	er plan th	
P B Check here if this is Check the appropria	an amended registration state te box if filing under: Fi S	ment. orm 5558 pecial ext	

Download FIRE Files

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How to Set Up the Client Letter for Form 8955-SSA

Each plan will have a default letter set up that was drafted by ftwilliam.com, which is located in the "Admin Menu" by clicking on "SAR/AFN/8955 - SSA Defaults." To modify the client letter, you have two options:

Single Plan:

For a single plan, you would go the "Form 5500 - Plan Year" screen and access the "Client Letter" in the "Form 8955 - SSA" box. It is located below the draft Form 8955 - SSA. The system will automatically save any changes you make.

Global:

To set up a global default of your own, you would go to the "Admin Menu" and click on "SAR/AFN/8955 - SSA Defaults." Make any changes necessary within the "8955 - SSA Defaults" box. The system will automatically save any changes you make. This will be the default client letter for batch printing. If you have already generated the Client Letter within a company/plan, then make changes to the "SAR/AFN/8955 - SSA Defaults" screen, the changes will not update the already-generated Client Letter.

Batch:

To set up a batch default of your own, you would go the "Form 5500 - Plan Year" screen and click on "Batches/Fulfillment" within the "Form 8955-SSA" box (or select "5500" from the "Batches" drop-down list on the "Select Company" screen). Next, click on your batch name and select "Cover Letter." From here you can choose to have "None," "Company Default," "Plan Specific" or "Batch Specific." If you choose the "Batch Specific" option, you are able to make any changes necessary on the same screen. Be sure to click "Update." This will be the default client letter for batch printing.

How to Use the Most Current Form 8955-SSA for Prior Years

If you find that you need to prepare a prior year SSA, whether as an original or to amend, you will notice that the process is similar to the prior year 5500 filings.

Select your company and your plan so that you are on the "Edit/Print Menu" screen.

Select the plan year you want to prepare the prior 8955-SSA within the "Print Menu" box and click "Go." Note: For the form years 2002 - 2008, if you do not have 5500 data, you may have to click "Continue" before you can proceed.

You will have to click on "Convert To EFAST2" before you see the "Form 8955-SSA" box displayed on the right-hand side of the screen, even though you are not submitting the Form 8955-SSA to the DOL.

You will be able to prepare a batch and submit for fulfillment, or you can download the .txt file if you plan to e-file on your own 8955-SSAs. (TCC Code required).

How to Mask SSNs on the Form 8955-SSA and Participant Statements

Note. SSN Masking is a Global feature that only Master and/or Designated Admin users will be able to access.

Users may print a copy of the client letter with the Form 8955-SSA with the SSNs masked by default by clicking on 'Print Client 8955-SSA - Masked SSN'. This copy will contain a watermark at the top of all pages stating, "Client copy: do not file with IRS". Otherwise, users may continue to print the client letter with the Form 8955-SSA without masking the SSNs by clicking on 'Print Client Letter w/8955-SSA's'.

8955-SSA			Edit 0055 CC / CCN Mashing Cattings	
FAQs for 8955-S	SA - Batche	s/Fulfillment - Uplo	oad	Eau 8955-55A 551V Masking Settings
DRAFT-EDIT	STATUS	FINAL	DEL	
Form 8955-SSA I p2	2 ок	Form 8955-SSA	Del	
Page 2 (N-1)	OK		Del	
Page 2 (N-2)	ок		Del	SSN Masking
Page 2 (N-3)	OK	/	Del	If you eachly CCN marking all but the last 4 digits of the CCN will be
Client Letter	OK			masked on the participant statements ONLY
	Edit Check	All 🖌		Facht Bartister A Character Con Marking Market
Print Clier	nt 8955-SSA	- Masked SSN		
Print Cli	ent Letter w	/ 8955-SSA's		
Pri	nt Client Let	ter [rtf]		If you enable SSN masking all but the last 4 digits of the SSN will be
	SSN Mask	ing		masked on the portal ONLY. This copy cannot be used for filing with the IRS.
-5	TATEMENT	DATA-		Enable Portal SSN Masking: Yes 🗸
DRAFT-EDIT	STATUS			
Contact Info	OK			These are global settings and will affect all companies' 8955-
Page 2 (N-1)	OK			SSA plans and participants.
Page 2 (N-2)	ок			
Page 2 (N-3)	ок			
	Edit Check	All		Update
	Print All [r	tf]		Close

Users that wish to mask the SSNs from the copy that is published to the **portal**, or to mask the SSNs on the participant statements should click on 'SSN Masking' (see image above). To mask the SSNs in the portal, update 'Enable Participant Statement SSN Masking:' to Yes and be sure to click 'Update'. To mask the SSNs on the participant statements, update 'Enable Portal SSN Masking:' to Yes and be sure to click 'Update'. Portal Users that have View/Print and/or E-File 8955-SSA permissions with the Masked SSNs enabled for the Form 8955-SSA will receive a copy that resembles the Form 8955-SSA that the user generates by clicking on 'Print Client 8955-SSA - Masked SSN'. **Note.** SSN Masking is a Global feature that only Master and/or Designated Admin users will be able to access.

Participant Statements

Single Plan:

Once you have the Form 8955-SSA completed, specifically page 2s, then you will be able to update participant addresses below the "Statement Data" portion of the "Form 8955-SSA" box. You will want to click on "Edit Check All" to run the edit checks for the statements. The "SSN Masking" option is only available to master/designated admins and is a global feature. By clicking on "Print All," you will generate a copy of the statements in a .pdf format. By clicking on " [rtf]," you will generate a copy of the statements in Word.

Batch Upload:

First, you would have page one of the Form 8955-SSA added, whether it was added manually; single plan upload; or via batch upload.

Next, you would create a batch and place those plans you wish to batch upload into that batch. Click on "Upload

Participants" so that you may download the "Starter File (.csv)" file. You may not use the "8955Sample.csv" file that you used for each individual plan; the "Starter File (.csv)" contains plan specific data to help determine which participants belong to which plan. Once you have the starter .csv file updated, you are then able to do your batch import.