

# Completing Form 8955-SSA, Uploads, Batch Features

05/02/2025 8:50 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.

8955-SSA

[FAQs for 8955-SSA](#) - [Batches/Fulfillment](#) - [Upload](#)

[Form 8955-SSA E-File FAQs](#)

DRAFT-EDITSTATUSFINALDEL

[Add Form 8955-SSA I](#)

-STATEMENT DATA-

DRAFT-EDITSTATUS

**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.

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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			
<a href="#">FAQs for 8955-SSA</a> - <a href="#">Batches/Fulfillment</a> - <a href="#">Upload</a> <a href="#">Form 8955-SSA E-File FAQs</a>			
DRAFT-EDIT	STATUS	FINAL	DEL
<a href="#">Add Form 8955-SSA I</a>			
<b>-STATEMENT DATA-</b>			
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			
<a href="#">FAQs for 8955-SSA</a> - <a href="#">Batches/Fulfillment</a> - <a href="#">Upload</a> <a href="#">Form 8955-SSA E-File FAQs</a>			
DRAFT-EDIT	STATUS	FINAL	DEL
<a href="#">Form 8955-SSA I p2</a>	OK	<a href="#">Form 8955-SSA</a>	<a href="#">Del</a>
<a href="#">Page 2 (New)</a>	OK		<a href="#">Del</a>
<a href="#">Client Letter</a>	???		
<a href="#">Edit Check All</a>			

### Create a New Batch:

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

Current 8955-SSA Batches													
<div> <div>+</div> <div>Create New Batch</div> </div>													<a href="#">Batch List Report</a>
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	Statement Locked Date
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.

Batch: Example Batch | Batch ID: 972555

Batch Setup

Select Plans

Upload Menu




(No plans are currently selected)

- 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

#### 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	Sponsor Name	Plan Name	Edit Check Status	Statement Edit Check Status
<input checked="" type="checkbox"/>	123 Example Co	123 Example Co		
<input type="checkbox"/>	5500 test	5500 test		

Select All  
Unselect All

- 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

 Update

- 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**  
[Select Plans](#) | [Upload Menu](#) | [Cover Letter](#)

**Batch Reports** (.csv)  
[Plans In Batch](#) | [Participants In Batch](#)

**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.**

Plans in Batch: 1

Participants in Batch: 1

Batch Edit Check Status:

**Batch Lock Status:**

Statement Edit Check Status:

Statement Lock Status:

## 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 **TEXT** 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 Batch** | **Batch ID: 972555**

**Batch Setup**  
[View Plans](#) | [Upload Menu](#) | [Cover Letter](#)

**Batch Reports** (.csv)  
[Plans In Batch](#) | [Participants In Batch](#)

**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 \(\\$17.75\)](#) |  
**Download FIRE Files**  
[ZIP](#)

Plans in Batch: 1  
Participants in Batch: 1  
Batch Edit Check Status:   
**Batch Lock Status:**   
Statement Edit Check Status:   
Statement Lock Status:

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.

## 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.

Current 8955-SSA Batches													
<div> <b>Create New Batch</b></div> <div><a href="#">Batch List Report</a></div>													
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	Statement Status
No Batches													

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

## 8955-SSA New Batch - 2023

[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.

**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

## 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)

[Return](#)

### 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 \(.csv\)](#) (Identifier: EIN/PN)  
 Download a starter file: [Starter File \(.csv\)](#) (Identifier: ftwilliam.com supplied)  
 Download the schema file: [8955P1Schema.xls](#) (right-click to download)  
 Download existing data: [Batch Page 1 \(.csv\)](#) (Identifier: EIN/PN)  
 Download existing data: [Batch Page 1 \(.csv\)](#) (Identifier: ftwilliam.com supplied)

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

Plan identifying information:

☐ EIN/PN

☒ ftwilliam.com supplied

Upload file name:

No file selected.

Number of rows to ignore before header row:

### 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 \(No participants in batch\)](#)

- 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-SSA Batch Participant Upload

Batch Name: **SampleName**  
Batch ID: **973834**  
Year: **2023**

\*\*\* Caution \*\*\*

**This will replace all of the Participant data on ALL Page 2's of the 8955-SSA for ALL plans included in this upload.**

**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 \(.csv\)](#) (Identifier: EIN/PN)  
Download a starter file: [Starter File \(.csv\)](#) (Identifier: ftwilliam.com supplied)  
Download the schema file: [8955Schema.xls](#) (right-click to download)  
Download existing data: [Batch Participants \(.csv\)](#) (Identifier: EIN/PN)  
Download existing data: [Batch Participants \(.csv\)](#) (Identifier: ftwilliam.com supplied)

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

Plan identifying information: ☐ EIN/PN  
☒ ftwilliam.com supplied

Upload file name:  No file selected.

Number of rows to ignore before header row:

### 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 icon.

[Home](#) > [Edit Company](#) > [Edit Plan](#) > [5500 Batch/Workflow](#) > [2023](#) > [8955-SSA Batches](#) > [SampleName](#)

## 8955-SSA SampleName Batch Menu - 2023

Batch: SampleName   Batch ID: 973834	
<b>Batch Setup</b> <a href="#">Select Plans</a>   <a href="#">Upload Menu</a>   <a href="#">Cover Letter</a>	Plans in Batch: 3 Participants in Batch: 2 Batch Edit Check Status:
<b>Batch Reports</b> (.csv) <a href="#">Plans In Batch</a>   <a href="#">Participants In Batch</a>	Batch Lock Status: Statement Edit Check Status: Statement Lock Status:

## 8955-SSA Batch Features

This guide explains the features and settings available within a batch. Before proceeding, see [How 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	
<b>Batch Setup</b> <a href="#">Select Plans</a>   <a href="#">Upload Menu</a>   <a href="#">Cover Letter</a>	Plans in Batch: 2 Participants in Batch: 5 Batch Edit Check Status: Batch Lock Status: Statement Edit Check Status: Statement Lock Status:
<b>Batch Reports</b> (.csv) <a href="#">Plans In Batch</a>   <a href="#">Participants In Batch</a>	
<b>Printing</b> <a href="#">Print 8955-SSA's</a> (.pdf) <a href="#">Print 8955-SSA's - Masked SSN</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP - Masked SSN</a> (.pdf) <a href="#">Print Cover Letters</a> Adobe (.pdf) ▼ <a href="#">Print Statements</a> Adobe (.pdf) ▼ - SSN Masking <a href="#">Download Statements to ZIP</a> Adobe (.pdf) ▼ - SSN Masking	
<b>Fulfillment</b> FIRE E-File (Batch must be locked)	
<b>Download FIRE Files</b> 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 the 8955-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
- ☐ Company default
- ☐ Plan specific
- ☐ Batch specific (below)

**Batch Specific Cover Letter:**

!@!Date

!@!Contact  
!@!PlanSponsor  
!@!PlanSponsorAddress1  
!@!PlanSponsorAddress2  
!@!PlanSponsorCity, !@!PlanSponsorState !@!PlanSponsorZIP

Dear !@!ContactSalutation:

Enclosed is the !@!FormYear Form 8955-SSA for the !@!PlanName. 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:

[Update](#)

[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 icon 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.*)
-  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 to 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

Yes for **Allow 8955-SSA E-File**. If this criteria is met, when the portal user logs in they will be able to select the **E-File 8955-SSA** button from the left side of the screen. From here the user will need to perform the following:

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

Wolters Kluwer Example Company 1 Example123 Log Out

Plan Home

Download 8955

E-File 8955

8955s to Sign For Example Company 1

Year
2022

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:

Print 8955-SSA

**Step 2: Review and Paper Copy before Filing**  
Read through the filing before E-Filing. Keep your copy in a safe place. A paper copy will not be sent to the Internal Revenue Service (IRS) but an electronic version will be sent once you electronically file below.

**Step 3: File Electronically**  
*Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct and complete.*

E-File 8955-SSA

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:

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.

[Home](#) > [5500 Batch/Workflow](#) > [2022](#) > [8955-SSA Batches](#)

[Help](#)

## 8955-SSA Batches - 2022

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 CST 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.

Current 8955-SSA Batches									
<a href="#">+ Create New Batch</a> <a href="#">Batch List Report</a>									
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
PortalEFile-ExampleCompany1	292909621	1	1			2023-10-02 16:51:30	Pending	-	-

## 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.

The image shows two screenshots related to the Form 8955-SSA. The top screenshot is a dialog box titled "Amend 8955" with a green border. It contains the text: "This form was submitted via Portal E-File and is part of a locked batch." and "Are you sure you would like to Amend the 8955? It will be removed from the current batch and added to a new amended batch once E-Filed again." At the bottom right are "OK" and "Cancel" buttons. The bottom screenshot is the Form 8955-SSA itself, titled "Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits". It shows "PART I Annual Statement Identification Information" for the plan year beginning 01/01/2015. Item B, "Check here if this is an amended registration statement.", is checked with a green box. Item C, "Check the appropriate box if filing under:", has "Form 5558" selected.

## 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

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



## 8955-SSA New Batch - 2022

[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.

## 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.

**Wolters Kluwer**  
This form is part of a locked batch. No changes can be made.  
[Return](#)  
Form 8955-SSA and pages

**This form was submitted via Portal E-File and is part of a locked batch.** [Amend 8955](#)

[General Instructions](#)

**Form 8955-SSA**  
Department of the Treasury  
Internal Revenue Service

**Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits**  
This form is required to be filed under section 6057 of the Internal Revenue Code. Information about Form 8955-SSA and its instructions is at [www.irs.gov/form8955ssa](http://www.irs.gov/form8955ssa).

OMB No. 1545-2187  
**2015**  
This Form is NOT Open to Public Inspection

**PART I Annual Statement Identification Information**

Are you sure you would like to Amend the 8955? It will be removed from the current batch and added to a new amended batch once E-Filed again.

[OK](#) [Cancel](#)

**Form 8955-SSA**  
Department of the Treasury  
Internal Revenue Service

**Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits**  
This form is required to be filed under section 6057 of the Internal Revenue Code. Information about Form 8955-SSA and its instructions is at [www.irs.gov/form8955ssa](http://www.irs.gov/form8955ssa).

**PART I Annual Statement Identification Information**  
For the plan year beginning 01/01/2015

A ☐ Check here if plan is a government, church, or other plan that is not a qualified plan.

B ☒ Check here if this is an amended registration statement.

C Check the appropriate box if filing under: ☐ Form 5558 ☐ Special extension

## 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.

## 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'.

The image shows two side-by-side screenshots from a web application. The left screenshot is titled '8955-SSA' and shows a table with columns 'DRAFT-EDIT', 'STATUS', 'FINAL', and 'DEL'. It lists items like 'Form 8955-SSA I p2', 'Page 2 (N-1)', 'Page 2 (N-2)', 'Page 2 (N-3)', and 'Client Letter', all with a status of 'OK'. Below this table are links: 'Edit Check All', 'Print Client 8955-SSA - Masked SSN', 'Print Client Letter w/ 8955-SSA's', 'Print Client Letter [rtf]', and 'SSN Masking'. A blue arrow points to 'Print Client 8955-SSA - Masked SSN' and a red arrow points to 'SSN Masking'. Below the first table is a section titled '-STATEMENT DATA-' with another table listing 'Contact Info', 'Page 2 (N-1)', 'Page 2 (N-2)', and 'Page 2 (N-3)', all with 'OK' status. Links 'Edit Check All' and 'Print All [rtf]' are at the bottom. The right screenshot is titled 'Edit 8955-SSA SSN Masking Settings'. It has a sub-header 'SSN Masking' and two sections. The first section says 'If you enable SSN masking all but the last 4 digits of the SSN will be masked on the participant statements ONLY.' and has a dropdown 'Enable Participant Statement SSN Masking:' set to 'Yes'. The second section says 'If you enable SSN masking all but the last 4 digits of the SSN will be masked on the portal ONLY. This copy cannot be used for filing with the IRS.' and has a dropdown 'Enable Portal SSN Masking:' set to 'Yes'. A note states 'These are global settings and will affect all companies' 8955-SSA plans and participants.' At the bottom are 'Update' and 'Close' buttons.

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.

## Uploading Data to 8955 - SSA - Single Plan

[Top](#)

Select Upload Type
<a href="#">Generic XML Upload (Page 1 &amp; Page 2)</a>
<a href="#">Page 1 CSV Upload (Page 1 Only)</a>
<a href="#">Participant CSV Upload (Page 2 Only) (No Page 1 exists)</a>

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).

[Top](#)

Select Upload Type
<a href="#">Generic XML Upload (Page 1 &amp; Page 2)</a>
<a href="#">Page 1 CSV Upload (Page 1 Only)</a>
<a href="#">Participant CSV Upload (Page 2 Only)</a>

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."

## 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:

No file chosen

Number of rows to ignore before  
header row:

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.

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