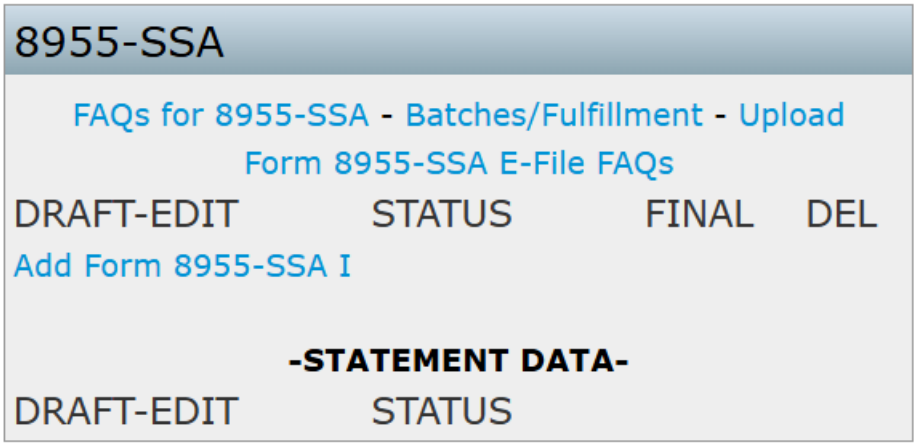
Completing an 8955-SSA

11/05/2026 12:55 pm CST

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.



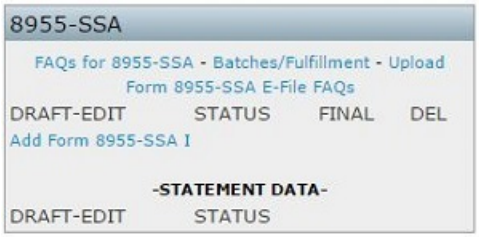
Note: You may enter data directly into the forms or upload data to complete the forms and/or participant statements via a spreadsheet. See How to Start for more details.

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 Billing Information for more details.

Top

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.



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.