

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

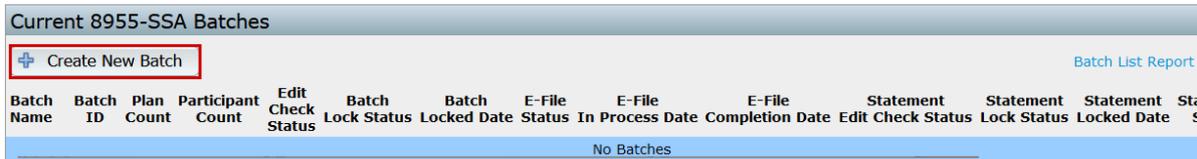
01/08/2025 10:04 am CST

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

[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.

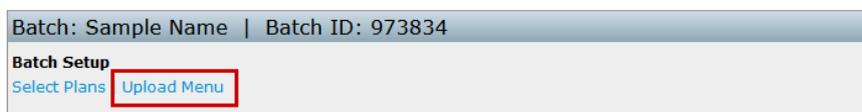
Step 2: Accessing the Upload Features

- Select the Upload Menu hyperlink

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

8955-SSA Sample Name Batch Menu - 2023

[Return](#)



- 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 \(.csv\)](#) (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	
Batch Setup	Plans in Batch: 3
Select Plans Upload Menu Cover Letter	Participants in Batch: 2
Batch Reports  (.csv)	Batch Edit Check Status: 
Plans In Batch Participants In Batch	Batch Lock Status: 
	Statement Edit Check Status: 
	Statement Lock Status: 