

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

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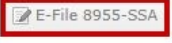
**Allow 8955-SSA E-File:** If "Yes" is selected within the Edit Portal User Screen AND the 8955-SSA has an "OK" status, the user will have the ability to electronically file the 8955-SSA to the IRS. When the portal user clicks on "E-File 8955-SSA" in the portal, he/she will need to do the following:

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."

The screenshot displays the Wolters Kluwer portal interface for 'Example Company 1'. The top navigation bar includes the company name, a dropdown menu, and a 'Log Out' button. On the left sidebar, there are buttons for 'Plan Home', 'Download 8955', and 'E-File 8955', with the latter being highlighted with a red box. The main content area is titled '8955s to Sign For Example Company 1' and contains a table with the following data:

Year
2022

Below the table, the section 'Sign 8955 - 2022' is visible. It contains three steps:

- 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:  

- 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.*  


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.

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