

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

01/08/2025 6:06 pm CST

**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."

The screenshot shows the Wolters Kluwer portal for 'Example Company 1'. The user is logged in as 'Example123'. On the left sidebar, the 'E-File 8955' button is highlighted with a red box. The main content area is titled '8955s to Sign For Example Company 1' and shows a table with the year '2022'. Below this, the 'Sign 8955 - 2022' section contains three steps: 'Step 1: Print Paper Copy of Form 8955-SSA' with a 'Print 8955-SSA' button highlighted in red; 'Step 2: Review and Paper Copy before Filing' with instructions to read through the filing; and 'Step 3: File Electronically' with a declaration and an 'E-File 8955-SSA' button highlighted in red.

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:

The screenshot shows the Wolters Kluwer portal for 'Example Company 1'. The user is logged in as 'Example123'. A yellow banner at the top displays the message '8955-SSA successfully e-filed for 2022.' Below this, the 'Welcome Message' section is titled 'Welcome to the Example Company 1' and contains the text 'Please select an option from the left to continue working with your plan.' The left sidebar shows the 'Plan Home' and 'Download 8955' buttons.

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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## 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									
<div><div><div><div></div></div><div>Create New Batch</div></div><div>Batch List Report</div></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
PortalEFile-ExampleCompany1	292909621	1	1			2023-10-02 16:51:30	Pending	-	-