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

11/05/2026 12:54 pm CST

E-Filing Form 8955-SSA

Key Differences from Form 5500

- The **8955-SSA** does **not** require the 5500 to be locked or ready to file.
- Unlike the 5500, you do **not** need to lock the filing for the user to sign.
- **DOL credentials are not required** for the 8955-SSA.

Requirements Before E-Filing

1. **Form Status**
   - All 8955-SSA forms in the batch must show **"OK"** for edit checks.

2. **Portal User Permissions**
   - In the **Edit Portal User** screen, ensure **"Allow 8955-SSA e-file"** is set to **Yes**.

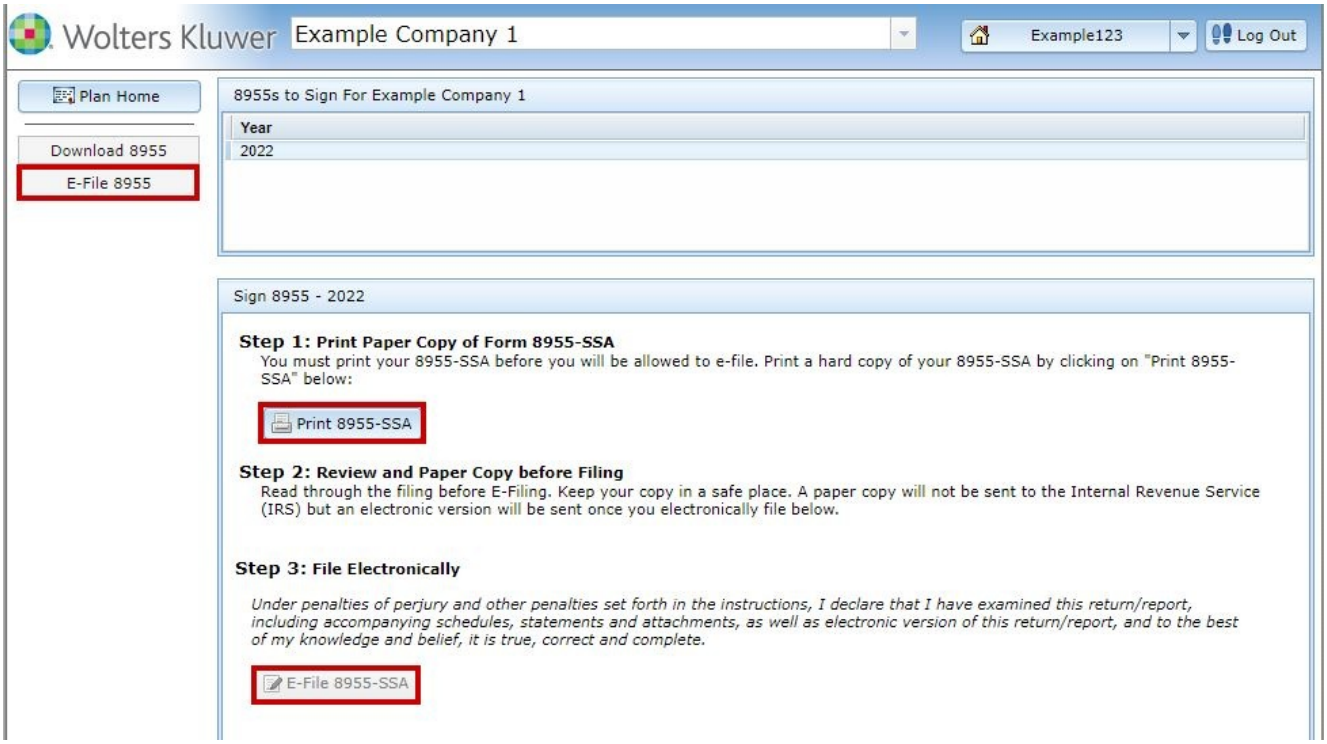
Granting Permissions

- Go to **Work with Portal Users and Signers**.
- Confirm **Allow 8955-SSA e-file** is marked **Yes** for the client.

Client E-Filing Process

Once permissions are set and the form status is OK, the client can e-file by:

1. Logging into the portal.
2. Selecting **E-File 8955-SSA**.
3. Completing these steps:
   - Click **Print 8955-SSA**.
   - Print and review the paper copy.
   - Click **E-File 8955-SSA** to submit to the IRS.



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:



What Happens After E-Filing Form 8955-SSA

From the ftwilliam.com User Perspective

- When the portal user clicks **"E-File 8955-SSA"**, the system creates a batch containing the plan.
- This batch appears on the **"8955-SSA Batches – [YEAR]"** screen with the status:
  - **Locked**
  - **Pending**
- These statuses indicate the batch has been sent to ftwilliam.com for fulfillment.

Billing Information

- **Cost per Filing:** $8.75 for each 8955-SSA e-filed by a portal user.
- **No Batch Fee:** These filings are **not subject** to the $18.85 batch fee.

- **Fee Update:** The previous $7.95 fee increased to $8.75 on **10/01/2026**.