

How to Amend the Form 8955-SSA

09/12/2024 12:31 pm CDT

Printing

If you chose to print and mail the Form 8955-SSA plan by plan and later discover an error, then you would go back to the draft Form 8955-SSA, check the box for Part I, Item B. Make any updates necessary and file with the IRS. Or, if you wish to use the fulfillment service for the newly amended plan, then go to 'Batches/Fulfillment' to create a new batch, making sure to check the box "Amended batch?*" . When you are brought to the select plan screen, you will see a listing of all plans that have the amended box checked on the 8955-SSA and that are not a part of another batch.

Fulfillment

If you chose to use our fulfillment service and later discover an error, then you will have to create a new batch. While creating the new batch, make sure to check the box "Amended batch?*" . When you are brought to the select plan screen, you will see a listing of all plans that have been fulfilled. Once you have selected the plan(s) you are amending, you will be able to go to the specific plan to make changes on the draft Form 8955-SSA. Part I, Item B will automatically be checked for you.

Portal E-File

If you chose to have a portal user E-File via the portal and later discover an error, then you will have to go back to the plan to click on the draft Form 8955-SSA to click on "Amend 8955". By clicking on the button, the form will become editable, and the Amend box will be auto-checked. When the Form 8955-SSA has an OK status, the plan can be E-Filed again via the portal.

The screenshot shows the top portion of the Form 8955-SSA interface. On the left is the Wolters Kluwer logo and a message: "This form is part of a locked batch. No changes can be made." In the center, the form title is "Form 8955-SSA Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits". A red box highlights the "Amend 8955" button. Below the title, there is a confirmation dialog box with the text: "Are you sure you would like to Amend the 8955? It will be removed from the current batch and added to a new amended batch once E-Filed again." The dialog box has "OK" and "Cancel" buttons.

The screenshot shows the "PART I Annual Statement Identification Information" section of the Form 8955-SSA. It includes the following fields and options:

- Form 8955-SSA Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits
- Department of the Treasury Internal Revenue Service
- For the plan year beginning 01/01/2015
- Item A: Check here if plan is a government, church, or other plan that is not a profit-sharing or 401(k) plan.
- Item B: Check here if this is an amended registration statement.
- Item C: Check the appropriate box if filing under:
 - Form 5558
 - Special extension

Download FIRE files

If you chose to download the ZIP file and later discover an error, then you will have to unlock your batch and remove the specific plan you need to amend. Then, go to the plan and check the box for Part I, Item B. Make any updates necessary and go back to the 'Batches/Fulfillment' to create a new batch, making sure to check the box "Amended batch?*" . When you are brought to the select plan screen, you will see a listing of all plans that have the amended box checked on the 8955-SSA and that are not a part of another batch. Once the plans have been

selected, lock your batch and download the ZIP file.
