

How to Set Up the Client Letter for Form 8955-SSA

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Each plan will have a default letter set up that was drafted by ftwilliam.com, which is located in the "Admin Menu" by clicking on "SAR/AFN/8955 - SSA Defaults." To modify the client letter, you have two options:

Single Plan:

For a single plan, you would go to the "Form 5500 - Plan Year" screen and access the "Client Letter" in the "Form 8955 - SSA" box. It is located below the draft Form 8955 - SSA. The system will automatically save any changes you make.

Global:

To set up a global default of your own, you would go to the "Admin Menu" and click on "SAR/AFN/8955 - SSA Defaults." Make any changes necessary within the "8955 - SSA Defaults" box. The system will automatically save any changes you make. This will be the default client letter for batch printing. If you have already generated the Client Letter within a company/plan, then make changes to the "SAR/AFN/8955 - SSA Defaults" screen, the changes will not update the already-generated Client Letter.

Batch:

To set up a batch default of your own, you would go to the "Form 5500 - Plan Year" screen and click on "Batches/Fulfillment" within the "Form 8955-SSA" box (or select "5500" from the "Batches" drop-down list on the "Select Company" screen). Next, click on your batch name and select "Cover Letter." From here you can choose to have "None," "Company Default," "Plan Specific" or "Batch Specific." If you choose the "Batch Specific" option, you are able to make any changes necessary on the same screen. Be sure to click "Update." This will be the default client letter for batch printing.
