

How to Use the Most Current Form 8955-SSA for Prior Years

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If you find that you need to prepare a prior year SSA, whether as an original or to amend, you will notice that the process is similar to the prior year 5500 filings.

Select your company and your plan so that you are on the "Edit/Print Menu" screen.

Select the plan year you want to prepare the prior 8955-SSA within the "Print Menu" box and click "Go." Note: For the form years 2002 - 2008, if you do not have 5500 data, you may have to click "Continue" before you can proceed.

You will have to click on "Convert To EFAST2" before you see the "Form 8955-SSA" box displayed on the right-hand side of the screen, even though you are not submitting the Form 8955-SSA to the DOL.

You will be able to prepare a batch and submit for fulfillment, or you can download the .txt file if you plan to e-file on your own 8955-SSAs. (TCC Code required).
