

How to Mask SSNs on the Form 8955-SSA and Participant Statements

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Note. SSN Masking is a Global feature that only Master and/or Designated Admin users will be able to access.

Users may print a copy of the client letter with the Form 8955-SSA with the SSNs masked by default by clicking on 'Print Client 8955-SSA - Masked SSN'. This copy will contain a watermark at the top of all pages stating, "Client copy: do not file with IRS". Otherwise, users may continue to print the client letter with the Form 8955-SSA without masking the SSNs by clicking on 'Print Client Letter w/8955-SSA's'.

The image shows two side-by-side screenshots from a software interface. The left screenshot displays the '8955-SSA' menu with a list of items and their statuses. A blue arrow points to 'Print Client 8955-SSA - Masked SSN' and a red arrow points to 'SSN Masking'. The right screenshot shows the 'Edit 8955-SSA SSN Masking Settings' dialog box. It contains two sections: 'Participant Statement SSN Masking' and 'Portal SSN Masking', each with a 'Yes' dropdown menu. A warning message states: 'These are global settings and will affect all companies' 8955-SSA plans and participants.' There are 'Update' and 'Close' buttons at the bottom.

8955-SSA			
FAQs for 8955-SSA - Batches/Fulfillment - Upload			
DRAFT-EDIT	STATUS	FINAL	DEL
Form 8955-SSA I p2	OK	Form 8955-SSA	Del
Page 2 (N-1)	OK		Del
Page 2 (N-2)	OK		Del
Page 2 (N-3)	OK		Del
Client Letter	OK		
Edit Check All			
Print Client 8955-SSA - Masked SSN			
Print Client Letter w/ 8955-SSA's			
Print Client Letter [rtf]			
SSN Masking			
-STATEMENT DATA-			
DRAFT-EDIT	STATUS		
Contact Info	OK		
Page 2 (N-1)	OK		
Page 2 (N-2)	OK		
Page 2 (N-3)	OK		
Edit Check All			
Print All [rtf]			

Edit 8955-SSA SSN Masking Settings

SSN Masking

If you enable SSN masking all but the last 4 digits of the SSN will be masked on the participant statements ONLY.

Enable **Participant Statement** SSN Masking:

If you enable SSN masking all but the last 4 digits of the SSN will be masked on the portal ONLY. This copy cannot be used for filing with the IRS.

Enable **Portal** SSN Masking:

These are global settings and will affect all companies' 8955-SSA plans and participants.

[Close](#)

Users that wish to mask the SSNs from the copy that is published to the **portal**, or to mask the SSNs on the participant statements should click on 'SSN Masking' (see image above). To mask the SSNs in the portal, update 'Enable Participant Statement SSN Masking:' to Yes and be sure to click 'Update'. To mask the SSNs on the participant statements, update 'Enable Portal SSN Masking:' to Yes and be sure to click 'Update'. Portal Users that have View/Print and/or E-File 8955-SSA permissions with the Masked SSNs enabled for the Form 8955-SSA will receive a copy that resembles the Form 8955-SSA that the user generates by clicking on 'Print Client 8955-SSA - Masked SSN'. **Note.** SSN Masking is a Global feature that only Master and/or Designated Admin users will be able to access.