Participant Statements

09/12/2024 12:35 pm CDT

Single Plan:

Once you have the Form 8955-SSA completed, specifically page 2s, then you will be able to update participant addresses below the "Statement Data" portion of the "Form 8955-SSA" box. You will want to click on "Edit Check All" to run the edit checks for the statements. The "SSN Masking" option is only available to master/designated admins and is a global feature. By clicking on "Print All," you will generate a copy of the statements in a .pdf format. By clicking on "[rtf]," you will generate a copy of the statements in Word.

Batch Upload:

First, you would have page one of the Form 8955-SSA added, whether it was added manually; single plan upload; or via batch upload.

Next, you would create a batch and place those plans you wish to batch upload into that batch. Click on "Upload Participants" so that you may download the "Starter File (.csv)" file. You may not use the "8955Sample.csv" file that you used for each individual plan; the "Starter File (.csv)" contains plan specific data to help determine which participants belong to which plan. Once you have the starter .csv file updated, you are then able to do your batch import.