Other Frequently Asked Questions

10/01/2026 9:19 am CDT

What is 55Autofill*?
55Autofill* allows you to download all of the prior year's Form 5500 data from the DOL database into the current year's 5500 forms by entering the plan sponsor's EIN number.

Where does the information come from that is used for 55Autofill*?
The information that appears in your forms and schedules after adding a company and plan is retrieved from the DOL database of Form 5500 filings.

Does 55Autofill* only work if we were a customer in the previous year?
It does not matter if you used our software in a previous year. As long as you filed a return in a previous year, you should be able to retrieve the information.

I know we filed a return last year, why isn't my information showing up when I use 55Autofill*?
If you filed a 5500EZ last year, the information will not appear when using 55Autofill*. The DOL does not release that information to the public. If you did not file an EZ and your information still does not appear, it could be that we have not received your information from the DOL yet. We receive quarterly updates, but we always provide three years' worth of 5500 data in case your most recent filing does not appear.

What is the EIN look-up?
The EIN look up is a convenient tool used to search for an EIN number using the company name and the state.

If I used ftwilliam.com last year will my data automatically carry forward to the new year or do I have to use 55Autofill* again?
If you used our software last year, that information will automatically transfer into the new forms and schedules for you by clicking on "Bring forward 20XX to 20XX for this plan only." Please see Add Forms and Schedules above, for further information. You do not have to use 55Autofill* again.

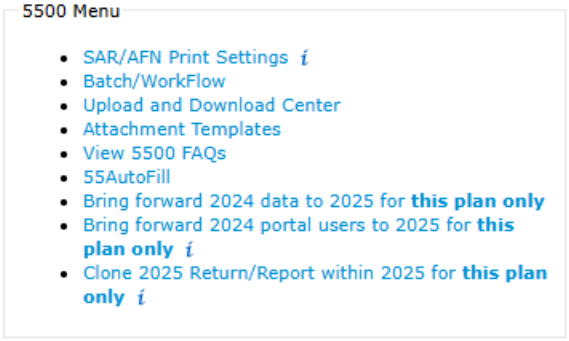
How do I use the upload features (Form 8955 - SSA, A, B etc.)?
If you would like to use one of our upload features located on the Form 5500 generation page, you must first click on the "Upload and Download Center" link provided underneath the "5500 - Year" box and download the sample spreadsheets we have supplied you (the sample spreadsheets for the Form 8955 - SSA uploads are found within the "8955 - SSA" box by clicking on "Upload"). Once you have made sure that your data is set up the same way as our sample and you have saved the file in .csv or .XML format, you then may begin uploading your data. To upload the file, click on "browse" and search for your saved file. Once selected, you may then click on "Submit" and all of your data will be uploaded into your forms/schedules. Please see Upload and Download Center above, for more information or call 800.596.0714 for further assistance.

I uploaded information into my schedules, but there were mistakes, how do I clear out the schedules without having to do them one by one?
First you must make any corrections to the spreadsheet and then save your changes. By uploading the corrected spreadsheet, it will replace all of the existing data so that you do not have to delete each schedule at a time.

How do I edit check my 5500 forms and schedules?
In the "5500 - Year" box there are three columns: "Draft/Edit," "Status" and "Final." The middle column called "Status" is where you do your edit checking. Each time you update your form, three question marks will appear next to the form in the "Status" column. If you click on the question marks, the system will tell you of any errors on the forms and will display an "OK" or "NOT-OK" next to the corresponding form or schedule. Once you have made corrections in the "Draft/Edit" version of the form, you will want to redo the edit checks by clicking on the three question marks, or run all edit checks by clicking on "Edit Check All 5500 Schedules" found on the "Form 5500 - Year" screen below the "5500 - Year" box.

How do I complete a Final or Short Year filing when the form has not yet been made available?

If you are completing a filing for a plan that has terminated in 2026, for example, and need to use a 2026 Form 5500, you will need to use the 2025 Form 5500 to complete the filing prior to December 31, 2026, as the DOL will not release the 2026 Form 5500 series prior to January 1, 2027. Once you have used the current year's Form 5500 for one plan, click on the "Clone 2025 Return/Report within 2025 for **this plan only**" link under the "5500 Menu". The Clone Return/Report feature is a quick way for users to clone a plan, including a clone of the Return/Report, to create Finals or Short Plan Year filings within the same plan year, in addition to adding the Portal User on file for the original Return/Report. Using the feature will add 'Final [timestamp]' at the end of the Plan Name to distinguish which plan is which. Note: The 'Final [timestamp]' will not be added to the Plan Name on the Return/Report.



How do I save my forms and schedules on my computer?
If you would like to store a copy of your forms and schedules on your hard drive, you will want to choose the "Final" version of the form in the "5500 - Year" box. Once you have opened the "Final" version, simply click on "File" and select "Save As" and you will be able to choose where you want to save your forms and schedules. Because the final version of your form is a PDF file, you may email your forms and schedules to your clients. If you choose to do this, you must first save the file to your computer and then attach it to an email. Do not use the email icon in Adobe.

How long will my filings be stored on the ftwilliam.com website?
We anticipate that we will retain at least six years of data from the date the filing was e-filed. For example, if you prepare a DFVC filing for 1999 in 2013, we will keep the data on the site until 2019.

How do I file a late return?
When you sign up with us, you will have access to complete filings back to 1988. If you are filing a return that goes back further than that, simply use the most recent Form 5500 and change the plan year beginning and ending dates to reflect the dates of the filing.

What are the blue boxes with question marks that appear on my forms and why is there an "I" next to all of my forms

and schedules?
For your convenience, we provide you with help buttons on all of your forms and schedules. They appear as a blue box with a question mark inside them. When you click on a blue box, instructions for that particular section or question on the form will appear in a text box on the page. The "I" that you see next to your forms and schedules are links to the DOL instructions. Simply click on the "I" and you may reference the instructions if you have questions.

Form 8955-SSA FAQs Top

What is the due date of the Form 8955-SSA?
The Form 8955-SSA is due the last day of the seventh month following the last day of that plan year. If the filing due date falls on a Saturday, Sunday, or legal holiday, the annual registration statement may be filed on the next business day.

If you complete a Form 5558 (extension) by the due date of the filing, you would be able to extend the due date an additional 2 1/2 months after the normal due date. For example, a calendar year plan would normally be due July 31st, but if on extension, the due date would be extended to October 15th.

Note: Signatures are not required when completing the Form 5558 for the Form 8955-SSA but they are required when completing Form 5330.

How do we e-file the Form 8955-SSA if we obtain our own TCC Code?
Once you have obtained the code, the Master Admin user for your ftwilliam.com account may go to "Admin Menu" and click on "Edit Company Profile." Towards the bottom of this screen, there are fields to enter the 8955-SSA TCC Code, your company's Contact, EIN and State. Make sure to click "Update" at the bottom of the screen. Once you create a batch file, click on "Batches/Fulfillment" and lock that batch. You will then be able to obtain the "ZIP" file that will contain one file per Form 8955-SSA you have prepared and placed in your batch. **Note:** You will have to upload each file within the ZIP file separately through the IRS FIRE site; you may not batch upload like you do for the 1099s.

How will ftwilliam.com e-file the Form 8955-SSA for us?
To take advantage of the fulfillment service, you would complete your Form 8955-SSAs, then "Create New Batch," by clicking on "Batches/Fulfillment," and mark those plans you want e-filed and click "Update." Once your batch is completed and you have passed all of the edits checks, you will be able to lock the batch and click on "FIRE E-File" below the "Fulfillment" header. You will then be brought to another screen where you confirm the fulfillment.

What is the cost to have ftwilliam.com e-file the Form 8955-SSA for us?
ftwilliam.com offers two options for e-filing 8955-SSA forms.

- **Batch E-File:** this filing method allows users to submit multiple 8955-SSA forms to a single batch to e-file in bulk.
  - The cost is $18.85/batch, plus $2.00/plan within the batch.
  - If you have 200 Form 8955-SSAs in one batch, the cost would be $418.85.
  - **Note:** The batch/plan fee increased from $17.15 to $18.85 on 10/1/2026.

- **Portal E-file:** this filing method allows users to send the 8955-SSA details to the plan sponsor for them to review and e-file individually.
  - **Cost per Filing:** $8.75 for each 8955-SSA e-filed by a portal user.
  - **No Batch Fee:** These filings are **not subject** to the $18.85 batch fee.

- **Note:** The fee increased from $7.95 to $8.75 on 10/01/2026.

Is the participant statement required?
The IRS has published more guidance on this question, which can be found at on the IRS website for the 8955-SSA FAQs site.

How does the website provide security?
ftwilliam.com utilizes SSL technology in order to protect all data while it is in transit from your web browser to the ftwilliam.com servers. SSL technology is the same technology and method of encryption that banks and other online merchants use to secure their transactions.

The data stored on the ftwilliam.com servers can only be accessed by those at your company who have a username and password for the ftwilliam.com system.

Are we able to bring forward participant data from prior years?
We do not bring forward prior year participant information because this changes from year to year. You can always download your participant information and re-upload it using the "Upload" link found within the "8955 - SSA" box. Basic plan information will populate the Form 8955-SSA.

Are there signature requirements when e-filing?
There are no signatures requirements when e-filing. However, it is always best practice to send the Form 8955-SSA to the plan administrator and sponsor for manual signature to keep on file for their records. Please see the below information from the IRS' 8955-SSA FAQs:

> **Q14. If the plan administrator and plan sponsor are the same person, in which capacity should that person sign the Form 8955-SSA?**
> If the plan administrator and the plan sponsor are the same person, that person should sign as plan administrator.
>
> Electronic signatures are not required for electronically filed Forms 8955-SSA. The name of the administrator or sponsor should be typed into the signature line. Administrators and sponsors are not required to have their own FIRE Transmitter Control Code, User ID or PIN.
>
> **Q15. Will the IRS accept scanned, faxed or copied signatures on Form 8955-SSA?**
> Yes. Although we prefer original signatures in ink, we will also accept scanned, copied and faxed signatures as well as original signatures in pencil.

How do I complete Line 6a and/or Line 6b on page 1 of the Form 8955-SSA?
The instructions for the Form 8955-SSA are a little more clear on whom to report on Line 6a and Line 6b. You could interpret the instructions to only report participants with Code As on Line 6a/6b and to report everyone (Code A, B, C and D) at Line 9.

If you still have questions after reading our FAQs, please feel free to contact us via email at support@ftwilliam.com or

call us at 800.596.0714.

* Patent Pending