

# How to Create and Submit an 8955-SSA Batch

01/08/2025 3:24 pm CST

After the 8955 data has been entered, the data verified and edit checks have been run, the filing may be added to a batch.

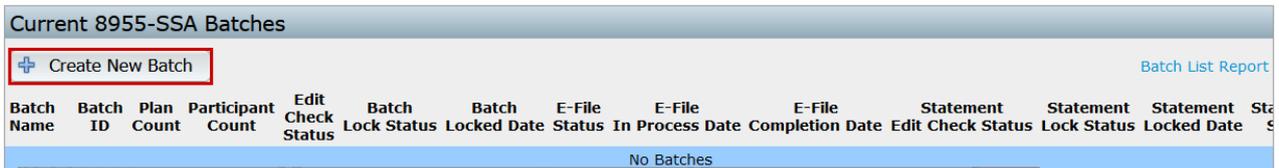
## Access the Batch Screen:

- From within the 8955-SSA window of the 5500 module, click on the **Batches/Fulfillment** hyperlink.



## Create a New Batch:

- From the Batches screen, click the **Create New Batch** button in the upper left corner.



- Enter a batch name for sorting and reference purposes, then click **Create New Batch**.

**Note:** The Amended Batch checkbox, when selected will only allow those filings with Part I Line B of Form 8955-SSA marked as an amended to be added to the batch. If this is an original filing please do not check this box.

## 8955-SSA New Batch - 2023

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### 8955-SSA New Batch

Enter batch name:  Amended batch?\*

[+ Create New Batch](#)

\* An amended batch includes ONLY corrected submissions that were previously submitted via batch process. Amended records can only be submitted via an amended batch.

### Adding Plans to the batch:

- In the new batch, click the **Select Plans** hyperlink. This will show all plans in the company code with an 8955-SSA present and not yet included in another batch.

### Batch: Example Batch | Batch ID: 972555

#### Batch Setup

[Select Plans](#) [Upload Menu](#)

(No plans are currently selected)

- Select the plans to add to the batch, then click **Update** (above or below the grid). Users may also choose to **Select All** or **Unselect All** in the upper right hand corner to quickly add all plans to the batch or remove the plans from the batch.

[Update](#)

### Batch: Example Batch | ID: 972555

Note: Only plans with an 8955-SSA record that are not already part of a different batch are shown.

Select	Sponsor Name	Plan Name	Edit Check Status	Statement Edit Check Status
<input checked="" type="checkbox"/>	123 Example Co	123 Example Co		
<input type="checkbox"/>	5500 test	5500 test		

[Select All](#)  
[Unselect All](#)

- After adding the plans, click the batch name link at the top of the breadcrumbs list.

[Update](#)

- Once the plans are added users are redirected to the Batch screen that provides printing and fulfillment options.
  - In the upper right, the number of plans and participants in the batch will be displayed.
  - Below that is the **Batch Lock** status. The batch may only be locked if passing edit checks indicated by the

green edit check icon beside the **Batch Edit Check Status**.

- A batch must be locked in order to e-file.

**Note:** The Statement Edit Checks do not need to be run or locked for e-filing the 8955-SSAs. ftwilliam.com does not offer a print and mail service. The statement batching feature checks for missing data and generates PDF files for printing outside the software. All plans in the batch will be compiled into a single file for each report type: Form 8955-SSAs, participant statements, and client letters (in .rtf or .pdf format).

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**Batch: Example Batch | Batch ID: 972555**

<b>Batch Setup</b> <a href="#">Select Plans</a>   <a href="#">Upload Menu</a>   <a href="#">Cover Letter</a>	Plans in Batch: 1
<b>Batch Reports</b> (.csv) <a href="#">Plans In Batch</a>   <a href="#">Participants In Batch</a>	Participants in Batch: 1
<b>Printing</b> <a href="#">Print 8955-SSA's</a> (.pdf) <a href="#">Print 8955-SSA's - Masked SSN</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP - Masked SSN</a> (.pdf) <a href="#">Print Cover Letters</a> <a href="#">Adobe (.pdf)</a> v <a href="#">Print Statements</a> <a href="#">Adobe (.pdf)</a> v - SSN Masking <a href="#">Download Statements to ZIP</a> <a href="#">Adobe (.pdf)</a> v - SSN Masking	Batch Edit Check Status:
<b>Fulfillment</b> FIRE E-File (Batch must be locked)	Batch Lock Status:
<b>Download FIRE Files</b> You must obtain a TCC and submit it to FTWilliam.com before you can download the FIRE file.  <b>If using our fulfillment service to submit batches (fees apply) or to have your client portal e-file (fees apply), your batch must be in "Pending" status by 12 PM CT two business days prior to the filing deadline to ensure the filing is fulfilled timely.</b>  <b>Note: If you are attempting to upload the ZIP file itself and getting a bad status, you must extract the .txt file from the ZIP file and submit each .txt file separately to the FIRE site.</b>	Statement Edit Check Status:
	Statement Lock Status:

### Lock and E-file

- Click the padlock next to **Batch Lock Status** to lock the batch and enable fulfillment options.
- Once locked, click **FIRE E-file**:
  - Clicking **FIRE E-file** does not automatically submit the order. A confirmation popup will appear, showing the user agreement and fees associated with the filing. By selecting **Submit**, the firm agrees to the terms provided, and the batch will be placed in a **Pending** status. A paper invoice from CCH Inc. will be sent in the first business week of the following month.

**IMPORTANT NOTICE:** Once you submit your returns, they are processed through an automated system. We cannot make any changes to your forms once they are submitted.

- If your account has its own TCC, and the details are entered in the Account Profile, the **Download FIRE Files** option will show either a **TXT** hyperlink (for one plan) or a **ZIP** hyperlink (for multiple plans). Clicking this will download a file to be saved and imported into the IRS FIRE site. The ZIP file contains individual .txt files for each plan; these must be uploaded separately to the FIRE site, as there is no batch upload option for Form 8955-SSA.

**Note:** To obtain a TCC for Form 8955-SSA, the IRS requires completing an online IR Application. Once assigned, the Master User for the ftwilliam.com account can enter the 8955-SSA TCC in the **Edit Company Profile** section under the Admin Menu. Enter the TCC, Contact Name, EIN, and State, then click **Update** at the bottom of the screen.

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### Batch: Example Batch | Batch ID: 972555

<b>Batch Setup</b> <a href="#">View Plans</a>   <a href="#">Upload Menu</a>   <a href="#">Cover Letter</a>	Plans in Batch: 1 Participants in Batch: 1 Batch Edit Check Status:
<b>Batch Reports</b> (.csv) <a href="#">Plans In Batch</a>   <a href="#">Participants In Batch</a>	<b>Batch Lock Status:</b> <span style="border: 2px solid red; padding: 2px;">Batch Lock Status: </span> Statement Edit Check Status: Statement Lock Status:
<b>Printing</b> <a href="#">Print 8955-SSA's</a> (.pdf) <a href="#">Print 8955-SSA's - Masked SSN</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP</a> (.pdf) <a href="#">Download 8955-SSA's to ZIP - Masked SSN</a> (.pdf) <a href="#">Print Cover Letters</a> <input type="text" value="Adobe (.pdf)"/> <a href="#">Print Statements</a> <input type="text" value="Adobe (.pdf)"/> - SSN Masking <a href="#">Download Statements to ZIP</a> <input type="text" value="Adobe (.pdf)"/> - SSN Masking	
<b>Fulfillment</b> <a href="#">FIRE E-File (\$17.75)</a>   <b>Download FIRE Files</b> <a href="#">ZIP</a>	

If using our fulfillment service to submit batches (fees apply) or to have your client portal e-file (fees apply), your batch must be in "Pending" status by 12 PM CT two business days prior to the filing deadline to ensure the filing is fulfilled timely.

Note: If you are attempting to upload the ZIP file itself and getting a bad status, you must extract the .txt file from the ZIP file and submit each .txt file separately to the FIRE site.