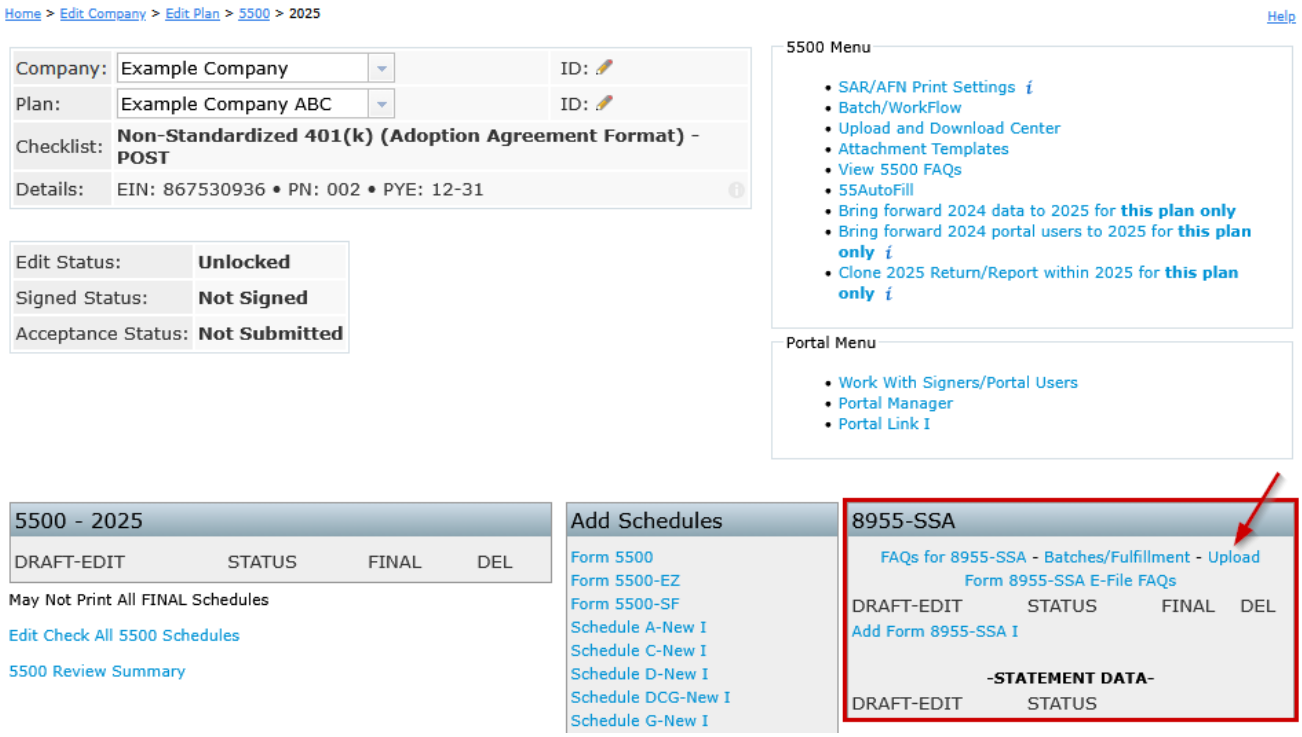
Uploading Data to 8955 - SSA - Single Plan

01/29/2026 10:36 am CST

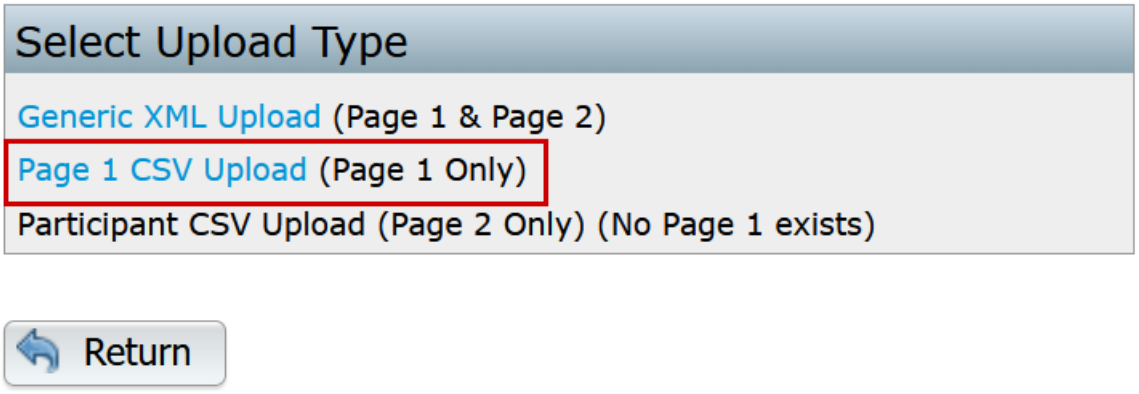
This guide explains how to upload both Page 1 and Page 2 (Participant) data for Form 8955-SSA within the 5500 Module. Each section walks through the available upload options and what to expect along the way.

Uploading Page 1 Information

To begin, open the **8955-SSA** box within the 5500 Module and select **Upload**. This opens the **8955-SSA Upload Menu**.



- From here, choose **Page 1 CSV Upload (Page 1 Only)** this redirects to the **Upload Screen.**

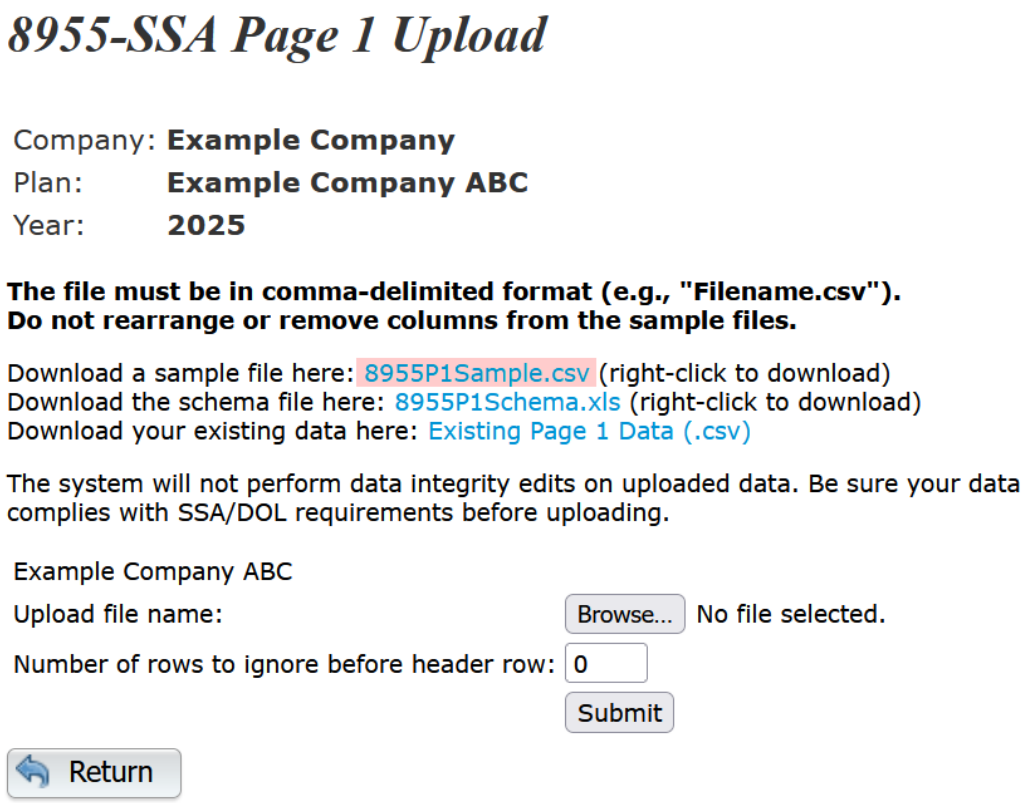


What's on the Upload Screen

The upload screen provides three helpful .csv files:

- **Sample File** – Supplies a preformatted .CSV file that shows exactly how Page 1 data should be structured. This is the best starting point when entering information for a new plan.
- **Schema File** – Lists all fields used in the upload, along with descriptions, data types, and acceptable values. This is useful for validating or troubleshooting data.
- **Existing Page 1 Data** – Exports any Page 1 information already entered for the plan. This makes it easy to update or correct data without starting from scratch.

For new 8955-SSA Form data, download the sample file **8955P1Sample.csv**.



After the required information has been added, return to the upload screen, select **Browse** to locate the file on your computer, and then select **Submit** to upload.

Once Page 1 details have been completed, the upload screen will now enable Page 2 Participant details to be imported.

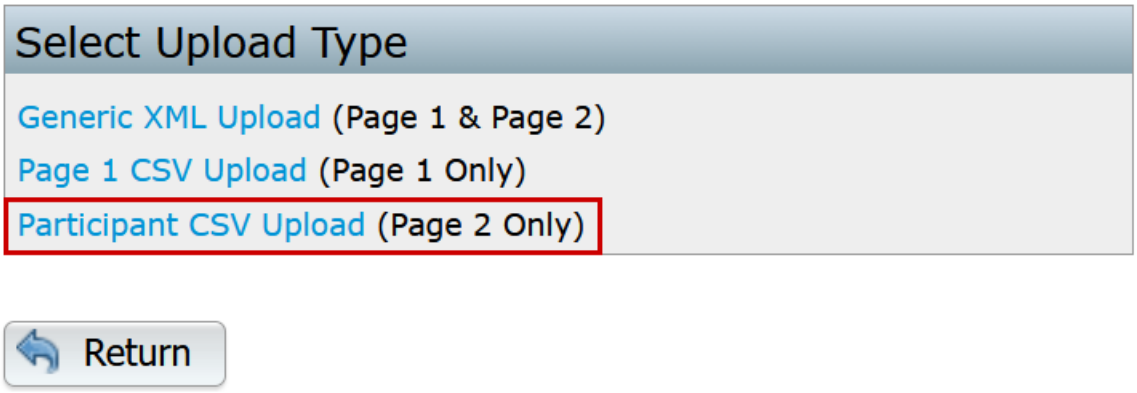
> **NOTE:** Only one plan can be uploaded at a time. The system reads only the first row of data in the file.

Uploading Participant (Page 2) Information

*Before uploading Page 2 participant data, a Page 1 record must already exist. This can be added manually using **Add Form 8955-SSA**, or it can be created through the Page 1 upload process described above.*

Once Page 1 is in place:

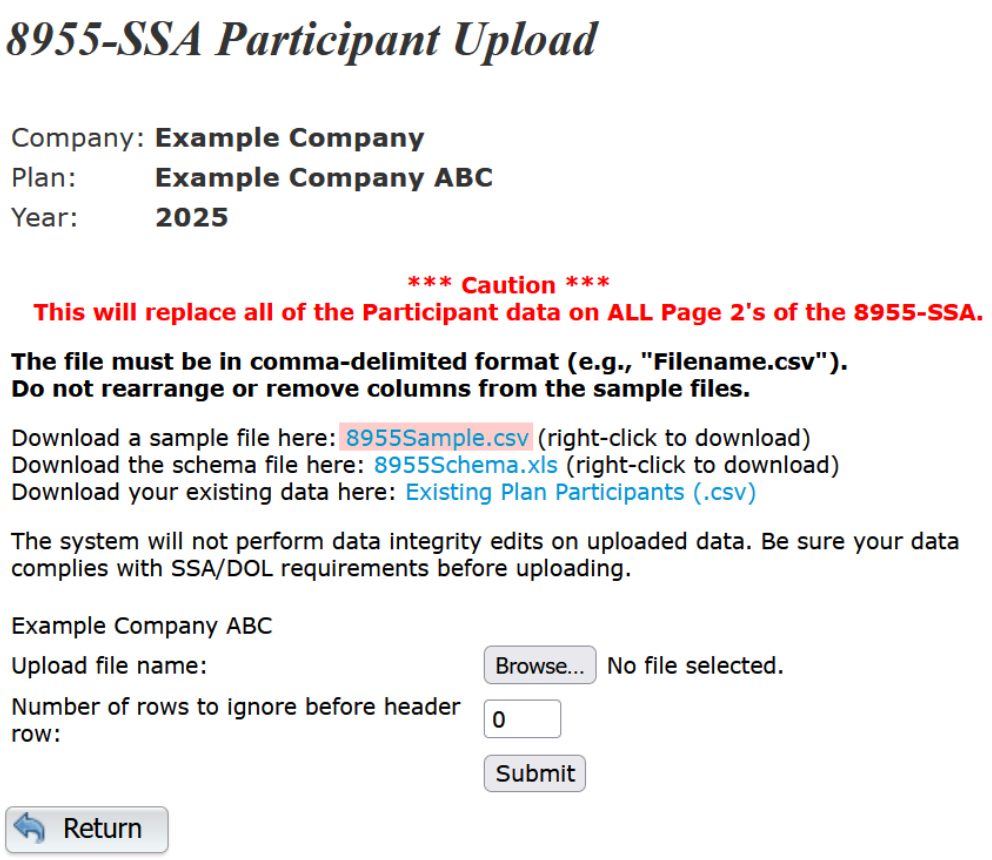
- Select the **Upload** link within the 8955-SSA box.
- In the **8955-SSA Upload Menu**, select **Participant CSV Upload (Page 2 Only)**.



What's on the Upload Screen

The Page 2 upload screen offers the same three options found on the Page 1 upload page:

- **Download a sample file** – Generates a CSV template formatted for Page 2 participant data.
  - This template also contains fields to upload participant addresses for the participant statements. If you do not wish to use ftwilliam.com's statements, then columns M-U pertaining to the address fields may be left blank.
- **Download the schema file** – Provides detailed descriptions of each participant data field and the accepted values.
- **Download the existing Page 2 participant data** – Exports any participant information currently stored for the plan for quick edits and re-uploading.



Download the sample CSV to begin entering participant information. After saving the completed file, select**Browse** to locate the file on your computer, and then select **Submit** to upload.

> **NOTE:** This will replace all of the Participant data on ALL Page 2's of the 8955-SSA.

Once completed both page 1 and 2 will be available to review, run edit checks, and e-file.