

Uploading Data to 8955 - SSA - Single Plan

05/02/2025 8:50 am CDT

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Select Upload Type
Generic XML Upload (Page 1 & Page 2)
Page 1 CSV Upload (Page 1 Only)
Participant CSV Upload (Page 2 Only) (No Page 1 exists)

Do not click on "Add Form 8955 - SSA." First, within the "8955 - SSA" box, click on the "Upload" link. You will be directed to the "8955 - SSA Upload Menu" screen where you would click on "Page 1 CSV Upload (Page 1 Only)." Now you are on the "8955 - SSA Page 1 Upload" screen. Next, save the sample .csv file to your hard drive. Once you have your data entered and saved to the .csv file, browse for the saved file and click "Submit." **Note:** You may only upload one plan at a time using this spreadsheet (ftwilliam.com only looks at the first row containing data).

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Select Upload Type
Generic XML Upload (Page 1 & Page 2)
Page 1 CSV Upload (Page 1 Only)
Participant CSV Upload (Page 2 Only)

Before you are able to upload participant data (Page 2), you would either have to manually click on "Add Form 8955 - SSA" or follow the steps above for the [8955 - SSA Page 1 Upload](#). After a Page 1 has been added manually or via upload, click on the "Upload" link. You will be directed to the "8955 - SSA Upload Menu" screen where you would click on "Participant CSV Upload (Page 2 Only)."

When you are on the "8955 - SSA Participant Upload" screen, save the sample .csv file to your hard drive. Once you have your data entered and saved to the .csv file, browse for the saved file and click "Submit."

8955-SSA Participant Upload

Company: **Example Company**

Plan: **Example Company**

Year: **2022**

***** Caution *****

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

**The file must be in comma-delimited format (e.g., "Filename.csv").
Do not rearrange or remove columns from the sample files.**

Download a sample file here: [8955Sample.csv](#) (right-click to download)

Download the schema file here: [8955Schema.xls](#) (right-click to download)

Download your existing data here: [Existing Plan Participants \(.csv\)](#)

The system will not perform data integrity edits on uploaded data. Be sure your data complies with SSA/DOL requirements before uploading.

Example Company

Upload file name:

No file chosen

Number of rows to ignore before header row:

The column headers for the .csv file must remain in the file that you upload and there is also a schema file that you may download, which provides you with details on how to format the .csv file. **Note:** You are able to upload participant addresses for the participant statements at the same time you upload the participant data. If you do not wish to use ftwilliam.com's statements, then you do not need to complete these columns.
