

Amending a Plan After Using the Fulfillment Service

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If you've used the fulfillment service and later discover an error in a submitted plan, follow the steps below to create an amended batch and make corrections.

Step 1: Create a New Batch

- Navigate to the **Batches/Fulfillment** screen.
- Select **Create New Batch**.
- Be sure to check the box labeled "**Amended batch?**" during setup.

Step 2: Select Fulfilled Plans

- On the **Select Plan** screen, you will see a list of all plans that have already been fulfilled.
- Select the plan(s) you need to amend.

Step 3: Access and Edit the Plan

- After selecting the plan(s), navigate to each one individually.
- Open the **draft Form 8955-SSA**.
 - The **Part I, Item B** checkbox will be automatically selected for you.
- Make all necessary corrections to the form.

Step 4: Finalize the Batch

- Once all updates are complete, proceed with locking the batch.
 - You will then click on "FIRE E-File" under the "Fulfillment" heading to submit your batch to ftwilliam.com for fulfillment.
 - Click on "Submit" to submit your batch to ftwilliam.com for fulfillment.
Once "Submit" is selected, the "E-File Status" column on the "8955-SSA Batches - Year" screen will change to "Pending."
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