

How to Amend the Form 8955-SSA

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Amending a Plan After Printing and Mailing Form 8955-SSA

If you printed and mailed Form 8955-SSA plan-by-plan and later discover an error, follow the steps below to correct and refile the plan.

Option 1: If Printing and Mailing your form

Step 1: Access the Draft Form

- Navigate to the affected plan.
- Open the **draft Form 8955-SSA**.

Step 2: Mark as Amended

- Check the box for **Part I, Item B** to indicate the form is being amended.

Step 3: Make Corrections

- Update the form as needed.
- Print and **file the corrected form with the IRS**.

Amending a Plan After Using the Fulfillment Service

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 and downloading the updated ZIP file, if applicable.

Amending a Plan After E-Filing via the Portal

If a portal user has already E-Filed a plan and later identifies an error, follow the steps below to amend and refile the Form 8955-SSA.

Step 1: Access the Plan

- Navigate to the plan that was previously E-Filed.
- Locate and open the **draft Form 8955-SSA**.

Step 2: Begin the Amendment Process

- Click the “**Amend 8955**” button.
 - This will make the form editable.
 - The “**Amended**” box will be automatically checked.

Step 3: Make Corrections

- Review the form and make all necessary updates.
- Ensure all changes are accurate and complete.

Step 4: Verify Form Status

- Confirm that the form now shows an **OK status**.
 - This indicates the form is ready for submission.

Step 5: Refile the Plan

- Once the form is in OK status, the plan can be E-Filed again via the portal.

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This form is part of a locked batch. No changes can be made.

Return

Form 8955-SSA and pages

This form was submitted via Portal E-File and is part of a locked batch. **Amend 8955**

General Instructions

Form **8955-SSA** Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits

Department of the Treasury
Internal Revenue Service

This form is required to be filed under section 6057 of the Internal Revenue Code.
Information about Form 8955-SSA and its instructions is at www.irs.gov/form8955ssa.

OMB No. 1545-2187
2015
This Form is NOT Open to Public Inspection

PART I Annual Statement Identification Information

Are you sure you would like to Amend the 8955? It will be removed from the current batch and added to a new amended batch once E-Filed again.

OK Cancel

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PART I Annual Statement Identification Information

For the plan year beginning 01/01/2015

A ☐ Check here if plan is a government, church, or other plan that is not a qualified plan.

B ☒ Check here if this is an amended registration statement.

C Check the appropriate box if filing under: ☐ Form 5558 ☐ Special extension

Amending a Plan After Using the Fulfillment Service

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 and downloading the updated ZIP file, if applicable.

Correcting an Error After Downloading a ZIP File

If you've already downloaded a ZIP file and later discover an error in one of the plans, follow these steps to make corrections and generate an amended batch:

Step 1: Unlock the Batch

- Go to the **Batches/Fulfillment** screen.
- Locate the batch containing the plan with the error.
- Unlock the batch to allow edits.

Step 2: Remove the Plan

- From the unlocked batch, **remove the specific plan** that needs to be amended.

Step 3: Amend the Plan

- Navigate to the plan.
- Check the box for **Part I, Item B** to indicate an amendment.
- Make all necessary updates to the plan.

Step 4: Create a New Batch

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

Step 5: Select Amended Plans

- On the **Select Plan** screen, you will see a list of:
 - Plans with the "**Amended**" box checked on the 8955-SSA.
 - Plans **not currently included in another batch**
- Select the appropriate amended plans.

Step 6: Finalize and Download

- Lock the new batch.
 - Download the updated ZIP file.
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