# 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**

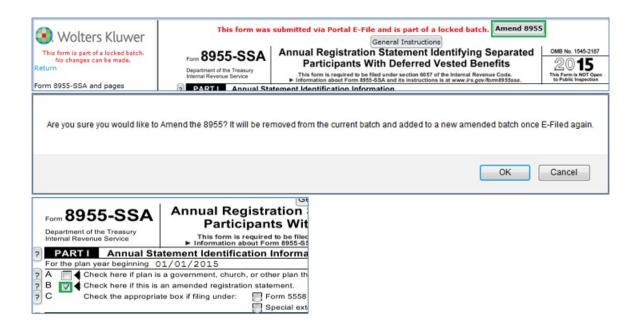
- Review the form and make all necessary updates.
- Ensure all changes are accurate and complete.

# **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.



# Amending a Plan After Using the Fulfillment Service

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- 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.