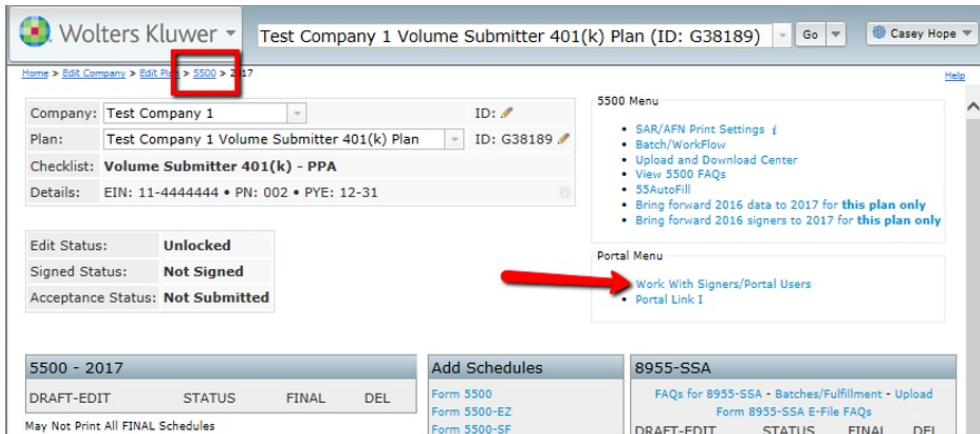


Adding 5500 Signers

05/06/2026 8:45 am CDT

This article covers how to add a new or existing signer to a 5500 plan.

If this is the first year you are completing a 5500 for this client and you need to add a signer to the system as a new portal user.

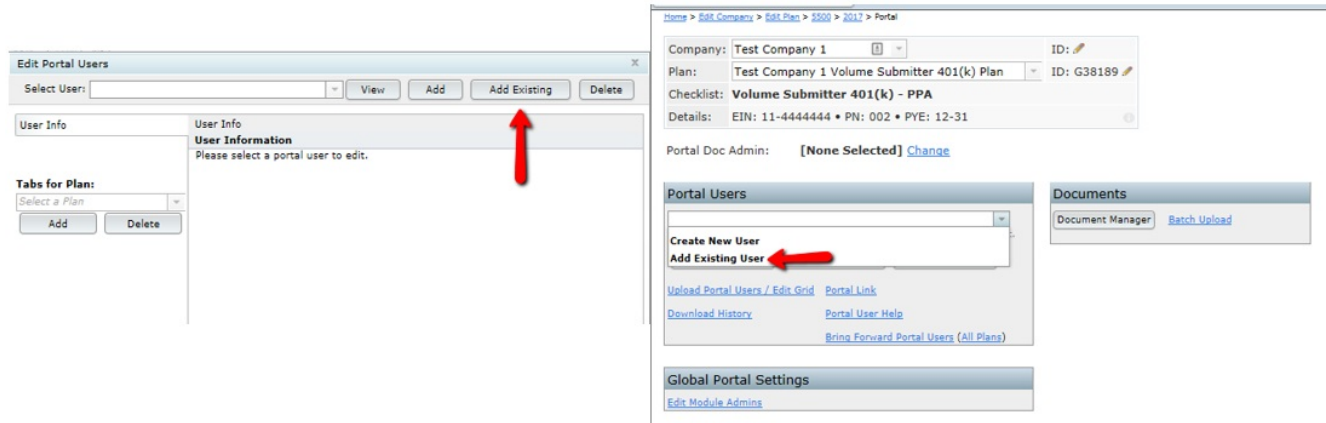


Go to the 5500 page and click on 'Work with Signers/Portal Users'

To ensure you do not create a duplicate record for an already existing portal user, click on 'Add Existing'.

(if you do not have full portal subscription)

(if you do have full portal subscription)

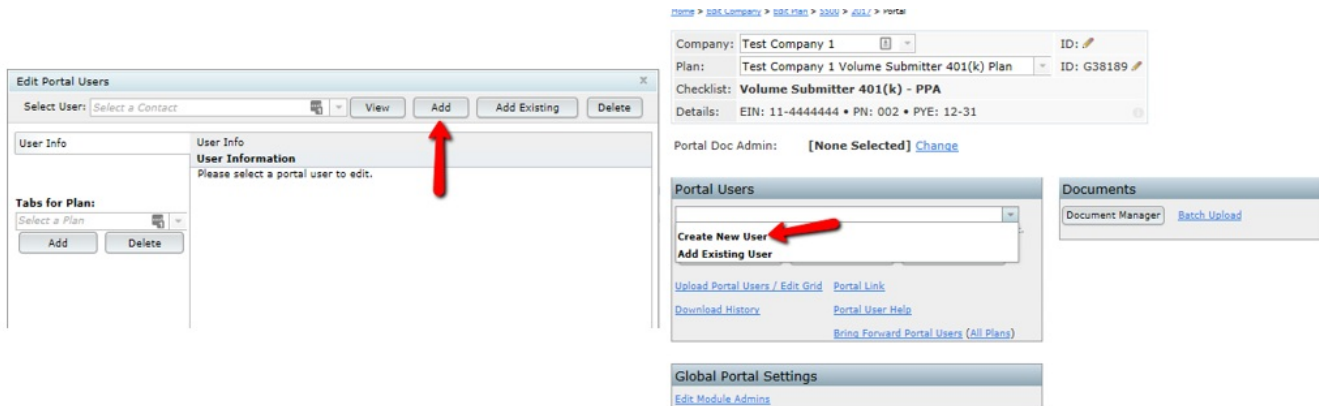


If the person you are adding is listed on the existing list, select them and click the button to add them.

If the person you are adding is not on the existing list, click on 'Add'/'Create New User' to add them

(if you do not have full portal subscription)

(if you do have full portal subscription)

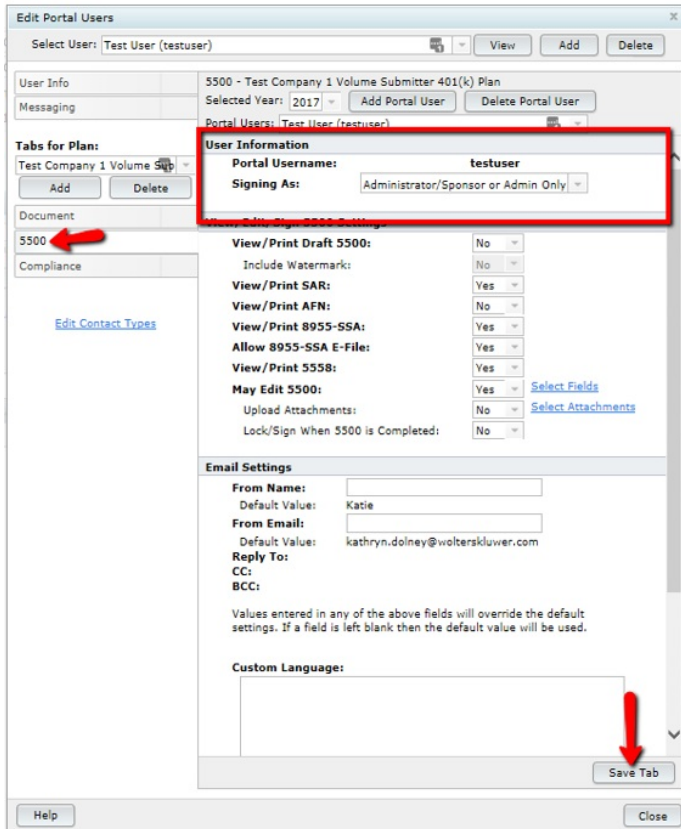


Enter all of the portal user's information and click 'Create New Contact'.

Please note: Portal usernames must be unique system-wide, over all ftwilliam.com customers. If you receive the message that the username already exists and the user is not present in your list of existing users, this indicates another customer within ftwilliam.com is already using that username. You will need to alter the username or make it more unique in order to add him/her to the system as a user. We suggest trying one of the following options to make a username more unique: JDoe123, JohnD123, DoeJohn, DoeJohn123, etc.

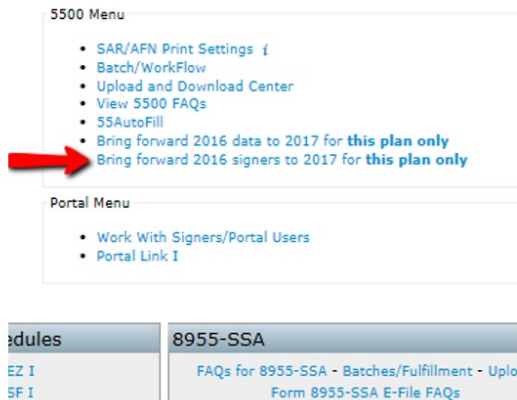
Adjust the portal user's permissions as needed.

Please note: if you have one signer for the plan they MUST be set with Signing As: Administrator/Sponsor or Admin Only. If you have multiple signers for a plan you would set one up as the Sponsor and the other up as the Administrator.



If this is not the first year you are filing for this plan and the signer is the same as it was last year.

You would click on the link on the 5500 screen to 'Bring forward 20XX signers to 20XX for this plan only'.



You can also complete this task for all of your plans together by clicking on 'Batch/Workflow' in the 5500 Menu box and then on 'Bring forward 20XX signers to 20XX for all plans'.

Please note: you must be a designated admin to access this feature.

5500 Menu


- SAR/AFN Print Settings 
- Batch/Workflow
- Upload and Download Center
- View 5500 FAQs
- 55AutoFill
- Bring forward 2016 data to 2017 for **this plan only**
- Bring forward 2016 signers to 2017 for **this plan only**

Portal Menu

- Work With Signers/Portal Users
- Portal Link I

5500 Batch/Workflow

Options

- Bring forward 2016 data to 2017 for **all plans** 
- Bring forward 2016 signers to 2017 for **all plans**
- Review/Assign Detail Status/Extensions
- 5500 Workflow Grid
- Batch Invite 5500/SF
- Admin Summary Status
- Batch SAR
- Batch Annual Funding Notice
- Batch Local Sign
- 8955-SSA Batch/Fulfillment
- Batch 5558

Schedules

8955-SSA

500-EZ I

FAQs for 8955-SSA - Batches/Fulfillment - I