

**FTWILLIAM.COM E-FILING  
CAPABILITIES FOR FORM 8955-SSA**  
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# WE WILL COVER:

- Who is Required to E-file?
  - IRS Regulations
- E-Filing Options
  - Using ftwilliam.com's Fulfillment Service
  - Creating a Batch and E-filing yourself to the IRS FIRE Site
  - Having your Portal User E-file from the Portal
- Amending your E-filed Forms

# WHO IS REQUIRED TO E-FILE?

- Filers (a.k.a. the Employer/Plan Sponsor) who will need to file more than 250 forms (including W-2s, 1099-Rs and income, employment and excise tax returns). Please click [here](#) for additional information from [www.irs.gov](http://www.irs.gov).
- Form 8955-SSA, must be filed electronically for plan years beginning on or after January 1, 2014, but only for returns with a filing date on or after **July 31, 2015** (not including extensions).
- **(IMPORTANT!)** Your returns will not be considered timely filed if you are required to electronically file and do not do so.

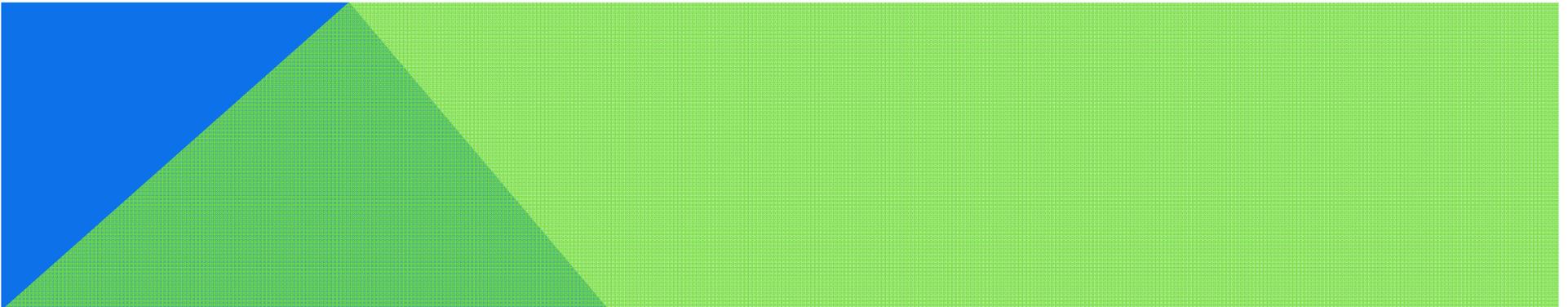
# E-FILING OPTIONS:

- E-Filing Options
  - Using ftwilliam.com's Fulfillment Service
  - Creating a Batch and E-filing yourself to the IRS FIRE Site
  - Having your Portal User E-file from the Portal

# FTWILLIAM.COM'S FULFILLMENT SERVICE:

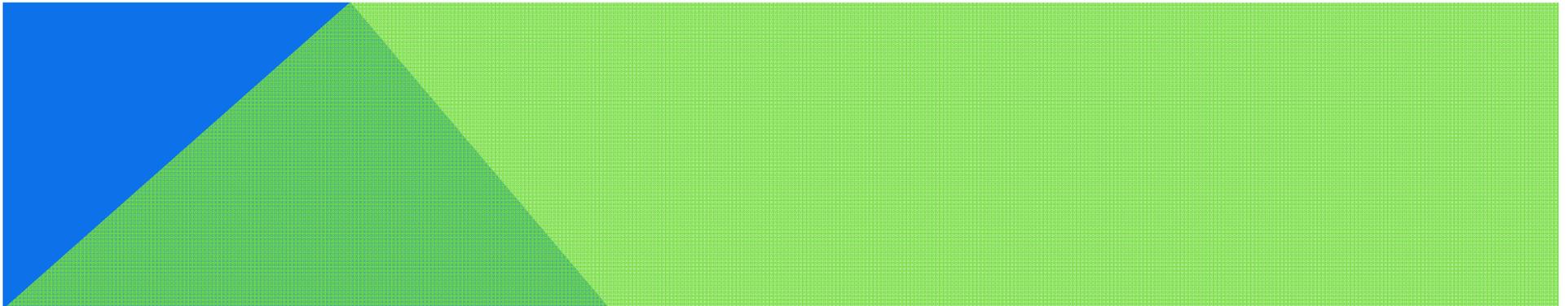
1. Create Batch
2. Add Plans to your Batch
3. Lock/Run Edit Checks
4. Submit for Fulfillment (\$10.75/Batch Fee + \$1.05/Plan Added to the Batch)
5. Check Filing Status

\*Note: You will be Notified by ftwilliam.com if the IRS Provides a “Bad” Status for any Forms in your Batch



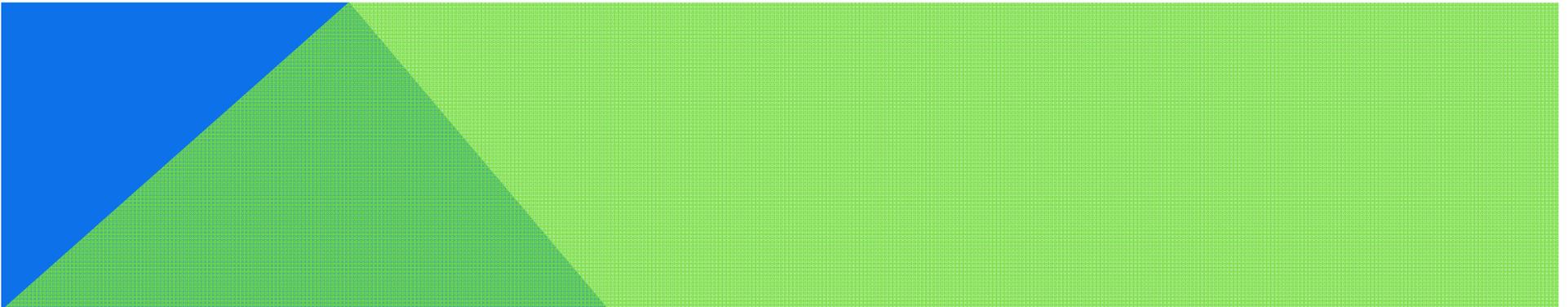
# E-FILING YOURSELF TO THE IRS FIRE SITE:

1. Obtain your own Transmitter Control Code (TCC) from the IRS (Form 4419)
2. Master User adds TCC to Account Profile (WK logo-> Administrative Tasks-> Account Profile)
3. Create Batch
4. Add Plans to your Batch
5. Lock/Run Edit Checks
6. Download .txt File in ZIP Folder
7. Upload Each Plan's .txt File to the IRS FIRE Site



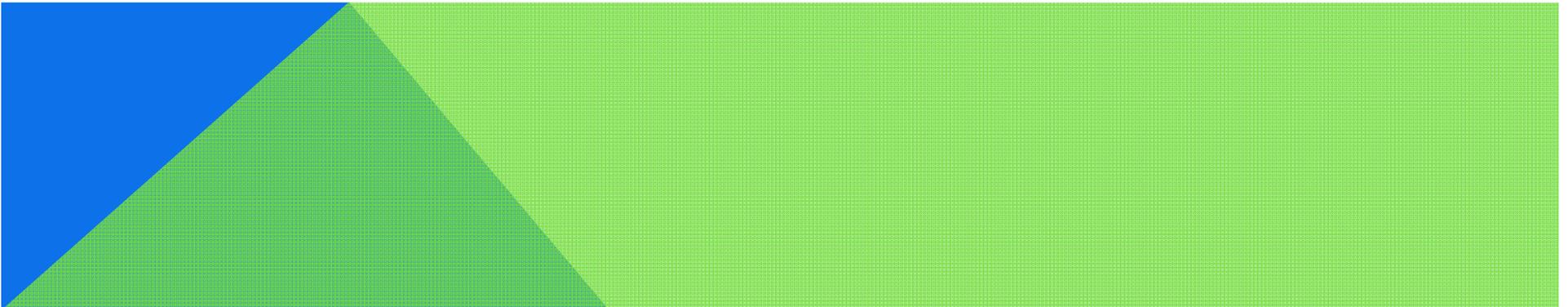
# PORTAL USER E-FILES FROM THE PORTAL

1. Form Preparation is Complete
2. Work with Signers/Portal Users (Allow 8955-SSA E-File = Yes)
3. Invite Portal User to the Portal
4. Portal User Logs into the Portal
5. E-File 8955-SSA
6. Click on “Print 8955-SSA”
7. Review
8. Click on “E-File 8955-SSA”
9. A Batch is Created of the One Plan and is Updated to Pending Status for [ftwilliam.com](http://ftwilliam.com) to fulfill for a \$5 fee.
10. Check Status



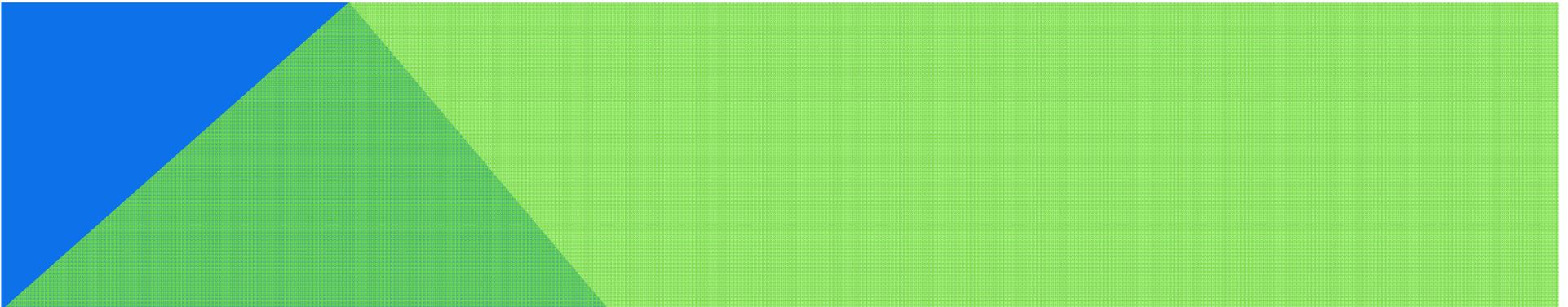
# AMENDING YOUR E-FILED FORM:

- How you Amend is Determined by how your Form was Originally Filed
  - Plan was Originally E-filed using ftwilliam.com's Fulfillment Service
  - Plan was Originally E-filed by you to the IRS FIRE Site



# QUESTIONS?

- The Webinar has been recorded and will be available on our Website (<http://ftwilliam.com/webinar.html>) within the next week or two.
- These slides, along with answers to any questions posed at the end of the Webinar, will be posted to our Webinars page.
- For any additional questions you may have, please contact [support@ftwilliam.com](mailto:support@ftwilliam.com) or 800-596-0714 for assistance.
- You may also want to review the “[Form 8955-SSA E-File FAQs](#)” guide available in [ftwilliam.com](http://ftwilliam.com) for additional information on the e-filing process through [ftwilliam.com](http://ftwilliam.com).



# Thank you for attending!

Katie, Sarah & Janeen

