

Form 8955-SSA E-Filing Options

Form 8955-SSA is able to be filed electronically by either utilizing ftwilliam.com's fulfillment service to submit your forms to the IRS FIRE site on your behalf, or you may create a batch and after obtaining a TCC Code, you may upload your files to the IRS FIRE site yourself. Please click [here](#) to obtain additional information from the 5500 User Guide.

CREATING A BATCH TO SUBMIT FORM 8955-SSA TO THE IRS FIRE SITE--

Prior to creating a batch, you will need to obtain a TCC Code from the IRS ([IR Application](#)) and place this on file within ftwilliam.com (NOTE: the 8955-SSA TCC Code is separate from the 1099 TCC Code. If you have a 1099 TCC Code, you will need to obtain an additional TCC Code for the purpose of filing Form 8955-SSA electronically). The TCC Code will need to be placed into the "Account Profile" option of the WK Logo-> Administrative Tasks menu. Only the **Master User** on the account has access to the Account Profile option. The Master User will need to complete the following fields:

8955-SSA TCC Code Information	
Company TCC:	<input type="text"/>
Contact Name:	<input type="text"/>
Company State:	<input type="text"/>
Company EIN:	<input type="text"/>

Once the TCC Code is on file, here are the steps you will need to follow to submit your forms electronically to the IRS FIRE site, if the forms have been completed and are ready for filing:

1. From the "Form 5500-Year" screen, click on "Batches/Fulfillment" within the "8955-SSA" box.
2. Once you are on the "8955-SSA Batches - Year" screen, click on "Create New Batch."
3. Enter your batch name and click "Create New Batch."
4. You are then on the "Select 8955-SSA (Batch Name) Batch Plans - Year" screen.
5. Select the plan(s) you wish to include in the batch and click "Update."
6. Click "Return."
7. You are now on the "8955-SSA (Batch Name) Batch Menu - Year" screen. Click "Return."
8. You are now on the "8955-SSA Batches - Year" screen, where you will click on the yellow triangle within the "Edit Check Status" column to run your edit checks.
9. Once you receive a green check mark for the "Edit Check Status" column for your batch, you will want to click on the yellow unlocked lock icon within the "Batch Lock Status" column.
10. After locking your batch, click on your batch name which will take you to the "8955-SSA (Batch Name) Batch Menu - Year" screen.

11. From the "8955-SSA (Batch Name) Batch Menu – Year" screen, you will click on "ZIP" below "Download FIRE Files" to download and save the file.

12. Once saved, you will need to un-zip the folder and take the files to the IRS FIRE site. Each file within the folder will need to be uploaded separately. **NOTE:** if you have questions about the e-filing process on the IRS FIRE site (e.g. where to upload your file, etc.), you will need to contact the IRS for assistance.

CREATING A BATCH TO UTILIZE FTWILLIAM.COM'S FULFILLMENT SERVICE--

1. From the "Form 5500-Year" screen, click on "Batches/Fulfillment" within the "8955-SSA" box.

2. Once you are on the "8955-SSA Batches – Year" screen, click on "Create New Batch."

3. Enter your batch name and click "Create New Batch."

4. You are then on the "Select 8955-SSA (Batch Name) Batch Plans – Year" screen.

5. Select the plan(s) you wish to include in the batch and click "Update."

6. Click "Return."

7. You are now on the "8955-SSA (Batch Name) Batch Menu – Year" screen. Click "Return."

8. You are now on the "8955-SSA Batches – Year" screen, where you will click on the yellow triangle within the "Edit Check Status" column to run your edit checks.

9. Once you receive a green check mark for the "Edit Check Status" column for your batch, you will want to click on the yellow unlocked lock icon within the "Batch Lock Status" column.

10. After locking your batch, click on your batch name which will take you to the "8955-SSA (Batch Name) Batch Menu – Year" screen.

11. From the "8955-SSA (Batch Name) Batch Menu – Year" screen, you will click on "FIRE E-File" under the "Fulfillment" heading to submit your batch to ftwilliam.com for fulfillment.

12. 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."

*If using ftwilliam.com's fulfillment service to electronically file the forms on your behalf to the IRS FIRE site, there is an additional fee (Flat \$13.90/batch fee + \$1.45/plan within the batch).

**You are also able to have your portal users e-file the SSA from the portal, which in turn uses our fulfillment service to electronically file the form with the IRS. There is a flat \$6.45/plan cost to use this option. Please click [here](#) to obtain additional information from the 5500 User Guide on having your portal users e-file Form 8955-SSA from the portal.

Frequently Asked Questions

Q1: Who is required to file electronically?

A: 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.

Q2. What are my electronic filing options in ftwilliam.com?

A: You have three options to file electronically: 1) obtain your own TCC Code, create a batch and file electronically yourself to the IRS FIRE site (no additional fee applies); 2) create a batch and submit for fulfillment to have ftwilliam.com electronically file your forms to the IRS FIRE site on your behalf (additional fee applies); or 3) allow your portal user to e-file the form from the portal, which in turn uses ftwilliam.com's fulfillment service to electronically file the form on your/your client's behalf to the IRS FIRE site (additional fee applies).

Q3. Am I still able to print/mail my Form 8955-SSA to the IRS?

A: As long as you do not meet the threshold described in Q1 above, you may still print/mail your Form 8955-SSA to the IRS. The Plan Sponsor and/or Plan Administrator will need to sign and date the form prior to mailing to the IRS.

Q4. If I decide to file electronically either by obtaining my own TCC Code or ftwilliam.com's fulfillment service, how will my client sign the form?

A: Currently, the IRS does not require a signature of either the Plan Sponsor or Plan Administrator on Form 8955-SSA when the form is filed electronically. It is suggested by the IRS that the Plan Sponsor/Plan Administrator's name is typed onto the form prior to filing electronically, but again, this is not currently a requirement. It is strongly suggested that you provide your client with a copy of the form to physically sign and maintain in his/her records if the form is filed electronically. Please click [here](#) for additional information from the IRS FAQs.