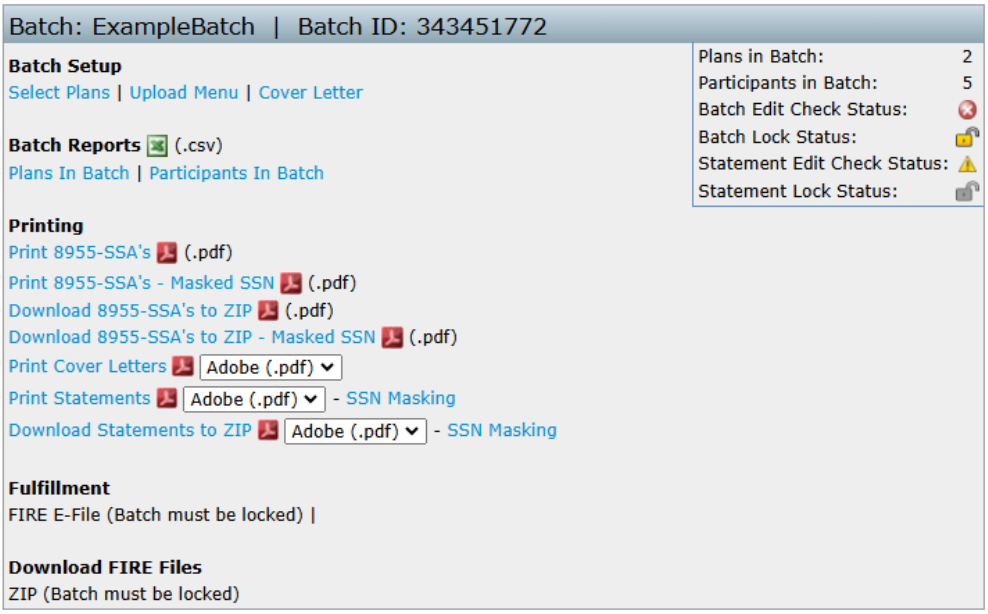
# 8955-SSA Batch Features

10/01/2026 9:24 am CDT

This guide explains the features and settings available within a batch. Before proceeding, seeHow to Create and Submit an 8955-SSA Batch for batch creation instructions.

### To use batch features:

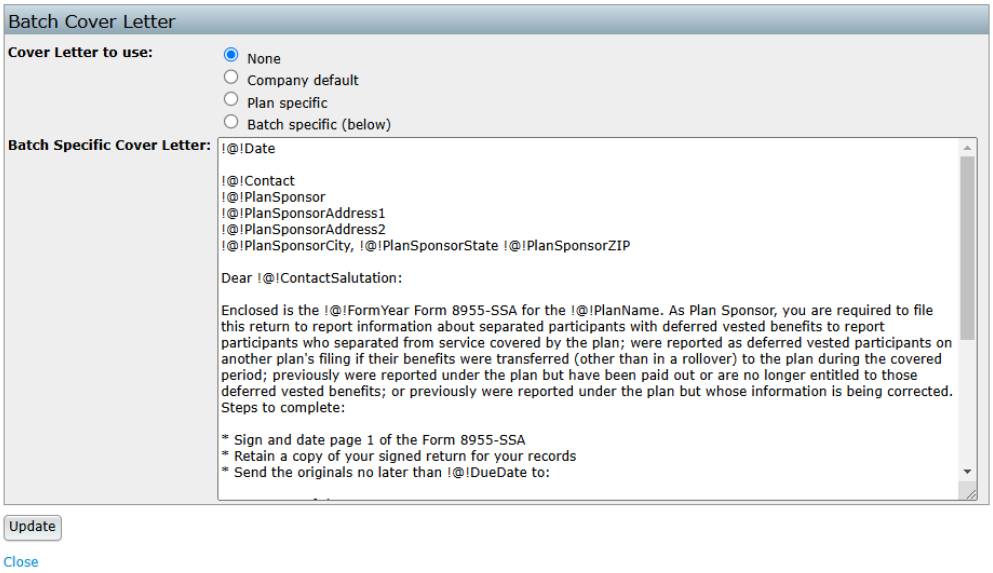
- Add plans to the batch using **Select Plans** or **Upload Menu** under Batch Setup *(explained in more detail below).*
- Once plans are added, batch options become enabled.




### Batch Setup

- **Select Plans:** Add or remove individual plans with an active 8955 for the filing year. (This will update to **View Plans** once the batch is locked.)
- **Upload Menu:** Upload bulk 8955-SSA data for pages 1 and 2, then add completed forms to the batch. See Uploading Data to 8955-SSA - Batch (for multiple plans) for step by step instructions on using this feature.
- **Cover Letter *(optional)*: T**his link enables users to create a cover sheet that will be printed with the8955-SSA in the **Printing** section of the batch options. The following are the available options for Cover Sheets:
  - **None:** The print features will not include a cover sheet
  - **Company Default:** Uses the default template from Global Email Settings. (Global Email Settings>5500 Module>8955-SSA Cover Letter)
  - **Plan Specific:** Uses a custom template for each plan (if available). (Located under the **Draft-Edit** section of the 8955-SSA window after the last listing of Page 2.) If a custom Plan Specific template has not been created, the Company Default letter will be used in its place.
  - **Batch Specific:** Creates a customized letter for this batch only. The**Company Default** or **Plan Specific** cover letters will not be impacted by batch level changes.

*Edit 8955-SSA Batch Cover Letter Settings*




## Batch Summary Section

Located in the top-right of the batch window, this section displays:

- **Plans in Batch:** Total plans added to this specific batch.
- **Participants in Batch**: Total participants across all selected plans in the batch.
- **Batch Edit Check Status**: Indicates if the plans in the batch are passing the required checks to be e-filed with the IRS.
    - For the batch to be locked and fulfillment options enabled, every plan must pass edit checks.
    - Selecting the Icon next to the status will run edit checks from within the batch. *(Edit checks may also be run from the **Current 8955-SSA Batches** that lists all batches for the year.)*

    A status code of a **green** check indicates that the edit checking was successfully completed, and no errors or warnings were detected.

    A status code of **red** x indicates that the edit checks have either not yet been run or one or more errors or warnings.

- **Batch Lock Status**: Shows if the batch is locked for e-filing. Locked batches cannot be edited or modified.*(May also be locked from the **Current 8955-SSA Batches** screen.)*

    indicates the batch is unlocked and fulfillment options are disabled.

    indicates the batch is locked and fulfillment options are enabled.

- **Statement Edit Check Status *(optional):*** indicates if the participant statements are passing edit checks. *(Not required for e-filing)*
- **Statement Lock Status *(optional):*** indicates if the participant statements have been locked. Locking statements will disable editing on the plan level. *(Not required for e-filing)*

### Batch Reports

Provide the option to download .csv files of batch details. Each report includes the Name of the Report, Filing Year, Batch Name, Batch ID as well as specific information as outlined below:

- **Plans in Batch:** provides EIN, Plan Number, Company Name, Plan Name and Plan IDs for all plans within the specific batch. ***Note:*** *The PlanIDs are a user defined field found on the Edit Plan screen. This column will be blank if not applicable.*
- **Participants in Batch:** provides the Plan Name, Plan Sponsor Name, as participant data for the plans in the batch.

### Printing

*The listing of the print options will vary if Cover letters are included.*

- **Print 8955-SSA's:** Prints all Form 8955-SSAs in the batch to a **single file**.
- **Print 8955-SSA's- Masked SSN**: Prints all 8955-SSA forms in the batch with a water mark and masks all but the last 4 digits of the SSNs.
- **Download 8955-SSA's to Zip:** Downloads all Form 8955-SSAs that are in the batch to a zip file containing **individual PDF files by plan**.
- **Download 8955-SSA's to Zip-Masked SSN:** Downloads all Form 8955-SSAs in the batch to a zip file containing **individual PDF files by plan**. The files will include a water mark and masks all but the last 4 digits of the SSNs.
- **Print Cover Letters:** Print all cover letters per plan to a single file as either .rtf or .pdf format.
- **Print Statements:** Print all Participant Statements per plan to a **single file** as either .rtf or .pdf format.
    - **SSN Masking:** Options open a new window to set masking preferences. Once preferences are set, selecting the Print Statements link will provide the Participant statements with all but the last 4 numbers masked.
- **Download Statements to Zip :** Downloads all Participant Statements in the batch to a zip file containing **individual PDF files by plan**.
    - **SSN Masking:** Options open a new window to set masking preferences. Once preferences are set, selecting the Download Statements link will provide the Participant statements with all but the last 4 numbers masked

### Fulfillment

*Fulfillment options are unavailable until the batch edit checks have been run and the batch has been locked.*

- **FIRE E-File**: this option sends the batch to ftwilliam.com for e-filing fulfillment (additional fee applies). Once submitted returns are processed through an automated system. We cannot make any changes toe the forms once submitted.
    1. Selecting the link will redirect users to the agreement and authorization screen which users will need to review and select the **submit** button for the batches to be submitted.
    2. This feature uses ftwilliam.com's TCC so customers do not need to register for their own.

> **Note:** Accounts are not billed immediately when using this feature. The Billing Contact for the account will receive a paper invoice from CCH Inc. around the first business week of the following month after generation

### Download FIRE Files

- This feature allows users to download a .TXT file to file outside of the software with the IRS FIRE site.
- To utilize this feature the account must obtain a TCC Code specifically for the Form 8955-SSA by completing an online IR Application.
    - Once obtained, the Master Admin user for the ftwilliam.com account may go to the "Admin Menu" and click on "Edit Company Profile."

- Towards the bottom of this screen, there are fields to enter the 8955-SSA TCC Code, Accounts Company's Contact, EIN, and State. Make sure to click "Update" at the bottom of the screen.
- After the batch is locked the **ZIP** file link will be enabled. This link will download a ZIP file (or TXT file if only one plan is present) containing one file per Form 8955-SSA prepared and placed in your batch. **Note:** Users will have to upload each file within the ZIP file separately through the IRS FIRE site; unlike batch uploading as for 1099s.