

How to Set Up and Allow for E-Filing of Form 8955-SSA by a Portal User

11/17/2025 8:51 am CST

E-Filing Form 8955-SSA

Key Differences from Form 5500

- The **8955-SSA** does not require the 5500 to be locked or ready to file.
- Unlike the 5500, you do **not** need to lock the filing for the user to sign.
- **DOL credentials are not required** for the 8955-SSA.

Requirements Before E-Filing

1. **Form Status**
 - All 8955-SSA forms in the batch must show “**OK**” for edit checks.
2. **Portal User Permissions**
 - In the **Edit Portal User** screen, ensure “**Allow 8955-SSA e-file**” is set to **Yes**.

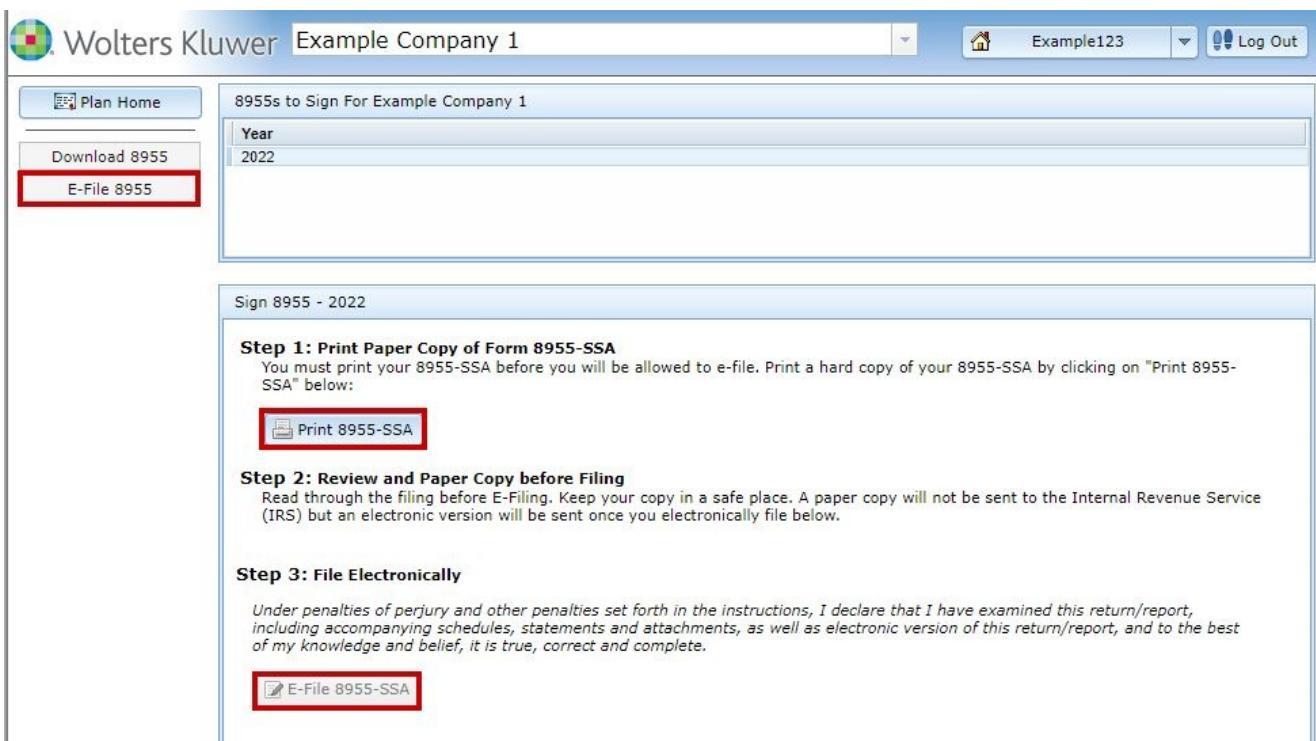
Granting Permissions

- Go to **Work with Portal Users and Signers**.
- Confirm **Allow 8955-SSA e-file** is marked **Yes** for the client.

Client E-Filing Process

Once permissions are set and the form status is OK, the client can e-file by:

1. Logging into the portal.
2. Selecting **E-File 8955-SSA**.
3. Completing these steps:
 - Click **Print 8955-SSA**.
 - Print and review the paper copy.
 - Click **E-File 8955-SSA** to submit to the IRS.



Wolters Kluwer Example Company 1

8955s to Sign For Example Company 1

Year
2022

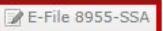
Sign 8955 - 2022

Step 1: Print Paper Copy of Form 8955-SSA
You must print your 8955-SSA before you will be allowed to e-file. Print a hard copy of your 8955-SSA by clicking on "Print 8955-SSA" below:

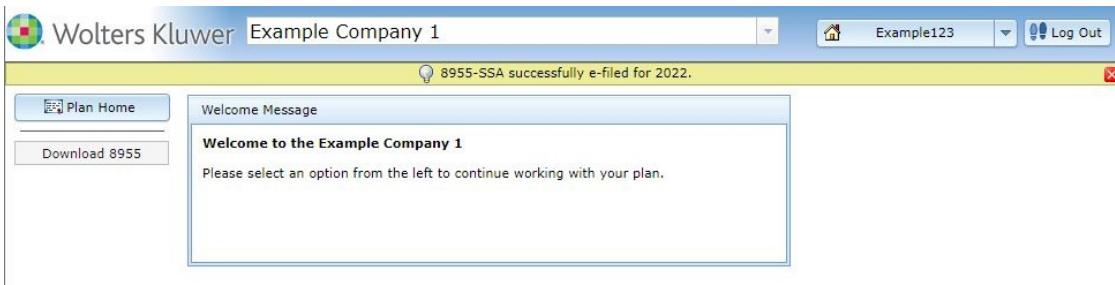


Step 2: Review and Paper Copy before Filing
Read through the filing before E-Filing. Keep your copy in a safe place. A paper copy will not be sent to the Internal Revenue Service (IRS) but an electronic version will be sent once you electronically file below.

Step 3: File Electronically
Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct and complete.



After the portal user has clicked on "E-File 8955-SSA," he/she will be directed to the main, portal "Welcome" screen and see the following message displayed in yellow:



Wolters Kluwer Example Company 1

8955-SSA successfully e-filed for 2022.

Welcome Message

Welcome to the Example Company 1

Please select an option from the left to continue working with your plan.

What Happens After E-Filing Form 8955-SSA

From the ftwilliam.com User Perspective

- When the portal user clicks "E-File 8955-SSA", the system creates a batch containing the plan.
- This batch appears on the "8955-SSA Batches - [YEAR]" screen with the status:
 - Locked
 - Pending
- These statuses indicate the batch has been sent to ftwilliam.com for fulfillment.

Billing Information

- Cost per Filing:** \$7.95 for each 8955-SSA e-filed by a portal user.
- No Batch Fee:** These filings are not subject to the \$16.07 batch fee.

- **Fee Update:** The previous \$7.46 fee increased to \$7.95 on **10/01/2025**.
