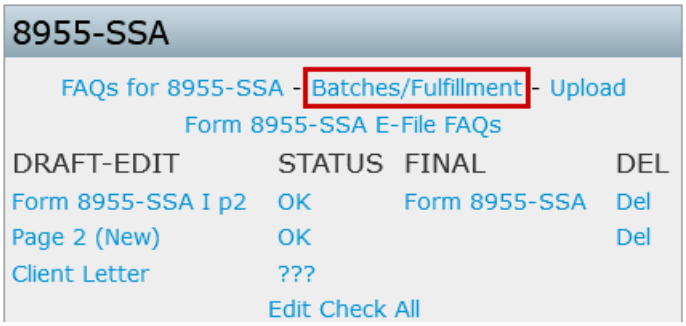
How to Create and Submit an 8955-SSA Batch

09/22/2026 9:34 am CDT

After the 8955 data has been entered, the data verified and edit checks have been run, the filing may be added to a batch.

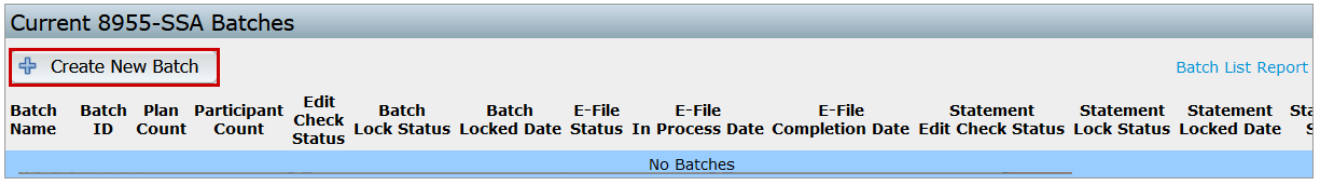
Access the Batch Screen:

- From within the 8955-SSA window of the 5500 module, click on the **Batches/Fulfillment** hyperlink.



Create a New Batch:

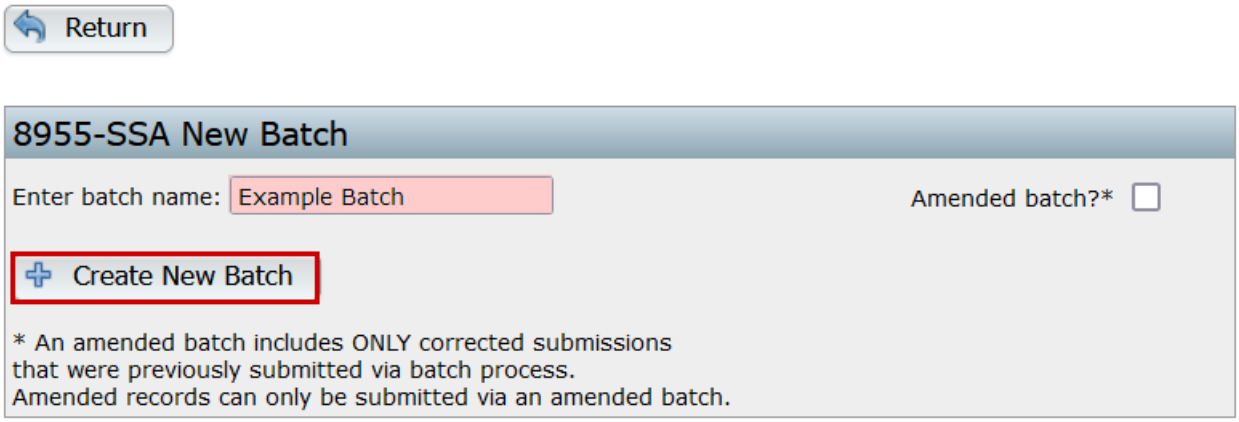
- From the Batches screen, click the **Create New Batch** button in the upper left corner.



- Enter a batch name for sorting and reference purposes, then click **Create New Batch**.

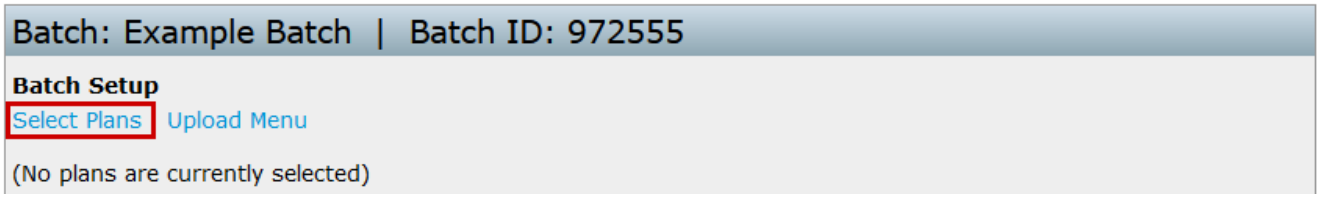
> **Note:** The Amended Batch checkbox, when selected will only allow those filings with Part I Line B of Form 8955-SSA marked as an amended to be added to the batch. If this is an original filing please do not check this box.

8955-SSA New Batch - 2023

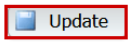


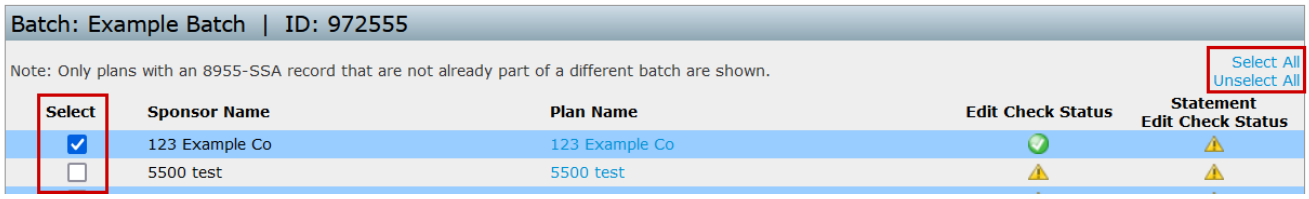
Adding Plans to the batch:

- In the new batch, click the **Select Plans** hyperlink. This will show all plans in the company code with an 8955-SSA present and not yet included in another batch.



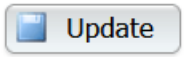
- Select the plans to add to the batch, then click **Update** (above or below the grid). Users may also choose to**Select All** or **Unselect All** in the upper right hand corner to quickly add all plans to the batch or remove the plans from the batch.





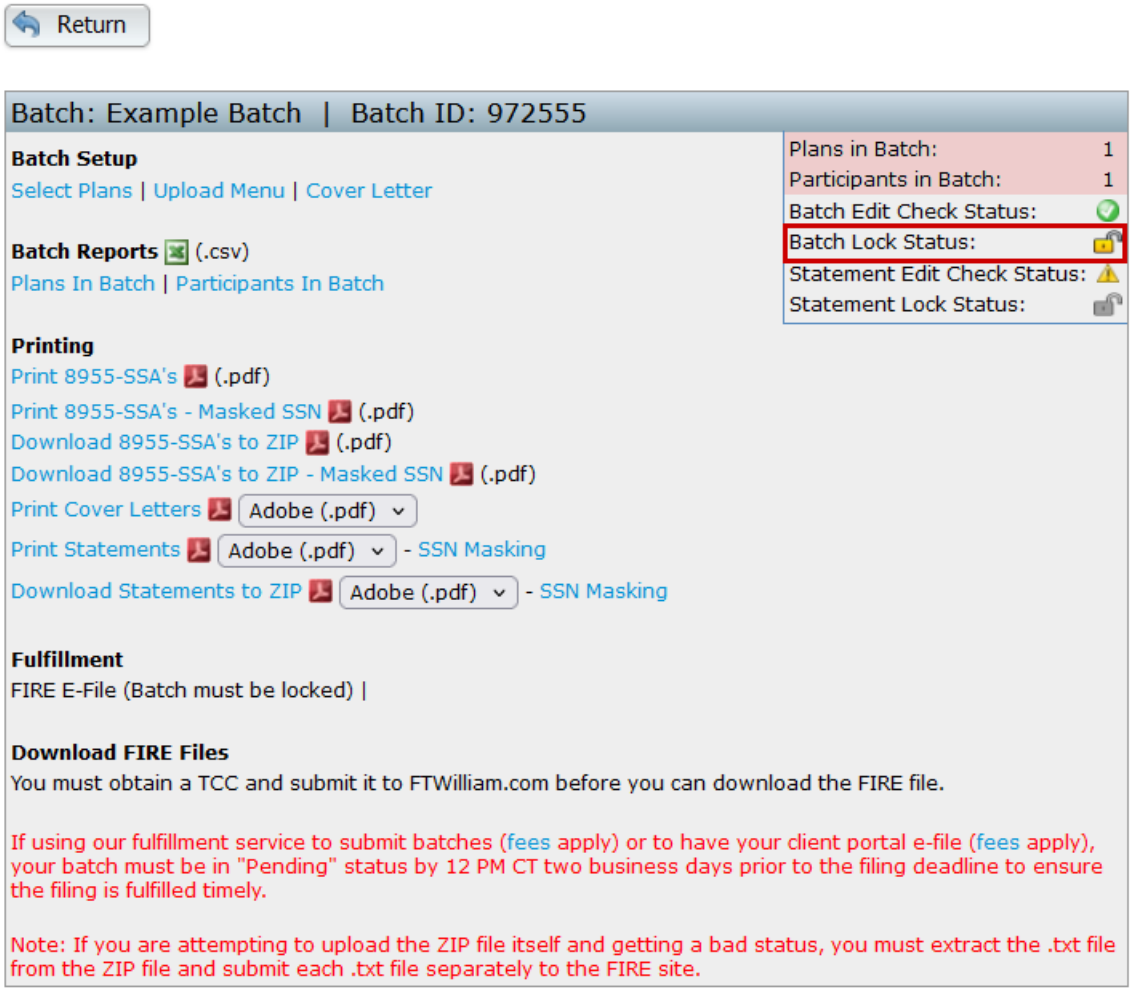
- After adding the plans, click the batch name link at the top of the breadcrumbs list.





- Once the plans are added users are redirected to the Batch screen that provides printing and fulfillment options.
    - In the upper right, the number of plans and participants in the batch will be displayed.
    - Below that is the **Batch Lock** status. The batch may only be locked if passing edit checks indicated by the green edit check icon beside the **Batch Edit Check Status.**
    - A batch must be locked in order to e-file.

> **Note**: The Statement Edit Checks do not need to be run or locked for e-filing the 8955-SSAs. ftwilliam.com does not offer a print and mail service. The statement batching feature checks for missing data and generates PDF files for printing outside the software. All plans in the batch will be compiled into a single file for each report type: Form 8955-SSAs, participant statements, and client letters (in .rtf or .pdf format).



Lock and E-file

- Click the padlock next to **Batch Lock Status** to lock the batch and enable fulfillment options.
- Once locked, click **FIRE E-file:**
    - Clicking **FIRE E-file** does not automatically submit the order. A confirmation popup will appear, showing the user agreement and fees associated with the filing. By selecting **Submit**, the firm agrees to the terms provided, and the batch will be placed in a **Pending** status. A paper invoice from CCH Inc. will be sent in the first business week of the following month.

> **IMPORTANT NOTICE:** Once you submit your returns, they are processed through an automated system. We cannot

make any changes to your forms once they are submitted.

- If your account has its own TCC, and the details are entered in the Account Profile, the**Download FIRE Files** option will show either a **TXT** hyperlink (for one plan) or a **ZIP** hyperlink (for multiple plans). Clicking this will download a file to be saved and imported into the IRS FIRE site. The ZIP file contains individual .txt files for each plan; these must be uploaded separately to the FIRE site, as there is no batch upload option for Form 8955-SSA.

Note: To obtain a TCC for Form 8955-SSA, the IRS requires completing an online IR Application. Once assigned, the Master User for the ftwilliam.com account can enter the 8955-SSA TCC in the Account Profile. This can be located by going to the WK logo > Administrative Tasks > Account Profile > scroll down to the 8955-SSA TCC Code Information.

Enter the TCC, Contact Name, EIN, and State, then click **Update** at the bottom of the screen.



Return

Batch: Example Batch | Batch ID: 972555

Plans in Batch:	1
Participants in Batch:	1
Batch Edit Check Status:	
Batch Lock Status:	
Statement Edit Check Status:	
Statement Lock Status:	

Batch Setup
View Plans | Upload Menu | Cover Letter

Batch Reports (.csv)
Plans In Batch | Participants In Batch

Printing
Print 8955-SSA's (.pdf)
Print 8955-SSA's - Masked SSN (.pdf)
Download 8955-SSA's to ZIP (.pdf)
Download 8955-SSA's to ZIP - Masked SSN (.pdf)
Print Cover Letters Adobe (.pdf)
Print Statements Adobe (.pdf) - SSN Masking
Download Statements to ZIP Adobe (.pdf) - SSN Masking

Fulfillment
FIRE E-File ($17.75) |

Download FIRE Files
ZIP

If using our fulfillment service to submit batches (fees apply) or to have your client portal e-file (fees apply), your batch must be in "Pending" status by 12 PM CT two business days prior to the filing deadline to ensure the filing is fulfilled timely.

Note: If you are attempting to upload the ZIP file itself and getting a bad status, you must extract the .txt file from the ZIP file and submit each .txt file separately to the FIRE site.