

Uploading Data to 8955 - SSA - Single Plan

08/19/2026 11:18 am CDT

This guide explains how to upload both Page 1 and Page 2 (Participant) data for Form 8955-SSA within the 5500 Module. Each section walks through the available upload options and what to expect along the way.

NOTE: The **Generic XML File Upload** feature is intended exclusively for importing data from **Relius** software. The XML schema for **Form 8955-SSA** is Relius-specific, and no other XML formats are supported for this form. Users of other software vendors, as well as users without a Relius-generated XML file, should use the **CSV File Upload** option instead.

Uploading Page 1 Information

To begin, open the **8955-SSA** box within the 5500 Module and select **Upload**. This opens the **8955-SSA Upload Menu**.

Home > Edit Company > Edit Plan > 5500 > 2025

Help

Company: Example Company ID:

Plan: Example Company ABC ID:

Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

Details: EIN: 867530936 • PN: 002 • PYE: 12-31

Edit Status: Unlocked

Signed Status: Not Signed

Acceptance Status: Not Submitted

5500 Menu

- SAR/AFN Print Settings
- Batch/Workflow
- Upload and Download Center
- Attachment Templates
- View 5500 FAQs
- 55AutoFill
- Bring forward 2024 data to 2025 for this plan only
- Bring forward 2024 portal users to 2025 for this plan only
- Clone 2025 Return/Report within 2025 for this plan only

Portal Menu

- Work With Signers/Portal Users
- Portal Manager
- Portal Link I

5500 - 2025

DRAFT-EDIT

STATUS

FINAL

DEL

May Not Print All FINAL Schedules

[Edit Check All 5500 Schedules](#)

[5500 Review Summary](#)

Add Schedules

[Form 5500](#)

[Form 5500-EZ](#)

[Form 5500-SF](#)

[Schedule A-New I](#)

[Schedule C-New I](#)

[Schedule D-New I](#)

[Schedule DCG-New I](#)

[Schedule G-New I](#)

8955-SSA

[FAQs for 8955-SSA - Batches/Fulfillment - Upload](#)

[Form 8955-SSA E-File FAQs](#)

DRAFT-EDIT

STATUS

FINAL

DEL

[Add Form 8955-SSA I](#)

-STATEMENT DATA-

DRAFT-EDIT

STATUS

- From here, choose **Page 1 CSV Upload (Page 1 Only)** this redirects to the **Upload Screen**.

Select Upload Type

[Generic XML Upload](#) (Page 1 & Page 2)

[Page 1 CSV Upload](#) (Page 1 Only)

[Participant CSV Upload](#) (Page 2 Only) (No Page 1 exists)

 Return

What's on the Upload Screen

The upload screen provides three helpful .csv files:

- **Sample File** – Supplies a preformatted .CSV file that shows exactly how Page 1 data should be structured. This is the best starting point when entering information for a new plan.
- **Schema File** – Lists all fields used in the upload, along with descriptions, data types, and acceptable values. This is useful for validating or troubleshooting data.
- **Existing Page 1 Data** – Exports any Page 1 information already entered for the plan. This makes it easy to update or correct data without starting from scratch.

For new 8955-SSA Form data, download the sample file [8955P1Sample.csv](#).

8955-SSA Page 1 Upload

Company: **Example Company**

Plan: **Example Company ABC**

Year: **2025**

**The file must be in comma-delimited format (e.g., "Filename.csv").
Do not rearrange or remove columns from the sample files.**

Download a sample file here: [8955P1Sample.csv](#) (right-click to download)

Download the schema file here: [8955P1Schema.xls](#) (right-click to download)

Download your existing data here: [Existing Page 1 Data \(.csv\)](#)

The system will not perform data integrity edits on uploaded data. Be sure your data complies with SSA/DOL requirements before uploading.

Example Company ABC

Upload file name:

No file selected.

Number of rows to ignore before header row:

 Return

After the required information has been added, return to the upload screen, select **Browse** to locate the file on your computer, and then select **Submit** to upload.

Once Page 1 details have been completed, the upload screen will now enable Page 2 Participant details to be imported.

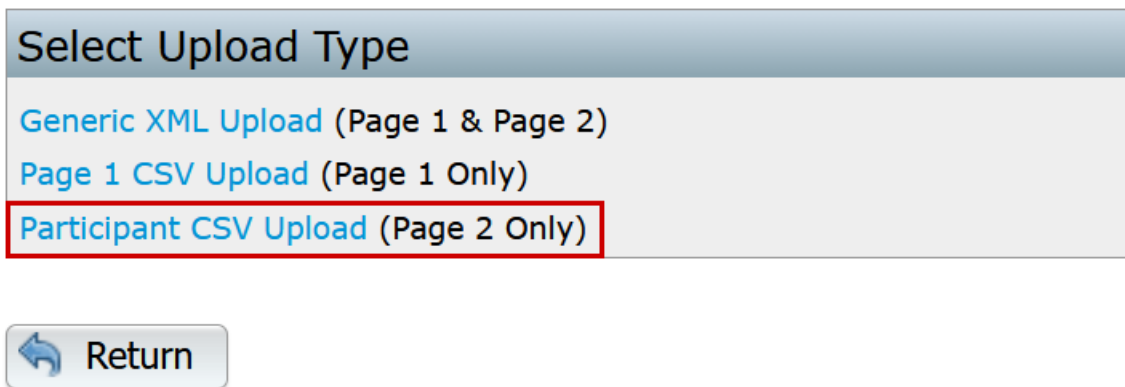
NOTE: Only one plan can be uploaded at a time. The system reads only the first row of data in the file.

Uploading Participant (Page 2) Information

*Before uploading Page 2 participant data, a Page 1 record must already exist. This can be added manually using **Add Form 8955-SSA**, or it can be created through the Page 1 upload process described above.*

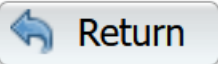
Once Page 1 is in place:

- Select the **Upload** link within the 8955-SSA box.
- In the **8955-SSA Upload Menu**, select **Participant CSV Upload (Page 2 Only)**.



Select Upload Type

- Generic XML Upload (Page 1 & Page 2)
- Page 1 CSV Upload (Page 1 Only)
- Participant CSV Upload (Page 2 Only)**

 Return

What's on the Upload Screen

The Page 2 upload screen offers the same three options found on the Page 1 upload page:

- **Download a sample file** – Generates a CSV template formatted for Page 2 participant data.
 - This template also contains fields to upload participant addresses for the participant statements. If you do not wish to use ftwilliam.com's statements, then columns M-U pertaining to the address fields may be left blank.
- **Download the schema file** – Provides detailed descriptions of each participant data field and the accepted values.
- **Download the existing Page 2 participant data** – Exports any participant information currently stored for the plan for quick edits and re-uploading.

8955-SSA Participant Upload

Company: **Example Company**
Plan: **Example Company ABC**
Year: **2025**

***** Caution *****

This will replace all of the Participant data on ALL Page 2's of the 8955-SSA.

**The file must be in comma-delimited format (e.g., "Filename.csv").
Do not rearrange or remove columns from the sample files.**

Download a sample file here: [8955Sample.csv](#) (right-click to download)
Download the schema file here: [8955Schema.xls](#) (right-click to download)
Download your existing data here: [Existing Plan Participants \(.csv\)](#)

The system will not perform data integrity edits on uploaded data. Be sure your data complies with SSA/DOL requirements before uploading.

Example Company ABC

Upload file name:

No file selected.

Number of rows to ignore before header row:

Download the sample CSV to begin entering participant information. After saving the completed file, select **Browse** to locate the file on your computer, and then select **Submit** to upload.

NOTE: This will replace all of the Participant data on ALL Page 2's of the 8955-SSA.

Once completed both page 1 and 2 will be available to review, run edit checks, and e-file.
