

How to Amend the Form 8955-SSA

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Amending a Plan After Printing and Mailing Form 8955-SSA

If you printed and mailed Form 8955-SSA plan-by-plan and later discover an error, follow the steps below to correct and refile the plan.

Option 1: If Printing and Mailing your form

Step 1: Access the Draft Form

- Navigate to the affected plan.
- Open the **draft Form 8955-SSA**.

Step 2: Mark as Amended

- Check the box for **Part I, Item B** to indicate the form is being amended.

Step 3: Make Corrections

- Update the form as needed.
- Print and **file the corrected form with the IRS**.

Amending a Plan After Using the Fulfillment Service

If you've used the fulfillment service and later discover an error in a submitted plan, follow the steps below to create an amended batch and make corrections.

Step 1: Create a New Batch

- Navigate to the **Batches/Fulfillment** screen.
- Select **Create New Batch**.
- Be sure to check the box labeled "**Amended batch?**" during setup.

Step 2: Select Fulfilled Plans

- On the **Select Plan** screen, you will see a list of all plans that have already been fulfilled.
- Select the plan(s) you need to amend.

Step 3: Access and Edit the Plan

- After selecting the plan(s), navigate to each one individually.
- Open the **draft Form 8955-SSA**.
 - The **Part I, Item B** checkbox will be automatically selected for you.
- Make all necessary corrections to the form.

Step 4: Finalize the Batch

- Once all updates are complete, proceed with locking the batch.
- You will then click on "FIRE E-File" under the "Fulfillment" heading to submit your batch to ftwilliam.com for fulfillment.
- 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."

Amending a Plan After E-Filing via the Portal

If a portal user has already E-Filed a plan and later identifies an error, follow the steps below to amend and refile the Form 8955-SSA.

Step 1: Access the Plan

- Navigate to the plan that was previously E-Filed.
- Locate and open the **draft Form 8955-SSA**.

Step 2: Begin the Amendment Process

- Click the **"Amend 8955"** button.
 - This will make the form editable.
 - The **"Amended"** box will be automatically checked.

Step 3: Make Corrections

- Review the form and make all necessary updates.
- Ensure all changes are accurate and complete.

Step 4: Verify Form Status

- Confirm that the form now shows an **OK status**.
 - This indicates the form is ready for submission.

Step 5: Refile the Plan

- Once the form is in OK status, the plan can be E-Filed again via the portal.

The screenshot shows the Wolters Kluwer Form 8955-SSA interface. At the top, a red banner states: "This form was submitted via Portal E-File and is part of a locked batch. Amend 8955". Below this, the form title is "Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits". A confirmation dialog box is displayed in the center, asking: "Are you sure you would like to Amend the 8955? It will be removed from the current batch and added to a new amended batch once E-Filed again." The dialog has "OK" and "Cancel" buttons. Below the dialog, a preview of the form is shown, including the title, year (2015), and Part I: Annual Statement Identification Information.

Correcting an Error After Downloading a ZIP File

If you've already downloaded a ZIP file and later discover an error in one of the plans, follow these steps to make corrections and generate an amended batch:

Step 1: Unlock the Batch

- Go to the **Batches/Fulfillment** screen.
- Locate the batch containing the plan with the error.
- Unlock the batch to allow edits.

Step 2: Remove the Plan

- From the unlocked batch, **remove the specific plan** that needs to be amended.

Step 3: Amend the Plan

- Navigate to the plan.
- Check the box for **Part I, Item B** to indicate an amendment.
- Make all necessary updates to the plan.

Step 4: Create a New Batch

- Return to the **Batches/Fulfillment** screen.
- Select **Create New Batch**.
- Be sure to check the box labeled **"Amended batch?"** during setup.

Step 5: Select Amended Plans

- On the **Select Plan** screen, you will see a list of:

- Plans with the “**Amended**” box checked on the 8955-SSA.
- Plans **not currently included in another batch**
- Select the appropriate amended plans.

Step 6: Finalize and Download

- Lock the new batch.
 - Download the updated ZIP file.
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