

# Amending a Plan After E-Filing via the Portal

10/30/2025 1:44 pm CDT

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.



This form is part of a locked batch.  
No changes can be made.

Return

Form 8955-SSA and pages

This form was submitted via Portal E-File and is part of a locked batch.

Amend 8955

General Instructions

Form **8955-SSA**

### Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits

Department of the Treasury  
Internal Revenue Service

This form is required to be filed under section 6057 of the Internal Revenue Code.  
Information about Form 8955-SSA and its instructions is at [www.irs.gov/form8955ssa](http://www.irs.gov/form8955ssa).

OMB No. 1545-2187

**2015**

This Form is NOT Open to Public Inspection

#### PART I Annual Statement Identification Information

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.

OK

Cancel

Form **8955-SSA**

### Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits

Department of the Treasury  
Internal Revenue Service

This form is required to be filed under section 6057 of the Internal Revenue Code.  
Information about Form 8955-SSA and its instructions is at [www.irs.gov/form8955ssa](http://www.irs.gov/form8955ssa).

#### PART I Annual Statement Identification Information

For the plan year beginning **01/01/2015**

- A  Check here if plan is a government, church, or other plan that is not a qualified plan.
- B  Check here if this is an amended registration statement.
- C Check the appropriate box if filing under:  
 Form 5558  
 Special extension