

Form 8955-SSA Access and E-Filing Instructions

Initial Client Communication

You will receive an email when your Form 5500 is ready for your review.

Email: **From:** rgf.messaging@fisglobal.com on behalf of (the person that prepared your 5500)

The email will include the following:

- A user name
- A link to the web-based application:

<https://rgf.fisglobal.com/5500Client/Site/Security/Login?ReturnUrl=%2F5500Client%2F%3Fid%3D363030-3DA1AD5279B3CD54>

Important note: this is the same site Voya® delivers the Form 5500. If Voya® prepares your form 5500, you will see both forms here once they are complete and ready to file.

Log In Page

- When you click on the link provided to you in the email notification, it will take you to the Log in page of the Voya® web-based application.
- On this screen, you will enter the user name and password Click, **Log In**.



The screenshot shows the login interface for the Voya Financial Form 5500 web application. At the top left is the VOYA FINANCIAL logo. On the right side, there is a login form with two input fields labeled "User Name" and "Password", a "Log In" button, and a blue link for "Forgot Password?". Below the login form, there is a blue arrow icon followed by the heading "Welcome to the Form 5500 web application!". Underneath this heading, a list of features is provided: "This site will allow you to: ... view your Form 5500 filing ... electronically sign your Form 5500 ... securely file your Form 5500 with the Department of Labor in compliance with the latest EFAST2 standards".

Plan Selection Screen

- Once you log in, you will be brought to the Plan Selection screen, as shown below. You can see the details and the current status of your published plan(s).
- Click on the link with the plan name to access your plan.

Home Welcome [\(edit\)](#) Log Out [?](#) [Print Queue](#)

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Plan Selection Form year: 2023

Page size: 10 1 items in 1 pages

Plan Name	EIN	Plan #	Plan Year End Date	Form Status	EFAST Filing Status	5558 Filing Status	8955-SSA Filing Status
Test Plan	359999999	001	12/31/2023	Published	Not Filed	Not Filed	Not Filed

Instructions

Welcome to the new 5500 Web Client! As you can see there are many changes to the user interface and we hope you will find it easier and more intuitive to use. You will find an instruction pane like this one on just about every page to guide you through the filing process. You can return to this page at any time by clicking on the "home" icon at the top left corner of any page you are on. In addition there is a User's Guide that you can access by clicking on the "?" at the top of the screen.

This is the Plan Selection screen. You can see the details and the current statuses of each plan that has been published to you. To begin the filing process find the plan you want to work with and left-click on the plan name. That will take you to the Plan Summary page where you start the filing process.

Viewing Your 8955-SSA

- To review your 8955-SSA and begin the E-filing process, click on **View Plan** from the Plan Summary Page.

Plan Summary **Abc company**

EIN: 71-0294708

Plan #: 001

Plan ID: 000001-13

Plan Year End: 12/31/2014

Form Year: 2014

Plan Year: 2014

Status Information

Form	Form Status	Filing Status
5500 Package	Viewed	Not Filed
8955-SSA filing	Viewed	Not Filed
5500 Filing extension (5558)	Viewed	

Instructions

This is the Plan Summary page. Above this pane you can see additional details for this plan and to the right you can see several features you can access. Depending on what has been published to you, you may not see all of the features listed below.

E-File Section

File EFAST Forms - This link will open a wizard that will guide you from reviewing the 5500 series forms to signing and filing them electronically to EFAST. Your Preparer may limit the available features that you can access in this filing process.

Links Section

E-File

[File EFAST Forms](#)
Electronically file your
5500 return (EFAST)

[File 8955-SSA](#)
Electronically file your
8955-SSA return (FIRE)

Links

[View Plan](#)
View forms and attachments
in the filing

Viewing Your 8955-SSA

- You will be brought to the Plan Details page.
- Under the **Actions** column, click on **View** link to the left of the 8955-SSA.

Plan Details Abc company

EIN: 71-0294708 Plan #: 001 Plan ID: 000001-13 Plan Year End: 12/31/2014 Form Year: 2014 Plan Year: 2014

Forms

<input type="checkbox"/> Print	Forms	Name	Actions
<input type="checkbox"/>	Plan Info		View
<input type="checkbox"/>	5500		View
<input type="checkbox"/>	5500 Sch. I		View
<input type="checkbox"/>	8955-SSA		View ←
<input type="checkbox"/>	5558		View Edit

Viewing Your 8955-SSA

- Your Form 8955-SSA will generate (Note: the Social Security Numbers will be masked).
- Please review the form thoroughly.
- Once complete click on the home page to get back to Plan Selection to begin the filing process.

Form **8955-SSA** Annual Registration Statement Identifying Separated Participants With Deferred Vested Benefits

Department of the Treasury
Internal Revenue Service

OMB No. 1545-2187
2014
This Form is NOT Open to Public Inspection

PART I Annual Statement Identification Information

For the plan year beginning **01/01/2014**, and ending **12/31/2014**

A Check here if plan is a government, church, or other plan that elects to voluntarily file Form 8955-SSA. (See instructions.)

B Check here if this is an amended registration statement.

C Check the appropriate box if filing under: Form 5558 Automatic extension Special extension (enter description)

Form **8955-SSA** (2014) Page 2

Name of plan: **Abc company** Plan Number: **001** EIN: **71-0294708**

PART III Participant Information - enter all requested information

9 Enter one of the following Entry Codes in column (a) for each separated participant with deferred vested benefits who:

Code A -- has not previously been reported.
Code B -- has previously been reported under the above plan number, but whose previously reported information requires revisions.
Code C -- has previously been reported under another plan, but who will be receiving benefits from the plan listed above instead.
Code D -- has previously been reported under the above plan number, but whose benefits have been paid out or who is no longer entitled to those deferred vested benefits.

(a) Entry Code	(b) Social Security Number (or FOREIGN)	(c) Name of Participant (See instructions.)			✓	Enter code for nature and form of benefit		Amount of vested benefit		Entry code "C" only	
		First name	M.I.	Last name		(d) Type of annuity	(e) Payment frequency	(f) Defined benefit plan -- periodic payment	(g) Defined contribution plan -- total value of account	(h) Previous sponsor's EIN	(i) Previous plan number
1	A	XXX-XX-1117	Elizabeth	Pereira	<input checked="" type="checkbox"/>	A	A		120,000	-	
2	A	XXX-XX-1118	Jay	Denote	<input checked="" type="checkbox"/>	A	A		250,000	-	

Electronic Filing

- Under Filing Status, the Form 8955-SSA should reflect as Not Filed.
- To File click on **File 8955-SSA**.

Plan Selection Form year: 2014

Page size: 10 1 items in 1 pages

Plan Name	EIN	Plan #	Plan Year End Date	Form Status	EFAST Filing Status	8955-SSA Filing Status
Abc company	710294708	001	12/31/2014	Viewed	Not Filed	Not Filed

Plan Summary Abc company

EIN: 71-0294708 Plan #: 001 Plan ID: 000001-13 Plan Year End: 12/31/2014 Form Year: 2014 Plan Year: 2014

Form	Form Status	Filing Status
5500 Package	Viewed	Not Filed
8955-SSA filing	Viewed	Not Filed
5500 Filing extension (5558)	Viewed	Not Filed

E-File

[File EFAST Forms](#)
Electronically file your 5500 return (EFAST)

[File 8955-SSA](#)
Electronically file your 8955-SSA return (FIRE)

Instructions

This is the Plan Summary page. Above this pane you can see additional details for this plan and to the right you can see several features you can access. Depending on what has been published to you, you may not see all of the features listed below.

Electronic Filing

- This is the first step to electronically filing your Form 8955-SSA. To validate the form and proceed with the filing click **Next**.

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Welcome (edit) Log Out (Print Queue)

File 8955-SSA Abc company

EIN: 71-0294708 Plan #: 001 Plan ID: 000001-13 Plan Year End: 12/31/2014 Form Year: 2014 Plan Year: 2014

1 Forms & Attachments 2 Validation 3 E-File

Forms

<input type="checkbox"/> Print	Forms	Name	Actions
<input type="checkbox"/>	Plan Info		View
<input type="checkbox"/>	8955-SSA		View

Print

Previous Cancel **Next**

Electronic Filing

- Once the form is successfully validated, click **Transmit** on the bottom of the screen.

Home Welcome (edit) Log Out ? (Print Queue)

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File 8955-SSA Abc company

EIN: 71-0294708 Plan #: 001 Plan ID: 000001-13 Plan Year End: 12/31/2014 Form Year: 2014 Plan Year: 2014

Forms & Attachments Validation E-File

Confirmation

Your filing has been successfully validated and is ready to be electronically filed through the FIRE system.

Would you like to submit your 8955-SSA for processing?

Transmit Cancel

E-File Results – IRS Fire system

- Under E-File Results section at the bottom of the screen, you should see that your filing is in queue for transmission to the IRS FIRE system.
- You may now click close at the bottom right of the screen.

File 8955-SSA Abc company

EIN: 71-0294708

Plan #: 001

Plan ID: 000001-13

Plan Year End: 12/31/2014

Form Year: 2014

Plan Year: 2014



Forms & Attachments



Validation



E-File

[View Status History](#)

Date	EIN	Plan #	Plan Id	Forms Status	Filing Status	User Name
05/18/2015	710294708	001	000001-13		Submitted	apinho1

E-File Results

Your filing is currently queued for transmission to the IRS FIRE system. The transmitter of this plan registered with the IRS will receive notification from the IRS when this filing is accepted.

 Close

E-File Results – IRS Fire system

- Filing Results:

- You will find your filing status and date transmitted under Filing Status as shown below.

Plan Summary Aetna Affiliate 401(k) Plan

EIN: [REDACTED] Plan #: [REDACTED] Plan ID: [REDACTED] Plan Year End: 5/15/2015 Form Year: 2015 Plan Year: 2015

Form Statuses: 8955-SSA: Printed

Workflow Status	
Workflow Status:	Not Ready
Change Workflow Status	

Filing Status	
Form Status:	Printed
8955-SSA Filing Status:	Filed
8955-SSA transmitted on:	3/11/2016
8955-SSA Filing due:	12/31/2015
5558 included:	NO

Prepare Plan	
Plan Information Worksheet	
Manage Forms & Attachments	
Generate SAR/AFN	
Print Plan	
Reassign Plan	
Delete Plan	
Status History	
Publish	
E-File	
Plan Utilities	

Forms in Plan	
Form	Validation Status
Add new form	
8955-SSA	

Thank you