



How To Guide: Filing Form 8955-SSA

D|W|C

ERISA CONSULTANTS

Strategic Precise Proactive

Accessing the DWC Portal



- Visit our website at www.DWCconsultants.com
 - Select 'Plan Document/Report Access' from the Client Access dropdown list

The screenshot displays the website header for DWC ERISA CONSULTANTS, with the tagline "Strategic Precise Proactive". A navigation bar includes links for SERVICES, KNOWLEDGE CENTER, CLIENT ACCESS, FINANCIAL ADVISORS, ABOUT US, and CONTACT US. The CLIENT ACCESS dropdown menu is open, with "Plan Document/Report Access" highlighted in a red box. Other menu items include "Year-End Data Submission", "Secure File Upload", and "Form 5500 E-Filing". To the right, an "Upcoming Events" section lists the ASPPA Regional Conference (November 17) and the Bank of Idaho Qualified Plans Symposium (September 25). The main content area features the slogan "Focused On You. And Your Business." and a call to action: "Learn how DWC can design and administer a customized plan to propel your business to high gear."

Logging In: Existing User



- Enter your username (which should be your e-mail address) and password
- Click the Sign In button



Username

Password

Remember My Username

[Sign In](#)

[Forgot password?](#)

[First time user?](#)

Logging In: New User



Username

Password

Remember My Username

[Sign In](#)

[Forgot password?](#)

[First time user?](#)



- Click 'First time user?' at the bottom of the screen

Logging In: New User



- Enter your e-mail address in the box that appears and click the “Submit” button.

First Time User Registration

Please enter the email address that you use to access PlanSponsorLink.com below. Then, click on the Submit button to request a new password. If the email address you entered is located, an email containing your new password will be sent to that address.

Email Address

Submit Cancel

- If the address entered matches the address DWC has on file...
 - You will receive an automated e-mail from Admin@PensionProSoftware.com, providing you with a temporary password and a link to login to the system.
 - Check your SPAM or junk e-mail folder if you do not receive this e-mail within a few minutes of clicking the “Submit” button.
- If the address entered does not match our records, please contact your consultant for assistance.

Logging In: New User



- Use the temporary password to login to the Portal.
- Once logged in, please click the user menu at the top right of the screen
 - Select “Change Password” to create your unique password for future use.

DWC ERISA Consultants, LLC

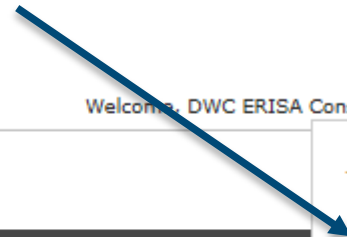
Welcome, DWC ERISA Consultants, LLC

1 My Active Tasks | Data Collection | Documents | Secure File Transfers | Industry Bulletins

My Active Task Your list of task items

ABC Company, Inc. 401(k) Plan (1)

- Help
- Training Videos
- Contact Us
- Change Password
- Logout




DWC Portal: Form 8955-SSA



- If not previously accessed, your Form 8955-SSA will be available as an Active Task for download.

The screenshot shows the 'My Active Task' section of the DWC Portal. At the top, there are navigation tabs: 'My Active Tasks' (with a red '1' badge), 'Data Collection', 'Documents', 'Secure File Transfers', and 'Industry Bulletins'. Below the tabs is a header 'My Active Task Your list of task items'. Underneath, there is a dropdown menu for 'ABC Company, Inc. 401(k) Plan (1)'. The main content is a table with columns for 'Name' and 'Active Date'. A single row is visible for 'Form 8955-SSA', which includes a PDF icon, a description, the date '5/15/2014', and a 'Download' button. A blue arrow points from the text above to this 'Download' button.


	Name	Active Date	
	Form 8955-SSA Form used to report terminated participants with balances due, or removed those paid out that were previously reported.	5/15/2014	Download

DWC Portal: Form 8955-SSA



- If you previously accessed the Form, your Form 8955-SSA can also be retrieved from the Documents tab.

The screenshot shows the DWC Portal interface. At the top, there is a navigation bar with several tabs: "My Active Tasks" (with a red notification icon), "Data Collection", "Documents" (which is circled in blue), "Secure File Transfers", and "Industry Bulletins". Below the navigation bar is a header for the "Documents" section, with the text "List of Forms, Compliance Reports and Legal Plan Documents" and a button labeled "Upload Fiduciary Document". Underneath, there is a link to "[-] Expand/Collapse All". The main content area shows a dropdown menu for "ABC Company, Inc. 401(k) Plan (1)", which is expanded to show "Compliance Reports (1)". A table displays the following information:

	Name	Description	Posted	Period	
	Form 8955-SSA	Form used to report terminated participants with balances due, or removed those paid out that were previously reported.	5/15/2014	01/01/2013 to 12/31/2013	Download

A blue arrow points from the "Form 8955-SSA" entry in the table to the "Documents" tab in the navigation bar.

Form 8955-SSA Filing



- **Print the form in its entirety and review.**
 - If any changes are requested, please notify DWC within 10 business days.
- **Sign and date in the spaces provided at the bottom of page 1.**
 - Any person authorized to sign on behalf of the plan sponsor/administrator may sign the form.
 - The same person may sign as both plan sponsor and administrator.
- **Retain a copy of the signed form for your files.**

DWC will electronically file the form on your behalf.



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