



How-To Guide:

E-Filing Form 8955-SSA

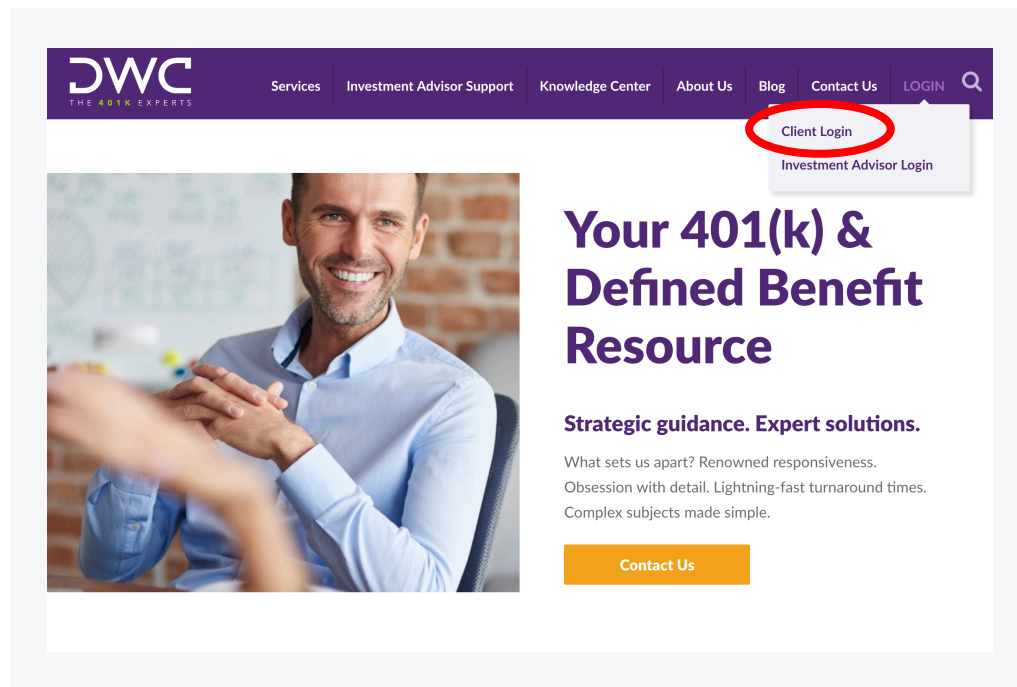
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Accessing the Form 5500 Portal

Step 1: Visit our website at www.dwc401k.com.

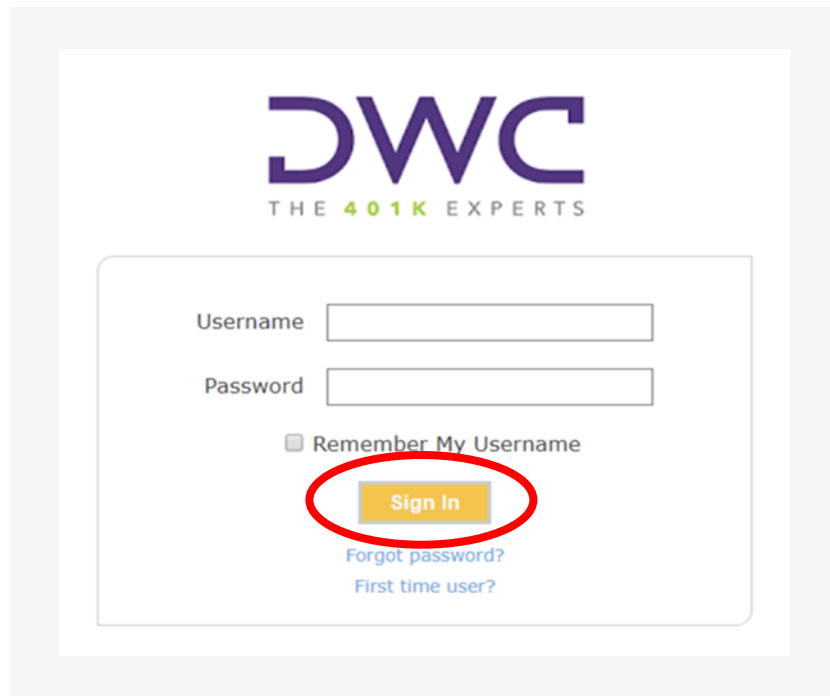
Step 2: Select “Client Login” from the “LOGIN” dropdown list.



Logging In: Existing User

Step 1: Enter your username (*which should be your email address*) and password.

Step 2: Click the “Sign In” button.

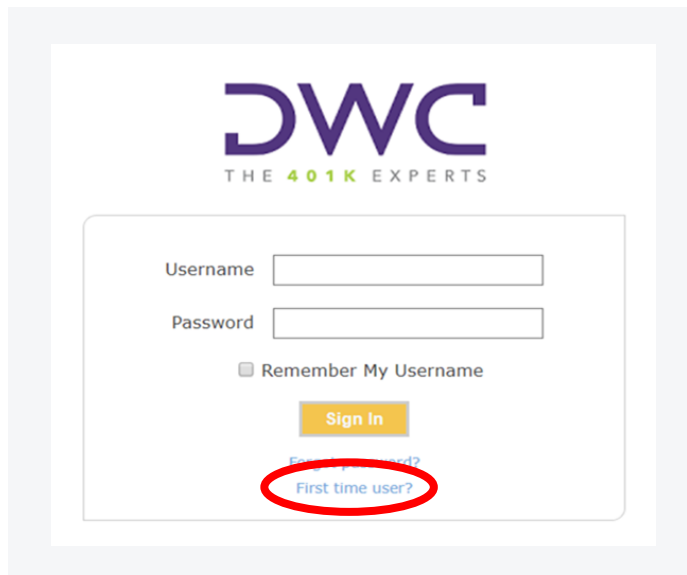


The image shows a login form for 'DWC THE 401K EXPERTS'. The form is enclosed in a light gray border. At the top, the logo 'DWC' is in large purple letters, with 'THE 401K EXPERTS' in smaller green and black text below it. The login fields are contained within a white rounded rectangle. It includes a 'Username' label and a text input field, followed by a 'Password' label and a password input field. Below these is a checkbox labeled 'Remember My Username'. A yellow 'Sign In' button is highlighted with a red circle. At the bottom of the form, there are two links: 'Forgot password?' and 'First time user?' in blue text.

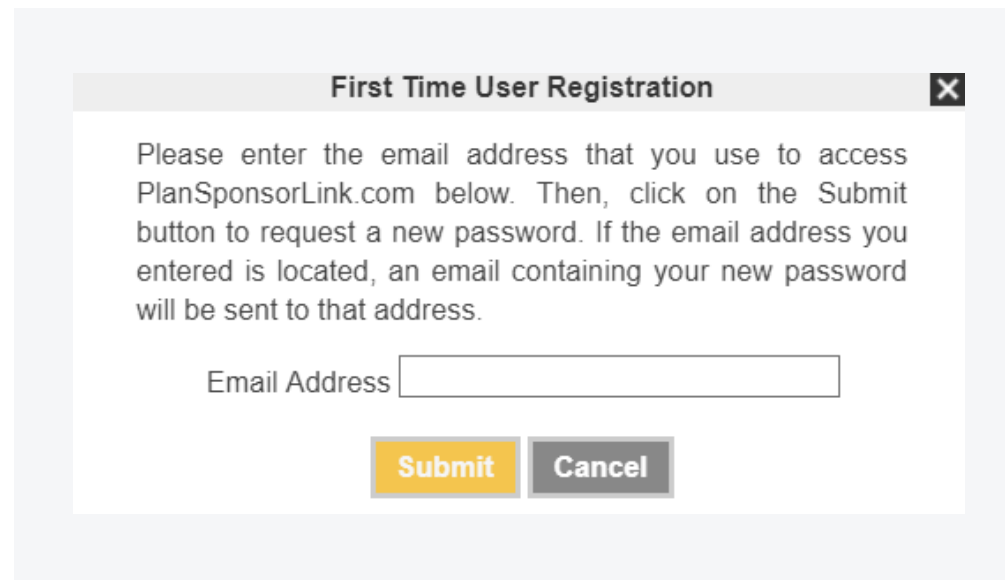
Logging In: New User

Step 1: Click “First time user?” at the bottom of the screen.

Step 2: Enter your email address in the box that appears and click the “Submit” button. You will receive an email with a default password.



The image shows the login interface for DWC THE 401K EXPERTS. At the top is the logo. Below it is a login form with fields for Username and Password. There is a checkbox labeled "Remember My Username". A yellow "Sign In" button is below the password field. At the bottom of the form, the text "First time user?" is circled in red.



The image shows a modal window titled "First Time User Registration" with a close button (X) in the top right corner. The text inside the modal reads: "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." Below the text is an "Email Address" label followed by a text input field. At the bottom of the modal are two buttons: a yellow "Submit" button and a grey "Cancel" button.

Logging In: New User

Step 3: Check to see If the address entered matches the address DWC has on file.

If the address matches

You will receive an automated email from admin@plansponsorlink.com, providing you with a temporary password and a link to log in to the system.

Note: Check your SPAM or junk email folder if you do not receive this email within a few minutes of clicking the “Submit” button.

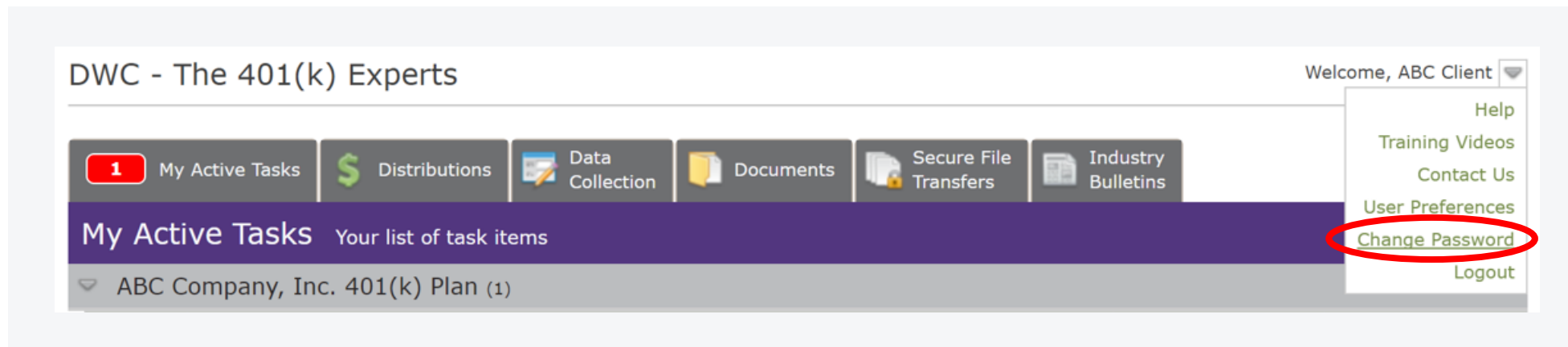
If the address entered does not match

Please contact your consultant for assistance.

Logging In: New User

Step 4: Use the temporary password to log in to the Portal.

Step 5: Once logged in, please click the user menu at the top right of the screen and select “Change Password” to create your unique password for future use.



DWC Portal: Form 8955-SSA

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

DWC - The 401(k) Experts

Welcome, ABC Client

1 My Active Tasks

Distributions

Data Collection

Documents

Secure File Transfers


Industry Bulletins

My Active Tasks

Your list of task items

Sign My 5500

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

	Name	Active Date	
	Form 8955-SSA Form used to report terminated participants with balances due, or removed those paid out that were previously reported.	12/31/2017	<div>Download</div>

DWC Portal: Form 8955-SSA

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

DWC - The 401(k) Experts

Welcome, ABC Client

0 My Active Tasks

\$ Distributions

Data Collection

Documents

Secure File Transfers

Industry Bulletins


Documents

List of Forms, Compliance Reports and Legal Plan Documents

Upload Fiduciary Document

ABC Company, Inc. 401(k) Plan (2)

Compliance Reports (2)

	Name	Posted	Effective	Period End	
	Form 8955-SSA Form used to report terminated participants with balances due, or removed those paid out that were previously reported.	11/01/2017	12/31/2017	12/31/2017	<div>Download</div>

Form 8955-SSA Filing

Step 1: Print the form in its entirety and review.

Note: If any changes are requested, please notify DWC within 10 business days.

Step 2: Sign and date in the spaces provided at the bottom of page 1.

Note:

- 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.*



Get in Touch

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