

REGISTERING For YOUR EFAST2 SIGNING CREDENTIALS

Step 1:

Access the Internet and go to <http://www.efast.dol.gov> or search for 'efast.dol.gov'.

This will take you to the DOL home page. You need to register on the website not only to fill out and track form 5500 filings, but to e-sign as well. So click on Register under the “Main” heading on the left.

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ERISA Filing - Welcome

New to EFAST?
New EFAST users need to Register in order to fill out and track form 5500 filings.

EFAST is a system designed to simplify and expedite the receipt and processing of the Forms 5500/5500 Short Form. These forms are filed each year by more than one million retirement and other employee benefit plans to satisfy annual reporting requirements under ERISA and the Internal Revenue Code.

The Department of Labor (DOL), Internal Revenue Service (IRS), and the Pension Benefit Guaranty Corporation (PBGC) created EFAST to streamline the forms and the methods by which they are filed and processed.

New and Noteworthy

U.S. Labor Department Announces New Online Tools For Workers and Plan Administrators:

- Pension Plan Actuarial Information Search
- DFVCP Penalty Calculator and Online Payment: News Release
- 2009 5500 Schedule C FAQs: News Release
- 5500 Deadline Extended After Severe Weather

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Step 2:

The next screen is the Privacy Statement. You should read the statement, but know that if you click the Decline Agreement button, or fail to check the box that you have read the agreement, you will not be able to proceed with your registration.



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Register - Privacy Statement

Please read and accept the following privacy statement to continue.

Thank you for visiting the Department of Labor (DOL) Web site and reviewing our privacy and security statement. DOL is strongly committed to maintaining the privacy of your personal information and the security of DOL computer systems. With respect to the collection, use and disclosure of personal information, DOL makes every effort to ensure compliance with applicable federal law, including, but not limited to, [The Privacy Act of 1974](#), [The Paperwork Reduction Act of 1995](#), and [The Freedom of Information Act](#).

As a general rule, DOL does not collect personally-identifying information about you when you visit our site, unless you choose to provide such information to us. The information we receive depends upon what you do when visiting our site.

If you respond to an online request for personal information:

Generally, DOL will use the information requested to respond to your inquiry or to provide you with the service associated with the request. However, when we request this information, we fully describe in a customized "Privacy Notice" the reasons for collecting it and DOL's intended use of the information. This Privacy Notice will either appear on the Web page collecting the information or be accessible through a link prominently displayed immediately preceding the information request.

If you visit our site to read or download information:

You must check the box after "I have read this agreement" and click the "Accept Agreement" button to advance to the next screen.

I have read this agreement ☐

Step 3:

Once you have told the DOL you have read the agreement and accepted it, the page where you enter your personal information will appear. This page is longer than previous pages, so the first picture shows the data you will enter and the second one shows the balance of the page.

IT IS VERY IMPORTANT THAT YOU MAKE SURE YOU ENTER YOUR EMAIL ADDRESS ACCURATELY. CHECK IT AND DOUBLE CHECK IT. An email from EFAST must be received by you in order to complete the registration process. If the email address is incorrect, EFAST will not try to deliver it again. And you will have to call 866-GO-EFAST for assistance.



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Register - Profile Information

Please enter your profile information and select Next to continue. Fields marked with an "*" are required.

* First Name:

* Last Name:

* Address:

Address 2:

* City/Town:

* State:

* Country:

* ZIP:

* Daytime Phone: [no dashes, example: 1234567890]

Fax:

* Email:

* Company Name:

Only Address 2 and Fax are optional fields. You must complete the rest of the fields.

You must enter your email address correctly. Double check it before moving on to the next page.

As you scroll down the screen, you will designate the User Type for which you will use your credentials. Click on the box in front of 'Filing Signer' and then click the 'Next' button at the bottom of the screen.

You must choose at least one User Type, but you may choose more.

* User Type:

☐ Filing Author

☒ Filing Signer

☐ Schedule Author

☐ Transmitter

☐ Third Party Software Developer

The only "User Type" you need is the Filing Signer. The other types apply to the firm(s) preparing your form 5500 filing and their software company.

If you click the ? in the circle, you will open a window that explains what each of the User Types are.

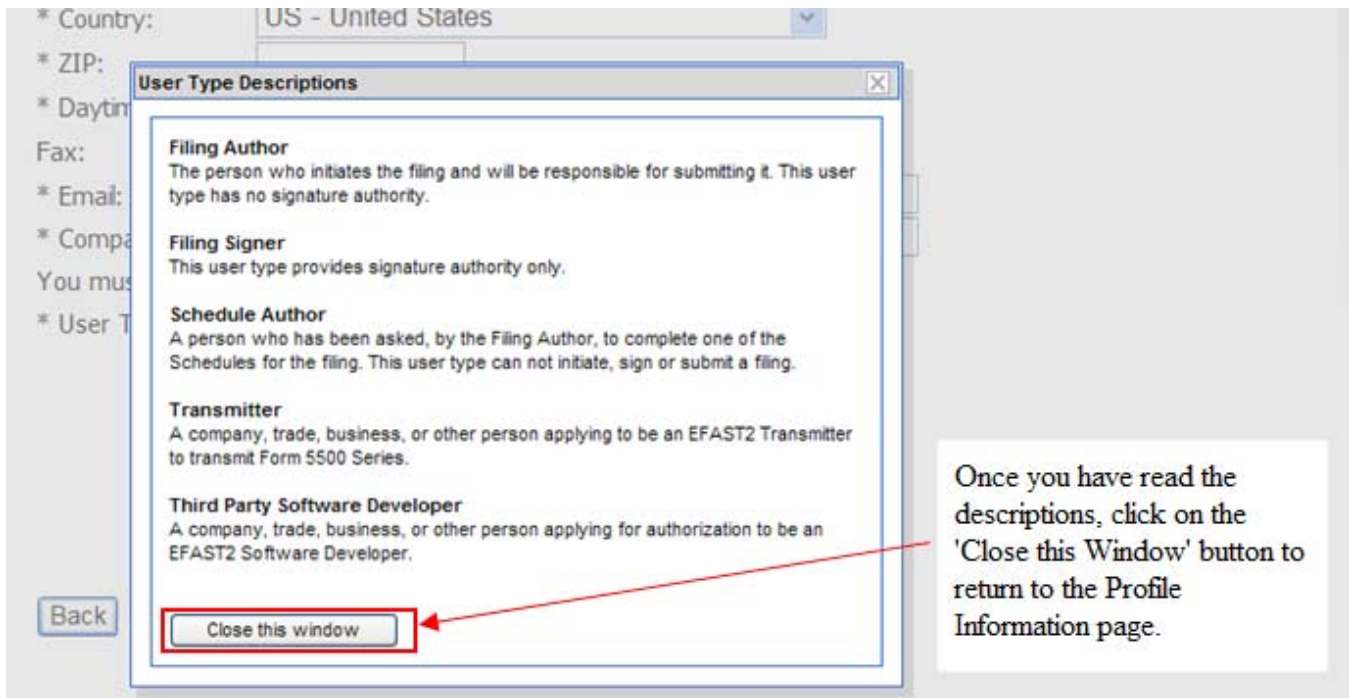
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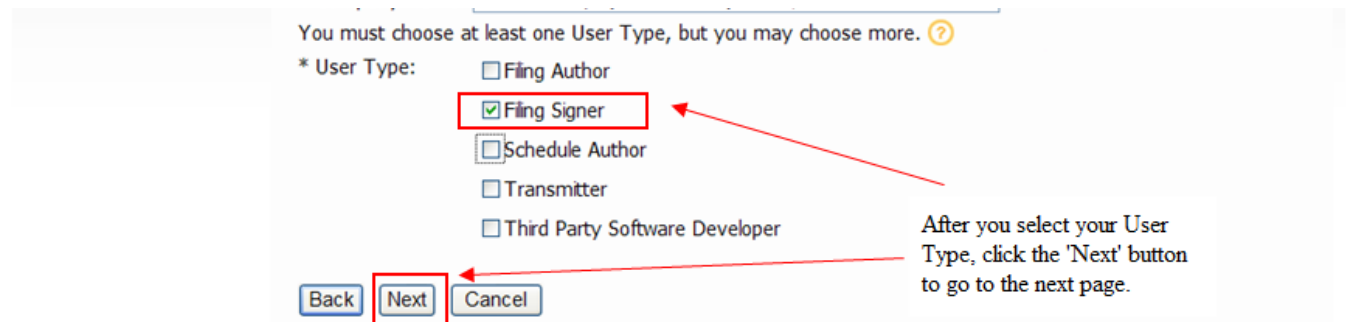
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If you click on the ? in the circle, a window will open with the definitions for each of the User Types.





Closing the window will take you back to the previous screen.



Step 4:

After you click the 'Next' button on the Profile Information page, you will be taken to the 'Challenge Question' page. The Challenge Question is a question that will be asked by the DOL to verify you are you later in the registration process or if you need to contact the DOL at a later time.



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Register - Challenge Information

Please select a Challenge Question, and provide an answer, then select Next to continue. Your Challenge Answer is required to complete your profile setup so please remember it.

* Challenge Question: Click the down arrow to display the question choices.

* Challenge Answer:

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There are only two choices; when were you born and where were you born.

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Register - Challenge Information

Please select a Challenge Question, and provide an answer, then select Next to continue. Your Challenge Answer is required to complete your profile setup so please remember it.

* Challenge Question:

* Challenge Answer:

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Since the only two challenge questions are very personal to you, it is unlikely that you will forget the answer to the question you select. But if you are concerned, you can print this page by pressing the 'Print This Page' button located above 'Register - Challenge Information'.

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Type in the answer to the Challenge Information you selected. The way you enter your answer is very important. If you should not remember how you entered the answer, you will not be able to access your UserID and PIN. Then you have to call 866-GO-EFAST and you will end up in a Catch-22 because your email address is being used. Better to make a note at this step of exactly how you entered the information.

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Register - Challenge Information

Please select a Challenge Question, and provide an answer, then select Next to continue. Your Challenge Answer is required to complete your profile setup so please remember it.

* Challenge Question:

* Challenge Answer:

Type in your information in a format that you will remember. Here we entered Zanesville OH, but we could have entered Zanesville, Ohio.

After you have answered the Challenge Question, click 'Next'.

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Step 5:

The next page is a Summary of the information you typed in. Review the information and decide if you need to make any changes or not. REMEMBER – Double check the email address you entered. It is vital to form 5500 filing for the DOL to have your correct email address. The ‘Edit’ button at the bottom will take you back to the Profile Information page so you can make changes. If the data shown is correct, just click the ‘Submit’ button.



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Register - Summary

Please review the information you provided. Select the Edit option to go back and make corrections or 'Submit' to complete this part of your registration.

* Last Name:
* First Name:
* Address:
Address 2:
* City/Town:
* State:
* Country:
* ZIP:
* Daytime Phone:
Fax:
* Email:
* Company Name:
* User Type:

The personal information you entered on the Profile Information page and the Challenge Question page is repeated in this Summary. Now is the time to correct any errors, or make any changes you need to make.

☒ Filing Author
☒ Filing Signer
☒ Schedule Author
☐ Transmitter
☐ Third Party Software Developer

* Challenge Question: Where is your place of birth?
* Challenge Answer: Zanesville OH

Submit

Edit

Cancel

If you need to change or decide to change the information shown on the Summary, click the 'Edit' button to go back to the Profile Information page so that you can enter the changes.

IF the summary shows the information you want to show, click the 'Submit' button.

Step 6:

When you submit your information, you will be taken to the Confirmation page. Just click the OK button and then check your email inbox.



The screenshot shows the 'Register - Confirmation' page of the EFAST system. The header includes the U.S. Department of Labor logo and a subscription form for e-mail updates. The left sidebar contains navigation links under 'Filings', 'Main', 'Support', and 'EBSA'. The main content area displays 'Registration Success!!' and provides instructions to check the e-mail for a confirmation link. A red box highlights an 'OK' button, with a red arrow pointing to it from the instruction text. Below the 'OK' button is a 'Back to Top' link. The footer contains a list of links (Frequently Asked Questions, Freedom of Information Act, etc.) and contact information for the U.S. Department of Labor.

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Register - Confirmation

Registration Success!!

This part of your registration is complete.

Please check the e-mail address you provided for a link into this system to acknowledge and complete the creation of your profile. You will need the answer to your challenge question in order to access the system.

OK

Click the 'OK' button and open your email account. An email from the DOL will appear.

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Step 7:

If you do not receive an email within a few minutes, chances are good that the email is stuck in the email spam filter. The remedy and retrieval of the missing email is dependent upon which spam filter is being used on the computer. If you do not know, and you can not access the Spam filter, you will need to contact the IT person responsible for the computer or the spam filter company for assistance.

When you get the email from EFAST, it will come from efast2@efastsys.dol.gov and will contain a link that will take you back into the EFAST Registration system so you can retrieve your signer ID and PIN. The link will be different for each person registering, so the one shown below will not work for others. A second link will be included for AOL users.



From: efast2@efastsys.dol.gov
To:
Cc:
Subject: Important: Your EFAST2 PIN and UserID

This will be addressed to the email address you provided on the Profile Information page.

Sent: Thu 12/31/2009 12:14 PM

You may now retrieve your PIN and UserID. For your security, you must go to the link below to retrieve these credentials from our secure server. Either select the link or copy the entire link and paste it into the address or location line of your Web browser. Make sure you copy and paste the entire link below; it may appear on multiple lines.

Please Note: Your PIN is available at the link below until 3/31/2010. If this date has already passed, please contact the EFAST2 Contact Center at 1-866-463-3278.

As part of the PIN application, you agreed not to disclose or share your PIN with anyone, including commercial service providers. You also agreed to keep your PIN in a safe location.

If your PIN is misplaced or stolen, either go to the EFAST2 Web site and change your PIN or contact the EFAST2 Contact Center at 1-866-463-3278.

<http://www.efast.dol.gov:80/portal/app/userAcknowledge?accountId=A1042671>

If you are an AOL user, click here:

Step 8:

When you click on the link in the email, you will be taken to the Challenge Question page which will show the question you selected and provide a space for you to enter the answer you gave previously.

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Register - Challenge Question Verification

Please answer your challenge question, and then select Next to continue.

Where is your place of birth?

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Remember to type in the answer exactly as you gave it previously.

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Register - Challenge Question Verification

Please answer your challenge question, and then select Next to continue.

Where is your place of birth?


Once you entered your answer, click the Next button to go to the next page.

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Step 9:

When the correct answer is given you will be taken to the PIN Agreement page. Note that at the time of this writing there is a prohibition on sharing your PIN with anyone. This means that when it is time to electronically sign the form 5500 filing, you must be the one to enter your signer ID and PIN.





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Register - PIN Agreement

Please read and accept the following PIN Agreement to continue.

By activating your PIN, you agree not to share your PIN with anyone. The security of your PIN is important because it can be used to:

- Electronically sign documents, and
- Access your personal records

If your PIN is lost or stolen, you also agree to:


- Contact the EFAST2 Contact Center at 1-866-463-3278 (1-866-GO-EFAST) , or

I have read this agreement ☐

Again, you must read the agreement and accept it to move to the next page.

Step 10:

After you have indicated that you have read the agreement and you accept it, clicking the Accept Agreement button will take you to the Signature Agreement page. As with the previous agreements, you must read it, indicate that you have read it and accept it before getting your User ID and PIN.



1/12/10

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Register - Signature Agreement

Please read and accept the following Signature Agreement to continue.

I understand and agree that the electronic signature is not transferable and that the inclusion of such electronic signature in a Form 5500 or Form 5500-SF return/report filed in electronic form shall have the same legal force and effect as my hand written signature. If I am not the Transmitter, I also agree that my electronic signature on a Form 5500 or Form 5500-SF constitutes consent for EFAST2 personnel to send my Transmitter an acknowledgment of receipt of transmission and to communicate with my Transmitter about the success or failure of the transmission and specific reason(s) for any failure(s).

If I am an EFAST2 Software Developer or EFAST2 Transmitter, I declare that I am authorized to make and sign this statement on behalf of the applicant. The applicant agrees that it and its employees will comply with all provisions of the EFAST2 procedures for the electronic filing of Form 5500 or Form 5500-SF for each year in which the applicant participates. Noncompliance will result in the applicant no longer being allowed to participate as an EFAST2 Software Developer or Transmitter. The applicant understands that acceptance as an EFAST2 Software Developer or Transmitter is not transferable. If applying to be an EFAST2 Transmitter, the applicant

I have read this agreement ☐

Step 11:

After you click the ‘I have read this agreement’ and clicked the ‘Accept Agreement’ button, you will be taken to the Finalize page. This is the page where you will receive your UserID and PIN. It is very important that you print this page or at least write down the UserID and PIN in a place where you can retrieve it when you need it.



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It is very important that you print this page. This is the only time you will see this information and if you forget or lose your User ID and PIN, you will have to have a record of the password you will select in the next step or call 866-GO-EFAST to have the DOL provide you with your User ID and PIN again.

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Register - Finalize

Here is your EFAST2 profile information. Please note your User ID and PIN and keep them in a safe place. In order to complete the registration process, click "Next" to create your password.

User ID:	Your UserID will be a combination of letters and numbers.
PIN:	Your PIN will be a 4-digit number.
ETIN:	
* Last Name:	
* First Name:	
* Address:	
Address 2:	The balance of the information
* City/Town:	shown on this page is the information
* State:	you entered on the Profile
* Country:	Information page
* ZIP:	
* Daytime Phone:	
Fax:	
* Email:	
* Company Name:	

Step 12:

At the bottom of the Finalize page, click the Next button to go to the Password page. You will be able to designate your own password and it is important that you pick a password that you can remember, or that you write down and file it in a location that will be easy for you to retrieve if you should lose your UserID and PIN. You will have to re-register if you can not remember your password and you forget your UserID and PIN.



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Register - Password

When you create your password, it must be between 10 and 16 characters long and must not contain spaces. You must use at least one letter and at least one number.

Password:

Confirm Password:

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Password Requirements

- Must be between 10 and 16 characters long
- At least 1 alpha character
- At least 1 numeric character

Your password will be masked when you enter it. You will have to enter the exact same password in the Confirm Password field.

Step 13:

Saving your password and confirmation of your password will take you to the Confirmation page showing that you have successfully registered for EFAST2. You may now electronically sign your form 5500 filing.

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Register - Confirmation

Successful Account Activation

Your account setup is now complete please retain your User ID and password to access the site in the future.

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You are now ready to electronically sign your form 5500 filing!!

After Registering for your signing credentials, electronically signing your Form 5500 filing will be easy.



