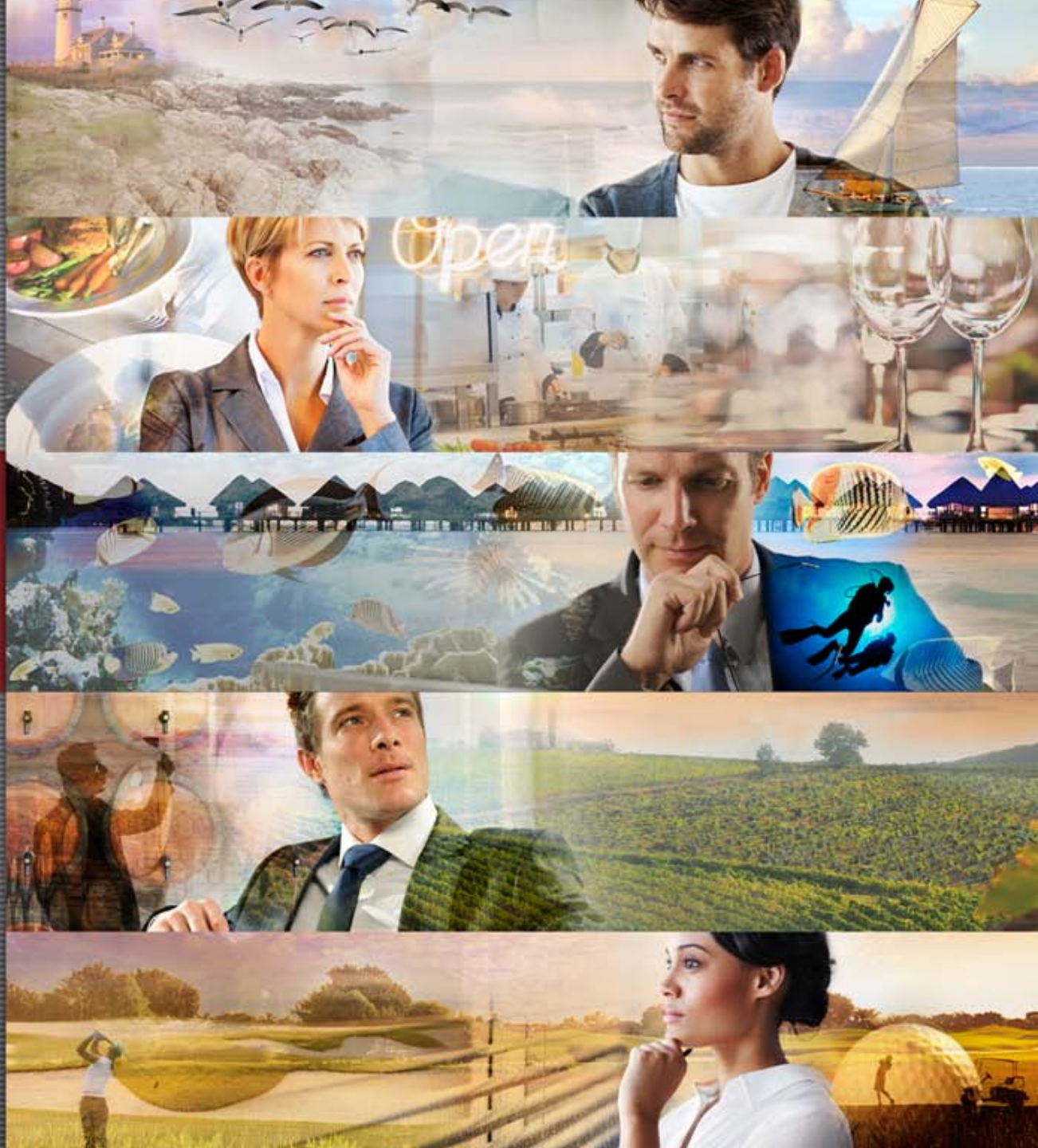


WHERE IS YOUR  
COMFORT PLACE?  
EJR CAN HELP YOU  
GET THERE.

**ejr** ejreynolds, inc.

>> EJREYNOLDS GUIDE TO  
OBTAINING SIGNING  
CREDENTIALS FROM THE  
DEPARTMENT OF LABOR

FEBRUARY, 2014





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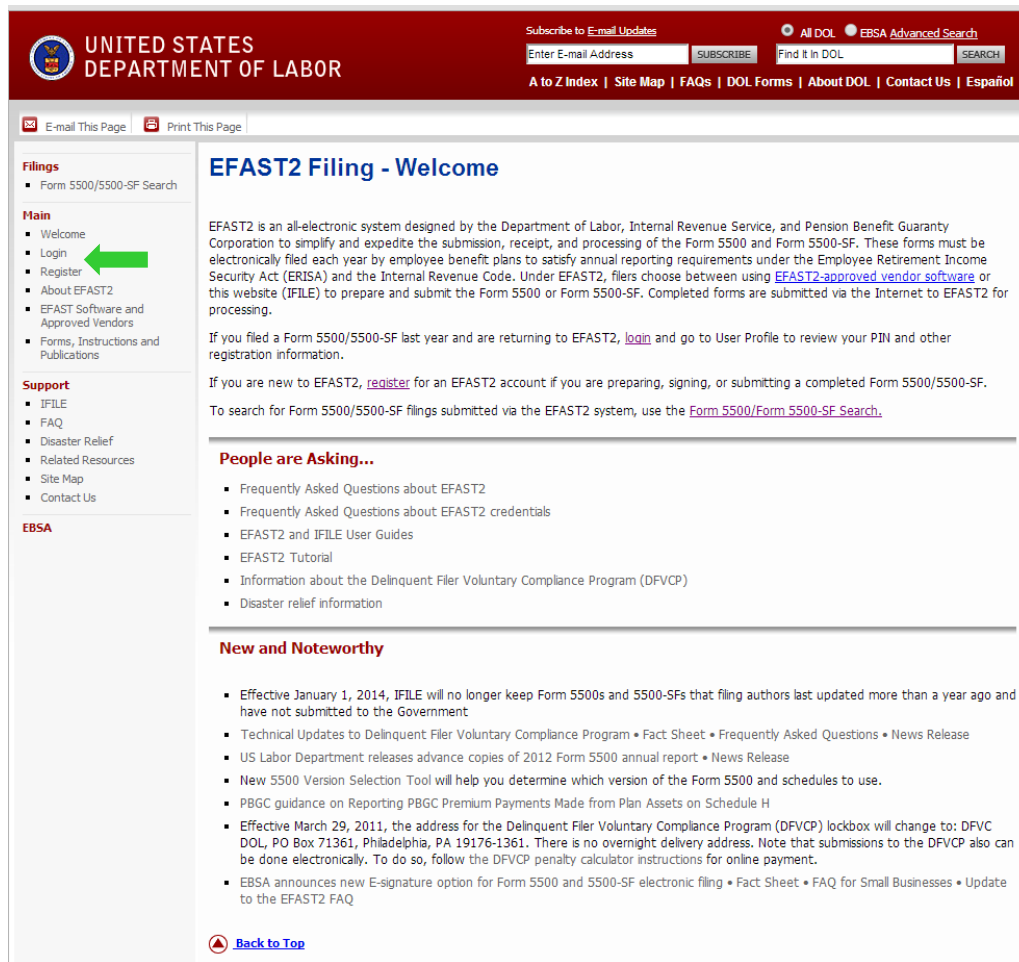


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- > For Plan Years beginning on or after January 1, 2009, the Form 5500 must be filed electronically through the Department of Labor's EFAST2 system.
- > The individuals who will be signing the Form 5500 must obtain filing credentials through the EFAST2 system.
- > In order to register with the EFAST2 system, the individuals must have their own email address.

# STEP 1 >>

Go to [www.efast.dol.gov](http://www.efast.dol.gov) and select the link to *Register*.



The screenshot shows the EFAST2 Filing - Welcome page. The header includes the United States Department of Labor logo and navigation links. The left sidebar contains a 'Main' menu with a green arrow pointing to 'Register'. The main content area has a 'Welcome' section with a paragraph about the system, a 'If you are new to EFAST2' section with a 'register' link, and a 'People are Asking...' section with a list of frequently asked questions. The bottom of the page has a 'Back to Top' link.

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## EFAST2 Filing - Welcome

EFAST2 is an all-electronic system designed by the Department of Labor, Internal Revenue Service, and Pension Benefit Guaranty Corporation to simplify and expedite the submission, receipt, and processing of the Form 5500 and Form 5500-SF. These forms must be electronically filed each year by employee benefit plans to satisfy annual reporting requirements under the Employee Retirement Income Security Act (ERISA) and the Internal Revenue Code. Under EFAST2, filers choose between using [EFAST2-approved vendor software](#) or this website (IFILE) to prepare and submit the Form 5500 or Form 5500-SF. Completed forms are submitted via the Internet to EFAST2 for processing.

If you filed a Form 5500/5500-SF last year and are returning to EFAST2, [login](#) and go to User Profile to review your PIN and other registration information.

If you are new to EFAST2, [register](#) for an EFAST2 account if you are preparing, signing, or submitting a completed Form 5500/5500-SF.

To search for Form 5500/5500-SF filings submitted via the EFAST2 system, use the [Form 5500/Form 5500-SF Search](#).

### People are Asking...

- Frequently Asked Questions about EFAST2
- Frequently Asked Questions about EFAST2 credentials
- EFAST2 and IFILE User Guides
- EFAST2 Tutorial
- Information about the Delinquent Filer Voluntary Compliance Program (DFVCP)
- Disaster relief information

### New and Noteworthy

- Effective January 1, 2014, IFILE will no longer keep Form 5500s and 5500-SFs that filing authors last updated more than a year ago and have not submitted to the Government
- Technical Updates to Delinquent Filer Voluntary Compliance Program • Fact Sheet • Frequently Asked Questions • News Release
- US Labor Department releases advance copies of 2012 Form 5500 annual report • News Release
- New 5500 Version Selection Tool will help you determine which version of the Form 5500 and schedules to use.
- PBGC guidance on Reporting PBGC Premium Payments Made from Plan Assets on Schedule H
- Effective March 29, 2011, the address for the Delinquent Filer Voluntary Compliance Program (DFVCP) lockbox will change to: DFVC DOL, PO Box 71361, Philadelphia, PA 19176-1361. There is no overnight delivery address. Note that submissions to the DFVCP also can be done electronically. To do so, follow the DFVCP penalty calculator instructions for online payment.
- EBSA announces new E-signature option for Form 5500 and 5500-SF electronic filing • Fact Sheet • FAQ for Small Businesses • Update to the EFAST2 FAQ

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## STEP 2 >>

Read the *Register – Privacy Statement*, select the *I have read this agreement* box and then click the *Accept Agreement* button.

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### Register - Privacy Statement (Step 1 of 7)

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:**

We collect and store the following information:

I have read this agreement ☐


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## STEP 3 >>

Complete the *Register – Profile Information* items with the required data. For *User Type*, select *Filing Signer*. When form is complete, click *Next*.


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### Register - Profile Information (Step 2 of 7)

Please enter your profile information and select Next to continue. Fields marked with an "\*" are required.  
OMB Control Number: 1210-0117 Exp. Date: 06/30/2015

Click on the  icons below for further explanations.

\* First Name:

\* Last Name:

\* Address:

Address 2:

\* City/Town:


\* State:

\* Country:


\* ZIP:

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


Fax:


\* Email:  

\* Company Name:

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



PAPERWORK REDUCTION ACT NOTICE

## STEP 4 >>

Now, select a *Challenge Question*, and provide a *Challenge Answer*. This is required to obtain your User ID and PIN. Click *Next* when done.


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### Register - Challenge Information (Step 3 of 7)

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:

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## STEP 5 >>

On the *Register – Summary* screen, review/edit your profile information and challenge question. After confirming the information, click *Submit*.


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### Register - Summary (Step 4 of 7)

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: Smith  
 \* First Name: Jane  
 \* Address: 9050 Pines Blvd.  
 Address 2: Suite 110  
 \* City/Town: Pembroke Pines  
 \* State: Florida  
 \* Country: US - United States  
 \* ZIP: 33024  
 \* Daytime Phone: (954) 431-1774  
 Fax: (954) 431-0833  
 \* Email: info@ejreynoldsinc.com  
 \* Company Name: EJReynolds, Inc.  
 \* User Type: ☐ Filing Author ☒ Filing Signer ☐ Schedule Author ☐ Transmitter ☐ Third Party Software Developer

\* Challenge Question: What is your date of birth?  
 \* Challenge Answer: January 18, 1983

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## STEP 6 >>

Next is the *Register – Check Email* screen stating that part of your registration is successful.

The screenshot shows the 'Register - Check Email' page of the EFAST2 system. The header includes the United States Department of Labor logo and navigation links. The main content area displays the title 'Register - Check Email' and a message: '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 also need the answer to your challenge question in order to complete the next step.' Below the message is an 'OK' button and a 'Back to Top' link. A left sidebar contains navigation links under 'Filings', 'Main', 'Support', and 'EBSA'. The footer contains contact information for the U.S. Department of Labor.

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**Register - Check Email**

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 also need the answer to your challenge question in order to complete the next step.

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> To complete your registration, please check your email for an email from [efast2@efastsys.dol.gov](mailto:efast2@efastsys.dol.gov). This email will contain a link to complete your registration





## STEP 7 >>

The email subject line will read “Important: Your EFAST2 PIN and User ID”. Click on the internet link from the email, which looks like this:

Dear Jane Smith,

You may now retrieve your PIN and User ID. 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 5/12/2014.

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.

<https://www.efast.dol.gov/portal/app/userAcknowledge?accountId=xxxxxxx>



If you are an AOL user, click here:

<a href="https://www.efast.dol.gov/portal/app/userAcknowledge?accountId=xxxxxxx">  
<https://www.efast.dol.gov/portal/app/userAcknowledge?accountId=xxxxxxx></a>

If you encounter any problems retrieving your PIN, you can contact the EFAST2 Contact Center for assistance.

Thank you,

U.S. Department of Labor

This is a system-generated email. No reply is necessary.

## STEP 8 >>

After using the internet link provided in the email, you will be directed to the *Register – Challenge Question Verification*. After answering the challenge question you set up, select *Next*.

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**Register - Challenge Question Verification**

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

\* Challenge Answer:

--Month-- / --Day-- / --Year--

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## STEP 9>>

A *Register – PIN Agreement* will appear which should be read and accepted. The accept, select the “*I have read this agreement*” box and then select the *Accept Agreement* button.

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### Register - PIN Agreement (Step 5 of 7)

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
- Request a new PIN by selecting User Profile from the EFAST2 Web site

I have read this agreement ☒

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## STEP 10>>

The next page is the *Register – Signature Agreement*. Please read and select the *I have read this agreement* box and then select the *Accept Agreement* button.


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### Register - Signature Agreement (Step 5a of 7)

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 further agrees that a copy of all returns/reports that the applicant transmits electronically to the Department of Labor will be provided to the plan administrator, employer or direct filing entity on whose behalf the return/report was transmitted.

Under penalties of perjury, I declare that I have examined this agreement, and to the best of my knowledge and belief the information provided in my request for access to the EFAST2 system is true, correct, and complete. I agree that this application can be made public information.

I have read this agreement ☒

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## STEP 11>>

The *Register – Password* page will now appear prompting you to enter a password that meets the specifications on the page. Select *Save* to complete the registration process.



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**Register - Password (Step 6 of 7)**

When you create your password, it must be between 8 and 16 characters long and must not contain spaces. You must use at least one uppercase letter, one lower case letter at least one number and at least one of the following special characters [!, @, #, \$, %, ^, &, \*, (, )]. No other special characters are allowed. Your new password must be different from your last 12 previous passwords. This field is case-sensitive.

**Password Requirements**

- Must be between 8 and 16 characters long
- At least 1 upper case alpha character
- At least 1 lower case alpha character
- At least 1 numeric character
- At least 1 of the following special characters [!, @, #, \$, %, ^, &, \*, (, )]

New Password:

Confirm New Password:

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> Please make note of this password as it is needed to log onto your EFAST2 profile.

# STEP 12>>

Congratulations you have completed your registration process with the EFAST2 system. The *Register – Confirmation* provides your EFAST2 profile information. ***Please print this page for your records.***


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## Register - Confirmation (Step 7 of 7)

**Successful Account Activation!**

Here is your EFAST2 profile information. Your account setup is now complete. Please retain your User ID and password to access the site in the future. Transmitters should also note your ETIN. You may print this page for your records.

User ID:	A2037684	
PIN:	1871	
ETIN:		
* Last Name:	Smith	
* First Name:	Jane	
* Address:	9050 Pines Blvd.	
Address 2:	Suite 110	
* City/Town:	Pembroke Pines	
* State:	Florida	
* Country:	US - United States	
* ZIP:	33024	
* Daytime Phone:	(954) 431-1774	
Fax:	(954) 431-0833	
* Email:	info@ejreynoldsinc.com	
* Company Name:	EJReynolds, Inc.	
* User Type:	<input type="checkbox"/> Filing Author <input checked="" type="checkbox"/> Filing Signer <input type="checkbox"/> Schedule Author <input type="checkbox"/> Transmitter <input type="checkbox"/> Third Party Software Developer	
* Challenge Question:	What is your date of birth?	



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Your EJReynolds Administrator will inform you when and how to sign the forms once they are ready. You may now exit the Department of Labor website. For additional guidance on signing the forms, please see the *EJReynolds Guide on How to File Your Form 5500*.