

5500 Form Signer Credential Procedures

The Department of Labor (DOL) is requiring that all 5500 filings be electronically filed and signed (known as "EFAST 2"). In the past, employee benefit plans could submit Form 5500 filings on paper. However, The DOL now requires electronic filing for all filers for plan years beginning on or after January 1, 2009. No paper filings of any kind will be accepted beginning January 1, 2010.

Detailed instructions to obtain your filing credentials can be found below. For the first filing year under EFAST 2 (2010), signers must register for filing credentials at the DOL website. You must have Internet access and an email account to establish credentials and approve filings. Once this process is complete, you can continue to use the UserID and PIN provided by the DOL in future years.

We suggest that you set aside approximately 15 minutes to complete the process.

1. Go to <http://www.efast.dol.gov> and select the link to register.
2. You will be asked to read and sign a privacy statement.
3. Complete your profile. You will be taken to a screen where you will be required to complete information that will serve as your profile (name, address, email and user type). Your user type is "filing signer".
4. Challenge question. Once your profile information is complete, you will be asked to select a challenge question and answer. This is required and will be used to obtain your UserID and PIN in step 6.
5. Confirm email. Check your email and click on the link provided in the email.
6. Answer your Challenge Question. You will be asked the challenge question you set up earlier in the process.
7. PIN agreement. You will then be asked to sign a PIN Agreement whereby you will agree not to share the PIN that is assigned to you.
8. Signature Agreement. You will then be asked to agree to a more detailed "signature agreement".
9. UserID and PIN. You will then be provided a UserID and Password. We strongly suggest printing this page for your records.
10. Password. The last step in the process is to create a password that will be assigned to the UserID and PIN that you were just provided. We suggest making a note of the password that you enter for your records. The password can be used with your UserID to obtain your PIN and/or log in to the DOL website in the future to change any profile information if necessary.