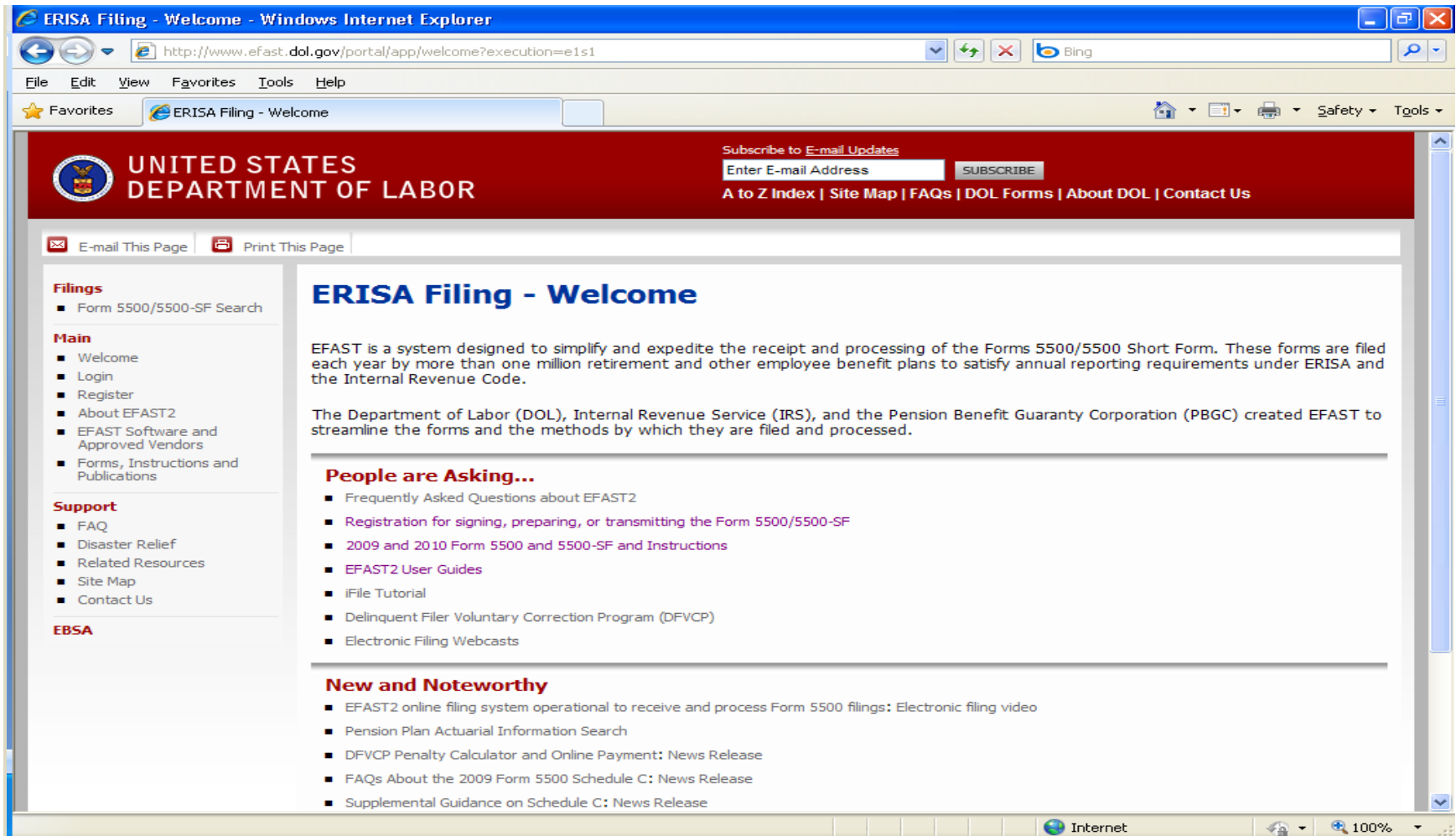


Instructions to Register for your EFAST2 UserID and PIN

Any person who signs the Form 5500 must register on the Employee Benefits Security Administration (EBSA) website to obtain an ID and PIN. You must have an email address to do so. Your registration will attach to the email address you use. You can change the email address later if needed.

Here are the steps:

1. Go to: www.efast.dol.gov – you should encounter the below page and you will need to click on “Register” on the left under the heading “Main”



The screenshot shows the EFAST2 website in a Windows Internet Explorer browser window. The address bar displays <http://www.efast.dol.gov/portal/app/welcome?execution=e1s1>. The page header features the United States Department of Labor logo and a subscription form for email updates. The main content area is titled "ERISA Filing - Welcome" and includes a navigation menu on the left with sections for Filings, Main, Support, and EBSA. The main text describes EFAST as a system for filing Forms 5500/5500-SF and lists frequently asked questions and new noteworthy information.

ERISA Filing - Welcome

Subscribe to E-mail Updates
Enter E-mail Address

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EBSA

ERISA Filing - Welcome

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.

People are Asking...

- Frequently Asked Questions about EFAST2
- [Registration for signing, preparing, or transmitting the Form 5500/5500-SF](#)
- [2009 and 2010 Form 5500 and 5500-SF and Instructions](#)
- [EFAST2 User Guides](#)
- iFile Tutorial
- Delinquent Filer Voluntary Correction Program (DFVCP)
- Electronic Filing Webcasts

New and Noteworthy

- EFAST2 online filing system operational to receive and process Form 5500 filings: Electronic filing video
- Pension Plan Actuarial Information Search
- DFVCP Penalty Calculator and Online Payment: News Release
- FAQs About the 2009 Form 5500 Schedule C: News Release
- Supplemental Guidance on Schedule C: News Release

2. You will be brought to this page where you need to read and accept the privacy agreement. Check the box to indicate you have read the agreement and click on "Accept Agreement".

The screenshot shows a Windows Internet Explorer browser window displaying the "Register - Privacy Statement" page for the EFAST2 system. The browser's address bar shows the URL: <https://www.efast.dol.gov/portal/app/userCreate?execution=e1s1>. The page header features the United States Department of Labor logo and a navigation menu with links for "A to Z Index", "Site Map", "FAQs", "DOL Forms", "About DOL", and "Contact Us". A sidebar on the left contains navigation links under "Filings", "Main", "Support", and "EBSA". The main content area is titled "Register - Privacy Statement" and contains the following text:

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:

I have read this agreement

Accept Agreement Decline Agreement

3. The EBSA will ask you to create a profile. Be sure to indicate your user type at the bottom as “Filing Signer”. This is the only credential you will need. Please use your primary business mailing address. Do not enter dashes in the phone number, fax number, or zip code.

Register - Profile Information - Windows Internet Explorer

https://www.efast.dol.gov/portal/app/userCreate?execution=e1s2

File Edit View Favorites Tools Help

Register - Profile Information

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EBSA

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

* First Name: John

* Last Name: Doe

* Address: 111 Any Street

Address 2:

* City/Town: Anytown

* State: North Carolina

* Country: US - United States

* ZIP: 27512

* Daytime Phone: 9191234567 [no dashes, example: 1234567890]

Fax:

* Email: john.doe@yourcompany.com

* Company Name: Any 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

Back Next Cancel

[Back to Top](#)

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4. You must choose one challenge question to answer. Currently you are limited to two simple options.

The screenshot shows a web browser window titled "Register - Challenge Information - Windows Internet Explorer". The address bar displays the URL: <https://www.efast.dol.gov/portal/app/userCreate?execution=e1s3>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "Register - Challenge Information".

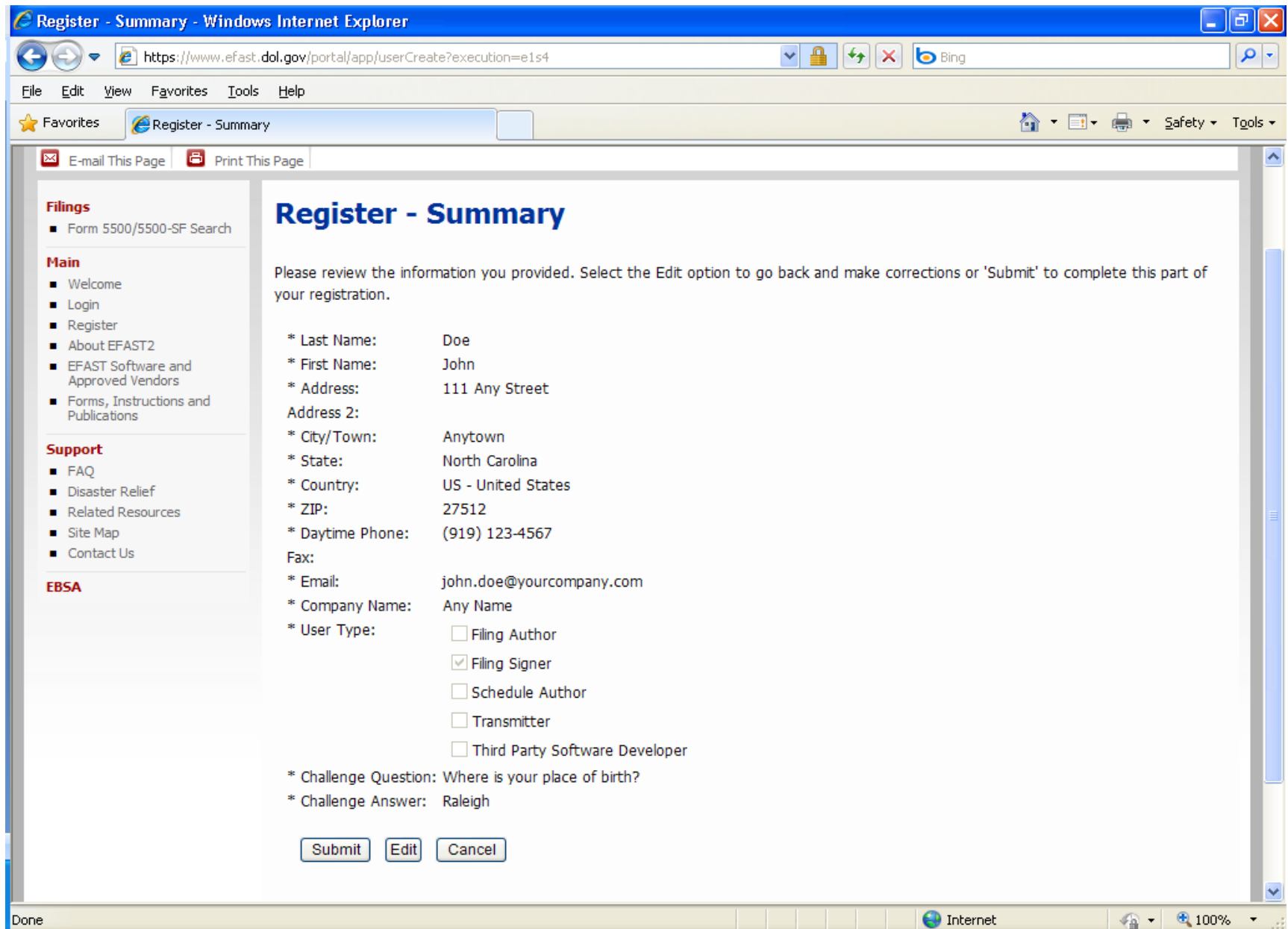
The page header features the United States Department of Labor logo and the text "UNITED STATES DEPARTMENT OF LABOR". To the right, there is a "Subscribe to E-mail Updates" section with an input field for "Enter E-mail Address" and a "SUBSCRIBE" button. Below this, navigation links include "A to Z Index", "Site Map", "FAQs", "DOL Forms", "About DOL", and "Contact Us".

The main content area is titled "Register - Challenge Information". It contains the following text: "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." Below this text are two form fields: "* Challenge Question:" with a dropdown menu currently showing "--Select--", and "* Challenge Answer:" with a dropdown menu showing two options: "What is your date of birth?" and "Where is your place of birth?". Below the form fields are three buttons: "Back", "Next", and "Cancel".

A sidebar on the left contains navigation links under three categories: "Filings" (Form 5500/5500-SF Search), "Main" (Welcome, Login, Register, About EFAST2, EFAST Software and Approved Vendors, Forms, Instructions and Publications), and "Support" (FAQ, Disaster Relief, Related Resources, Site Map, Contact Us). At the bottom of the sidebar is the "EBSA" section.

The footer of the page includes a red bar with links: "Frequently Asked Questions", "Freedom of Information Act", "Privacy & Security Statement", "Disclaimers", "Customer Survey", and "Web Site Notices". Below this, contact information is provided: "U.S. Department of Labor, Frances Perkins Building, 200 Constitution Ave., NW, Washington, DC 20210", "www.dol.gov", "Telephone: 1-866-463-3278", "TTY: 1-877-889-5627", and "Fax: 1-202-693-7888 | Contact Us".

5. Click on "Submit" after reviewing your information.



6. You should get a confirmation screen. An email will be sent to the address you registered at. Once you receive your email, you can click "OK" and close your internet browser.

The screenshot shows a Windows Internet Explorer browser window displaying the EFAST registration confirmation page. The browser's address bar shows the URL: <https://www.efast.dol.gov/portal/app/userCreate?execution=e1s5>. The page header features the United States Department of Labor logo and a "Subscribe to E-mail Updates" form with a "SUBSCRIBE" button. Below the header, there are links for "A to Z Index", "Site Map", "FAQs", "DOL Forms", "About DOL", and "Contact Us". The main content area is titled "Register - Confirmation" and displays a "Registration Success!!" message. The message states: "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." Below the message is an "OK" button and a "Back to Top" link. The left sidebar contains navigation links under "Filings", "Main", "Support", and "EBSA". The footer includes a "Frequently Asked Questions" link and contact information for the U.S. Department of Labor.

Register - Confirmation - Windows Internet Explorer

https://www.efast.dol.gov/portal/app/userCreate?execution=e1s5

File Edit View Favorites Tools Help

Subscribe to E-mail Updates
Enter E-mail Address SUBSCRIBE

A to Z Index | Site Map | FAQs | DOL Forms | About DOL | Contact Us

E-mail This Page Print This Page

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

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UNITED STATES DEPARTMENT OF LABOR

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www.dol.gov | Telephone: 1-866-463-3278 | TTY: 1-877-889-5627 | Fax: 1-202-693-7888 | Contact Us

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7. The email will come from efast2@efastsys.dol.gov. Be sure to check your spam folder if you do not see it. If you do not have it within five minutes, you will need to call the EBSA at 1-866-GOEFast (463-3278) and get assistance. They can finish your registration over the phone. Please be sure to save the email or print a hard copy. The email will look like this:

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 XX/XX/2010.
(the date will be three months after the date you register)*

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=AXXXXXXX>

If you are an AOL user, click here:

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

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

Thank you,

U.S. Department of Labor

8. When you receive the email, go to the indicated website. You should see the below screen. You will need to answer the challenge question you chose again.

The screenshot shows a Windows Internet Explorer browser window displaying the EFAST website. The address bar shows the URL: <https://www.efast.dol.gov/portal/app/userAcknowledge?execution=e3s1>. The browser's title bar reads "Register - Challenge Question Verification - Windows Internet Explorer".

The website header features the United States Department of Labor logo and the text "UNITED STATES DEPARTMENT OF LABOR". To the right, there is a "Subscribe to E-mail Updates" section with an input field for an email address and a "SUBSCRIBE" button. Below this, there are links for "A to Z Index", "Site Map", "FAQs", "DOL Forms", "About DOL", and "Contact Us".

The main content area is titled "Register - Challenge Question Verification" in large blue text. Below the title, it says "Please answer your challenge question, and then select Next to continue." The challenge question is "Where is your place of birth?" followed by an empty text input field. Below the input field is a "Next" button.

On the left side of the page, there is a navigation menu with the following sections:

- Filings**
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 - EFAST Software and Approved Vendors
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At the bottom of the page, there is a footer with links for "Frequently Asked Questions", "Freedom of Information Act", "Privacy & Security Statement", "Disclaimers", "Customer Survey", and "Web Site Notices". Below the footer, the address "U.S. Department of Labor, Frances Perkins Building, 200 Constitution Ave., NW, Washington, DC 20210" is listed, along with contact information: "www.dol.gov | Telephone: 1-866-463-3278 | TTY: 1-877-889-5627 | Fax: 1-202-693-7888 | Contact Us".

9. You will have to accept the PIN agreement. You are agreeing not to share the PIN with anyone, including MVP. Only you can sign the Form 5500 with your credentials. Check the box that you have read the agreement and click on “Accept Agreement”.

The screenshot shows a web browser window titled "Register - PIN Agreement - Windows Internet Explorer". The address bar displays the URL: <https://www.efast.dol.gov/portal/app/userAcknowledge?execution=e3s2>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "ERISA Filing - Welcome" and "Register - PIN Agreement".

The page header features the United States Department of Labor logo and the text "UNITED STATES DEPARTMENT OF LABOR". To the right, there is a "Subscribe to E-mail Updates" section with an input field for "Enter E-mail Address" and a "SUBSCRIBE" button. Below this, there are links for "A to Z Index", "Site Map", "FAQs", "DOL Forms", "About DOL", and "Contact Us".

The main content area is titled "Register - PIN Agreement" and contains the following text:

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 Change My PIN from the EFAST2 Web site

I have read this agreement

At the bottom of the agreement text, there are two buttons: "Accept Agreement" and "Decline Agreement".

The browser's status bar at the bottom shows "Done" on the left and "Internet" and "100%" on the right.

10. Read the Signature Agreement. It states that you understand and agree that your digital signature is as legally binding as your hand written signature. Check the box that you have read the agreement and click the “Accept Agreement” button.

The screenshot shows a web browser window titled "Register - Signature Agreement - Windows Internet Explorer". The address bar displays the URL: <https://www.efast.dol.gov/portal/app/userAcknowledge?execution=e3s3>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "ERISA Filing - Welcome" and "Register - Signature Agre...". The page content is as follows:

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 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.

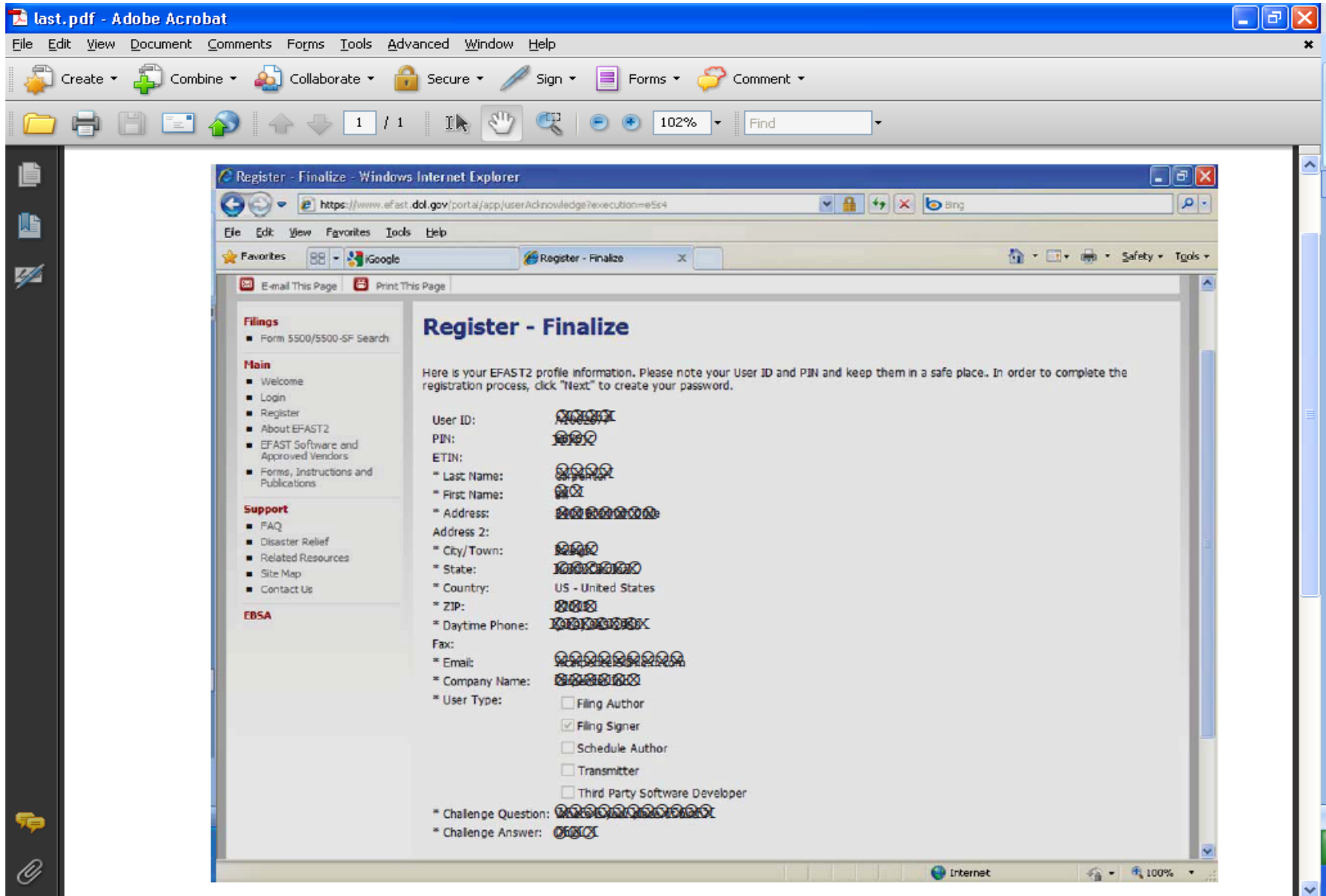
I have read this agreement

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11. The last screen is a confirmation of your registration and the assignment of your User ID and PIN. The User ID was included in the email from the EBSA, the PIN was not. You will need your PIN to sign the 5500. Either print this confirmation screen or save the User ID and PIN in a safe location. No one else can legally use your digital signature, so you should not share it with anyone.



12. Click the “Next” button and you will see the below screen and be asked to create a password. Save your created password with your User ID and PIN.

Register - Password - Windows Internet Explorer

https://www.efast.dol.gov/portal/app/userAcknowledge?execution=e3s5

File Edit View Favorites Tools Help

ERISA Filing - Welcome Register - Password

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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:

Save Back Cancel

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Password Requirements

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

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13. After creating and saving your password, you will be given an opportunity to log in using your User ID and password. You can do this to be sure it is set up correctly. If you need to change your password or PIN, you will return to this website. Please be sure to securely save your password and PIN if you make changes. You will not need to return to this website when it is time to sign the Form 5500. You will do that on the MVP plan sponsor website. This is where you will need the PIN number you saved.

Although the EBSA has released the 2009 Forms on their website, the software vendors are not yet ready with their versions. Once your MVP administrator has completed your plan's annual reports for 2009 and filled out the Form 5500 for you, you will receive instructions on how to access the form, review it and sign it. Please note that you will not yet see the link to the Form 5500 on the MVP Plan Sponsor website, but it will be up shortly and you will receive further instructions.

We appreciate your patience with the Department of Labor as we go through this new process.