

Filing Form 5500 electronically with EFAST2



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5500 filing
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through
EFAST2*

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In 2009, The Department of Labor (DOL) mandated that all Forms 5500 be filed electronically. In order to accomplish this, the signer of the Form 5500 must register with the DOL to obtain signing credentials. A valid e-mail address and internet access is required in order to sign the form electronically. Initially, there was no exception to this rule, but after many complaints the DOL decided that plan sponsors could also have their service provider file the Form 5500 on their behalf if a waiver is signed. (Note: The plan sponsor's actual signature will be displayed on the DOL website if a waiver is used to allow a service provider to sign electronically for the plan sponsor.)

In the signing process, the Form 5500 is uploaded to the DOL website and is posted almost immediately. The sponsor and service provider will also receive an e-mail from the DOL that will specify the status of the return. The same electronic signature can be used year after year and it can also be used for multiple Forms 5500 if the sponsor maintains multiple plans.

Please see the other side of this sheet for instructions on obtaining credentials, filing the Form 5500, and retrieving lost information.



**PLAN SPONSOR SERIES
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Instructions on filing electronically with EFAST2

Obtaining Signing Credentials

In order to obtain the credentials to sign your return, log onto www.efast.dol.gov and click on “Register.” You must read and agree to the privacy agreement and click on the “Accept this Agreement” button. Then, enter your profile on the next screen. Choose “Filing Signer” as the user type. The web site will offer a challenge question that you must answer. Review the information you have entered and submit. The system will then tell you that your registration is confirmed and will send an e-mail to you to finalize the registration process. Once you receive the e-mail from the DOL (it should be immediate), you will need to click on the link in the e-mail. You will need to answer your challenge question and agree to keep your PIN confidential. Then, you will receive your UserID and PIN which will be needed to sign your Form 5500. Make sure to print this information or record it in a safe location as you will need it to sign your form each year. You can choose your password and complete your registration. Your password is used only for obtaining your information from the DOL (if forgotten) – it is not used in the signing process.

Filing your Form 5500

When your Form 5500 is ready for signing, you will receive an e-mail with a link that directs you to a signing page. Click on the link, enter your UserID and PIN and click “Sign.” The webpage will thank you for signing and you will receive a confirmation e-mail that tells you that the form was received.

Retrieving lost information from the DOL EFAST2 website

Go to www.efast.dol.gov and click on “Login.” Click on “Forgot UserID” or “Forgot Password.” Enter your e-mail and click “Submit.” You will be prompted to enter your challenge question to verify your identity. The next screen will display your lost UserID or request that you enter a new password. To retrieve a lost PIN, go to www.efast.dol.gov and click “Login.” Enter your UserID and password. Click on “User Profile” and the system will display your PIN.