

# EFAST2 AND IFILE QUICK START GUIDE

## How to File a Form 5500 Series Return/Report



If you are using purchased software	If you are using the EFAST2 IFILE application
<p>Complete steps 1 and 2 to register.</p> <p>Then, refer to your purchased software's instructions or contact your software vendor.</p>	<p>Follow all steps listed below.</p>

1. **Go to** the EFAST2 website at [efast.dol.gov](http://efast.dol.gov).

2. **Sign In.**

**Current EFAST2 Users.** Click **Sign In with Login.gov**. Enter Email address and Password. Click Sign In. You will be rerouted back to the EFAST2 website.

-or-

**New EFAST2 Users.** Click **Sign In with Login.gov**. Click **Create an Account** if you do not already have a Login.gov account and follow the steps. After signing in to Login.gov, you will be rerouted to the EFAST2 website to create your EFAST2 profile, choose user roles, and obtain the EFAST2 UserID and PIN for creating/importing/signing/filing the Form 5500 Series Annual Return/Report. If you are uncertain which user roles to select when registering, check Filing Author and Filing Signer. You only need to register one time.

3. **Filing Summary.** Once you sign in, you will see the **Filing Summary** screen with a snapshot of any filings you may be working on or are required to sign.

Note that the top menu bar includes **Your Filings**.

4. **Start a Form 5500 Series Filing.** You must be registered as a Filing Author to start a Form 5500 Series filing. After logging in, click on one of the two following options under **Your Filings**:

a. **Create a Filing.** Select this option to start with a blank form. Follow the steps requesting the form and **Filing Name**. The Filing Name is for your record keeping only and is not sent to the Government.

b. **Import a Filing.** Select this option to upload an already prepared return/report in XML format into IFILE. Follow the steps requesting the form and **Filing Name** and select the **Browse** button to locate the XML file you wish to upload. The Filing Name is for your record keeping only and is not sent to the Government.

If you only have a PDF file that cannot be imported, use **Create a Filing** as described above.

5. **Complete the Form 5500 Series Annual Return/Report.** Select a tab at the top of the screen to go to a page and enter information into the required fields of the form. After entering information on each page, click the Save button at the bottom before selecting another tab.

When you are finished with the Form, click the **Save and Close** button. The screen that appears afterward is the **Filing Menu** screen. Your previously entered information will be saved, and you can come back to this form at any time to continue working on it.

6. **Complete any needed schedules.** From the **Filing Menu** screen, in the **Available Schedules** box on the right, click on the schedule you wish to add to your return/report, then click one of the two following buttons:

- a. **Create.** Select this option to complete a blank schedule.
  - b. **Import.** Select this option to upload a previously completed schedule in XML format.
- Enter information into the schedule fields through the tabbed pages. **Save and Close** to return to the **Filing Menu**. If you create a schedule in error, select the schedule and click Delete.
7. **Add any needed attachments.** From the **Filing Menu** screen, click **Add** in the **Attachments** section and follow the steps to upload an attachment in PDF or TXT formats. For Structured Attachments related to Schedule MB or SB, click **Add** and follow the steps to manually enter or import CSV file data into a structured table format, similar to schedules.
  8. **Check the completed return/report for errors.** From the **Filing Menu** screen, in the top row of buttons, click **Validate**. A pop-up box will display a list of errors in your return/report. Use the information in this the box to correct errors in your return/report, and then validate again.
  9. **Sign the filing.**

If you are the only person who needs to sign	If someone else needs to sign
<p>From the <b>Filing Menu</b> screen top row of buttons, click <b>Sign</b>.</p> <p>Follow the steps and enter your UserID and PIN. If you don't remember your PIN, click Profile &amp; PIN under Your Account.</p>	<p>From the <b>Filing Menu</b> screen top row of buttons, click <b>Add signers</b>.</p> <p>Enter the email address of the person who will be signing the return/report. That email address you enter must have already been registered in EFAST2.</p> <p>Click the <b>Add</b> button after entering each email address.</p> <p>Click <b>Done</b> when finished.</p>

10. **Submit the return/report.** From the **Filing Menu** screen's top row of buttons, click the **Submit** button. Your return/report will automatically be checked for errors. You may return to the filing and fix the identified errors, or you may scroll down the page to continue to submit your return/report. A pop-up box will alert you to when your return/report has been successfully submitted.
11. **Check the status of your return/report.** From the **Filing Summary** screen, under the **Filing Submission** heading, click the **5500 Series Submissions** button. You will see returns/reports that you signed or submitted and their statuses. If there are errors, click on the status to see a list of the issues.
12. **Keep a copy** of the filing. From the **Submission** page, click on the Filing Name to get a PDF copy of the filing.

For more detailed information on filing the Form 5500 Series Annual Return/Report, see the EFAST2 FAQs, the EFAST2 Guide for Filers and Service Providers, the EFAST2 IFILE User Guide, and EFAST2 Tutorial videos. You can find these resources at [EFAST2 Publications](#).

For live assistance, call the EFAST2 Help Desk at 866-GO EFAST (866-463-3278). The EFAST2 Help Desk is open Monday to Friday from 8 a.m. to 8 p.m. ET and is closed for Federal Holidays, except Columbus Day.