

EFAST2 AND IFILE QUICK START GUIDE

Steps for Filing a Form 5500 Series Return/Report



If you are using purchased software, you need to complete steps 1 and 2 (Registration). To complete and submit your Form 5500 Series Annual Return/Report with your purchased software after registering, refer to your purchased software's instructions or contact your software vendor.

If you are using the EFAST2 IFILE application to complete and submit your Form 5500 Series Filing, you must follow all steps listed below.

1. **Go to** the EFAST2 website at <https://www.efast.dol.gov>
2. **Register.** Click on the **Register** link. Follow the page-by-page registration process. You only need to register one time. By registering, you will obtain credentials (UserID, PIN, and password) needed to create/import, sign, and file the Form 5500 Series Annual Return/Report. When registering:
 - a. If you are uncertain which user types to select, check Filing Author and Filing Signer.
 - b. You must enter a valid e-mail address in order to receive an EFAST2 UserID. Once you receive your EFAST2 UserID via e-mail, click on the link in that e-mail to finalize the registration process. Your registration is not complete until you create a password.
3. **Login.** Enter your EFAST2-issued UserID and your password. Once you login, you will see the **Filing Summary** screen providing a snapshot of any filings you may be working on or are required to sign. Note that the links in the top menu bar will have expanded to include **Your Filings**.
4. **Starting 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 file you wish to upload. The Filing Name is for your record keeping only and is not sent to the Government.
5. **Complete the Form 5500 Series Annual Return/Report.** Select a tab at the top of the screen to go to the page desired and enter information into the required fields of the form. After entering information on each page, it is a good idea to 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 after you click the Save and Close button 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 into your return/report.

Enter information into the schedule fields through the tabbed pages.

7. **Add any needed attachments.** From the **Filing Menu** screen, in the top row of buttons, click **Add Attachments**. Follow the steps to upload an attachment in PDF or TXT formats.
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 appear showing a list of errors in your return/report. **Make sure your browser pop-up blocker is turned off or you will not be able to see this.** Close the box and correct any errors in your return/report.
9. **Sign the filing.**
 - a. If you completed the return/report and are the only person that needs to sign it, from the **Filing Menu** screen top row of buttons, click **Sign**. Follow the steps and enter your UserID and PIN. If you don't remember your PIN, click Profile & PIN under Your Account.
 - b. If you completed the return/report but need someone else to sign it, from the **Filing Menu** screen top row of buttons, click **Add signers**. 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. Click the **Add** button after entering each email address. Click **Done** when finished.
10. **Submit the return/report.** From the **Filing Menu** screen, in the top row of buttons, click the **Submit** button. Your return/report will automatically be checked for errors. You may fix any identified errors or 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. **Make sure your browser pop-up blocker is turned off or you will not be able to see the alert.**
11. **Check the status of your return/report.** From the **Filing Summary** screen, under the **Filing Submission** heading click the **Submissions** button. You will see

returns/reports that you signed or submitted and their status. If there are errors, click on the status to see a list of the errors.

- 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 FAQ, EFAST2 Guide for Filers and Service Providers EFAST2 IFILE User Guide**, and **EFAST2 Tutorial videos**. For live assistance, call the EFAST2 Help Desk at 866-GO EFAST (866-463-3278). The EFAST2 Help Desk is open Monday – Friday from 8 a.m. to 8 p.m. (Eastern Time), and closed for all Federal Holidays except for Columbus Day.