



EFAST2 THIRD-PARTY SOFTWARE DEVELOPERS

GETTING STARTED – Registration, Communications, Developer Materials

Private-sector companies can develop software applications to prepare and transmit Form 5500 series filings to the EFAST2 system for processing. Software applications must be validated and authorized by the Department of Labor, in accordance with DOL published schemas and communication protocols. The EFAST2 validation and certification process is the *Participant Acceptance Testing System (PATS)*.

GETTING STARTED

- Step 1. Register for EFAST access.** Go to <https://www.efast.dol.gov> and click *Register* for access to the EFAST2 website. Be sure to select “Software Developer” as a user type during registration. You will be assigned a User ID and PIN, and will create a Password and Challenge Answer during registration. We suggest that you print your profile page that contains this information.
- Step 2. Login.** Go to the <https://www.efast.dol.gov> website and click *Login*. Enter the EFAST2 User ID obtained during registration and the Password that you created.
- Step 3. Access Materials.** Click *Certify Software* from the left navigation menu to access Software Developer materials that apply to the PATS testing and certification process.
- Step 4. Required Downloads.** A PATS Package is available for each active form year. Click the desired *PATS Package* version to open and/or download the file. Open the PATS Package to access the *Software Developer Specification, which contains registration steps* (used in Step 5 below), *testing procedures, and certification criteria*.
- Step 5. Register Company and Product.** When ready to begin the PATS testing and certification process, log in and click *Certify Software* to register your company and product for a Transmission Software ID and a unique Filing Preparation Software ID for each distinct Form Year.

COMMUNICATION AND OUTREACH

- 1. Call or email with questions.** Call the EFAST Contact Center at 866-463-3278 (866-GO-EFAST) or email at efast2@efast.dol.gov with questions about the software developer materials or the software registration, testing, and certification process.
- 2. Email Distribution List.** An email distribution list is used for outbound notifications to software developers regarding maintenance windows, software developer material updates, system changes, or other relevant information. Submit requests for additions or changes to the email distribution list to efast2@efast.dol.gov.
- 3. Software Developer Conference.** An EFAST software developer conference occurs each June. The conference is an opportunity for software developers and preparers to meet with the DOL and EFAST2 teams to ask questions and understand upcoming software requirements and system changes. Notifications and other information are sent via email to third party software developers who request to receive the information via the distribution list. For further information, email the EFAST2 Contact Center at efast2@efast.dol.gov.



PUBLICATIONS AND MATERIALS

EFAST2 publications available to the general public:

- EFAST2 FAQs: [Electronic Filing System](#) and [Credentials](#)
- [EFAST2 Guide for Filers and Service Providers](#) – Detailed information regarding EFAST2 registration, login, credentials, and viewing information and status of submitted filings.

Software developer materials (sign in at <https://www.efast.dol.gov> and click *Certify Software*):

- **PATS Package** – Includes PATS user guides and test cases for each Form Year, draft versions of the Form 5500 and Form 5500-SF instructions, and the annual conference presentation.
- **Software Developer Specification** – Defines XML data elements, user interface requirements, communications protocols, and other technical specifications required to develop software to enable electronic filing submissions to the EFAST2 system. Provides registration steps, testing procedures, and certification criteria.
- **Data Element Requirements (DER)** – Government-defined specifications for form, schedule, and attachment data elements, validation and schema rules, and edit tests.
- **Schema files** – Government-defined XML schema definition (.xsd) files and Web Services Description Language (.wsdl) file.
- **Edit Test Mask Lists** – Business rules that are not active (i.e., are “masked”) for each Form Year.