

Instructions for Applying for EFAST2 Credentials

◆ What is EFAST2?

EFAST2 is a system designed by the Department of Labor, Internal Revenue Service, and Pension Benefit Guaranty Corporation to simplify and expedite the submission, receipt, and processing of the Form 5500 and Form 5500-SF. These forms must be filed each year for specified employee benefit plans to satisfy annual reporting requirements under the Employee Retirement Income Security Act (ERISA) and the Internal Revenue Code.

◆ What are EFAST2 credentials?

The 5500 Tax Form must be signed by the Plan Sponsor and Plan Administrator. This is an authorized representative of the company, generally a company officer. By applying for EFAST2 credentials you are receiving authorization to electronically sign the tax form as Plan Sponsor and Plan Administrator.

◆ How do I register for EFAST2 credentials?

Registration is performed on the [EFAST2 Web site](http://www.efast.dol.gov/welcome.html) (www.efast.dol.gov/welcome.html), select "Register" on the Welcome screen. You can get your EFAST2 credentials by completing five easy steps. The whole process should take just a few minutes.

1. Read and accept the privacy statement. On the next screen, provide contact information (name, address, phone, company name, etc.) and select "Filing Signer".
2. Select one of the two challenge (or security) questions and provide an answer. The challenge question and answer is used in case you forget your password. After verifying that the information you entered is correct, you will see the Registration Confirmation screen telling you that completion of your registration will be pending until you receive your Credentials Notification email with further instructions. EFAST2 generates and sends the Credentials Notification email within five minutes.
3. Once you receive the Credentials Notification email, select the link in the email that will take you to a secure EFAST2 web site, which will display your registration information, UserID, and PIN, and ask you for the answer to your challenge (or security) question.
4. You will be asked to accept the PIN Agreement, which describes the security of your PIN and what to do if your PIN is lost or stolen. You will also be asked to accept the Signature Agreement if you will be signing the Form 5500 or Form 5500-SF.
5. You will be prompted to create a password. The password must be a combination of letters, numbers, and special characters, and must be re-set after 30 days.

Once you have your UserID, PIN, and password, your EFAST2 registration is complete.

◆ How long does it take to receive my Credentials Notification e-mail?

Within five minutes of submission and acceptance of the registration form, EFAST2 should generate the credentials. Once the credentials are generated, EFAST2 sends a notification to the email address provided during registration. In this e-mail notification, you will find a link to a secure web site as well as instructions on how to retrieve and activate the credentials.

◆ Do I need to register each year?

No, you should only need to register one time. However, credentials that have never been used for three consecutive calendar years will expire. In addition, the registration is not linked to one plan. It can be used for multiple tax form filings.