



PBS

Professional Benefit Services, Inc.

EFAST2 Registration Instructions

The EFAST2 program is the required format that needs to be used for all Form 5500 filings to be submitted electronically.

Registration as a Filing Signer is required for individuals who will be signing form 5500 filings. Upon registering, which may take about 15 minutes, you'll need a valid email address and will then be issued DOL credentials that consist of a UserID (used to identify you) and a PIN (used as your electronic signature). EFAST2 user credentials belong to the individual who obtains them. They cannot be shared, so each signer will need their own. While company information is provided when registering, the credentials are personal and are not linked to a plan.

To obtain your DOL User ID & PIN, you will start with the DOL EFAST2 Website:

<https://www.efast.dol.gov/welcome.html>

1. Click **Sign in with Login.gov** and complete the required registration and/or log in.
2. After returning to the EFAST2 website from **Login.gov**, you can choose to **Create** an EFAST2 account if an existing account is not found for you.
3. On the EFAST2 Registration page, click **Continue**.
4. Read and accept the privacy statement.
5. On the next screen, provide your profile information and select "Filing Signer" as your user type. After verifying that the information you entered is correct, click **Submit**.
6. 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 filing.
7. The **Confirmation** page displays your EFAST2 **UserID** and **PIN**, and your EFAST2 registration is complete.

If you don't remember your PIN: After logging in to the EFAST2 website (above), you may view or change your PIN and/or profile information by going to **Your Account** and clicking **Profile & PIN**.

There are a couple things to know about these electronic credentials.

- Only one set of credentials will be issued for each email address. The credentials allow you to sign as the plan sponsor, the plan administrator, or both.
- The DOL prohibits sharing of your credentials with PBS, Inc., or others
- Credentials are issued to you as an individual, not your employer. If you leave your current employer, your credentials go with you. Be sure to update your profile if your information changes.
- Large plan filers will need to have their auditor's reports attached to their filing online. All large plan auditor reports must be provided to us in a pdf format that is not encrypted or password protected.

EFAST2 Additional Information

If you do not have a Login.gov account, you will need to follow these instructions for your Login.gov access:

1. On the EFAST2 login page, click **Sign in with Login.gov**.
2. On the [Login.gov](https://login.gov) website, click **Create an Account**.
3. Enter an email address. Use the same email address that you use for EFAST2 if you have an existing EFAST2 account. Click **Submit**.
4. A message will be displayed to indicate that an email was sent to the given email address.
5. Open the email sent to your email address, and from that email, click **Confirm Email Address**.
6. On the [Login.gov](https://login.gov) password page, create a strong password of at least 12 characters, and then click **Continue**.
7. On the Authentication Method Setup page, select any option from the list. For example, select the phone method to get security codes by text message (SMS) or phone call. Click **Continue**.
8. After adding an authentication method, click **Agree and Continue**.

The system is referred to as a paperless system, however, this is only on the part of the government. Plan sponsors/administrators must keep a physical signature or “wet signature” paper copy of the Form 5500 with all schedules and attachments. Electronic signatures are not accepted as a replacement of this requirement. The Form 5500 copy may be stored electronically as long as the electronic copy has the handwritten signatures.

Please let us know if you have any questions about the EFAST2 process. We also have copies of the LARGE pdf government instructions if you would like a copy.

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