

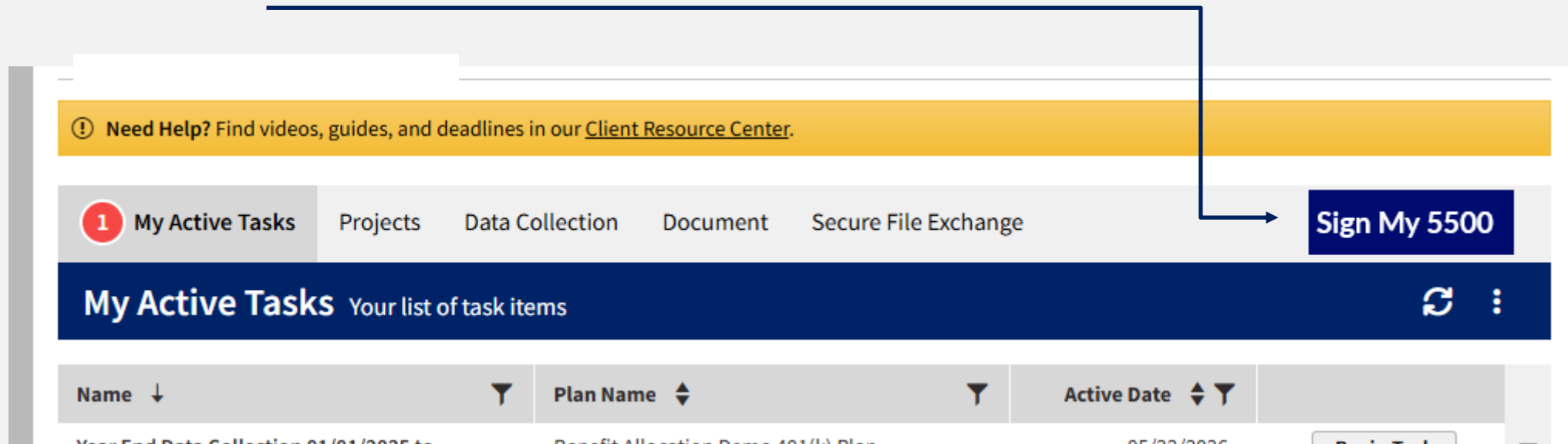
# How-To Guide:

E-Filing Form 5500 &  
Retrieving DOL EFAST2  
Credentials




# Login to the Portal to Electronically File

Click on the “Sign My 5500” button in the upper right hand corner.



You will be redirected to the Form 5500 Gateway.



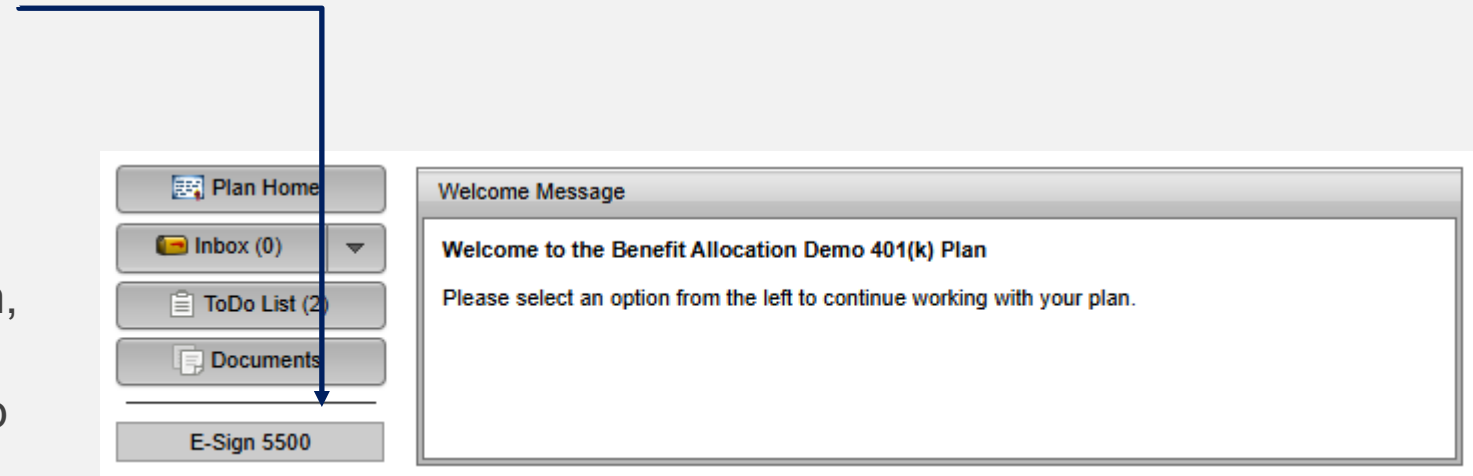
# Form 5500 Gateway:

E-Filing Form 5500

# E-Filing Form 5500

Select “E-Sign 5500” on the left side of the home screen.

- If you have access to more than one plan, you can change plans by selecting a plan name from the dropdown menu at the top of the screen.



# E-Filing Form 5500

**If this is not the first year in which our team has prepared a Form 5500 filing, you will need to select the current plan year.**

You may access prior years' filings from this screen as well. If this is the first year, you will bypass this screen.



The screenshot displays a web interface for e-filing Form 5500. On the left side, there is a vertical navigation menu with three buttons: 'Plan Home' (with a home icon), 'Documents' (with a document icon), and 'E-Sign 5500'. The main content area is titled 'Select a Year' and contains the instruction 'Please select a year to sign.' Below this instruction is a dropdown menu with the placeholder text 'Select a Year'. A blue arrow points to the dropdown arrow icon on the right side of the menu.

# E-Filing Form 5500: Step 1

The screenshot shows the E-Filing Form 5500 interface. On the left, there is a navigation menu with buttons for 'Plan Home', 'Inbox (0)', 'ToDo List (2)', 'Documents', and 'E-Sign 5500'. The main content area is titled '5500s to Sign For Benefit Allocation Demo 401(k) Plan' and shows a table with a 'Year' column containing '2025'. Below this, the 'Sign 5500 - 2025' section is displayed. It contains four steps: Step 1: Print Paper Copy of Form 5500, Step 2: Review and Sign Paper Copy before Filing, Step 3: Enter/Review EFAST Credentials, and Step 4: Sign and File Electronically. Step 1 includes a 'Print 5500' button with a blue arrow pointing left. Step 2 includes a 'Change Name' button. Step 3 includes input fields for 'Administrator/Sponsor DOL User ID' and 'Administrator/Sponsor DOL PIN'. Step 4 includes a 'Sign 5500' button. The footer of the page reads '© 2007-2026 CCH Incorporated or its affiliates'.

Plan Home

Inbox (0)

ToDo List (2)

Documents

E-Sign 5500

5500s to Sign For Benefit Allocation Demo 401(k) Plan

Year
2025

Sign 5500 - 2025

**Step 1: Print Paper Copy of Form 5500**  
You must print your 5500 before you will be allowed to sign. Print a hard copy of your 5500 by clicking on "Print 5500" below. **Note:** If you have logged out and back in, you must print the 5500 again to unlock Step 3.

←

If you do not have your signing credentials you will need to obtain them by going to [EFAST2 Registration](#) and clicking on 'Sign in with LOGIN.GOV'. Click [here](#) for detailed instructions on how to obtain signing credentials.

If you have lost your User ID or PIN contact DOL EFAST2 support at 866-463-3278 or visit [EFAST2 Login](#) (click on "Forgot UserID" or "Forgot Password").

**Step 2: Review and Sign Paper Copy before Filing**  
Once you have read through the filing and find it acceptable, sign the printed copy with a "wet" signature. Keep your signed copy in a safe place. A paper copy will not be sent to the Department of Labor but an electronic version will be sent once you electronically sign below.

**Step 3: Enter/Review EFAST Credentials**  
Verify that Name, User ID, and PIN exactly match (including punctuation and spacing) what you entered/received from the DOL registration process. If it does not exactly match click the button 'Change Name' below to change the name on this 5500.

Administrator/Sponsor Name: (View) Demo Client

Administrator/Sponsor DOL User ID:

Administrator/Sponsor DOL PIN:

**Step 4: Sign and File Electronically**  
*Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct and complete.*

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## Hard Copy Requirements

- The Department of Labor requires all plan sponsors to maintain signed copies of their form 5500s for their records.
- After clicking 'Print 5500', a PDF version of the Form 5500 will appear in a new tab or window. Depending on your settings, you may need to click Open on a pop-up dialogue.
- A copy must be made available, upon request, to participants, beneficiaries and the DOL.
- Plan sponsors may use electronic media to store copy as long as signatures are plainly visible.

# E-Filing Form 5500: Step 2 - 3

The screenshot displays the E-Filing Form 5500 interface. On the left, there is a navigation menu with buttons for 'Plan Home', 'Inbox (0)', 'ToDo List (2)', 'Documents', and 'E-Sign 5500'. The main content area is titled '5500s to Sign For Benefit Allocation Demo 401(k) Plan' and shows a table with a 'Year' column containing '2025'. Below this, the 'Sign 5500 - 2025' section is visible, containing four steps:

- Step 1: Print Paper Copy of Form 5500**  
You must print your 5500 before you will be allowed to sign. Print a hard copy of your 5500 by clicking on "Print 5500" below. **Note:** If you have logged out and back in, you must print the 5500 again to unlock Step 3.  
A 'Print 5500' button is present.
- Step 2: Review and Sign Paper Copy before Filing**  
Once you have read through the filing and find it acceptable, sign the printed copy with a "wet" signature. Keep your signed copy in a safe place. A paper copy will not be sent to the Department of Labor but an electronic version will be sent once you electronically sign below.
- Step 3: Enter/Review EFAST Credentials**  
Verify that Name, User ID, and PIN exactly match (including punctuation and spacing) what you entered/received from the DOL registration process. If it does not exactly match click the button 'Change Name' below to change the name on this 5500.  
Fields include: Administrator/Sponsor Name: (View) Demo Client (with a 'Change Name' button), Administrator/Sponsor DOL User ID: [input field], and Administrator/Sponsor DOL PIN: [input field]. A blue arrow points to the PIN field.
- Step 4: Sign and File Electronically**  
Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct and complete.  
A 'Sign 5500' button is present. A blue arrow points to the button.

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- Enter your DOL User ID and PIN.
- Click “Sign 5500” to electronically sign and submit Form 5500.
- Confirm that the filing status shows “Accepted.”
  - If the status shows anything other than “Accepted,” contact our team as soon as possible.
  - If the status shows “Accepted,” the DOL has received and accepted your electronic filing.

# EFAST2 Credentials: New User

To create your account,  
DOL UserID and PIN go to  
<https://secure.login.gov>

**If you have not previously requested your signing credentials via the EFAST2 website, you must do so before you will be able to electronically sign the Form 5500.**

- Click on 'Create an account' to initiate the process.
- You must enter a unique email address, not previously used for EFAST2 credentials. Login. Gov will send you an automated email. Please click 'Confirm'. If you do not see the email, Check your junk folder, or click 'Send again' internally inside of Login. Gov.
- Once the email is confirmed, you'll be re-directed to create your password. Your password must be at least 12 characters and not commonly used.
- Click 'Create' to create your EFAST2 Account to generate your DOL UserID and PIN.
- Complete the registration information and prompts shown on the screen. For User Type – ensure to select 'Sign a Filing' by checking the 'Filing Signer' type.
- Read and accept the PIN Agreement and Signature Agreement
- You will then be routed to a page with your automated ID, PIN and EFAST Credentials. Print this page and keep it in a safe location for your reference. You will need this to E-Sign your 5500s. Please note that your User ID is assigned from the DOL and cannot be changed.

# EFAST2 Credentials: Existing User

To retrieve your  
DOL UserID and PIN go to  
<https://secure.login.gov>

If you have not previously requested your signing credentials via the EFAST2 website, you must do so before you will be able to electronically sign the Form 5500.

- Click '**Forgot your password?**' at the bottom of the screen.
- Insert the e-mail address you used when first establishing your credentials to retrieve your password
- If you require additional assistance with your **User ID** or **Password** you may contact the EFAST Help Desk directly at **844-875-6446**.