

Creating an EFAST2 User Account

For Form 5500 Filing Signers

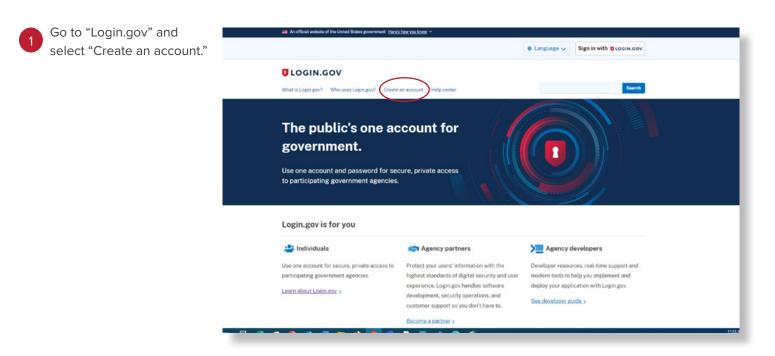
Background

Beginning January 1, 2023, new Form 5500 filing signers must register through a <u>Login.gov</u> portal. This portal provides additional security and offers a single sign-on opportunity for various governmental functions, such as administering SBA loans, Homeland Security TSA travel programs and federal job applications.

Existing users will be required to obtain new credentials but may use their existing User ID and PIN to transmit 5500s until September 1, 2023. After September 1, 2023, registration for a Login.gov account will be required for all Form 5500 signers.

The plan sponsor's designated filing signer's EFAST2-created user IDs and 4-digit PINs are also entered when e-signing 5500s. The instructions and screenshots below are intended to assist filing signers in completing the registration process.

Instructions

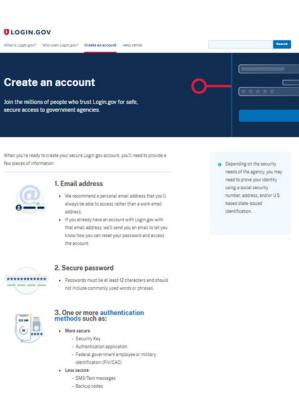




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You will be redirected to a page summarizing the information necessary to register with <u>Login.gov.</u>

When you are ready, click "Create an account" to get started.

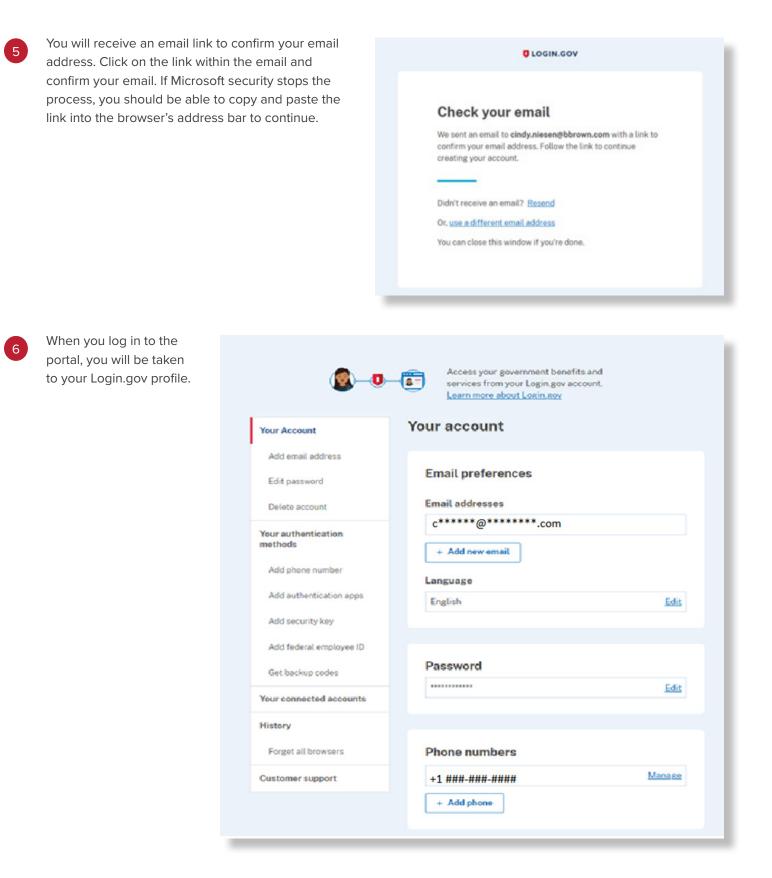


Your one account for gover Create an account

Enter your email address, select your language preference, read and accept the agreement, then hit the button to "submit" to move on to the next screen.

Review the Rules of Use.

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elect your email langung agin.gov allows you to rec spich. Spenish or French. © English (default) © Espeñol. © Français I Frend and accept the Lo Submit	eive your email communication in
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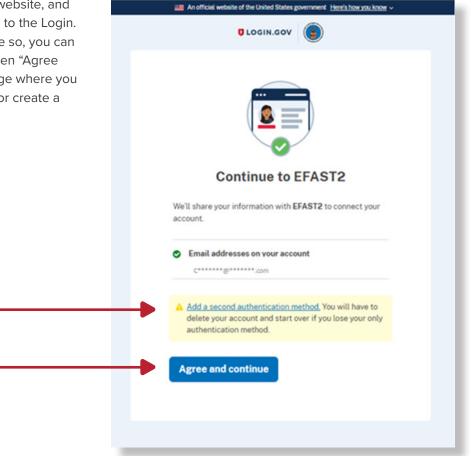


After you have created your Login.gov profile, go to the EFAST2 website (<u>https://www.efast.dol.gov/welcome.html</u>), and select "sign in/up" on the "Welcome" screen.

Your Account v Filing Search v Help v		
elcome	500-5F, and 5500-E2) Annual Returns, Reports and Form PR Pooled Plan Provider Registr	ations
filed with us in the part, just want to know your EFAST PIN, or need to register for a new account.	Form 5500 Series Search Search for Form 5500 Series	Form PR Registration Search Search for Form PR Registration Filings
On October 5, 2022 IRS published Notice and Request for Comments for <u>proposed</u>	ling of annual returns/reports. 2 Form 5500 Series and <u>announced upcoming changes</u> to the EFAST2 website authenticc <u>changes</u> to Form 5558, Application for Extension of Time To File Certain Employee Plan Re J you must file the Form 5500-E2; you can no longer use the Form 5500-57. See the <u>Form</u>	eturns, allowing for electronic filing through EFAST2.
	onives and displays Form 5500 Series Annual Returns/Reports and Form PR Pooled Plan Provider Registration blood EFAST2 Belated Resources Privator & Security Statement Office of the Invertine General	
Click the link to "Sign in with Login.G	ov."	
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You will be redirected to the Login.gov website, and your EFAST2 account will be connected to the Login. gov sign-in. If you have not already done so, you can add a second authentication method, then "Agree and continue." You will be taken to a page where you can link to an existing EFAST2 account or create a new one.

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To create a new EFAST2 account, you must complete each of the steps in the EFAST2 Registration process.

An official website of the United States government. Here's how you know "
us.boxmon or Laos
EFAST
Your Account 🗸 Filing Search 🗸 Help 🗸
We Did Not Find An Existing EFAST2 Account For You
Click 'Create', if you are a new user and want to create a new EFAST2 account.
Click 'Lookup Account', if you have an existing EFAST2 account.
Exit Create Account

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An official website of the United States government. Here's how you know () U.S.D EFAST unt 🗸 Filing Search 🗸 He **EFAST2** Registration You need to register through this website if you wish to sign or submit Form 5500 Series or Form PR filings. When your registration is complete, you will be provided with EFAST2 credentials · User ID (used to identify you) · PIN (used for your electronic signature) Click Continue and then follow the prompts to complete the seven-step registration process. O Continue O Cancel EFAST2 Credentials FAQs answer: I am not sure if I have already registered. How can I check? I registered but don't remember my credentials. How can I retrieve them? How do I unlock my account? Do I need to register each year? Useful EFAST2 guides: EFAST2 and IFILE Quick Start Guide EFAST2 Tutorial EFAST2 Guide for Filers and Service Providers EFAST2 IFILE User Guide Back to Top



Select at least one user type. The system default is "Filing Author" and "Filing Signer," which is automatically selected for you. These roles permit you to create, import or amend filings, as well as to electronically sign 5500 annual reports.

Register - Profile Information

Enter your profile information below then select Next to continue. Fields marked with an "" are required.

You must provide accurate and reliable contact details below so we can correspond with you.

Note that the first three user types require registration by an individual person. The credentials for this account may not be shared with others

OMB Control Number: 1210-0117 Exp. Date: 11/30/2024

First Name:	_*********
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Last Name:	n******
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Address 2:	
City/Town:	M*******
State:	M********* ~
Country:	US - United States V
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Daytime Phone:	###-######## [Do not include dashes and do not begin with "1"]
ac	####-##########
Email:	c****@****.com \star 💿
Company Name:	Plan Sponsor, Inc.

You must choose at least one User Type, but you may choose more.

I want to:	User Type	Definition
Create, import or amend a filing	Filing Author	The person who starts filing out the form 5500/5500-SF/5500-EZ/PR filing and is responsible for submitting it. This user type has no signature authority.
Sign a Filing	B Filing Signer	Filing signers are Plan Administrators, Employers/Plan Sponsors, or Direct Filing Entities who electronically sign the Form 550015500-SF/5500-E2. This role should also be selected by plan service providers that have written authorization to file on behalf of the plan administrator under the EFAST2 e-signature option. Filing signers are also pooled plan providers who electronically sign the Form PR. No other filing-related functions may be performed by selecting this user role alone.
Create a schedule but not a filing	O Schedule Author	A person who has been asked, by the Filing Author, to complete one of the Schedules to include in the Form 55005800-SF/8500-EZ filing. This user type cannot start, sign or submit a filing. This is rare.
Submit a filing on behalf of an individual or company	O Transmitter	An individual or company/organization authorized by the plan sponsor or plan administrator to submit electronic returns for the plan. This is rare.
Develop and certify third party software	Third Party Software Developer	A company, trade, business, or other person applying for authorization to be an EFAST2 Software Developer. This is rare.



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This information collection has been approved by OMB under OMB Control Number 1210-0117 (Expires 11/30/2024). The obligation to respond to this collection of information is mandatory for covered respondents. 20 CPR 2520 104a-2. You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of the internal Revume Code or are required to be maintained under Title I or Title V of ERISA. The time needed to complete and file this form will vary depending on individual circumstances. The estimated average time is 20 minutes. If you have comments concerning the accuracy of this time estimate or suggestions for making this form simpler, we would be happy to hear from you. See the <u>Context Us</u> area on the EFAST2 Web page for information regarding how to contact us.

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Select "Next" to see a summary once your profile has been completed.

Select "Next." Then, "Accept Agreement" to accept the PIN and Signature Agreement.

Register - PIN Agreement

Please read and accept the following PIN Agreement to continue.

By activating your PIN, you agree not to share your PIN with anyone. The security of your PIN is important because it can be used to: Electronically sign documents, and Access your personal records	*
If your PIN is lost or stolen, you also agree to: Contact the EFAST2 Contact Center at 1-888-453-3278 (1-886-00-EFAST), or Request a new PIN by selecting User Profile from the EFAST2 Web site	
	*
Accept Agreement Decline Agreement Back to Top	

Register - Signature Agreement

Please read and accept the following Signature Agreement to continue.

I understand and agree that the electronic signature is not transferable and that the inclusion of such electronic signature in a Form 5500 Series Annual Return/Report or Form PR filed in electronic form shall have the same legal force and effect as my hand written signature. If I am not the Transmitter, I also agree that my electronic signature on a Form 5500 Series Annual Return/Report constitutes consent for EFAST2 personnel to send my Transmitter an acknowledgment of receipt of transmission and to communicate with my Transmitter about the success or failure of the transmission and specific reason(s) for any failure(s).

If I am an EFAST2 Software Developer or EFAST2 Transmitter, I declare that I am authorized to make and sign this statement on behalf of the applicant. The applicant agrees that it and its employees will comply with all provisions of the EFAST2 procedures for the electronic filing of Form 5500 Series Annual Return/Report for each year in which the applicant participates. Noncompliance will result in the applicant no longer being allowed to participate as an EFAST2 Software Developer or Transmitter. The applicant understands that acceptance as an EFAST2 Software Developer or Transmitter is not transferable. If applying to be an EFAST2 Transmitter, the applicant further agrees that a copy of all returns/reports that the applicant transmits electronically to the Department of Labor will be provided to the plan administrator, employer or direct filing entity on whose behalf the return/report was transmitted.

0	Accept Agreement	0	Decline Agreement
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You will see a confirmation screen with your EFAST2 account information and profile.

Your unique User ID and PIN created during this process will be used to e-sign Form 5500s.

You will e-sign your health and welfare plan Form 5500s through approved third-party software. It should not be necessary to enter the EFAST2 portal again unless you need to revise your profile in the future (for example, your email address changes) or you are manually entering or importing Form 5500s directly to EFAST2.



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Connect with your Brown & Brown service team to learn more about how we can help find solutions to fit your unique needs.



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