

# Creating an EFAST2 User Account

## For Form 5500 Filing Signers

### Background

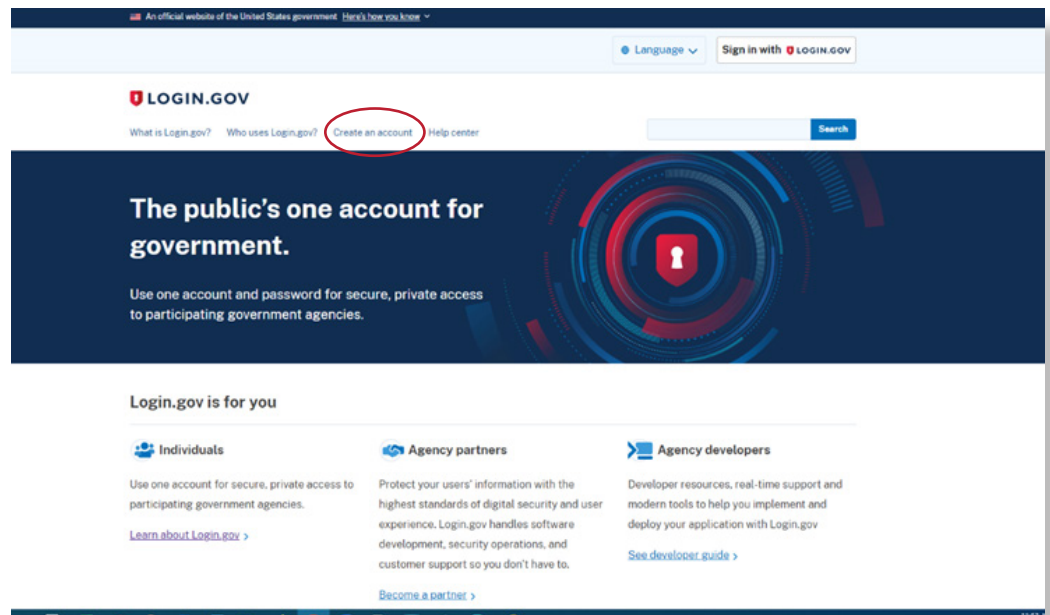
Beginning January 1, 2023, new Form 5500 filing signers must register through a [Login.gov](https://login.gov) portal. This portal provides additional security and offers a single sign-on opportunity for various governmental functions, such as administering SBA loans, Homeland Security TSA travel programs 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.

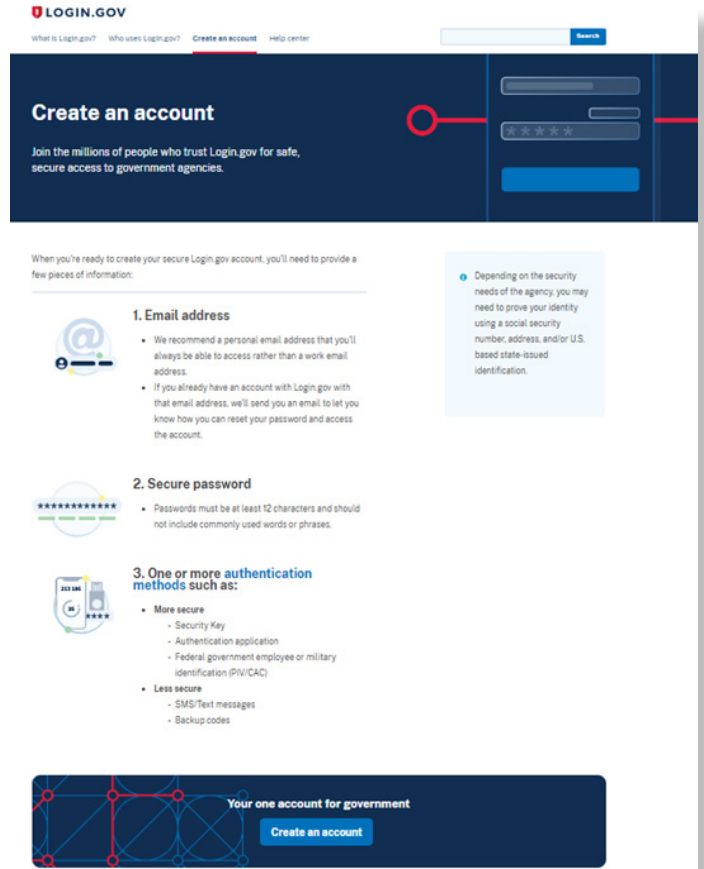
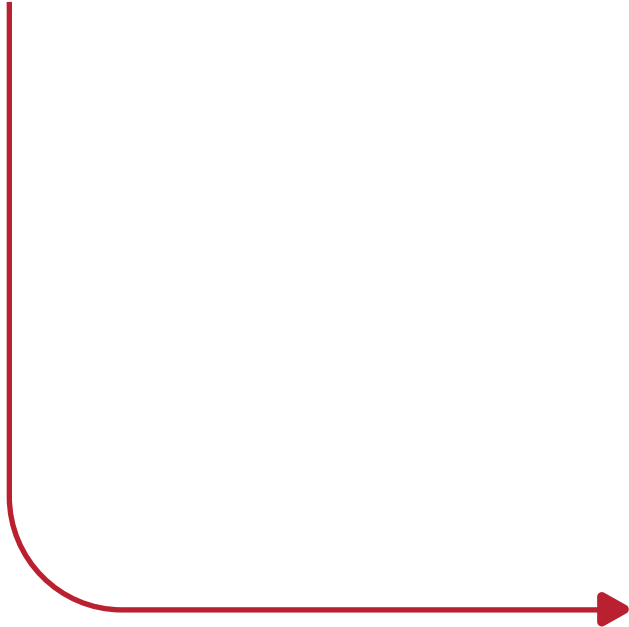
### Instructions

- 1 Go to "Login.gov" and select "Create an account."



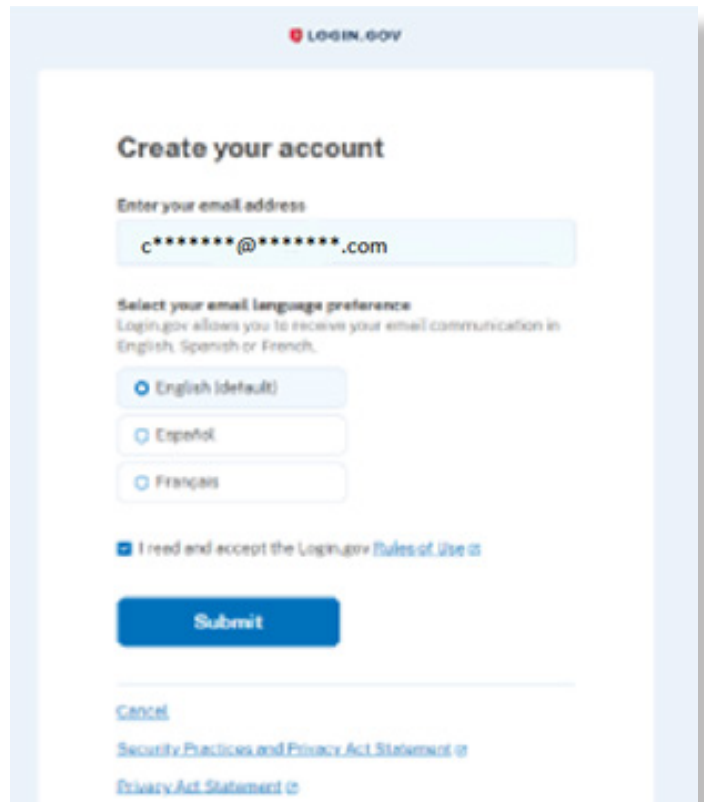
2 You will be redirected to a page summarizing the information necessary to register with [Login.gov](https://login.gov).

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

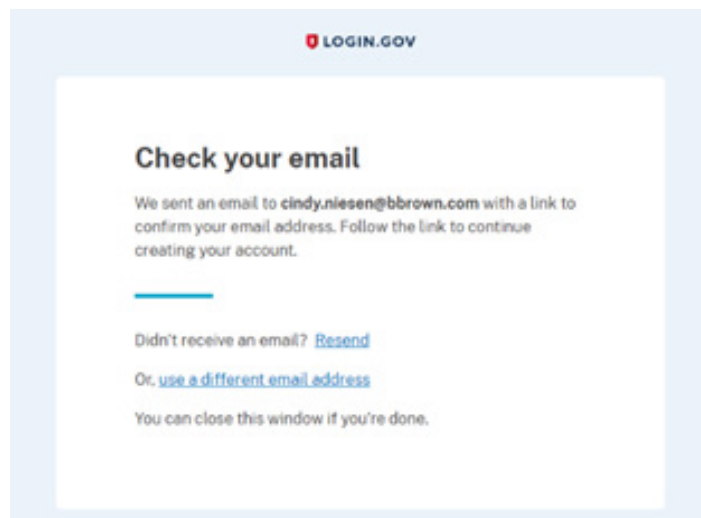


3 Enter your email address, select your language preference, read and accept the agreement, then hit the button to “submit” to move on to the next screen.

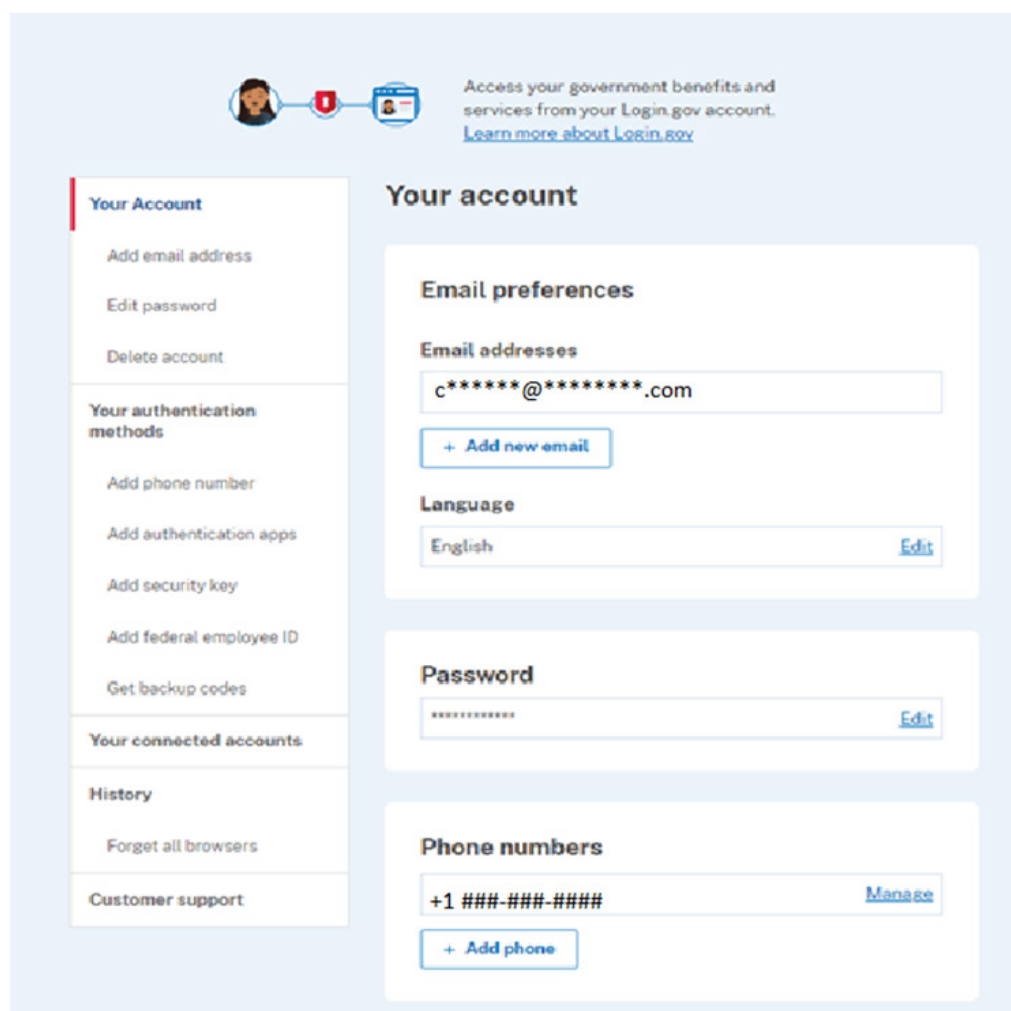
4 Review the Rules of Use.



- 5 You will receive an email link to confirm your email address. Click on the link within the email and confirm your email. If Microsoft security stops the process, you should be able to copy and paste the link into the browser's address bar to continue.



- 6 When you log in to the portal, you will be taken to your Login.gov profile.



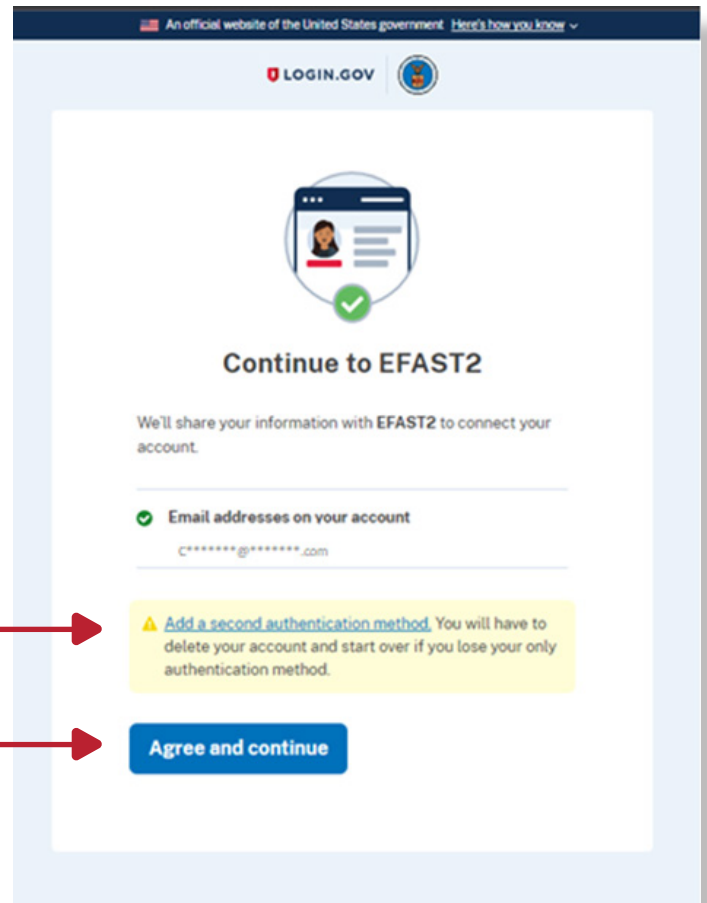
- 7 After you have created your Login.gov profile, go to the EFAST2 website (<https://www.efast.dol.gov/welcome.html>), and select “sign in/up” on the “Welcome” screen.

The screenshot shows the EFAST2 Welcome page. At the top, it says "An official website of the United States government" and "U.S. DEPARTMENT OF LABOR". Below that is the EFAST logo. A navigation bar includes "Your Account", "Filing Search", and "Help". The main content area has a "Welcome" heading and a sub-heading: "This Government website lets you file, find, and learn about Forms 5500 Series (5500, 5500-SF, and 5500-EZ) Annual Returns/Reports and Form PR Pooled Plan Provider Registrations." There are three main buttons: "Sign In/Up" (circled in red), "Form 5500 Series Search", and "Form PR Registration Search". Below these is a "New and Noteworthy" section with a list of updates. At the bottom, there are links for "About EFAST2", "Related Resources", "Privacy & Security Statement", and "Office of the Inspector General".

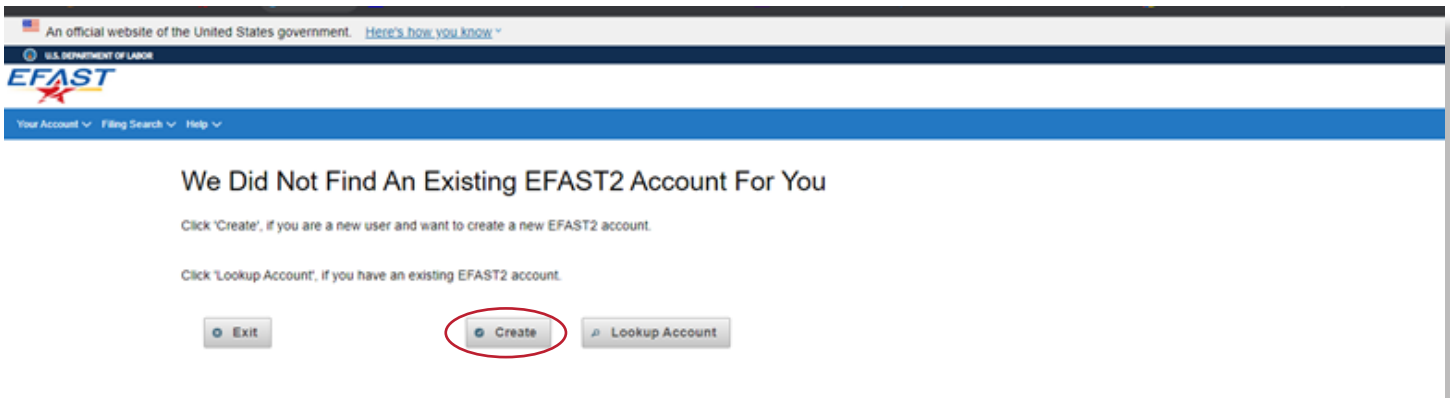
- 8 Click the link to “Sign in with Login.Gov.”

The screenshot shows the EFAST2 Login page. At the top, it says "An official website of the United States government" and "U.S. DEPARTMENT OF LABOR". Below that is the EFAST logo. A navigation bar includes "Your Account", "Filing Search", and "Help". The main content area has an "EFAST2 Login" heading. There are two main options: "Sign in with Login.gov" (circled in red) and "OR" followed by "User ID" and "Password" fields. Below the "User ID" and "Password" fields is a "Login" button. To the right of the login fields is a text box explaining that using Login.gov is preferred and that existing accounts can be used. At the bottom, there are links for "About EFAST2", "Related Resources", "Privacy & Security Statement", and "Office of the Inspector General".

9 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.

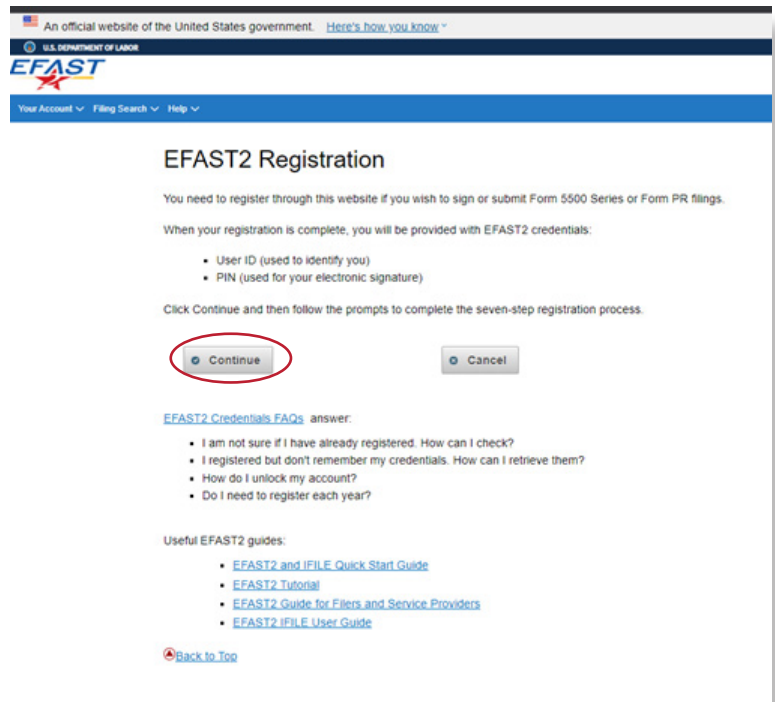


10 To create a new EFAST2 account, you must complete each of the steps in the EFAST2 Registration process.



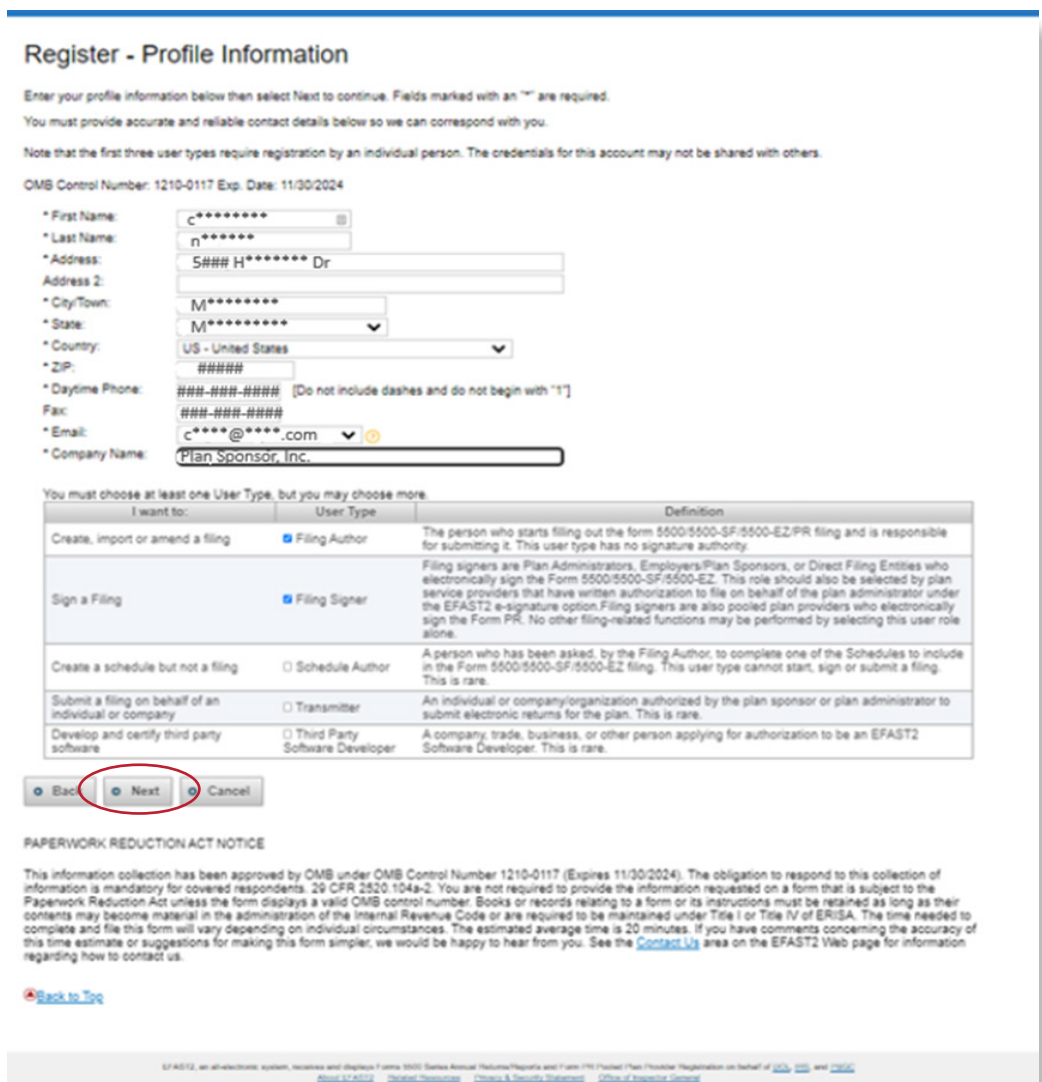
11

Select "Continue" and complete your profile.



12

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.





- 13 Select "Next" to see a summary once your profile has been completed.
- 14 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 1-855-453-3275 (1-855-GO-EFAST2) , or
- Request a new PIN by selecting User Profile from the EFAST2 Web site

I have read this agreement

Accept Agreement  Decline Agreement

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## 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.

I have read this agreement

Accept Agreement  Decline Agreement

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- 15 You will see a confirmation screen with your EFAST2 account information and profile.
- 16 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.



## How Brown & Brown Can Help

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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