

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

New mandatory electronic filing requirements (EFAST2) now apply to the Form 5500 Annual Return that your benefit plan must file. The electronic filing procedures require that you sign the Form 5500 electronically. In order to sign the Form 5500, the signer(s) will need to obtain “filing signer” credentials. The Department of Labor (DOL) will not permit third party administrators (such as Alliance Benefit Group of Houston) or other representatives to obtain the credentials on your behalf. To obtain the filing signer credentials, the signer(s) must register on the DOL’s website.

If you do not have internet access, the Department of Labor advises you to utilize a public library or other service that may have computers and Internet connections. The DOL will not make any exceptions to the electronic filing requirement according to its guidance.

The registration process is simple and does not take much time. Once you are on the website, the steps are self-explanatory; however, we have outlined the steps below for your reference:

1. Open your web browser and go to www.efast.dol.gov. On the left side of the Welcome screen you will see a menu. Click on the “Register” link.

The screenshot shows the top navigation bar of the EFAST website. It includes the United States Department of Labor logo, a search bar for email updates, and a list of navigation links: A to Z Index, Site Map, FAQs, DOL Forms, About DOL, and Contact Us. Below the navigation bar are links for 'E-mail This Page' and 'Print This Page'. The main content area is titled 'EFAST & EFAST2 Filing - Welcome'. It contains a description of EFAST, a list of 'People are Asking...' questions, and a 'New and Noteworthy' section. A sidebar on the left contains a menu with 'Register' circled in blue.

UNITED STATES DEPARTMENT OF LABOR

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[A to Z Index](#) | [Site Map](#) | [FAQs](#) | [DOL Forms](#) | [About DOL](#) | [Contact Us](#)

E-mail This Page | Print This Page

EFAST & EFAST2 Filing - Welcome

EFAST is a system designed to simplify and expedite the receipt and processing of the Forms 5500/5500 Short Form. These forms are filed each year by more than one million retirement and other employee benefit plans to satisfy annual reporting requirements under ERISA and the Internal Revenue Code.

The Department of Labor (DOL), Internal Revenue Service (IRS), and the Pension Benefit Guaranty Corporation (PBGC) created EFAST to streamline the forms and the methods by which they are filed and processed.

People are Asking...

- [Frequently Asked Questions about EFAST2](#)
- [Registration for signing, preparing, or transmitting the Form 5500/5500-SF](#)
- [2009 and 2010 Form 5500 and 5500-SF and Instructions](#)
- [EFAST2 User Guides](#)
- [iFile Tutorial](#)
- [Delinquent Filer Voluntary Correction Program \(DFVCP\)](#)
- [Electronic Filing Webcasts](#)

New and Noteworthy

- [Getting Ready for the 2009 Form 5500 and Electronic Filing Webcast - January 21, 2010](#)
- [EFAST2 online filing system operational to receive and process Form 5500 filings: Electronic filing video](#)
- [DOL Adds FAQs 26 and 27 to Supplemental Schedule C FAQs Regarding Compensation Paid to Pharmacy Benefit Managers](#)
- [Supplemental Guidance on Schedule C: News Release](#)
- [FAQs About the 2009 Form 5500 Schedule C: News Release](#)
- [Disaster relief information](#)

Support

- [FAQ](#)
- [Disaster Relief](#)
- [Related Resources](#)
- [Site Map](#)
- [Contact Us](#)

EFAST2

Main

- [Welcome](#)
- [Login](#)
- [Register](#)
- [About EFAST2](#)
- [EFAST Software and Approved Vendors](#)
- [Forms, Instructions and Publications](#)

Filings

- [Form 5500/5500-SF Search](#)

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

2. Read the privacy statement, check the box indicating that you have read the privacy statement, and click the “Accept Agreement” button.

Register - Privacy Statement

Please read and accept the following privacy statement to continue.

Thank you for visiting the Department of Labor (DOL) Web site and reviewing our privacy and security statement. DOL is strongly committed to maintaining the privacy of your personal information and the security of DOL computer systems. With respect to the collection, use and disclosure of personal information, DOL makes every effort to ensure compliance with applicable federal law, including, but not limited to, [The Privacy Act of 1974](#), [The Paperwork Reduction Act of 1995](#), and [The Freedom of Information Act](#).

As a general rule, DOL does not collect personally-identifying information about you when you visit our site, unless you choose to provide such information to us. The information we receive depends upon what you do when visiting our site.

If you respond to an online request for personal information:

Generally, DOL will use the information requested to respond to your inquiry or to provide you with the service associated with the request. However, when we request this information, we fully describe in a customized "Privacy Notice" the reasons for collecting it and DOL's intended use of the information. This Privacy Notice will either appear on the Web page collecting the information or be accessible through a link prominently displayed immediately preceding the information request.

If you visit our site to read or download information:

I have read this agreement

3. All registrants must provide their contact information. Without this information, EFAST2 will not be able to create and send the necessary electronic filing credentials. The email address is probably the most important piece of information because the system will use that email address to send you a confirmation email. The email address should be one that you can access easily and which you monitor regularly. It will be utilized with us also for accessing your completed Form 5500.

4. On the same screen, select the “filing signer” credential and click the “Next” button.

Register - Profile Information

Please enter your profile information and select Next to continue. Fields marked with an "*" are required.

* First Name:

* Last Name:

* Address:

Address 2:

* City/Town:

* State: -- Select --

* Country: US - United States

* ZIP:

* Daytime Phone: [no dashes, example: 1234567890]

Fax:

* Email:

* Company Name:

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

* User Type: Filing Author Filing Signer Schedule Author Transmitter Third Party Software Developer

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

5. On the next screen “Register-•Challenge Information,” select a challenge question, provide an answer, and click “Next.”

Filings

- Form 5500/5500-SF Search

Main

- Welcome
- Login
- Register
- About EFAST2
- EFAST Software and Approved Vendors
- Forms, Instructions and Publications

Register - Challenge Information

Please select a Challenge Question, and provide an answer, then select Next to continue. Your Challenge Answer is required to complete your profile setup so please remember it.

* Challenge Question: --Select--

* Challenge Answer: --Select--
What is your date of birth?
Where is your place of birth?

Back Next Cancel

6. Verify that all the information is correct on the “Register – Summary” screen, especially the email address, which is crucial to the next step of registration. EFAST2 uses the email address to notify users their credentials are ready to be retrieved and activated. Without the email notification (and the secure link it contains), users will not be able to retrieve their credentials. Click “Submit” to continue.

Filings

- Form 5500/5500-SF Search

Main

- Welcome
- Login
- Register
- About EFAST2
- EFAST Software and Approved Vendors
- Forms, Instructions and Publications

Support

- FAQ
- Disaster Relief
- Related Resources
- Site Map

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Register - Summary

Please review the information you provided. Select the Edit option to go back and make corrections or 'Submit' to complete this part of your registration.

* Last Name: Taylor

* First Name: Alan

* Address: 246 Dev Lane

Address 2:

* City/Town: Lawrence

* State: Kansas

* Country: US - United States

* ZIP: 66044

* Daytime Phone: (785) 123-4567

Fax: (785) 765-4321

* Email: karenjayhawk@gmail.com

* Company Name: Taylor Business Associates

* User Type:

- Filing Author
- Filing Signer
- Schedule Author
- Transmitter
- Third Party Software Developer

* Challenge Question: Where is your place of birth?

* Challenge Answer: Pa ul, St.

Submit Edit Cancel

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

7. Click "OK" on the "Register - Confirmation" page.

Filings

- Form 5500/5500-SF Search

Main

- Welcome
- Login
- Register
- About EFAST2
- EFAST Software and Approved Vendors

Register - Confirmation

Registration Success!!

This part of your registration is complete.

Please check the e-mail address you provided for a link into this system to acknowledge and complete the creation of your profile. You will need the answer to your challenge question in order to access the system.

OK

8. The DOL will then send an email to the email address you provided. Note: the DOL indicates that the email confirmation will occur immediately. If you do not receive the email within a reasonable period of time, you may want to check your "junk mail" or "spam" because it is possible that your system may identify the email as spam.

★ efast2@efastsys.dol.gov to me [show details](#) 12:06 PM (2 hours ago) Reply

Dear Laura,

You may now retrieve your PIN and UserID. For your security, you must go to the link below to retrieve these credentials from our secure server. Either select the link or copy the entire link and paste it into the address or location line of your Web browser. Make sure you copy and paste the entire link below; it may appear on multiple lines.

Please Note: Your PIN is available at the link below until 7/19/2010.
If this date has already passed, please contact the EFAST2 Contact Center at 1-866-463-3278.

As part of the PIN application, you agreed not to disclose or share your PIN with anyone, including commercial service providers. You also agreed to keep your PIN in a safe location.

If your PIN is misplaced or stolen, either go to the EFAST2 Web site and change your PIN or contact the EFAST2 Contact Center at 1-866-463-3278.

<http://www.efast.dol.gov/portal/app/userAcknowledge?accountId=A1209166>

If you are an AOL user, click here:

<http://www.efast.dol.gov/portal/app/userAcknowledge?accountId=A1209166>

If you encounter any problems retrieving your PIN, you can contact the EFAST2 Contact Center for assistance.

Thank you,

U.S. Department of Labor

9. In the email, the DOL will provide a link that you will click on to retrieve your filing signer credentials, which will consist of a User ID and Pin code. The email message includes a statement indicating that as part of the application, you agree not to share the credentials with anyone, including a commercial service provider.

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

10. When you click on the link, you will be taken to the “Register - Challenge Verification page.” You will need to answer the challenge question selected when registering and click “Next.”

Filings

- Form 5500/5500-SF Search

Main

- Welcome
- Login
- Register
- About EFAST2
- EFAST Software and Approved Vendors
- Forms, Instructions and Publications

Register - Challenge Question Verification

Please answer your challenge question, and then select Next to continue.

Where is your place of birth?

11. You must next agree to the PIN Agreement. Check the box indicating that you have read the agreement and click “Accept 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 1-866-463-3278 (1-866-GO-EFAST) , or
- Request a new PIN by selecting Change My PIN from the EFAST2 Web site

I have read this agreement

ALLIANCE BENEFIT GROUP of Houston, Inc.

EFAST2 REGISTRATION INSTRUCTIONS

12. On the next page, “Register - Signature Agreement,” check the box and click the “Accept Agreement” button indicating you have read the agreement and you understand your electronic signature has the same legal force as your handwritten signature.

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 return/report 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 constitutes consent for EFAST 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 EFAST Software Developer or EFAST 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 EFAST procedures for the electronic filing of Form 5500 Series for each year in which the applicant participates. Noncompliance will result in the applicant no longer being allowed to participate as an EFAST Software Developer or Transmitter. The applicant understands that acceptance as an EFAST Software Developer or Transmitter is not transferable. If applying to be an EFAST 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.

Under penalties of perjury, I declare that I have examined this agreement, and to the best of my knowledge and belief the information provided in my request for access to the EFAST2 system is true, correct, and complete. I agree that this application can be made public information.

I have read this agreement

13. Next, you will see the “Register—Finalize” screen. The DOL provides you with your User ID and Pin code.

You should note or print the User ID and PIN information for future reference. Click “Next” to continue.

Register - Finalize

Here is your EFAST2 profile information. Please note your User ID and PIN and keep them in a safe place. In order to complete the registration process, click "Next" to create your password.

User ID: A1348608
PIN: 4219
ETIN: Y1358135
* Last Name: Taylor
* First Name: Alan
* Address: 246 Dev Lane
Address 2:
* City/Town: Lawrence
* State: Kansas
* Country: US - United States
* ZIP: 66044
* Daytime Phone: (785) 123-4567
Fax: (785) 765-4321
* Email: karenjayhawk@gmail.com
* Company Name: Taylor Business Associates
* User Type: Filing Author
 Filing Signer
 Schedule Author
 Transmitter
 Third Party Software Developer
* Challenge Question: Where is your place of birth?
* Challenge Answer: Pa ul, St.

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EFAST2 REGISTRATION INSTRUCTIONS

14. On the next page, “Register - Password,” you must create a password. Click “Save” to set your password.

Register - Password

When you create your password, it must be between 10 and 16 characters long and must not contain spaces. You must use at least one letter and at least one number.

Password:	<input type="password"/>
Confirm Password:	<input type="password"/>

Password Requirements

- Must be between 10 and 16 characters long
- At least 1 alpha character
- At least 1 numeric character

15. The last page, “Register - Confirmation,” informs you that you have completed the registration process.

Register - Confirmation

Successful Account Activation

Your account setup is now complete please retain your User ID and password to access the site in the future.

It should be noted that if the officer signing the Form 5500 as Employer is not the employee who will also be signing as Plan Administrator, that each has to go through the credentialing process to obtain their “filing signer” credentials. If there is a possibility that one of these signers may not be available at the time the Form 5500 must be filed, then there should be another officer (or more, depending on the size of the entity) who should go through the credentialing process. You cannot afford to wait until the 5500 deadline (regular or extended) is here and you do not have an authorized signer with credentials.

If you have any questions or have trouble in obtaining the credentials, please contact us at EFAST@abghouston.com soon as possible.