

The Portal Signing Experience

09/11/2024 3:53 pm CDT

Once a filing is locked and a signer is invited to sign, they access the portal via the link you send them with their username and password.

When your client logs in to the Portal for the first time, he/she will be prompted to answer three challenge questions and then will be prompted to enter a new password. The password your client enters will be used by your client going forward, for as many years as he/she is logging in and signing filings as your client.

Initial Login

Welcome to the Portal!
Please fill out the following challenge questions and responses to complete your user profile, which will be used in the event you have to click on 'Forgot Password' to reset your password.

Select Challenge Questions / Responses

Please type or select 3 challenge questions and enter your answers.

What was the make of your first car?	Answer 1
What is your favorite secret code?	Answer 2
What is the name of your first pet?	
What was the name of your first friend?	
What is your mother's middle name?	
What is your mother's maiden name?	
What is your favorite number?	
What is your favorite color?	
What is your father's middle name?	
What is the name of your first pet?	
What is the name of your favorite song?	
What is the name of your favorite movie?	
What is the name of your favorite book?	
In which city was your mother born?	
In which city was your father born?	
How many tickets have you received for speeding?	

Save Changes

Password Reset

Welcome to the Portal!
Please enter a new password below.

Set Password

Password must be: At least 8 characters and contain at least number and special character.

Enter new password:

Enter new password again:

Save Changes

You provide a password for your client for the first time he/she logs into the Portal (this is done on the screen where a new portal user is added). Once the portal user has logged in and responded to security questions, the portal password data entry will be replaced with a link to reset the user's password via an email to the user (under "Work with Signers/Portal Users").

Clicking on "Reset Password" will send an e-mail to your client containing a link for him/her to follow. Following this link will automatically log your client into the Portal and he/she will be prompted to enter a new password. Your client also has the option to click on "Forgot Password" on the Portal log in screen to answer his/her challenge questions and create a new password in the instance where he/she no longer remembers his/her password. The "Reset Password" email is sent from a "donotreply@ftwilliam.com" address. Your client should receive the "Reset Password" email within a few minutes of the button being selected, but we do suggest having your client check his/her Junk or Spam folder to verify the "Reset Password" email has not been re-directed to either of those folders.

After clicking on the link to "E-Sign 5500," signers will be taken to the "Sign 5500 - Year" screen shown below.

The signer must first click the link to "Print 5500" before he/she will be permitted to enter his/her DOL User ID and PIN to electronically sign the filing. There are also instructions to sign the paper version of the filing with a wet signature and a suggestion to save the pdf file to the user's hard-drive.

If you are using portal branding and you would like users to send you a copy of the wet signature page, you may want to indicate this or any other specific instructions within your portal branding.

The DOL User ID and PIN fields will not become editable until after "Print 5500" has been selected. If your client logs into the portal to print a copy of the filing, then logs back out without signing, he/she will need to click on "Print 5500" again after logging back into the portal to enable the DOL User ID and PIN fields.

Plan Home

Inbox (0)

ToDo List (2)

Documents

E-Sign 5500

5500s to Sign

Year
2022

Sign 5500 - 2022

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**.

[Print 5500](#)

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: Example User [Change Name](#)

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.

[Sign 5500](#)

The "Sign 5500 - Year" page reads as follows:

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**.

[Print 5500 Button]

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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: [Change Name Button]

Administrator/Sponsor User ID:

Administrator/Sponsor 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.

[Sign Button]

If your client receive the below message while attempting to sign, he/she will need to verify his/her User ID and/or PIN are being entered correctly:

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:

Sample Smile



Administrator/Sponsor DOL User ID:

A1234567

* The DOL UserID and/or PIN was

Administrator/Sponsor DOL PIN:

1234

NOT validated by the DOL.

Your client will need to log into his/her profile on the DOL's website at <http://www.efast.dol.gov/> and verify the User ID and/or PIN that he/she is using are correct. Once your client has verified his/her DOL User ID and PIN, he/she will need to return to the "Signing Screen," enter his/her DOL User ID and PIN and click "Sign 5500."