Populating Signing Page with Prior Year Accepted Filing UserID and PIN

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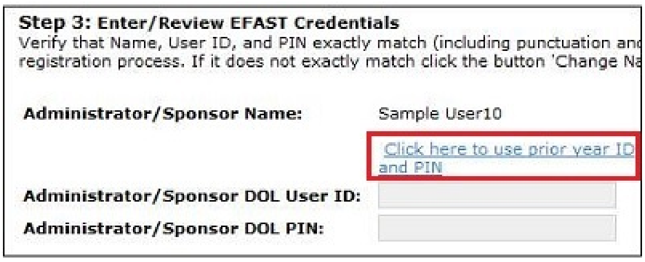

If the portal user has not submitted a filing to the DOL via ftwilliam.com in a previous year, he/she will not see the option to "Click here to use prior year ID and PIN" on the signing screen. Additionally, if the portal user has submitted a filing to the DOL in a prior year via ftwilliam.com, but the spelling of his/her name or his/her username has changed from the prior year, he/she will not see the option to "Click here to use prior year ID and PIN." You will need to ensure your client's username and name exactly match what was used in the prior year in order for him/her to see the "Click here to use prior year ID and PIN" option on the signing screen. If he/she clicks on the link, a window will open that reads:

> Under penalties of perjury and other penalties set for in the instructions to the Form 5500, I declare that I am [Signer Name] and my DOL UserID is [User ID]. I would like my Administrator/Sponsor PIN to be populated below with the same four-digit number I entered in the prior year filing submitted to the Department of Labor.

To accept, click "OK," otherwise click "Cancel" and the User ID and PIN will not appear.

To enable or disable this feature, the Master User for the account will need to log into ftwilliam.com, click on the "Wolters Kluwer" logo, select "Administrative Tasks" and from the list, click on "Account Profile." Within the "Portal Options box," he/she will see "Allow 5500 Portal users to auto-populate DOL User ID and PIN from prior year." If this option is changed to "Yes," portal users will see the "Use prior year ID and PIN" feature on the portal signing screen. If the option is changed to "No," portal users will not see this feature on the portal signing screen. After selecting either "Yes" or "No," please be sure to click "Update" below the "Portal Options" box to save the changes that have been made.

Once the signer electronically signs the filing (enters his/her User ID, PIN and clicks on "Sign 5500"), he/she will be taken to a status screen. The status screen, shown below, is an example of a plan that was "Not-Accepted" and will need to be amended to make the corrections. The statuses portal users/signers see are the same as those displayed on the "5500 > [Year]" screen within "Details".

The signer may always log back into the portal to check the status of the filing. The user will see a button as shown below to "Check 5500 Status:"

Once your client clicks on "Check 5500 Status," he/she will see the "Details" of the filing. Portal users may also click on "View as a PDF" to save a copy of the details to his/her hard drive.

Portal users will also have access to a "Portal User Help" guide by clicking on "Help" at the top of the portal screen. You can view the guide by clicking here. Note that the link to the user guide can also be removed by branding the portal if you wish.