

Portal Correspondence

09/11/2024 4:37 pm CDT

- Portal Correspondence was designed to assist you in sending out notification to your customers that they will need to sign up on the IREG website for "Signing Credentials." This option is only available if you have selected to "Specify a Server" under the "Email Settings," described above. Although this feature is specifically designed to assist you in notifying customers about the need to register on the DOL website as a signer, it can be used for essentially any 5500-related correspondence.

You have the ability to upload a spreadsheet with each of your customers' names, along with their email address. To upload a file, click on "browse", locate the file and indicate the number of rows to ignore before the column names. You should have a "Name" column and an "Email" Column. (If the first rows in your spreadsheet are "Name" and "Email", then there will be zero rows before Column Name). Once you've reviewed the recipient list by clicking on "View Recipient List" you may then batch email your clients.

The default language we have prepared is shown below. Note that "!!@!Name" will actually be filled in the with the name you upload in your excel spreadsheet. Please also note that we have prepared some of the instructions in a manner that will be suitable for the majority of plans but that there may be customizations you will want to make depending on your processes.

If you make changes but would like to revert to the default language, see the link to "Load Defaults" on the Portal Correspondence page.

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Dear !!@!Name,

The Department of Labor (DOL) is requiring that all 5500 filings be electronically filed and signed (known as "EFAST 2"). For the first filing year under EFAST 2, signers must register for filing credentials at the DOL website. Below are instructions for how to obtain filing credentials with the DOL.

Once this process is complete, you can continue to use the UserID and PIN provided by the DOL in future years. If a different person signs the 5500 filing in a future year, that person will have to register with the DOL signing credentials at that time. In addition, more than one person may obtain credentials to sign a 5500 form if more than one person may actually sign the filing.

5500 Form Signer Credential Procedures

There are several steps to registering at the DOL website. We suggest that you set aside approximately 15 minutes to complete the process. However, please keep in mind that it may take more than 15 minutes as there are several steps in the process. Please also note that the DOL may change the registration process - these are the steps as we understand them at the time of this email.

1. Go to <https://www.efast.dol.gov> and select the link to register.
2. You will be asked to read and sign a privacy statement.
3. Complete your profile. You will be taken to a screen where you will be required to complete information that will serve as your profile (name, address, email and user type). Your user type is "filing signer."
4. Challenge question. Once your profile information is complete, you will be asked to select a challenge

question and answer. This is required and will be used to obtain your UserID and PIN in step 6.

5. Confirm email. Check your email and click on the link provided in the email.
6. Answer your Challenge Question. You will be asked the challenge question you set up earlier in the process.
7. PIN agreement. You will then be asked to sign a PIN Agreement whereby you will agree not to share the PIN that is assigned to you.
8. Signature Agreement. You will then be asked to agree to a more detailed "signature agreement".
9. UserID and PIN. You will then be provided a UserID and PIN. We strongly suggest printing this page for your records.
10. Password. The last step in the process is to create a password that will be assigned to the UserID and PIN that you were just provided. We suggest making a note of the password that you enter for your records. The password can be used with your UserID to obtain your PIN and/or log in to the DOL website in the future to change any profile information if necessary.

Click [here](#) for detailed instructions on how to obtain signing credentials with screenshots.

Once your Form 5500 and schedules have been prepared, we will contact you to complete the signing ceremony online. At that time, you will be required to enter the UserID and PIN that you received through the process outlined above.

Thank you for helping us make the transition from paper filing to EFAST 2 electronic filing as smooth as possible.

Sincerely,
