

## **Tutorial Title: Review and Sign a Filing in IFILE.**

### **Slide 1: Title page with EFAST2 logo.**

Description: Animated text displays the title: IFILE - Sign a Filing.

Narration: Welcome to the tutorial for signing a filing in IFILE.

### **Slide 2: EFAST2 Welcome page.**

Description: The Sign In with Login.gov button is highlighted.

Narration: To begin, click Sign In with Login.gov.

### **Slide 3: Login.gov page.**

Description: The options are to enter an email address and password and click Sign In, or click Create an Account.

Narration: At Login.gov, enter your email address and password to sign in, or click Create an Account if you don't already have one. If you're not sure if you have an account or forgot your password, click Forgot Your Password.

### **Slide 4: Login.gov page.**

Description: The options are to enter a one-time code, submit, send another code, choose another authentication method, and cancel.

Narration: When signing in, follow the prompt for your authentication method. For example, if you chose to receive a text or phone call, enter the one-time code and click Submit.

### **Slide 5: Filing Summary page – Warning banner.**

Description: After completing a registration and clicking Login, you must accept the warning about accessing a U.S. Government information system.

Narration: After signing in with Login.gov, a warning message will display each time that you access the EFAST2 website. Click Accept to continue, or click Reject to return to the Welcome page.

### **Slides 6 and 7: Filing Summary page.**

Description: On the Filing Summary page, under the user's name, the View Your User ID and PIN button is highlighted. The Filing Summary page has been scrolled down to show the functions at the bottom of the page. The Provide Signature button is highlighted.

Narration: After signing in, you can View your User ID and PIN, if necessary. Scroll down for more options. To see a list of filings assigned to you for your signature, click Provide Signature.

### **Slide 8: Filing List page.**

Description: The Filing List page shows one filing in the status of Awaiting Signatures. Mouse movement shows how to click the filing name link.

Narration: On the Filing List page, click the name of the filing that you want to sign.

### **Slides 9 and 10: Filing Menu page.**

Description: The name of the filing is displayed at the top of the Filing Menu page. In this example, the name is Acme Trading Company 401k. After the name is the "Last Updated" date. Below the name and date is a row of buttons for each function on the Filing Menu page. For the Filing Signer, the only active buttons are View PDF, Sign, and Close. The View PDF button is highlighted. Mouse movement shows how to click the file download at the top of the browser window to view the PDF of the filing.

Narration: You can view a PDF of the filing before signing. The PDF download may open in a new browser window or tab, or in another application, depending on your settings.

### **Slide 11: PDF of Form 5500.**

Description: A PDF of Form 5500 is displayed. The PDF contains the information entered by the Filing Author, represented in blue text in the form fields.

Narration: After reviewing the PDF, return to the filing menu.

**Slide 12: Filing Menu page.**

Description: The Sign button is highlighted.

Narration: Click Sign to begin the 3-step process.

**Slide 13: Sign – Validate Filing (Step 1 of 3).**

Description: A pop-up window is displayed and contains the Plan Name, Sponsor Name, Plan Number, EIN, Plan Year Begin, and Plan Year End dates, which are highlighted for emphasis. The on-screen text "We did not identify any errors or warnings in your unsubmitted return/report. The filing is ready for you to sign" is highlighted. The Sign button is highlighted.

Narration: Review the Plan Name, EIN, and Plan Number in Step 1. If errors or warnings are found and need to be corrected, contact the person who created the filing. Click Sign to continue.

**Slide 14: Sign – Signature Agreement (Step 2 of 3).**

Description: The Signature Agreement appears in Step 2. The box labeled "I have read agreement" is check marked and highlighted. The Accept Agreement button is highlighted.

Narration: Read and accept the Signature Agreement in Step 2.

**Slide 15: Sign – Apply Signature (Step 3 of 3).**

Description: Animated typing text shows an entry of "1201234" in the User ID field, and an entry of four characters (represented by asterisks) in the PIN field. The Plan Administrator box is checked to indicate the signing role. The Sign button is highlighted.

Narration: In step 3, enter your User ID and 4-digit PIN. Select the role for which you are signing, and then click Sign.

**Slide 16: Sign – Confirmation.**

Description: On-screen text indicates that the signature has been successfully added to the filing. The Go to Filing Menu button is highlighted.

Narration: Once the signature is confirmed, go to the Filing Menu.

**Slide 17: Filing Menu page.**

Description: On the Filing Menu page, the Sign button is no longer an option in the row of buttons at the top of the page. The View PDF is still available. Mouse movement shows how to click the Close button.

Narration: If the option to Submit the filing is not available, then the person who requested your signature must submit the filing. At this point, you can close the filing to return to the Summary page.

**Slide 18: Filing Summary page.**

Description: After returning to the Filing Summary page the page can be scrolled down to see that Provide Signature is no longer an option. The 5500 Series Submissions button is highlighted to show how to check the status of the filing on the Submissions page.

Narration: After signing, the Provide Signature option is no longer available unless you have another filing to sign. After the filing has been submitted by the preparer, you can go to 5500 Series Submissions to view the filing status and signed PDF.

**Slide 19: Filing Summary page.**

Description: From the Filing Summary page, a circle shows where to click Your Account in the navigation menu. An arrow points to the Logout menu option.

Narration: When you're finished, go to Your Account and click Logout.

**Slide 20: End page.**

Description: Text displays the message: For more information, please visit [www.efast.dol.gov](http://www.efast.dol.gov).

Narration: Thank you for watching. For more information, please visit [www.efast.dol.gov](http://www.efast.dol.gov).