# Procedures for Obtaining Signing Credentials

## Registering

For the sake of accuracy, security, and timeliness, users must complete the registration process in a single session. Incomplete registration forms will not be saved in the ERISA Filing Acceptance System (EFAST2) database. If users end the session prior to completing the registration form, they will need to start the process over from the beginning. Users must follow six steps to complete EFAST2 registration:

1. Read and accept the privacy statement
2. Provide contact information and select user type
3. Select challenge question and answer
4. Verify registration information
5. Receive a credentials email notification
6. Retrieve and activate credentials

To register with EFAST2, users must go to the EFAST2 web site, located at http://www.efast.dol.gov. On the navigation panel on the left side of the **Welcome** screen, the user should click on the "*Register*" link.

### Read and Accept Privacy Statement

The first step of EFAST2 registration is to read and accept the privacy statement.

After reading the privacy statement, the user must

1. Check the box labeled "*I have read this agreement*" and
2. Click one of the buttons at the bottom of the screen:
   a. *Accept Agreement*
      1) The user will be taken to the **Profile Information** page to provide contact information and select a user type.
      or
   b. *Decline Agreement*
      1) If the user clicks the **Decline Agreement** button, a warning message will appear asking "*Do you really wish to decline this agreement and stop your registration?*"
         a) If the user confirms and clicks the "*Yes*" button, all registration will cease, and the user will be returned to the Welcome screen.
         b) If the user clicks the "*No*" button, s/he will be returned to the **Privacy Agreement** page. The user must now click the "*Accept Agreement*" button to continue.

### Complete Contact Information

After reading and accepting the privacy statement, registrants must provide contact and user type information on the **Profile Information** screen.

#### Enter Contact Information

All registrants must provide their contact information. Without this information, EFAST2 will not be able to create and send the necessary electronic filing credentials to the user.

In the upper portion of the **Profile Information** screen, users are asked to provide the following contact information. Note that an asterisk (*) next to the field label on the screen indicates a required field.

**Required** – First Name, Last Name, Address, City/Town, Country, State, Zip Code, Daytime Phone, Email Address, and Company Name.

**Optional** – Address 2 and Fax.

**Select User Type/Role**

After entering the contact information, registrants must indicate on the bottom portion of the **Profile Information** screen their desired user type/role: **Filing Signer**. More than one user type/role can be selected.

Once a user has selected their user type/role, they must click the *Next* button to continue.

**Validation of Profile Information**

The system will next validate the entries made on the screen. A registration form will be rejected if:
• Email address entered is already on file
• Required identification fields are incomplete
• Invalid field values have been entered (e.g., phone number must be a numeric value).
• Failure to select a user type/role

These errors will not let you past the **Profile Information** screen. The user must correct the information on the screen before continuing.

**Select Challenge Question and Answer**

In the next step of the registration process, the user proceeds to the **Challenge Information** screen. At this screen, the registrant must select one of two challenge (or security) questions and provide an answer. Answers to challenge questions are case sensitive. The challenge question provides a level of security that helps prevent unauthorized third parties from accessing the user's account. You should use an answer that cannot easily be guessed, such as "hospital."

**Verify Registration Information**

After selecting the challenge question and answer, users will go to the Summary screen. This screen lists the registration information they have entered. Users should verify that all this information is correct, 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.

If there are mistakes on the Summary screen, users must use the *Edit* button to correct them.

**Registration Confirmation**

Upon completion of the first part of registration, the user will receive the **Registration Confirmation** screen. Click the *OK* button to continue. The user is now done until they receive their **Credentials Notification** email with further instructions.

When the user clicks the *OK* button, they are returned to the Welcome page.

**Receive Credentials Notification**

Within five minutes of submission and acceptance of the registration form, EFAST2 will generate the user's credentials.

Once the credentials are generated, EFAST2 sends a notification to the email address the user indicated in the registration form. In this email notification, users will find a link to a secure web site as well as instructions on how to retrieve and activate the credentials at that site. In addition, the PIN information is always accessible via the user's profile page.

Note that users must access this information within three months of registering or their account will be deactivated. If the user wishes to use the same email address to reactivate their account, the user will need to contact the EFAST2 Contact Center at 1-866-463-3278 (1-866-GO EFAST) to revoke the expired account and free up the email address.

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## Retrieve and Activate Credentials

Users should follow the instructions found in the email notification to retrieve their credentials. The user will be asked to return to the EFAST2 web site to acknowledge receipt of the credentials and set his or her password.

1. The user must first answer the Challenge Question selected when registering.

   If the Challenge Question is answered incorrectly three times, the account is automatically revoked and you must re-register through the tool.
2. The user must next agree to the **PIN Agreement**. This works the same as the **Privacy Agreement.**
3. If the user selected the Filing Signer type/role, the next screen will be the Signature Agreement. As with the **PIN Agreement**, it follows the same process as the **Privacy Agreement**.
4. Next, the user will see the **Finalize** screen. The user should note the User ID and PIN for future reference. Click the *Next* button to continue.

   The *Back* button will return the user to the **PIN Agreement** screen.

   The *Cancel* button will return the user to the **Welcome** screen and cancel the registration activation.
5. Now that the user has been authenticated, the user must set his or her password. The user may enter any password of their own choosing; as long as it meets the password requirements.

   The password must be entered twice; once to set it and once to confirm it.
6. Once the user has set the password, their registration activation is complete and the user is now ready to log in and begin using the account. Click the *Login* button to return to the **Welcome** page.
7. From the **Welcome** page, click the *Login* link on the navigation panel on the left.

## Changes to Account Information

Users can change any of their account information through the EFAST2 web site.

Users can change their password and PIN by accessing their account through the EFAST2 web site. If users wish to change obtain a new user ID they must do so by revoking the existing user ID and repeating the registration process. Warning: If you change your User ID, you will no longer have access to filings created or signed using your original User ID. If users wish to use the same email address, they will need to contact the EFAST2 Contact Center at 1-866-463-3278 (1-866-GOEFAST) to revoke their current account and free up their email address.

If users change their name, PIN, password, challenge questions and answers, or email address in EFAST2, a record of that change will be maintained in the EFAST2 database.

When any change is made to a user's account, a notification of that change will be sent to the email address currently in the system for that user. If the user changes his or her email address in the EFAST2 database, a change notification will be sent to both the old and new email addresses associated with the account.

If your User ID was used for filings belonging to a single organization, and you no longer are responsible for filings for that organization, you should revoke your existing user ID via the EFAST2 Contact Center and re-register to obtain a new user ID.