

EFAST2 THIRD-PARTY SOFTWARE DEVELOPERS

GETTING STARTED – Registration, Communications, Developer Materials



Private-sector companies can develop software applications to prepare and transmit Form 5500 series filings to the EFAST2 system for processing. Software applications must be validated and authorized by the Department of Labor, in accordance with DOL published schemas and communication protocols. The EFAST2 validation and certification process is the **Participant Acceptance Testing System (PATS)**.

GETTING STARTED

Step 1. Register for EFAST access. Go to www.efast.dol.gov and click **Sign in with Login.gov** and follow the steps to **Sign in** or **Create an account** at Login.gov. When you return to the EFAST2 website, you can choose to **Create** an EFAST2 account if an account does not already exist. Be sure to select “Software Developer” as a user type during registration. You will be assigned a User ID and PIN for signature credentials.

Step 2. Sign In. Go to the www.efast.dol.gov website and click **Sign in with Login.gov**. Enter email address and password and click **Sign in**. After authentication, you will be rerouted back to the EFAST2 website.

Step 3. Access Materials. Click **Software Developer Tools** from the navigation menu to access Software Developer materials that apply to the PATS testing and certification process.

Step 4. Required Downloads. A PATS Package is available for each active form year. Click the desired **PATS Package** version to open and/or download the file. Open the PATS Package to access the **Software Developer Specification**, which contains registration steps (used in Step 5 below), testing procedures, and certification criteria.

Step 5. Register Company and Product. When ready to begin the PATS testing and certification process, log in and click **Software Developer Tools** to register your company and product for a Transmission Software ID and a unique Filing Preparation Software ID for each distinct form year.

COMMUNICATION AND OUTREACH

- 1. Call or email with questions.** Call the EFAST Contact Center at 866-463-3278 (866-GO-EFAST) or email at support@efast.dol.gov with questions about the software developer materials or the software registration, testing, and certification process.
- 2. Email Distribution List.** An email distribution list is used for outbound notifications to software developers regarding maintenance windows, software developer material updates, system changes, or other relevant information. Submit requests for additions or changes to the email distribution list to support@efast.dol.gov.
- 3. Software Developer Conference or Online Webinar.** An in-person conference or online webinar is provided annually for third-party software developers. The presentations focus on annual changes to forms and edit tests, periodic changes in communications infrastructure or protocol, and procedures for gaining software certification. Timing of the annual presentation and related support materials allow software developers and service providers time to implement changes prior to the start of the new processing year. Documentation includes updated test cases and requirements related to form changes and modifications to edit tests. For further information, email the EFAST2 Contact Center at support@efast.dol.gov.

PUBLICATIONS AND MATERIALS

EFAST2 publications available to the public:

- EFAST2 FAQs: [Electronic Filing System](#) and [Credentials](#)
- [EFAST2 Guide for Filers and Service Providers](#) – Detailed information regarding EFAST2 registration, login, credentials, and viewing filing submissions and status.

Software developer materials (sign in at www.efast.dol.gov and click **Software Developer Tools**):

- **PATS Package** – Includes PATS user guides and test cases for each form year, draft versions of the Form 5500 Series instructions, and a PDF copy of the in-person conference presentation or a link to the recorded online webinar.
- **Software Developer Specification** – Defines XML data elements, user interface requirements, communications protocols, and other technical specifications required to develop software to enable electronic filing submissions to the EFAST2 system. Provides registration steps, testing procedures, and certification criteria.
- **Data Element Requirements (DER)** – Government-defined specifications for form, schedule, and attachment data elements, validation and schema rules, and edit tests.
- **Schema files** – Government-defined XML schema definition (.xsd) files and Web Services Description Language (.wsdl) file.
- **Edit Test Mask Lists** – Business rules that are not active (i.e., are “masked”) for each form year.