



5500 FILING AND SIGNING INSTRUCTIONS

Training Tips

- You will receive an email from RPCSI titled “Your 5500 is Ready to be Signed”
- Click on the link in Section I which will take you to the RPCSI Portal log on screen.
- Your Username information is listed in Section I (a) of the email from RPCSI.
 - If you are a new user, you will need to use the link, username, and password we provide to you in our email to log on. After logging on, you will need to set your own password and challenge questions.
 - If you have used our system before, the Password is the password you have previously set up.
 - If you forget your password, and cannot answer your Challenge Questions, you will need to request a Password Reset. You may need to email your RPCSI contact in order to request that the password be reset. Once we initiate the reset, you will receive an email from ftwilliam/Wolters Kluwer containing the instructions for re-setting your password. Once you access your portal, please update the challenge questions by using the (View) “Name” on the top right pulldown and select Profile.
 - **NOTE: The Username and Password for your RPCSI Form 5500 access is NOT the same as your Department of Labor log-in information.**
- Once logged on to the RPCSI Portal, select your plan and then click on E-Sign 5500. *If you have more than one plan, you will need to complete this process for each plan.*
 - A four-step box will open.
 - Step 1: Click the ‘Print Paper Copy’ of Form 5500. This will be the copy of the form you physically sign and keep for your records. *If you have to restart the process, you are required to click the ‘print’ button each time you log-in.*
 - Step 2: Review and Sign Paper Copy before Filing Electronically.
 - Step 3: Enter/Review DOL EFAST Credentials (User ID and PIN).
 - **NOTE:** If you have signed in a prior year through RPCSI you may find a small link to click above the ID/PIN boxes that says “Click here to use prior year ID/PIN”. When the link is clicked, your DOL Credentials will auto-populate in the boxes. If the link does not appear, you will need to manually enter your DOL Credentials. If you do not yet have, or need to find, your DOL Credentials, please see the DOL Credentials Instructional Sheet.
 - Step 4: Sign and File Electronically. You will click the Sign 5500 box. You should immediately see an acceptance screen open. Please print the acceptance confirmation and file this with the hard copy of the Form 5500 you printed and signed in Steps 1 and 2. If you receive any notification other than an acceptance, please contact RPCSI.
- You have now completed the electronic filing of the Form 5500!