

Instructions for the Review and/or Completion of Form 5500

1. Access the Form 5500:

- Select *Main* in the upper left hand corner of your screen.
- Select *Planbooks* from the dropdown menu.
- **Select the Current Plan Year from the View Plans for Form Year dropdown box.**
- **Select EFAST from the Form Set dropdown box.**
- Select *View Forms* in the Action column to access a list of the forms and schedules.
- Select *View Forms* in the Action column to access the specific Form Type.

If there are no changes to your Form 5500 continue to Step 2. If changes are needed, contact your PPS Administrator.

2. Print and E-File the Form 5500:

Select "Return to Plan List" to **PRINT:**

- Select *Print* in the Actions column.
- Select the *Print Box* then click on the PDF download.
- Select *Open / File / Print / OK*.
- *Close Screen*.
- *Sign* as the Plan Administrator and Plan Sponsor at the bottom of page 1 of your Form 5500.
- *Retain* the signed copy in your files and *forward* a copy to PPS if you would like us to keep a SIGNED copy in the PPS File Cabinet website.

NOTE: The IRS requires you to maintain a copy of the Form 5500 with your actual signature.

Select "Main/Planbooks" to **E-FILE:**

- Select *E-FILE* in the Actions column.
- Select the *boxes* as Plan Administrator **and** as Plan Sponsor and insert your DOL Credentials User ID and PIN in each. The User ID and PIN number may have been saved from previous years, confirm the numbers before selecting save. If they are not there, locate your PPS Password Card or select the **U.S. DOL IREG** link.
- Save your PIN information.
- Select the *box to accept the Signing Agreement*--Read the agreement.
- Select the **Agree and Transmit** box.

Filing of the Form 5500 is complete. You will soon receive an email from PPS confirming receipt.

3. Distribute the SUMMARY ANNUAL REPORT (SAR):

Select "Main/Planbooks" to view **ATTACHMENTS:**

- Select *Attachments* in the Actions column.
- Select *SAR (pension)* at the bottom of the page in the Reference Attachments box.
- Select *Open*--To resize the SAR to fit on one page, click on print preview in Word and select Shrink One Page.
- Select *Print*.

A copy of the SAR needs to be distributed to all participants and beneficiaries no later than 9 months after your plan year end or later under 5500 extension.

QUESTIONS? Please contact the PPS office at:

- Phone: 1(515)223-0433 or 1(800)524-2815
- Email: ppservices4@pensionplanservices.com