

# How to EFILE Form 5500 (5500-SF) - Sentinel Web Client

1. Visit [sentinelgroup.com](http://sentinelgroup.com). Ensure you have "For Employers" selected in the upper left corner. Click the green "Login" button.
2. Enter your email address and password to access the employer portal. If you have never logged into the employer portal, learn more about your [First Time Logging In](#).
3. Select "Retirement" from the home page of the employer portal.
4. Select your Retirement Plan on the "Plan Selection" page. This will display your Plan Sponsor Dashboard.
5. Next, select the Web Client link.



Note: If no toolbar appears, click on the  on the upper left-hand corner to view your toolbar.

Plan Selection:

1. This page will list all published 5500 filings for your Plan.
2. Select your Plan and you will be directed to the Plan Summary page with an instruction pane to help you navigate through each page.

## Plan Selection

Form year: 2017

Page size: 10		1 items in 1 pages				
Plan Name	EIN	Plan #	Plan Year End Date	Form Status	EFAST Filing Status	8955-SSA Filing Status
<a href="#">Test 401(k) Plan</a>	999999999	001	12/31/2017	Viewed	Not Filed	

### Instructions

Welcome to the new 5500 Web Client! As you can see there are many changes to the user interface and we hope you will find it easier and more intuitive to use. You will find an instruction pane like this one on just about every page to guide you through the filing process. You can return to this page at any time by clicking on the "home" icon at the top left corner of any page you are on. In addition there is a User's Guide that you can access by clicking on the "?" at the top of the screen.

This is the Plan Selection screen. You can see the details and the current statuses of each plan that has been published to you. To begin the filing process find the plan you want to work with and left-click on the plan name. That will take you to the Plan Summary page where you start the filing process.

Note: Ensure the year is correct or change "Form Year" from the menu in the top right corner to select the correct year.

Select "File EFAST Forms:"

**Plan Summary** Test 401(k) Plan

EIN: 99-9999999 Plan #: 001 Plan ID: test Plan Year End: 12/31/2017 Form Year: 2017 Plan Year: 2017

Form	Form Status	Filing Status
5500 Package	Viewed	Not Filed
5500 Filing extension (5558)	Viewed	

**Instructions**

This is the Plan Summary page. Above this pane you can see additional details for this plan and to the right you can see several features you can access. Depending on what has been published to you, you may not see all of the features listed below.

**E-File Section**

**File EFAST Forms** - This link will open a wizard that will guide you from reviewing the 5500 series forms to signing and filing them electronically to EFAST. Your Preparer may limit the available features that you can access in this filing process.

**File 8955-SSA** - This link will open a wizard to guide you through the form 8955-SSA electronic filing process to the IRS FIRE system.

**Links Section**

**View Plan** - Click on this link to view all of the forms in the plan and its attachments. This is the quick way to see the plan if you just want to view and edit the documents.

**Print Plan** - Click this link to print the plan and its attachments. If you just need to print, this is the place to go. You can also print the plan when filing or viewing the plan.

**Review Complete** - If you needed to edit the plan and have completed your editing, click here to lock the plan for further editing and notify your Preparer that you have finished.

**View Status History** - Click here to view a history of the plan's progress toward filing.

**E-File**

- File EFAST Forms** - Electronically file your 5500 return (EFAST)

**Links**

- View Plan** - View forms and attachments in the filing
- Print Plan** - Print forms and attachments in the filing
- Review Complete** - Locks forms and sends email to preparer that forms are finished
- View Status History** - View history of the plan

Validation Errors - If you are directed to a Validation screen and it displays an error, please

contact your Plan Consultant.

### File 5500 Test 401(k) Plan

EIN: 99-9999999 Plan #: 001 Plan ID: test Plan Year End: 12/31/2017 Form Year: 2017 Plan Year: 2017



#### Forms

Forms	Name	Actions
5500-SF		<a href="#">View</a>

If in good order, select Next and you will arrive at the Signature screen. Enter your User ID and PIN that you obtained from the DOL.

### Signatures

[Manage Saved Signatures](#)

#### Administrator Signature

Name of Signer  User ID  PIN  Date

Only complete the first section, as Administrator.

After review, select "I have read this agreement" then select "Agree and Transmit" to submit your filing.

#### Signing Agreement

Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report including accompanying schedules, statements and attachments, as well as the electronic version of this return/report and to the best of my knowledge and belief, it is true, correct, and complete.

I have read this agreement.

COMPLETED!

You will now see your E-file Results and receive an email with the status of your filing.

### E-File Test 401(k) Plan

EIN: 99-9999999 Plan #: 001 Plan ID: test Plan Year End: 12/31/2017 Form Year: 2017 Plan Year: 2017



[View Status History](#)

Date	EIN	Plan #	Plan Id	Forms Status	Filing Status	User Name
09/10/2018	999999999	001	test		Submitted	

#### E-File Results

Your filing has been successfully submitted to the transmission queue at 09/10/2018. Until such time that the filing is successfully transmitted to the Department of Labor the filing Status will be listed as Submitted.

Please allow up to 24 hours for the filing to be transmitted.

Click on Close to go back to the Plan Summary or click on Log Out to exit.