

# Instructions for Downloading Form 5500/5500-SF Data Sets from the DOL EFAST2 Website

1. Go directly to the eFast data set site:

<https://www.dol.gov/agencies/ebsa/about-ebsa/our-activities/public-disclosure/foia/form-5500-datasets>

2. Scroll down to find the appropriate year end data set you need and click Schedule H.

U.S. DEPARTMENT OF LABOR

Employee Benefits Security Administration

ESPAÑOL | 1-8

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## Form 5500 Datasets

The Form 5500 Annual Report is the primary source of information about the operations, funding and investments of approximately 800,000 retirement and welfare benefit plans. The datasets below contain structured data from Form 5500 and Form 5500-SF forms and schedules filed annually.

### 2022 Form 5500

[Data Dictionary](#)



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▼ Latest

- [Form 5500](#) | [File Layout](#)
- [Form 5500-SF](#) | [File Layout](#)
- [Form 5500-SF Part 7](#) | [File Layout](#)
- [Schedule A](#) | [File Layout](#)
- [Schedule A Part 1](#) | [File Layout](#)
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- [Schedule C Part 1, Item 1](#) | [File Layout](#)
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- [Schedule C Part 1, Item 3 Service Codes](#) | [File Layout](#)
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- [Schedule G Part 1](#) | [File Layout](#)
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- [Schedule H](#) | [File Layout](#)

**Note:** Schedule H lists the financial information for the plan as well as the name and employer identification number (EIN) of the accountant and type of opinion attached (unqualified, qualified, disclaimer, or adverse). The Form 5500 (All) data set includes all filings for the plan since 2009 (the initial year for required electronic filings using EFAST), including amended returns. The Form 5500 (Latest) data set includes only the most recent submission for a particular plan year.

- After downloading the ZIP file, open the data set labeled “F\_SCH\_H\_20xx\_latest,” where “xx” denotes the plan year you have selected for download.

Name	Type	Compressed size	Password pr...
 F_SCH_H_2022_latest	Microsoft Excel Comma Separ...	13,838 KB	No
 F_SCH_H_2022_latest_layout	Text Document	2 KB	No

- In the resulting EXCEL spreadsheet, hide all columns other than columns A through E, DL and DM. Adjust the width of the remaining columns so that all test is visible. Sort column DL (ACCOUNTANT\_FIRM\_NAME) alphabetically (A-Z). Save the file as an EXCEL workbook instead of a CSV file for easier use.

**Note:** Data sets in excess of 90,000 may not be supported by older versions of EXCEL. The columns may be in a different order than laid out below.

A	B	C	D	E
ACCOUNTANT_FIRM_NAME	SCH_H_TAX_PR	SCH_H_EIN	ACCOUNTANT_FIRM_EIN	ACK_ID
2)CALIBRE CPA GROUP PLLC	12/31/2022	112236389	470900880	20231016092902NAL0024435187001
415 GROUP	12/31/2022	203210779	341341400	20230802072916NAL0010200323001
415 GROUP	12/31/2022	320038874	341341400	20230915102855NAL0015168451001
415 GROUP	11/15/2022	113695025	341341400	20230724125743NAL0008129153001
415 GROUP	12/31/2022	341030967	341341400	20230814230735NAL0000105025001
415 GROUP	12/31/2022	272137101	341341400	20230814092334NAL0019168499001
415 GROUP	12/31/2022	200254788	341341400	20230908121521NAL0015919409001

- Go to the eFast search site: <https://www.efast.dol.gov/5500search/> and search by Plan EIN (SCH\_H\_EIN), or ACK\_ID. You can then download the full Form 5500 with attached audit from the results.

## Form 5500 Search

[Show Filters](#) [Help](#)

This search tool allows you to search for Form 5500 series returns/reports filed since January 1, 2010. Posting on the web does not constitute acceptance of the filing by the U.S. Department of Labor, the Pension Benefit Guaranty Corporation, or the Internal Revenue Service.

See the [CSV File Data Dictionary](#) and [Form 5500 Series Data Dictionary](#) for additional information regarding the data included in the downloads.

Use the box below to search for specific filings.

EIN

112236389

Go!


X EIN: [11-2236389](#)

Results Count: 28

[Export to CSV](#)

[Reset Form](#)

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	Plan Name	Plan Year	EIN/PN	↓ Received	Sponsor	City, State	Participants	Assets
	NEW YORK BACKSTRETCH EMPLOYEES PENSION PLAN	2022	11-2236389 001	10/16/2023	NEW YORK BACKSTRETCH EMPLOYEES PENSION PLAN	ELMONT, NY	2137	\$47,881,281