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

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

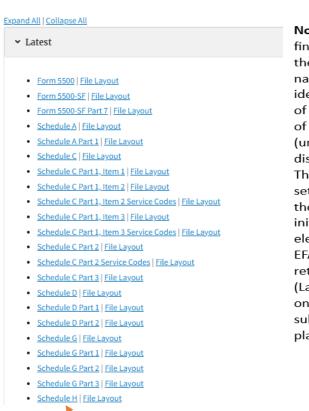


Form 5500 Datasets

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.

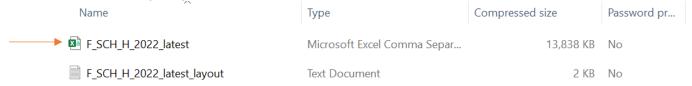
2022 Form 5500

Data Dictionary



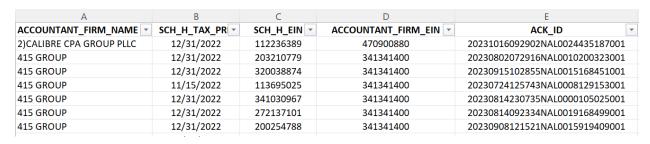
Note: Schedule H lists the financial information for the plan as well as the and employer identification number (EIN) of the accountant and type opinion attached (unqualified, qualified, disclaimer, or adverse). The Form 5500 (All) data set includes all filings for the plan since 2009 (the initial year 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.



4. 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.

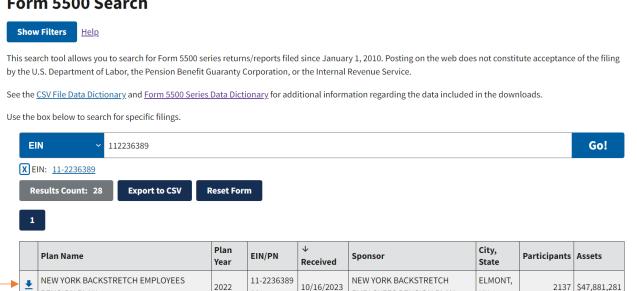
Note: Data sets in excess of 90,000 may not be supported by older versions of EXCEL. The columns may be in a different order than laid out below.



5. 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

PENSION PLAN



EMPLOYEES PENSION PLAN

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