

Reminder: Form 5500 Filing Deadline is July 31

Employers/plan sponsors are reminded that Form 5500, *Annual Return/Report of Employee Benefit Plan*, must be filed with the U.S. Department of Labor (DOL) by the last day of the seventh month after the plan year ends. **For calendar-year plans, that due date falls on July 31.**

Who Must File Form 5500

In general, all group health plans covered by the [Employee Retirement Income Security Act](#) (ERISA) are required to file Form 5500. However, group health plans (whether fully insured, self-insured, or a combination of the two) that covered **fewer than 100 participants** as of the **beginning** of the plan year **are exempt from the Form 5500 filing requirement.**

How to File Form 5500

[Forms 5500](#) and applicable [Form 5500 Schedules](#) must be filed electronically with the DOL through the ERISA Filing Acceptance System (EFAST2), using either the [IFILE](#) web-based filing system or [EFAST2/Approved Vendor software](#).

NOTE: Even though Form 5500 is filed electronically, the plan administrator must keep a copy on file, and must make a paper copy available upon request to participants, beneficiaries and the DOL.

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