

Step-by-Step Guide: Preparing for EDGAR Next

This guide will walk you through how to prepare to comply with the EDGAR Next final rule.

If you have any further questions, please reach out to file@filepoint.com for further assistance.

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Overview

To prepare for the upcoming March 24, 2025, deadline, the SEC has provided the following [infographic](#):



EDGAR Filers – Understand and be ready for the transition to EDGAR Next

Here’s how filers can prepare, enroll and comply with the SEC’s changes to EDGAR system filer access and account management

| PREPARE <small>BETA OPENS</small> September 30, 2024 | ENROLL <small>DASHBOARD GOES LIVE</small> March 24, 2025 | COMPLY <small>COMPLIANCE REQUIRED</small> September 15, 2025 |
|--|--|--|
| <p style="text-align: center; background-color: #ffc107; padding: 5px;">Prepare for EDGAR Next changes</p> <ul style="list-style-type: none"> > Individuals authorized by filers obtain Login.gov credentials using the email address they plan to use for EDGAR. Credentials will be needed for beta testing, enrollment, and compliance. > Filers test in Adopting Beta. If planning to connect to optional APIs, filers develop API connections and adjust their filing applications. > Filers gather CIK, CCC, and passphrase; identify whom they will authorize as account administrators, and, if connecting to optional APIs, technical administrators (unless using API connections of delegated entity); if planning to delegate authority to file, contact potential delegated entities. > Beta remains open until at least December 19, 2025. | <p style="text-align: center; background-color: #ffc107; padding: 5px;">Existing filers: Enroll Applicants for access: Submit amended Form ID</p> <ul style="list-style-type: none"> > Enrollment opens March 24, 2025, on the dashboard of the new EDGAR Filer Management website. > Filers have 6 months to enroll before compliance is required and an additional 3 months to enroll thereafter. > Applicants for EDGAR access (prospective new filers and existing filers who do not have information needed to enroll) must complete and submit amended Form ID on dashboard. > Option for enrolled filers and filers granted access on amended Form ID to file through submission API and use other APIs starting March 24, 2025. > All other filers continue filing on EDGAR filing websites per existing process through September 12, 2025. | <p style="text-align: center; background-color: #ffc107; padding: 5px;">Filers must comply with EDGAR Next changes to file on EDGAR</p> <ul style="list-style-type: none"> > To make submissions, filers must be enrolled in EDGAR Next or granted access on amended Form ID. > Login.gov credentials and completion of multifactor authentication required for login to all EDGAR websites. > Existing filers may continue to enroll until December 19, 2025, but will not be able to file until they enroll. > Filers can no longer file on EDGAR using legacy codes. > Enrollment ends December 19, 2025. After this date, submission of amended Form ID required to request access to existing accounts. |

for additional details visit www.sec.gov/edgar-next



SEC Resources

For additional information on the EDGAR Access final rule, please refer to the following SEC resources:

[EDGAR Access Final Rule](https://www.sec.gov/files/rules/final/2024/33-11313.pdf) <https://www.sec.gov/files/rules/final/2024/33-11313.pdf>

[Preparing for EDGAR Access](https://www.sec.gov/submit-filings/improving-edgar/edgar-next-improving-filer-access-account-management) <https://www.sec.gov/submit-filings/improving-edgar/edgar-next-improving-filer-access-account-management>

[EDGAR Filer Manual](https://www.sec.gov/files/edgar/vol-1-edgar-filer-manual.pdf) (effective March 24, 2025 containing EDGAR Next changes) <https://www.sec.gov/files/edgar/vol-1-edgar-filer-manual.pdf>

Register at Login.gov

The new EDGAR Filer Management website including the dashboard is Login.gov. Individual account credentials may be set up prior to the March 24, 2025, deadline. The email used for Login.gov credentials must correspond to the email that is used in connection with EDGAR when the EDGAR Next changes take effect on September 15, 2025.

To create an account:

1. Navigate to <https://filermanagement.edgarfiling.sec.gov/>.
2. Click **Sign in with Login.gov**.

U.S. Securities and Exchange Commission
Electronic Data Gathering, Analysis, and Retrieval (EDGAR)

EDGAR Next Adopting Beta depicts draft content and processes for test purposes only. The Adopting Beta does not contain any account information that currently exists in live EDGAR. Consult the [Adopting Beta Filer Guidance](#) for information about testing passphrase resets and enrollment (including test CIKs to enroll) in Adopting Beta. The SEC has adopted EDGAR Next rule and form changes, however, SEC staff may revise technical content in the Adopting Beta. If you experience any bugs, they may be reported [here](#).

Filer Management

EDGAR has new access and account management processes

Consult [Rule 10 of Regulation S-T](#) and the [EDGAR Filer Manual](#) for requirements. Reference the [EDGAR Next - Improving Filer Access and Account Management](#) page and the [How Do I?](#) pages for guidance.

All filers must have at least two account administrators—except individual filers and single-member companies must have at least one account administrator.

All individuals must have individual account credentials obtained through Login.gov to access EDGAR. Select “Sign in with LOGIN.GOV” below to sign in to EDGAR or to obtain individual account credentials. If you do not have individual account credentials through Login.gov, you will be prompted to create them.

BEFORE YOU PROCEED TO LOGIN.GOV: The Login.gov credentials you create may be used to log into live EDGAR in the future. Consider using an email address that you plan to use for EDGAR, at which you would receive EDGAR notifications. For the Beta and later live EDGAR, the email address will appear next to your name on the dashboard and will be visible to other persons. You may wish to provide Login.gov a different email address than that which you use for personal purposes.

EDGAR is available from 6:00 a.m. to 10:00 p.m. ET, Monday through Friday, except [Federal holidays](#). Plan to make your filings and manage your account during these business hours. Please also familiarize yourself with the rules related to filing dates.

[Contact Filer Support](#)

Avoid technical problems by using EDGAR’s [recommended browsers](#): Google Chrome or Microsoft Edge.

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Sign in with LOGIN.GOV

3. Click **Create an account**.

Sign in **Create an account**

Create an account for new users

Enter your email address

Select your email language preference
 You will receive emails from Login.gov in the language you choose.

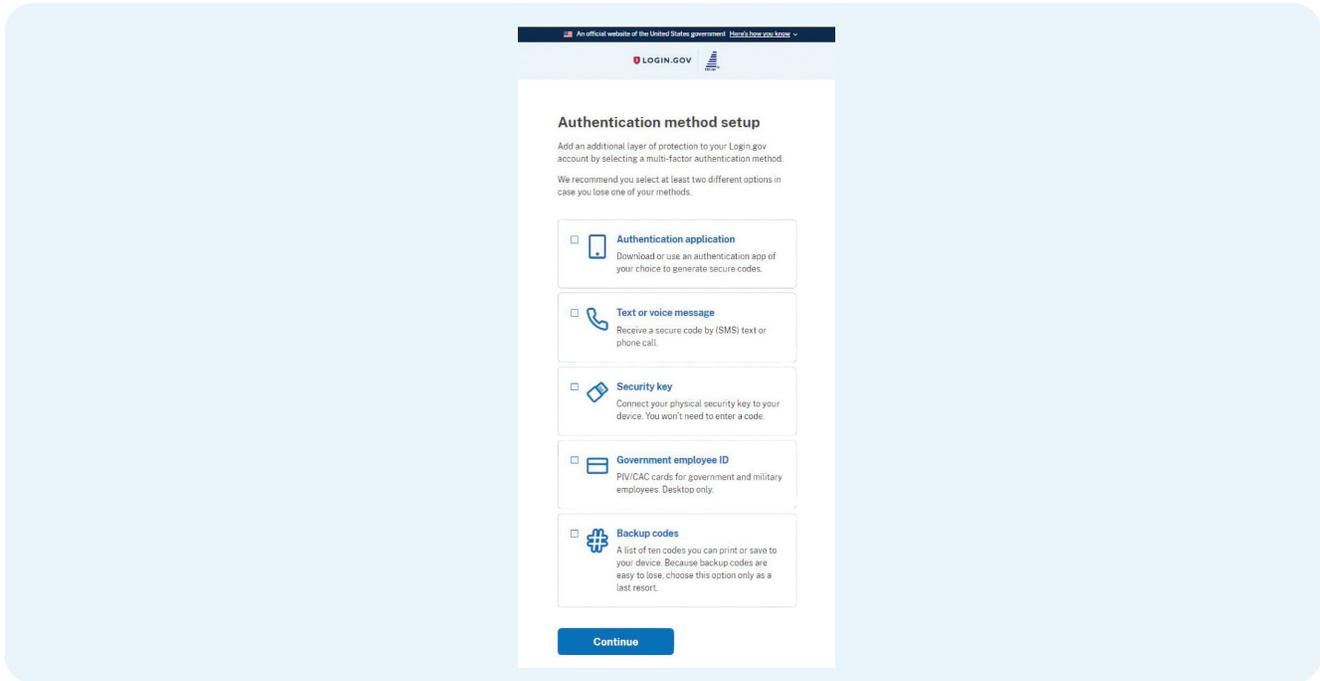
English (default)
 Español
 Français
 中文 (简体)

I read and accept the Login.gov [Rules of Use](#)

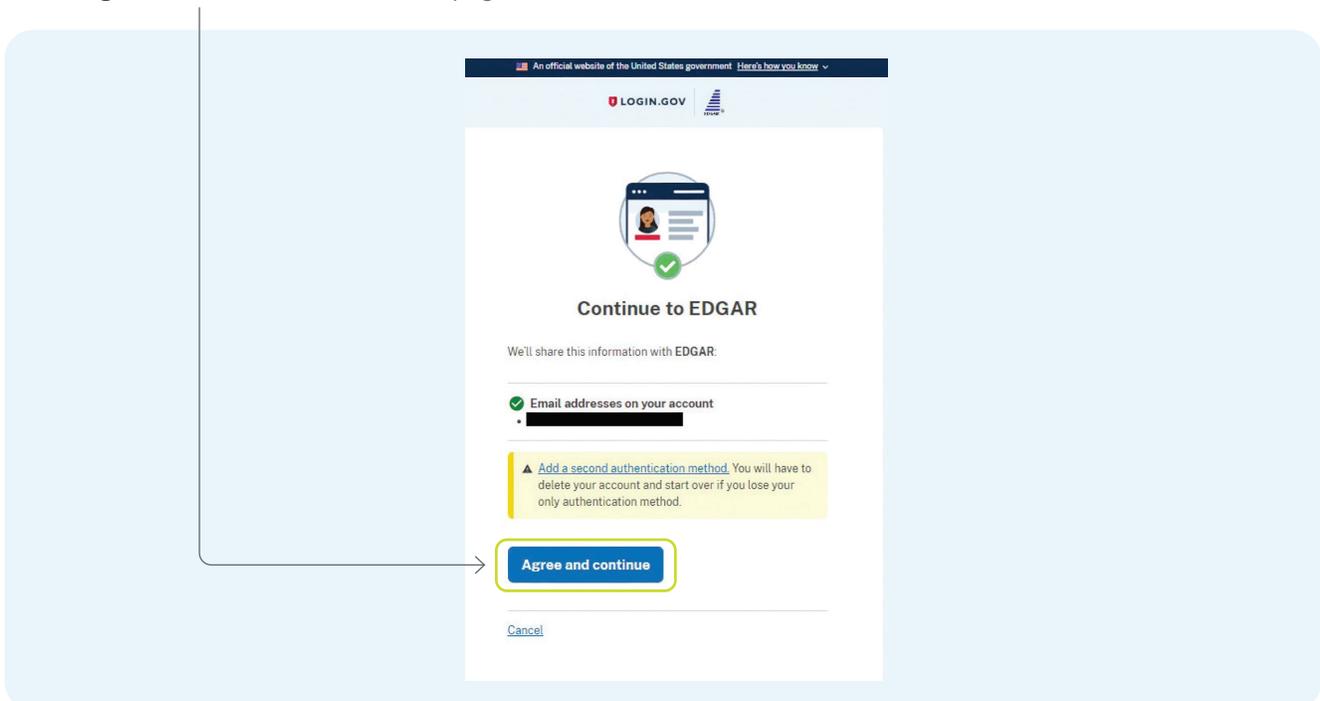
Submit

[Cancel](#)
[Security Practices and Privacy Act Statement](#)
[Privacy Act Statement](#)

4. Proceed by entering in your email address, preferred language, and accept the Login.gov Rules of Use.
5. Click **Submit**. A confirmation email will be sent to the listed email.
6. Click on the **Confirm email address** link. You will be prompted to set up two-factor authentication.



7. Set up two-factor authentication using one of the above methods.
8. Add a second two-factor authentication method if preferred. Otherwise, click on **Skip for now**.
9. Click **Agree and continue** on the next page.



Your individual account is now set up. This will be the account that will be used when the EDGAR Next changes are effective on September 15, 2025. To avoid interruption when filing, all EDGAR filers must transition to EDGAR Next by September 12, 2025.

On March 24, 2025, once your organization has been enrolled, you may add individuals to the organization and assign roles. If all users that plan on being account administrators, users, or technical administrators have already set up individual accounts prior to March 24, 2025, then you may invite them to your organization through the Login.gov dashboard.

Under **Manage Individuals and User Groups > Add Individual**, you can send an individual an invitation to your organization and assign roles. This form will send an email invite they will need to accept that lasts two weeks. Following the **two-week** period, the invite will expire, and an additional invite will need to be sent. Once accepted, they will become a member of your organization with the assigned roles.

Add individual ×

Filer: [REDACTED]

Business email [REDACTED]
Please enter a valid email

First name [REDACTED] Middle name (optional) [REDACTED] Last name [REDACTED]

Role(s):

- Account Administrator
- User
- Technical Administrator

CANCEL **ADD INDIVIDUAL**

Note:

Creating individual accounts prior to the March 24, 2025, deadline will help ensure individuals are able to be added to the organization quickly.



Test the Beta Environment

Once an individual account is set up, you will have full access to the beta Login.gov dashboard. This dashboard will closely match the dashboard that will be used once EDGAR Next is effective on September 15, 2025. Please note the dashboard is subject to change prior to the compliance date.

Key features to test and become familiar with:

- How to view and manage personal information.
- How to access and create personal API tokens.

Account administrators may become familiar with:

- How to view and edit account details.
- How to enroll in EDGAR Next or apply for EDGAR access, if applicable.
- How to manage and add individuals to your organization.
- How to view and manage your organization's CCC.
- How to view and manage delegations.
- How to view and submit the annual account confirmation.

Refer to the [SEC's EDGAR Next Filer Testing Guidance](#) for additional test cases to prepare for and become familiar with.



Prepare Organization Structure

Filers are now required to assign user roles to individuals within the organization. Roles include account administrator, user and technical administrator.

Account Administrator

- May add and remove users, account administrators and technical administrators.
- May delegate filing authority to other EDGAR accounts.
- May submit the required annual confirmation of organization information.
- One account administrator must be the point of contact (POC) for SEC staff regarding the account.
- Has all permissions of a User.

User

- May submit filings on EDGAR.
- May submit COUPDAT requests (may update their CIK's name, address, state of incorporation etc.).

Technical Administrator

- Can issue and deactivate filer API tokens on the dashboard.
- POC for SEC staff regarding API use.

| Role | Submit filings, view CCC | Generate/change | Manage account administrators, users, technical administrators, and delegated entities | Delegate to another filer | Manage delegated users | Manage filer API token | Manage user AP token |
|-------------------------|--------------------------|-----------------|--|---------------------------|------------------------|------------------------|----------------------|
| Account Administrator | ✓ | ✓ | ✓ | ✓ | | | ✓ |
| User | ✓ | | | | | | ✓ |
| Technical Administrator | | | | | | ✓ | |
| Delegated Administrator | ✓ | | | | ✓ | | ✓ |
| Delegated User | ✓ | | | | | | ✓ |

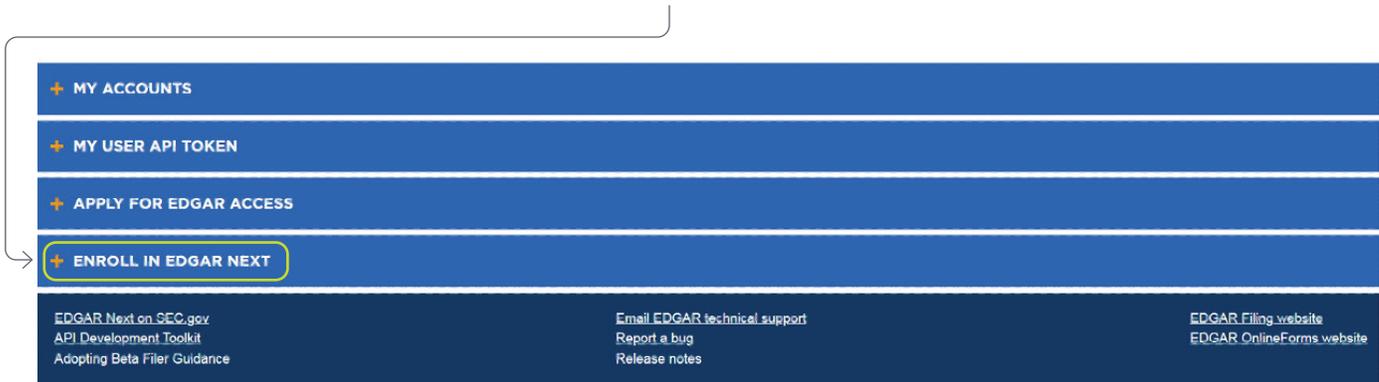
Prior to enrollment during the March 24, 2025, to September 12, 2025 period, consider determining which individuals should be Account Administrators, Users and Technical Administrators ahead of time. This will help ensure you have time for any discussions or communications needed during this process.

Prepare for Enrollment

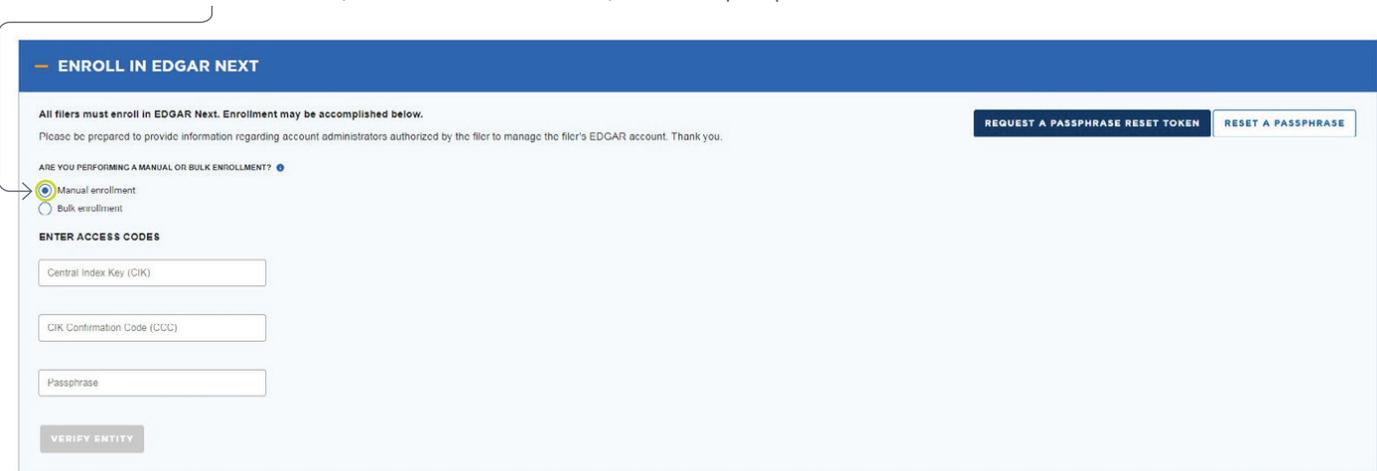
Beginning on March 24, 2025, all existing filers will be able to enroll their organization prior to compliance on September 15, 2025. In order to enroll, filers must have access to their **CIK, CCC and passphrase**.

To enroll an existing filer on EDGAR, an individual must have registered and created an account on Login.gov. For instructions on how to create an account on Login.gov, please refer to page 2 of this user guide

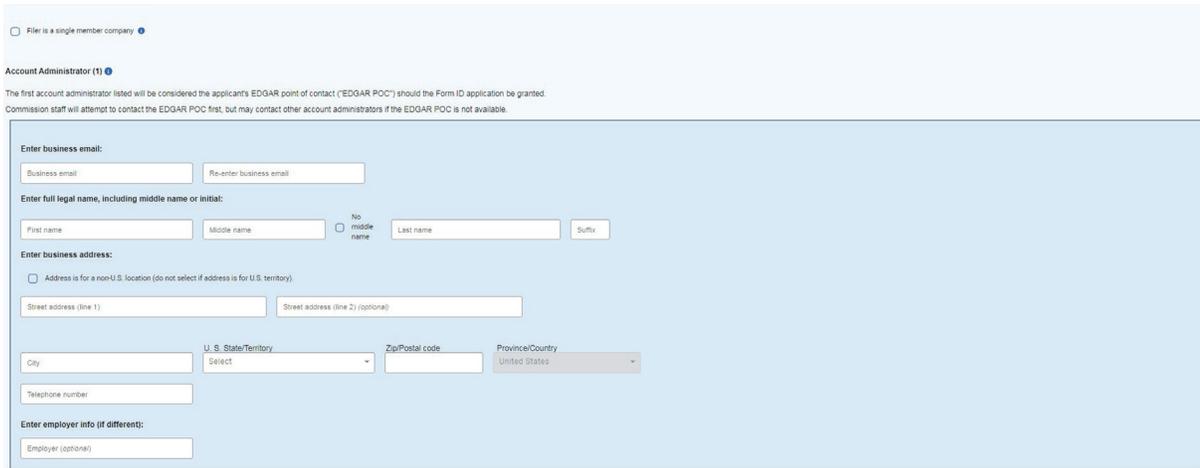
1. On the home page of the dashboard, click **Enroll in EDGAR Next**.



2. Click **Manual enrollment**, and enter the filer's CIK, CCC and passphrase.



3. Click **Verify Entity**.
4. Enter the desired **annual confirmation date** and information for the **two required account administrators** (one for single- member companies).



Filer is a single member company

Account Administrator (1)

The first account administrator listed will be considered the applicant's EDGAR point of contact ("EDGAR POC") should the Form ID application be granted. Commission staff will attempt to contact the EDGAR POC first, but may contact other account administrators if the EDGAR POC is not available.

Enter business email:

Business email: Re-enter business email:

Enter full legal name, including middle name or initial:

First name: Middle name: No middle name Last name: Suffix:

Enter business address:

Address is for a non-U.S. location (do not select if address is for U.S. territory).

Street address (line 1): Street address (line 2) (optional):

City: U.S. State/Territory: Zip/Postal code: Province/Country:

Telephone number:

Enter employer info (if different):

Employer (optional):

5. Click **Enroll Now**.

A message will display indicating successful enrollment. Listed account administrators will have access to the enrolled organization immediately on their Login.gov dashboard. Account administrator(s) may begin inviting individuals to their organization and make submissions on EDGAR.

Note: The filer's ability to manage its CCC, password, and the EDGAR primary POC on the EDGAR Filing website will be disabled after completing enrollment. The filer's designated account administrator(s) will manage the CCC, password, and the filer's EDGAR primary POC on the dashboard going forward.

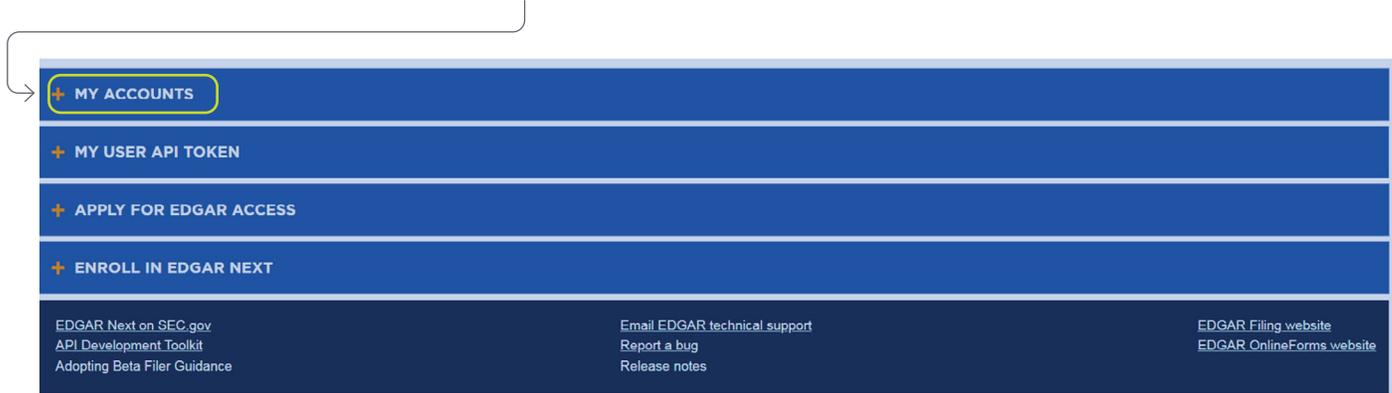
Additionally, enrolling in EDGAR Next will **reset the filer's CCC**. As a part of EDGAR Next, delegating filing authority to a CIK will allow them to view your current CCC. After enrolling in EDGAR Next, please notify FilePoint and any other filing agents of the CCC change and delegate filing authority following instructions on page 9.

Delegate Filing Authority to FilePoint

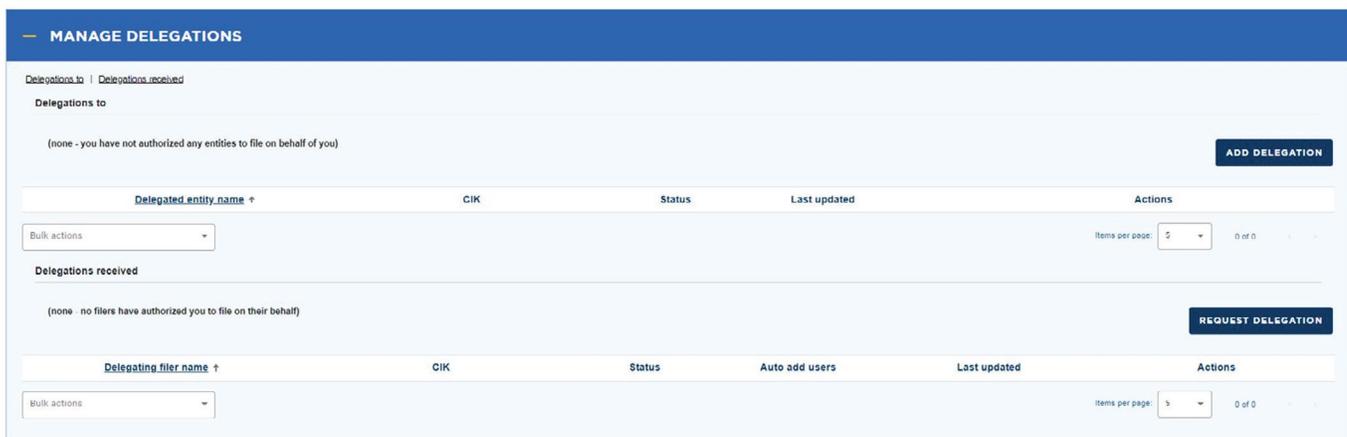
Beginning on March 24, 2025, filers may begin delegating filing authority to filing agents or any other external users that are authorized to file on their behalf. Filers must transition to EDGAR Next no later than September 12, 2025, to avoid interruption when filing. Beginning September 15, 2025, in order for FilePoint to continue submitting EDGAR filings on a filer’s behalf, all filers must delegate filing authority to FilePoint in EDGAR.

To delegate filing authority to FilePoint beginning March 24, 2025, a filer must first:

- Have registered and created an account on Login.gov.
 - Enrolled their organization in EDGAR Next.
 - Be an Account Administrator for their organization. To delegate filing authority to FilePoint:
1. As an Account Administrator, click **My Accounts** on the home page of the dashboard.



2. Click on the **Filer Name** to access the filer dashboard view.
3. Click **Manage Delegations**, then **Add Delegation**.



4. Enter FilePoint's CIK (**0001398344**) and click **Delegate**.

Delegate authority to file ✕

To delegate authority to file on your behalf to another filer, enter the CIK number of that filer below.

- Only delegate to a filer with which you have an existing agreement to file on EDGAR on your behalf.
- If the filer's account administrator accepts the invitation, the filer will become your delegated entity and will be able to make filings on your EDGAR account.
- You may cancel the delegation at any time by selecting "Cancel delegation." The delegated entity need not accept the cancellation for it to be effective.
- For more information on delegation, see [EDGAR Next](#) on SEC.gov.

Delegated filer(s): ██████████

Enter your delegated entity's CIK **VERIFY CIK**

CANCEL **DELEGATE**

FilePoint will receive an email invitation to become delegated filers. Once accepted, FilePoint will be able to submit EDGAR filings on the filer's behalf.

Alternatively, FilePoint may request delegation if preferred. If sent, an account administrator may accept the request on their Login.gov dashboard.

Delegating filing authority prior to the September 15, 2025 deadline will ensure FilePoint is able to make any EDGAR submissions on or after this date without interruption.

Still have questions? Email us at file@filepoint.com or call 919.706.4090.