

# EDGAR NEXT

## KICK-OFF WEBINAR #5

SEC EDGAR Business Office (EBO)

February 20, 2025 | 1:30 – 3:00 pm ET



U.S. Securities and  
Exchange Commission

# DISCLAIMER

This presentation represents the views of the staff of the EDGAR Business Office. It is not a rule, regulation, or statement of the Securities and Exchange Commission (SEC or Commission). The Commission has neither approved nor disapproved its content. As with all staff statements, this information has no legal force or effect: it does not alter or amend the applicable law, and it creates no new or additional obligations on any person.



# AGENDA

- Overview of EDGAR Next
- Form ID As Amended Effective March 24, 2025
- Dashboard Demonstration
- Enrollment Opens March 24, 2025
- Resources
- Q&A



# OVERVIEW OF EDGAR NEXT



# WHAT IS EDGAR NEXT?

Improvements to EDGAR security, filer access and account management capabilities

<b>Current EDGAR</b>	<b>EDGAR Next</b>
Entity-level access codes with no individual-level authorization or multifactor authentication.	Individual account credentials with multifactor authentication to identify and track individuals logging into EDGAR.
Filers share access codes potentially via various unsecured methods.	New Filer Management dashboard to manage filers' accounts and filing permissions in a standardized, transparent method.
Filing agents engage in “web scraping” to create custom filing applications that are not formally supported by the SEC.	Application programming interfaces (“APIs”) to provide improved stability and performance for custom filing applications.



# SCOPE OF EDGAR NEXT

All EDGAR filers must comply with EDGAR Next to file on EDGAR.

- The filer may be an entity (for example, an issuer, a filing agent, etc.) or an individual (for example, a Section 16 filer).
- "Filers" may also be referred to as "EDGAR accounts" or "CIKs" (CIK refers to the "Central Index Key" number that uniquely identifies each EDGAR filer account).



# TRANSITION TO EDGAR NEXT

- March 24, 2025—EDGAR Filer Management website changes:
  - The new dashboard will be available, and legacy Filer Management functions will be removed.
  - The dashboard is accessed by providing Login.gov individual account credentials and completing multifactor authentication.
  - On the dashboard, existing filers may enroll in EDGAR Next.
  - Also on the dashboard, individuals and entities must apply for access on the amended Form ID. (Filers whose Form ID is granted on or after March 24, 2025 will be automatically subject to EDGAR Next and will not need to enroll.)
  - Enrolled filers can use optional APIs to make submissions, retrieve information, and manage their EDGAR accounts.



# TRANSITION TO EDGAR NEXT

- September 15, 2025 (and thereafter):
  - Individuals taking actions in EDGAR must access all three EDGAR websites using individual account credentials from Login.gov and complete multifactor authentication.
  - Filers that have not yet enrolled will not be able to file until they enroll.
- December 19, 2025:
  - Enrollment ends. Filers that have not yet enrolled will not be able to file on EDGAR until they submit a Form ID application that is granted by SEC staff.



# INDIVIDUAL ROLES IN EDGAR NEXT

## Account administrator (20 max)

- Manages the filer's account on the dashboard, including adding and removing individuals
- Performs annual confirmation
- Delegates authority to file to other EDGAR accounts
- Generates or creates custom CCC

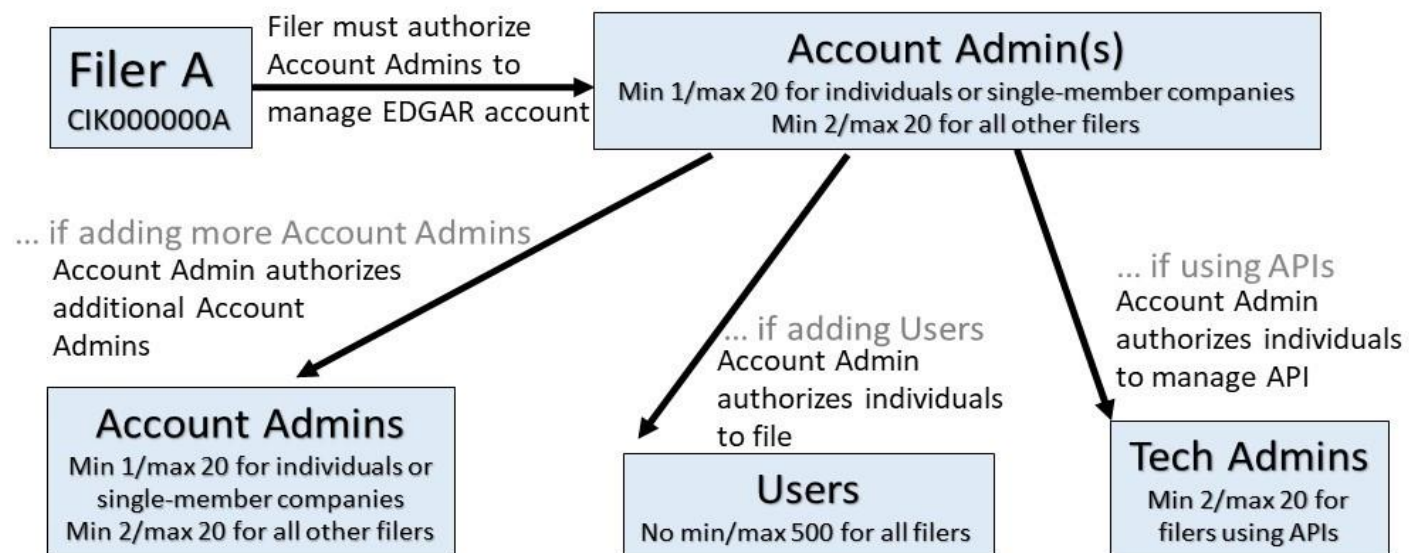
## User (500 max)

- Makes submissions on behalf of the filer
- Views CCC

## Technical administrator (20 max)

- Generates filer API tokens
- Manages filer's connection to APIs

Diagram 1: Authorization of Individual Roles



# INDIVIDUAL ROLES IN EDGAR NEXT

Diagram 2: Key Functions for each Role

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

An individual can have one or more roles for each filer

- Account administrator can be a Technical Administrator but not a User
- Technical Administrator can be a User or an Account Administrator

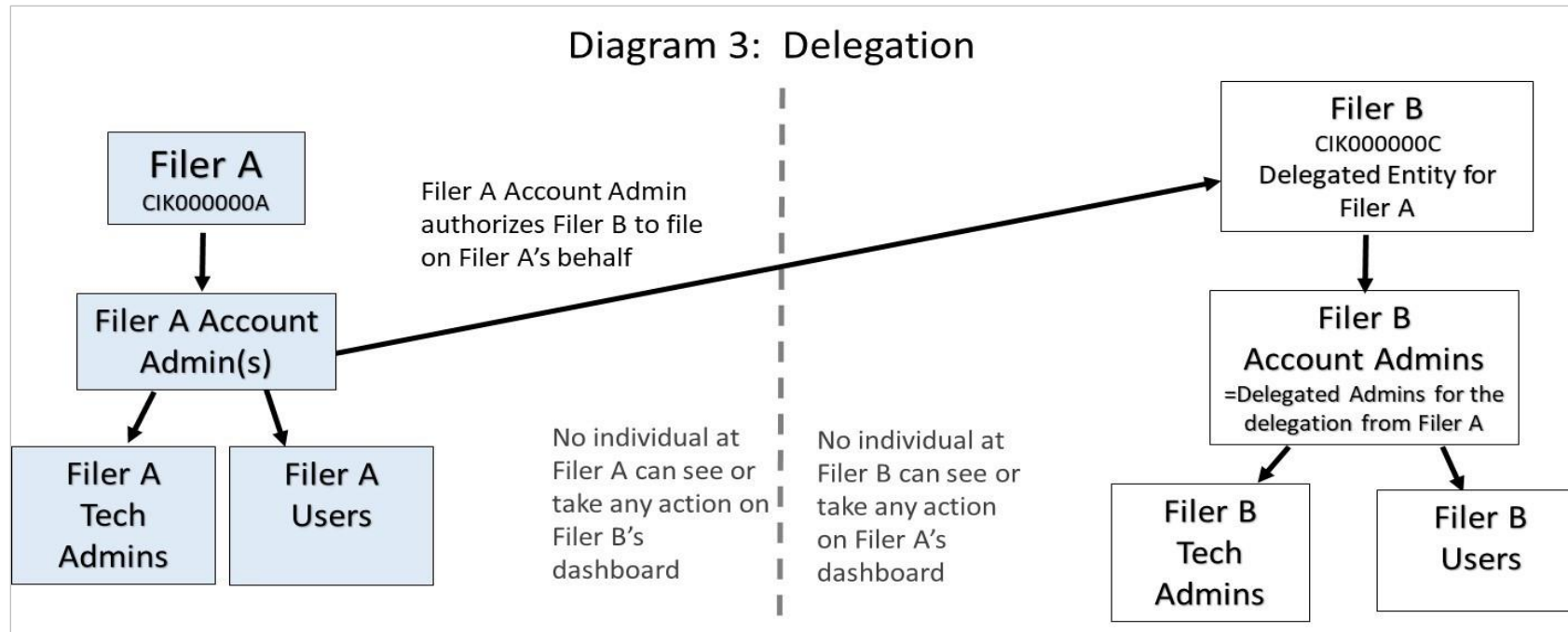
*Note: Delegated Administrators and Delegated Users are the Account Administrators and Users at the Delegated Entity.*



# INDIVIDUAL ROLES IN EDGAR NEXT

## Delegated Administrator is Account Administrator at Delegated Entity

- Manages the Delegated Entity/filer's account on the dashboard, including adding and removing individuals (Filer B, Delegated Entity for Filer A)
- Manages filing permissions for Delegated Entity with regards to filer's account (Filer A)
- Has options to create default user group, auto accept delegations, and accept delegation requests.



# 15 APIs INTRODUCED BY EDGAR NEXT

- Submission API
- Submission Status API
- EDGAR Operational Status API
- Add, Remove, and View Individuals APIs (3 APIs)
- Change Roles API
- Send, Request, and View Delegations APIs (3 APIs)
- View Filer Account Information API
- Generate and Create Custom CCC APIs (2 APIs)
- Filing Credentials Verification API
- Enrollment API



# API TOKENS USED IN EDGAR NEXT

Filer API Token	User API Token
<ul style="list-style-type: none"><li>Identifies the entity using the API (e.g., law firm, broker-dealer, filing agent, filer)</li></ul>	<ul style="list-style-type: none"><li>Identifies the individual using the API (e.g., User or Account Administrator of entity)</li></ul>
<ul style="list-style-type: none"><li>Created by the entity's Technical Administrator</li></ul>	<ul style="list-style-type: none"><li>Created by the individual</li></ul>
<ul style="list-style-type: none"><li>Valid for up to one year, but removed from the dashboard after creation</li></ul>	<ul style="list-style-type: none"><li>Valid for 30 days, and retained in the dashboard after creation</li></ul>
<ul style="list-style-type: none"><li>May be shared between a filer and a Delegated Entity (and vice versa)</li></ul>	<ul style="list-style-type: none"><li>May not be shared</li></ul>



# API TOKENS USED IN EDGAR NEXT

## Options for use of API tokens

1. Filers may use their own filer API token and a user API token belonging to a User or Account Administrator of the filer.
2. Filers who delegate may use their Delegated Entity's filer API token and a user API token belonging to a User or Account Administrator of the filer.
3. Filers who delegate may ask their Delegated Entity to use the filer's filer API token and a user API token belonging to a User or Account Administrator of the Delegated Entity.
4. Filers who delegate may ask their Delegated Entity to use the Delegated Entity's filer API token and a user API token belonging to a User or Account Administrator of the Delegated Entity.



# FORM ID AS AMENDED

EFFECTIVE MARCH 24, 2025



# FORM ID AS AMENDED EFFECTIVE MARCH 24, 2025

The Form ID application for access to file on EDGAR is being amended effective March 24, 2025.

- If you do not have an EDGAR account or cannot reset your codes to regain access to your EDGAR account, and you anticipate the need to file prior to March 24, 2025, **apply for access to EDGAR on current Form ID now.**
  - *Existing filers should not attempt to "enroll" on Form ID. Enrollment is a separate streamlined process for existing filers.*
- Prior to March 24, 2025, SEC staff anticipates an increased volume of Form ID applications, and staff may require more than the current minimum processing time of two business days to review Form IDs.



# FORM ID AS AMENDED

## EFFECTIVE MARCH 24, 2025

- If a Form ID is not granted by **10 p.m., Friday, March 21, 2025**, EDGAR will suspend it.
- Applicants whose Form IDs are suspended must re-apply for access on or after Monday, March 24, 2025 on the Form ID as amended on the dashboard of the new EDGAR Filer Management website.

***SEC staff seeks to minimize disruptions that filers may experience during the transition to EDGAR Next. If you have questions about your particular filing situation, contact Filer Support at (202) 551-8900 option #2.***



# DASHBOARD DEMONSTRATION



# EDGAR INSTRUCTIONAL VIDEO



Link to Video: ["Overview of the account administrator role"](#)



# OBTAINING LOGIN.GOV CREDENTIALS

1

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 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 It?](#) 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.

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.

EDGAR® and EDGARlink® are registered trademarks of the U.S. Securities and Exchange Commission. All other brand product names mentioned in this software are trademarks or registered trademarks of their respective holders.

**Sign in with LOGIN.GOV**

2

LOGIN.GOV

EDGAR is using Login.gov to allow you to sign in to your account safely and securely.

**Sign in** **Create an account**

Sign in for existing users

Email address

Password

Show password

**Sign in**

Sign in with your government employee ID

EDGAR is using Login.gov to allow you to sign in to your account safely and securely.

**Sign in** **Create an account**

Create an account for new users

Enter your email address

AaaDoe@company1.com

Select your email language preference  
Login.gov allows you to receive your email communication in English, Spanish, French or 中文 (简体).

English (default)  
 Español  
 Français  
 中文 (简体)

3

LOGIN.GOV

EDGAR is using Login.gov to allow you to sign in to your account safely and securely.

**Sign in** **Create an account**

Sign in for existing users

Email address

AaaDoe@company1.com

Password

Show password

**Sign in**

Sign in with your government employee ID

4

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 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

**Aaa Doe** **SIGN OUT**

Login.gov email: AaaDoe@company1.com **SHOW NOTIFICATIONS**

Contact information: no contact information available [Edit My Information](#)

**MY ACCOUNTS**

**MY USER API TOKEN**

**APPLY FOR EDGAR ACCESS**

**ENROLL IN EDGAR NEXT**

EDGAR Next on SEC.gov  
API Development Toolkit  
Adopting Beta Filer Guidance

Email EDGAR technical support  
Report a bug  
Release notes

EDGAR Filing website  
EDGAR OnlineForms website



# DASHBOARD LANDING PAGE



Filer Management

**Aaa Doe** 68 [SHOW NOTIFICATIONS](#) [SIGN OUT](#)

Login.gov email: [aaadoe@company1.com](mailto:aaadoe@company1.com)  
Contact information: 123 Main St, Fairfax, VA, 22032 [Edit my information](#)

**+ MY ACCOUNTS**

**+ MY USER API TOKEN**

**+ APPLY FOR EDGAR ACCESS**

**+ ENROLL IN EDGAR NEXT**

<a href="#">EDGAR Next on SEC.gov</a>	<a href="#">Email EDGAR technical support</a>	<a href="#">EDGAR Filing website</a>
<a href="#">API Development Toolkit</a>	<a href="#">Report a bug</a>	<a href="#">EDGAR OnlineForms website</a>
<a href="#">Adopting Beta Filer Guidance</a>	<a href="#">Release notes</a>	<a href="#">Request a password and CCC reset token</a>
		<a href="#">Reset password and CCC</a>

# ENROLL IN EDGAR NEXT

## MANUAL ENROLLMENT

+ APPLY FOR EDGAR ACCESS

— ENROLL IN EDGAR NEXT

All filers must enroll in EDGAR Next. Enrollment may be accomplished below.

Be prepared to provide information regarding account administrators authorized by the filer to manage the filer's EDGAR account.



PASSPHRASE RESET

Are you performing a manual or bulk enrollment?

- Manual enrollment
- Bulk enrollment

ENTER ACCESS CODES

Central Index Key (CIK)

CIK Confirmation Code (CCC)

Passphrase

VERIFY ENTITY



# ENROLL IN EDGAR NEXT

## MANUAL ENROLLMENT

### 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 email:

#### Enter full legal name, including middle name or initial:

   No middle name  

#### Enter business address:

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

### Account Administrator (2) ⓘ

#### Enter email:

# ENROLL IN EDGAR NEXT

## BULK ENROLLMENT

**ENROLL IN EDGAR NEXT**

All filers must enroll in EDGAR Next. Enrollment may be accomplished below.

Be prepared to provide information regarding account administrators authorized by the filer to manage the filer's EDGAR account.

**Are you performing a manual or bulk enrollment?**



Manual enrollment

Bulk enrollment

Add account administrators for multiple CIKs at the same time. Provide the relevant CIKs, enter information for a second account administrator, and enter the passphrase and CCC for each CIK.

Use the template below to authorize account administrators for multiple EDGAR accounts/CIKs at the same time. Provide the relevant CIKs, information for both account administrators, and the passphrase and CCC for each CIK. Upload the completed template using the expected formats displayed below.

**Bulk enrollment CSV template** **Bulk enrollment CSV template instructions**

**UPLOAD THE COMPLETED TEMPLATE**

File information

Drag one file at a time here or [choose from folder](#)

**ENROLL NOW**

**PASSPHRASE RESET**



# ENROLL IN EDGAR NEXT

## BULK ENROLLMENT

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Entity Name	CR	CCC	Passphrase	Confirmati	Single Me	First Acco	FAA S	FAA Last Name	FAA Suffix	FAA Business Street Address 1	FAA Busi	FAA City	FAA US State Code	FAA Zip	FAA Country/Province code	FAA Business Phone Number	FAA Email
2	Company 1	2075928	dazzie#1	dazzie#1	1	0	Aaa	Doe			123 Main St		Fairfax	VA	22032	USA	123-456-7890	aaadoc@company1.com
3	Company 2	2075917	anfield8	anfield8	8		Bbb	Doe			1221 Elm St		Springfield	MA	1108	USA	988-765-4321	bbbdoc@company2.com
4	Company 3	2075918	klopp#20	klopp#20	4		Ccc	Doe			776 Oak St		St Louis	MO	34567	USA	568-555-4444	cccdoc@company3.com
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		



# ENROLL IN EDGAR NEXT

## NEW FILERS


### — APPLY FOR EDGAR ACCESS

Is this application for a new EDGAR account or for access to an existing EDGAR account?

[Instructions](#)

- New** EDGAR account (new EDGAR account number, known as a Central Index Key (CIK), will be issued)
- Existing** EDGAR account (applicant currently has an EDGAR account and Central Index Key (CIK))

**CONTINUE**

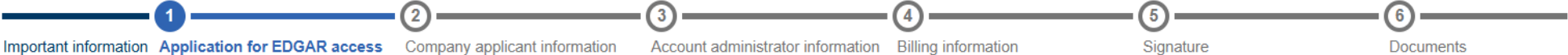
- 
- Resume and submit** application from previously saved and downloaded (.eis) file 



# ENROLL IN EDGAR NEXT

## FORM ID APPLICATION FOR EDGAR ACCESS

**OMB Approval**  
Number: *(td)*  
Expires: *(td)*  
Estimated average burden hours per response: *(td)*



### PART 1 - APPLICATION FOR EDGAR ACCESS (To be completed by all applicants)

- New** EDGAR account (new EDGAR account number, known as a Central Index Key (CIK), will be issued)
- Existing** EDGAR account (applicant currently has an EDGAR account and Central Index Key (CIK))

#### Application information

##### Is the applicant a company or an individual?

Only apply as an individual if you seek an EDGAR account for yourself as a natural person.  
All others should apply as a company.

- Applicant is a company
- Applicant is a individual

EXIT


SAVE & DOWNLOAD

CONTINUE

[Instructions](#)



# DASHBOARD – FILER VIEW

 Filer Management


[BACK TO MY ACCOUNTS](#) [SIGN OUT](#)

**Aaa Doe**

Account, CIK:

My role(s): Account Administrator

[ACCOUNT DETAILS](#)

 **ANNUAL CONFIRMATION**  
(due date 12/31/2025)

- + [MANAGE INDIVIDUALS](#)
- + [MANAGE CCC & PASSWORD](#)
- + [MANAGE DELEGATIONS AND USER GROUPS](#)
- + [MANAGE ABS ISSUER ACTIVITY](#)
- + [MANAGE FILER API TOKEN](#)

[EDGAR Next on SEC.gov](#)      [Email EDGAR technical support](#)      [EDGAR Filing website](#)  
[API Development Toolkit](#)      [Report a bug](#)      [EDGAR OnlineForms website](#)  
[Adopting Beta Filer Guidance](#)      [Release notes](#)      [Request a password and CCC reset token](#)  
           [Reset password and CCC](#)



# DASHBOARD – MY ACCOUNTS

SIGN OUT

**Aaa Doe** 70 SHOW NOTIFICATIONS

Login.gov email: aaadoe@company1.com

Contact information: 123 Main St, Fairfax, VA, 22032 [Edit my information](#)

## MY ACCOUNTS

Filter by

<input type="checkbox"/>	<u>Filer name</u> ↑	Filer CIK	Role(s)	Invite date ⓘ	Accept date ⓘ	<u>Confirmation due date</u> ⓘ	Allow delegation request	Auto accept delegation	Actions
<input type="checkbox"/>	<a href="#">Company 2</a>	0002079770	User, Technical Administrator	11/14/2024	11/14/2024	▲ 03/31/2025	Yes	Yes	...
<input type="checkbox"/>	<a href="#">Corp 97</a>	0002083312	Account Administrator, Technical Administrator	01/22/2025	02/11/2025	▲ 03/31/2025	Yes	-	...
<input type="checkbox"/>	<a href="#">Company 3</a>	0002079771	Account Administrator	11/14/2024	11/14/2024	✓ 12/31/2025	Yes	Yes	...
<input type="checkbox"/>	<a href="#">Company 1</a>	0002079769	Account Administrator	08/15/2024	11/14/2024	✓ 12/31/2025	Yes	-	...

Items per page: 5 1 – 4 of 4

Bulk actions



# DASHBOARD – MANAGE INDIVIDUALS



## 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

[BACK TO ACCOUNTS](#) [SIGN OUT](#)

**Aaa Doe**

Account, CIK: Company 1 - CIK 0002079769

My role(s): Account Administrator

[ACCOUNT DETAILS](#)

[ANNUAL CONFIRMATION \(due date 12/31/2025\)](#)

### MANAGE INDIVIDUALS

Filter by

[ADD INDIVIDUAL](#)

Name ↑	Role(s)	Primary point of contact	Invite date	Accept date	Email	Contact info	Actions
Aaa Doe	Account Administrator	yes	08/15/2024	11/14/2024	aaadoe@company1.com	123-456-7890	...
Bbb Doe	User	-	08/19/2024	08/19/2024	bbbdoe@company1.com	123-456-7890	...
Ccc Doe	Technical Administrator	-	08/19/2024	08/20/2024	cccdoe@company1.com	123-456-7890	...
Ddd Doe	Account Administrator	-	08/19/2024	08/19/2024	ddddee@company1.com	123-456-7890	...

Items per page: 5 | 1 – 4 of 4

[+ MANAGE CCC & PASSWORD](#)

[+ MANAGE DELEGATIONS AND USER GROUPS](#)



# DASHBOARD – ADD INDIVIDUALS

**Filer Management**

BACK TO MY ACCOUNTS SIGN OUT

**Aaa Doe**  
Account, CIK: Company 1 - CIK 0002079769  
My role(s): Account Administrator

### MANAGE INDIVIDUALS

Filter by

Name ↑	Role(s)
Aaa Doe	Account Administrator
Bbb Doe	User
Ccc Doe	Technical Administrator
Ddd Doe	Account Administrator

#### Add individual

Filer: Company 1 - CIK 0002079769

Business email: Eeedoe@company1.com

First name: Eee Middle name (optional): Last name: Doe

Role(s):

- Account Administrator
- User
- Technical Administrator

CANCEL ADD INDIVIDUAL

ADD INDIVIDUAL

Contact info	Actions
XXXXXXXXXX	...
XXXXXXXXXX	...
XXXXXXXXXX	...
XXXXXXXXXX	...

Items per page: 5 1 - 4 of 4

+ MANAGE CCC & PASSWORD



# MANAGE DELEGATIONS

## MANAGE DELEGATIONS AND USER GROUPS

[Delegations to](#) | [Delegations received](#) | [User groups](#) | [Delegation preferences](#)

Show all grids

### Delegations to

Filter by

ADD DELEGATION

	Delegated entity name ↑	CIK	Status	Last updated	Actions
<input type="checkbox"/>	Company 10	0002079816	ACTIVE	08/19/2024	...
<input type="checkbox"/>	Company 3	0002079771	ACTIVE	11/14/2024	...
<input type="checkbox"/>	Entity 1	0002079824	ACTIVE	11/14/2024	...

Bulk actions

Items per page: 5 1 - 3 of 3

### Delegations received

Filter by

REQUEST DELEGATION

	Delegating filer name ↑	CIK	Status	Auto add users	Last updated	Actions
<input type="checkbox"/>	Company 1111	0002079815	DEACTIVATED	n/a	11/20/2024	
<input type="checkbox"/>	Company 2	0002079770	DEACTIVATED	n/a	11/28/2024	
<input type="checkbox"/>	Holder Test Co 1	0001684862	DEACTIVATED	n/a	11/14/2024	

Bulk actions

Items per page: 5 1 - 3 of 3

### User groups

Filter by

ADD USER GROUP

	User group name ↑	Default user group	Actions
32	User group 1	Yes	...

# MANAGE CCC – VIEW AND GENERATE

## MANAGE CCC & PASSWORD

### Change CCC

Current CCC: \*\*\*\*\*  Show CCC

GENERATE CCC

Enter new CCC

Re-enter new CCC

Show new CCC

CREATE CUSTOM CCC

### Create/Update password

This is a temporary password that will be used during the transition for the sole purpose of logging in to the EDGAR Filing and Online Forms websites. Following the transition period, Login.gov password will replace the CIK/Password authentication.

Enter new password

Re-enter new password

Show new password

SET NEW PASSWORD

[What is a CIK Confirmation Code\(CCC\)?](#)

[Why generate a new CCC?](#)



# MANAGE CCC – CREATE CUSTOM CCC

**MANAGE CCC & PASSWORD**

### Change CCC

Current CCC: \*\*\*\*\*  Show CCC

**GENERATE CCC**

Enter new CCC  Re-enter new CCC   Show new CCC

**CREATE CUSTOM CCC**

---

### Create/Update password


This is a temporary password that will be used during the transition for the sole purpose of logging in to the EDGAR Filing and Online Forms websites. Following the transition period, Login.gov password will replace the CIK/Password authentication.

Enter new password  Re-enter new password   Show new password

**SET NEW PASSWORD**

[What is a CIK Confirmation Code\(CCC\)?](#)

[Why generate a new CCC?](#)



# MANAGE PASSWORD

## MANAGE CCC & PASSWORD

### Change CCC

[What is a CIK Confirmation Code\(CCC\)?](#)

Current CCC: \*\*\*\*\*  Show CCC

[Why generate a new CCC?](#)

GENERATE CCC

Enter new CCC

Re-enter new CCC

Show new CCC

CREATE CUSTOM CCC

### Create/Update password

This is a temporary password that will be used during the transition for the sole purpose of logging in to the EDGAR Filing and Online Forms websites. Following the transition period, Login.gov password will replace the CIK/Password authentication.

Enter new password

.....

Re-enter new password

.....

Show new password

SET NEW PASSWORD



# DASHBOARD LANDING PAGE

 Filer Management

[SIGN OUT](#)

**Aaa Doe** 68 [SHOW NOTIFICATIONS](#)

Login.gov email: [aaadoe@company1.com](mailto:aaadoe@company1.com)  
Contact information: 123 Main St, Fairfax, VA, 22032 [Edit my information](#)

[+ MY ACCOUNTS](#)

[+ MY USER API TOKEN](#)

[+ APPLY FOR EDGAR ACCESS](#)

[+ ENROLL IN EDGAR NEXT](#)

<a href="#">EDGAR Next on SEC.gov</a>	<a href="#">Email EDGAR technical support</a>	<a href="#">EDGAR Filing website</a>
<a href="#">API Development Toolkit</a>	<a href="#">Report a bug</a>	<a href="#">EDGAR OnlineForms website</a>
<a href="#">Adopting Beta Filer Guidance</a>	<a href="#">Release notes</a>	<a href="#">Request a password and CCC reset token</a>
		<a href="#">Reset password and CCC</a>



# DASHBOARD – FILER VIEW

**Filer Management**

[BACK TO MY ACCOUNTS](#) [SIGN OUT](#)

**Aaa Doe**

Account, CIK: Company 1 - CIK 0002079769

My role(s): Account Administrator

[ACCOUNT DETAILS](#)

✓ ANNUAL CONFIRMATION (due date 12/31/2025)

### Filer information

Filer: Company 1 - CIK 0002079769

**Company or individual:** Company

**CCC:** 9\$GIQ3gz

**Confirmation due date:** 12/31/2025

**Business Address:** 1212 SE KING STREET  
FAIRFAX, VA 22033

**Phone number:** XXXXXXXXXXX

**Company Website:** [✎](#)

[CLOSE](#)

- + [MANAGE INDIVIDUALS](#)
- + [MANAGE CCC & PASSWORD](#)
- + [MANAGE DELEGATIONS AND USER GROUPS](#)
- + [MANAGE ABS ISSUER ACTIVITY](#)
- + [MANAGE FILER API TOKEN](#)

EDGAR Next on [SEC.gov](#) | [API Development Toolkit](#) | [Adopting Beta Filer Guidance](#)

[Email EDGAR technical support](#) | [Report a bug](#) | [Release notes](#)

[EDGAR Filing website](#) | [EDGAR OnlineForms website](#) | [Request a password and CCC reset token](#) | [Reset password and CCC](#)



# ENROLLMENT

OPENS MARCH 24, 2025



# OVERVIEW OF ENROLLMENT

- Enrollment allows filers to transition to EDGAR Next in a simplified process that does not require Form ID, notarization, or presentation of a power of attorney.
- Filers enroll on the dashboard on the new EDGAR Filer Management website.
- Filers enroll by submitting the information requested in the "Enroll" section on the dashboard.
  - *Existing filers should not attempt to "enroll" on Form ID.*



# TIMING FOR ENROLLMENT

- Enrollment opens **March 24, 2025**.
  - Enrollment is required for all filers/CIKs created before March 24, 2025.
  - New filers/CIKs whose Form ID applications for EDGAR access are submitted and granted by SEC staff on or after March 24, 2025 will be automatically subject to EDGAR Next and do not need to enroll.
  - Each filer may enroll only once, and only one individual can enroll each filer.



# TIMING FOR ENROLLMENT

- Compliance with EDGAR Next is required to file as of **September 15, 2025**.
  - Beginning September 15, 2025, filers that have not enrolled or been granted access after submitting amended Form ID will be unable to file on EDGAR until they successfully enroll.
  - Enrollment ends December 19, 2025. Failure to enroll by that date will result in an inability to file on EDGAR, unless an amended Form ID is submitted and granted by SEC staff.



# INFORMATION REQUIRED FOR ENROLLMENT

- During enrollment, a person authorized by each filer must enter:
  - The filer's CIK, CCC and passphrase;
    - If the filer has not reset its CCC and/or passphrase since September 2019, the filer should reset these codes prior to enrolling.
  - The name, email address, business address, and business telephone number for each Account Administrator;
  - A quarter-end annual confirmation date; and
  - An indication of whether it is a single-member company.



# NOT REQUIRED FOR ENROLLMENT

- What is NOT needed for enrollment:
  - No power of attorney is needed to enroll.
    - Filers authorize Account Administrators by providing their name and their information during enrollment and providing the filer's CIK, CCC and passphrase.
    - Filers are presumed to have authorized the person enrolling them by providing that person with the filer's CIK, CCC, and passphrase.
  - Notarization is not required.



# ENROLLING ACCOUNT ADMINISTRATORS

- Only two (2) Account Administrators can be authorized during enrollment.
  - More Account Administrators can be added on the dashboard after enrollment.
  - We encourage all filers to authorize two (2) Account Administrators during enrollment, but individual and single-member company filers are only required to authorize one (1) Account Administrator.



# BENEFITS OF EARLY ENROLLMENT

- Filers that have successfully enrolled (or have been granted access after submitting amended Form ID on the dashboard on or after March 24, 2025) will immediately have the option to use APIs.
  - Filers can make submissions and manage their accounts using APIs.
  - Typically, the Account Administrator or Delegated Entity for the filer will manage the use of APIs.
  - To use APIs, the Account Administrator or Delegated Entity will need to present both a filer API token and a user API token that they generate on the dashboard.



# BENEFITS OF EARLY ENROLLMENT

- There is no downside to enrolling “early” (before the September 15, 2025 compliance date).
- Filers can continue to file as they do now until September 12, 2025:
  - Submissions on the EDGAR Filing and EDGAR Online Forms websites will continue per the existing access process for all filers, regardless of whether they have enrolled, until close of business for EDGAR on September 12, 2025.



# RESOURCES



# EDGAR NEXT WEB PAGE RESOURCES

[www.sec.gov/edgar-next](http://www.sec.gov/edgar-next)

Visit the EDGAR Next page on SEC.gov for information and guidance:

- [Important Dates: Prepare, Enroll, and Comply](#)
- [“How Do I” guidance](#), including [“How Do I Enroll in EDGAR Next”](#)
- EDGAR Next Instructional Video Series – [SEC YouTube Channel](#)
- EDGAR Next Webinars – [prior presentations and video recordings](#)
- [EDGAR Next Filer Testing Guidance](#)



# EDGAR NEXT WEB PAGE RESOURCES

[www.sec.gov/edgar-next](http://www.sec.gov/edgar-next)

## API guidance:

- [Overview of EDGAR APIs](#)
- [EDGAR API Developer Toolkit](#)
- API Development Support Q&A Session – LIVE
  - Tuesday, March 4, 2025, 1:00 – 2:00 p.m. ET
  - Registration link available at [www.sec.gov/edgar-next](http://www.sec.gov/edgar-next)



# EDGAR NEXT WEB PAGE RESOURCES

[www.sec.gov/edgar-next](http://www.sec.gov/edgar-next)

Guidance for Filers That Do Not Have a Current Passphrase (Needed to Enroll):

- If the filer does not have or does not know its current EDGAR passphrase, but the filer has a current EDGAR point of contact (POC) email address on file with EDGAR (at which the filer currently can receive email from EDGAR) the filer can reset/obtain a current passphrase by following the instructions in [Reset Your EDGAR Passphrase, EDGAR POC Email](#).
- If the filer cannot access its current EDGAR POC email address, the filer can update it to an address at which the filer can receive email by following the instructions in [Reset Your EDGAR Passphrase, EDGAR POC Email](#).



# EDGAR NEXT WEB PAGE RESOURCES

[www.sec.gov/edgar-next](http://www.sec.gov/edgar-next)

Guidance for Filers That Do Not Have a Current CCC (Needed to Enroll):

- If the filer does not have a current CCC or does not know its CCC, the filer can reset/obtain a current CCC by following the instructions in [Generating new and replacement CCC, password, and PMAC](#).
- For more information, see [Understand and Utilize EDGAR CIKs, Passphrases, and Access Codes](#).



# filer support for EDGAR Next

## Filer Support Contacts:

- Email support: [EDGARNextBeta@sec.gov](mailto:EDGARNextBeta@sec.gov)
- Telephone support: (202) 551-8900, Option #2



# FILER SUPPORT FOR EDGAR NEXT

Sign up to receive emails of all EDGAR announcements:

- Enter your email address at the bottom of the [EDGAR News & Announcements](#) page to subscribe.

The screenshot shows the 'EDGAR News & Announcements' page on the U.S. Securities and Exchange Commission website. The page features a table of recent announcements and a subscription form at the bottom. A red arrow points from the text in the slide to the subscription form.

Date	Title
Feb 14, 2025	<a href="#">EDGAR Next: Webinar February 20, 2025</a>
Feb 10, 2025	<a href="#">Need EDGAR Access to Pre-Release EDGAR Next Goes Live on March 24, 2025? Apply Now!</a>
Feb 7, 2025	<a href="#">New Filing Fee Refund Payment Portal in EDGAR March 10, 2025</a>
Jan 29, 2025	<a href="#">Ready for EDGAR Next? Enrollment starts and amended Form ID is effective March 24, 2025</a>
Jan 9, 2025	<a href="#">EDGAR Will Be Closed Thursday, January 9, 2025</a>
Dec 20, 2024	<a href="#">EDGAR Will Be Closed Tuesday, December 24, 2024 and Wednesday, December 25, 2024</a>
Dec 16, 2024	<a href="#">EDGAR Release 24.4</a>
Oct 22, 2024	<a href="#">New Available 2025 Peak Filing Volume Dates for EDGAR Filings</a>
Oct 16, 2024	<a href="#">Cancelled: SEC Staff Publishes Draft Technology for Form DMS</a>
Sept 27, 2024	<a href="#">SEC Adjusts EDGAR Next Improvements to Filer Access and Account Management</a>
Sept 16, 2024	<a href="#">EDGAR Release 24.3</a>
July 15, 2024	<a href="#">Updated EDGAR eXtensible Business Reporting Language (XBRL) Guide Available</a>
July 8, 2024	<a href="#">New Filing Fee Refund Payment Type in EDGAR and Elimination of Check Methods</a>
July 3, 2024	<a href="#">EDGAR Release 24.2</a>
July 1, 2024	<a href="#">Upcoming Changes to EDGAR Webpages on SEC.gov</a>
June 6, 2024	<a href="#">Filing Fee Portal: Modernization Technical and Structured Data Information</a>
March 18, 2024	<a href="#">EDGAR Release 24.1</a>
Feb 20, 2024	<a href="#">Reminder: Confirm Accurate Internal Links in EDGAR Filings (updated announcement)</a>
Feb 15, 2024	<a href="#">New Miss Do I Choose an Inline XBRL Filing Fee Portal?</a>
Feb 5, 2024	<a href="#">EDGAR Release 24.0.2</a>

1 to 20 of 102 items

1 2 3 ... 9 Next » Last »

Get alerts sent straight to your inbox.

Your email address

SUBSCRIBE



# QUESTIONS & ANSWERS

PLEASE TYPE YOUR QUESTIONS IN THE CHAT

