EDGAR NEXT

WEBINAR #6

SEC EDGAR Business Office (EBO)

August 26, 2025 | 2:00 – 3:00 pm ET

U.S. Securities and Exchange Commission

DISCLAIMER

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AGENDA

- Overview of EDGAR Next
- Dashboard Demonstration
- Enrollment Required to File Starting September 15, 2025
- Frequently Asked Questions
- Resources
- Q&A

OVERVIEW OF EDGAR NEXT

WHAT IS EDGAR NEXT?

Improvements to EDGAR security, filer access and account management capabilities

Current EDGAR	EDGAR Next
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:
  - New dashboard available, and legacy Filer Management functions 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*)

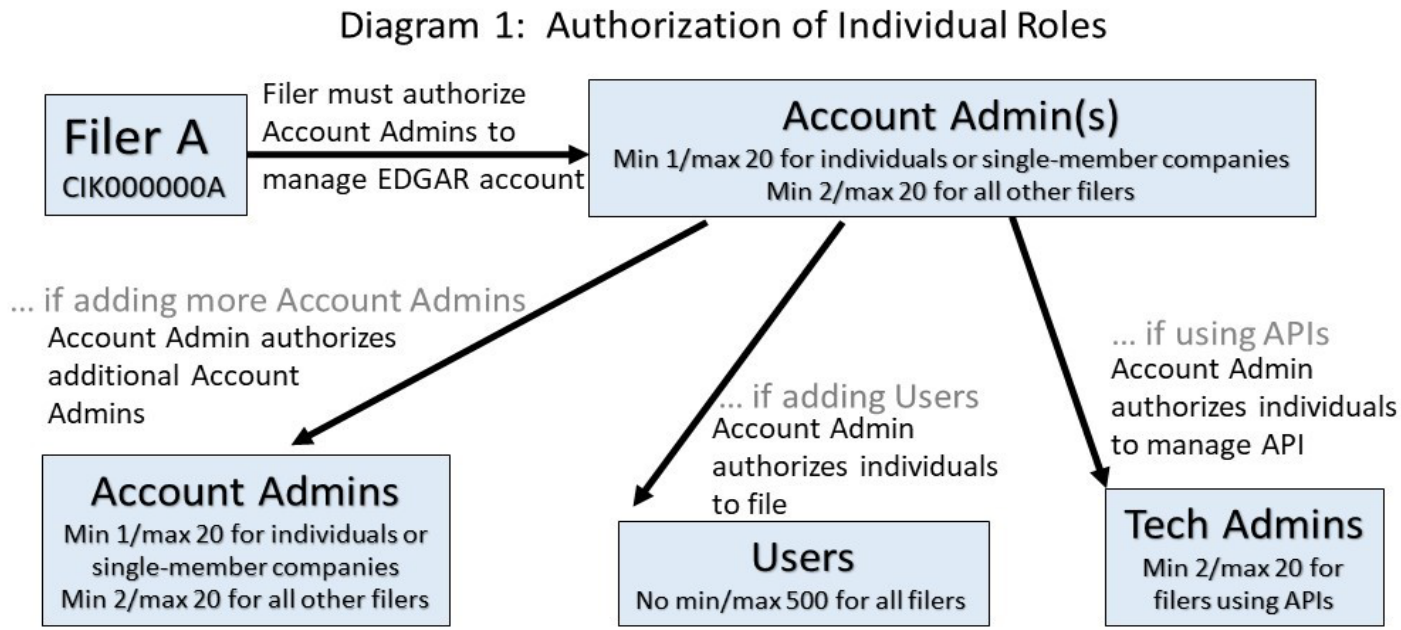
- Manages the filer's account on the dashboard, including adding and removing individuals
- Performs annual confirmation
- Delegates authority to file to other EDGAR accounts
- Generates or creates custom CCC

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



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

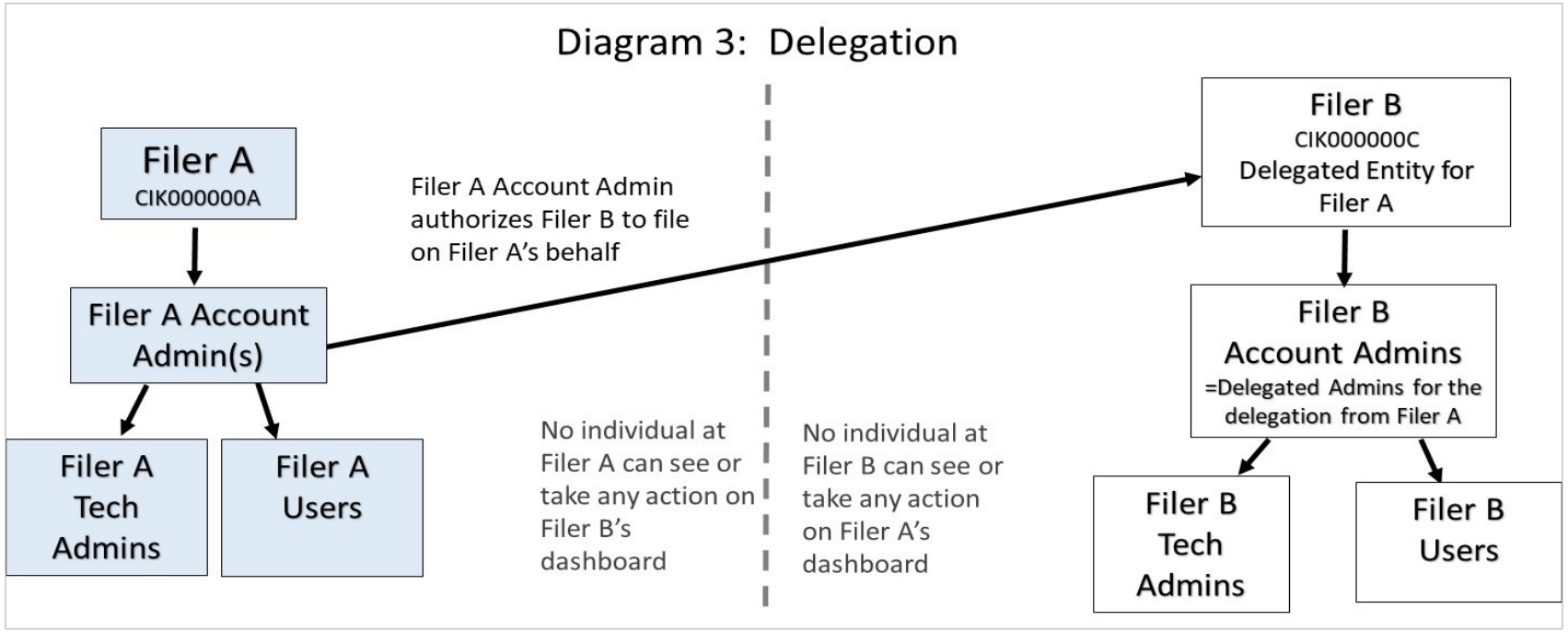
- Account administrator can be a Technical Administrator but not a User
- Technical Administrator can be a User or an Account Administrator

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.



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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
• Identifies the entity using the API (e.g., law firm, broker-dealer, filing agent, filer)	• Identifies the individual using the API (e.g., User or Account Administrator of entity)
• Created by the entity's Technical Administrator	• Created by the individual
• Valid for up to one year, but removed from the dashboard after creation	• Valid for 30 days, and retained in the dashboard after creation
• May be shared between a filer and a Delegated Entity (and vice versa)	• May not be shared

API TOKENS USED IN EDGAR NEXT

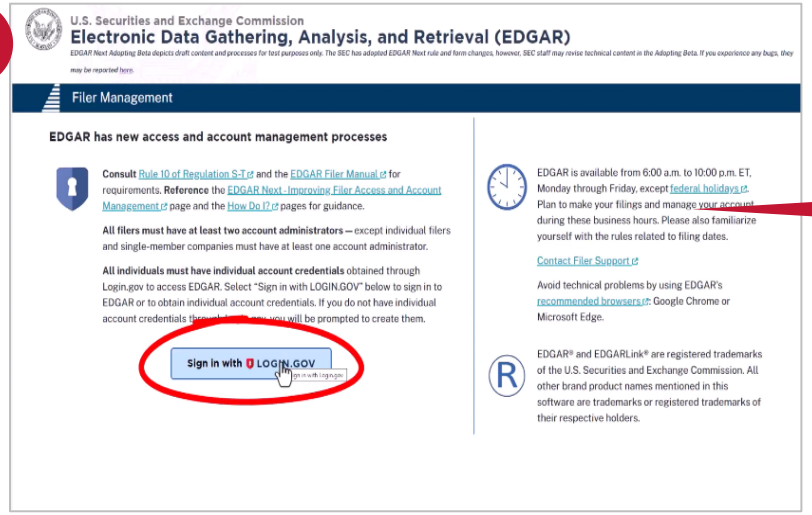
Options for use of API tokens

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.

DASHBOARD DEMONSTRATION

OBTAINING LOGIN.GOV CREDENTIALS

1



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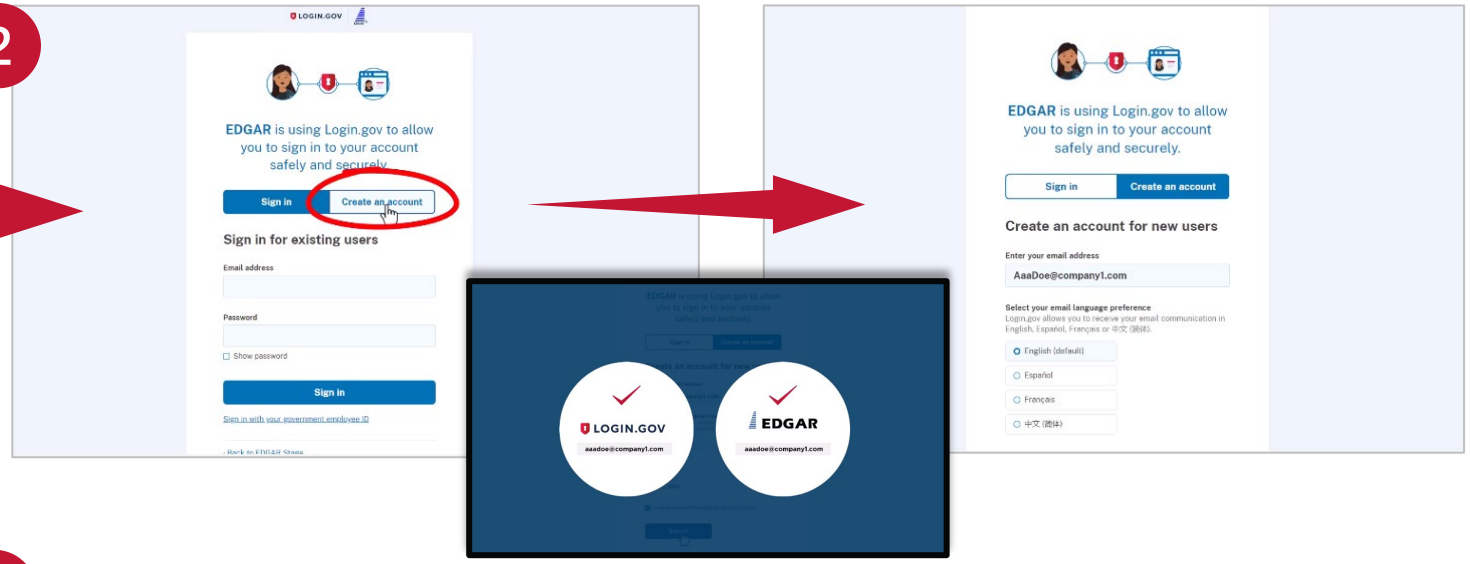

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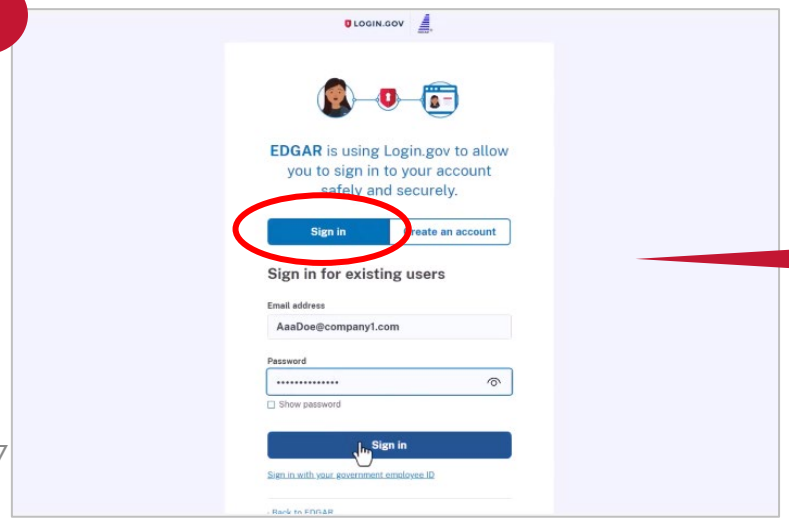

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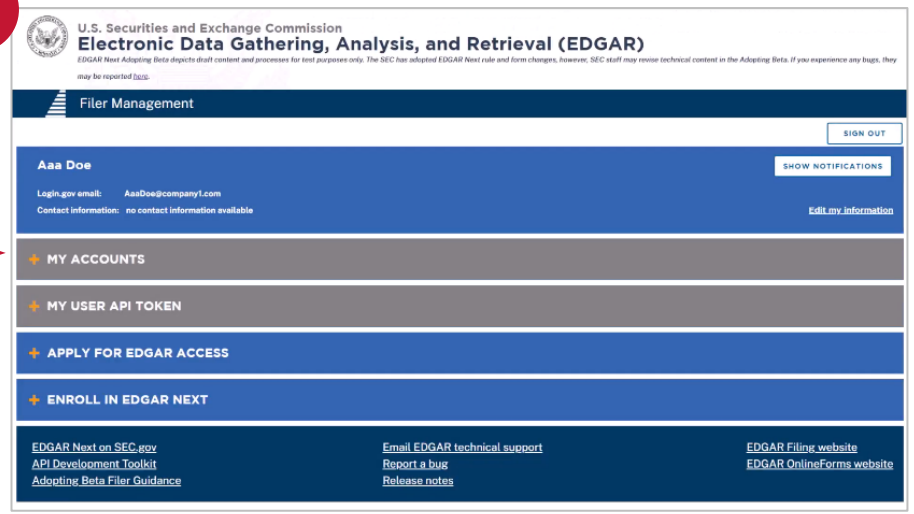

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DASHBOARD LANDING PAGE

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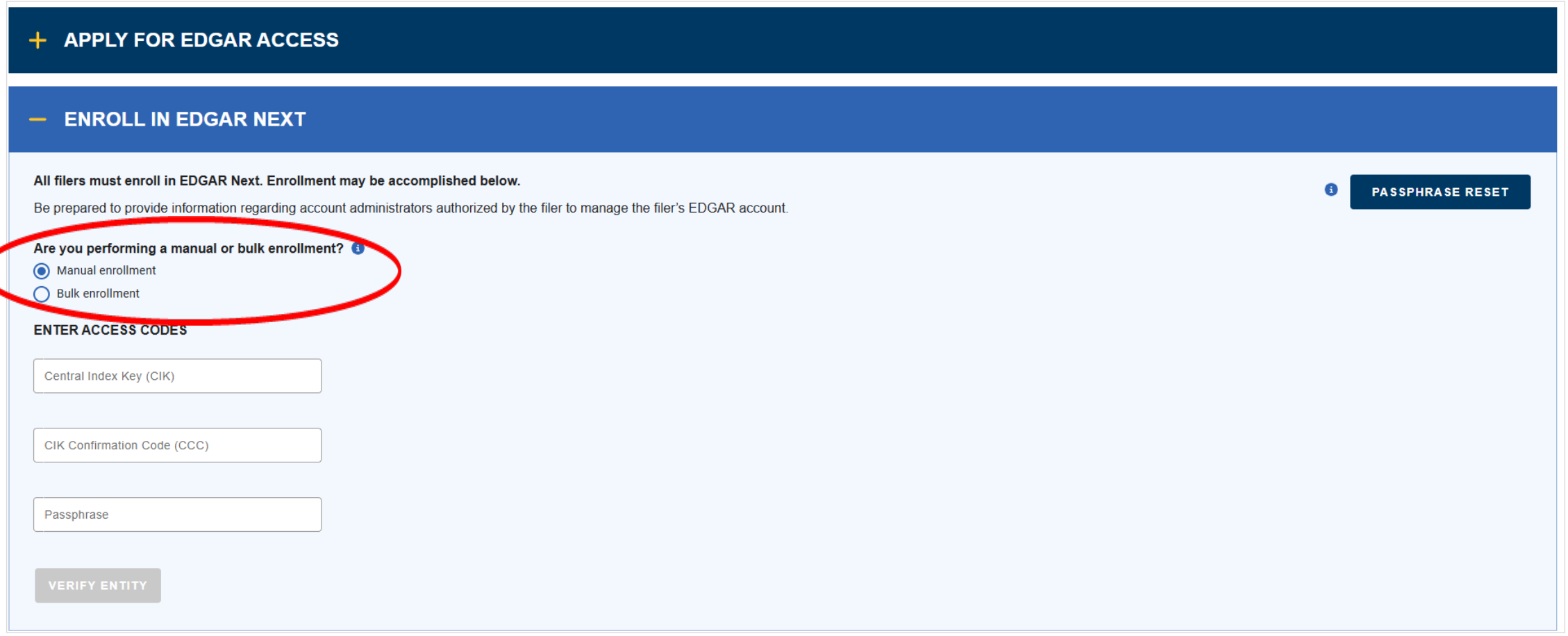
ENROLL IN EDGAR NEXT
MANUAL ENROLLMENT



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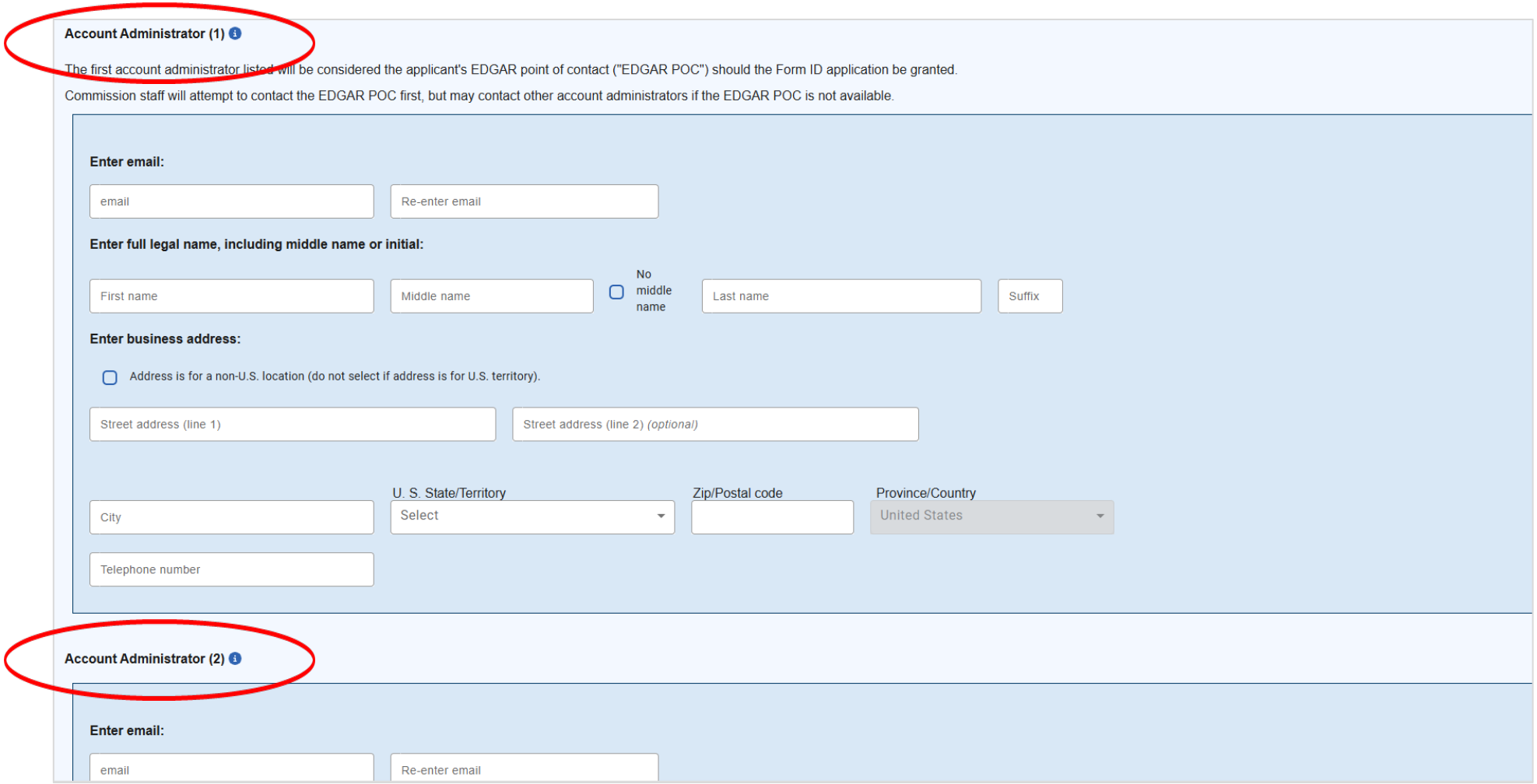
ENROLL IN EDGAR NEXT

MANUAL ENROLLMENT



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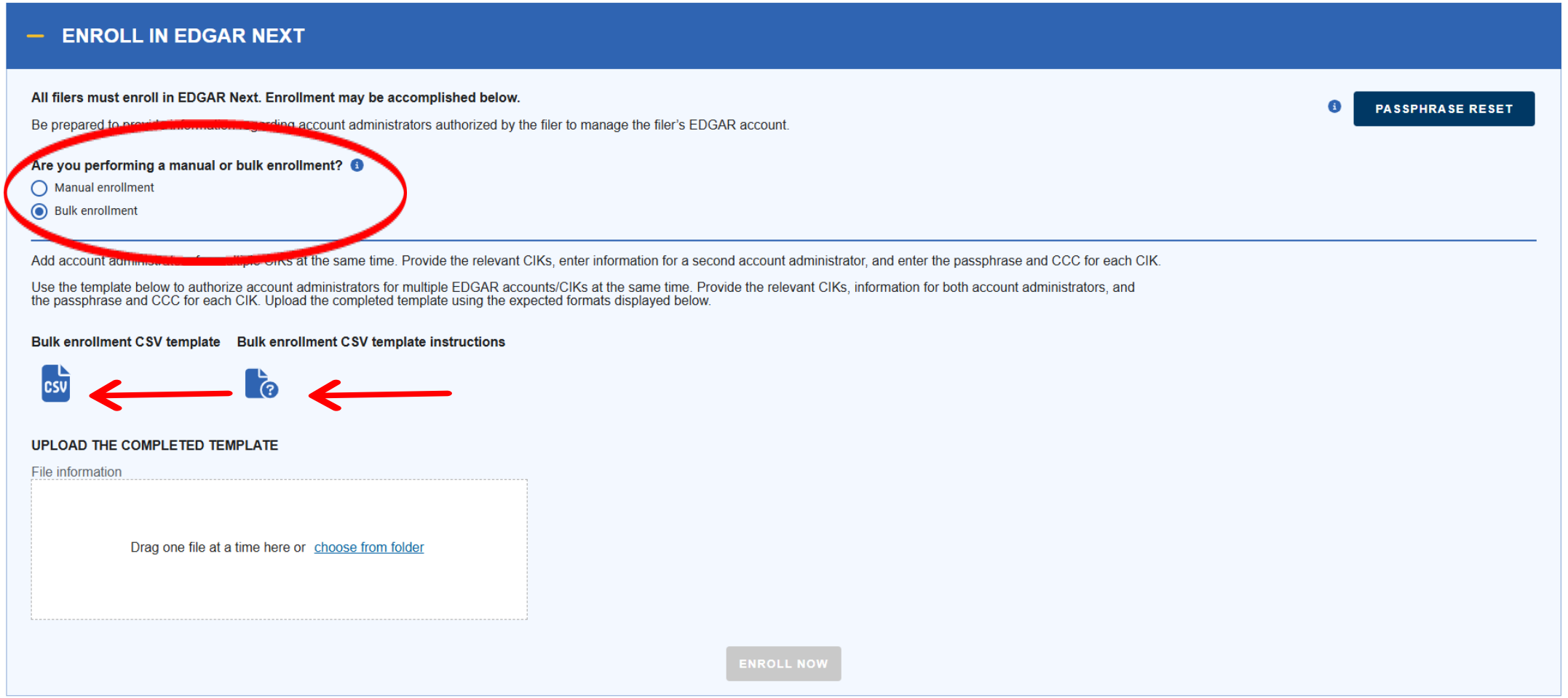
ENROLL IN EDGAR NEXT

BULK ENROLLMENT



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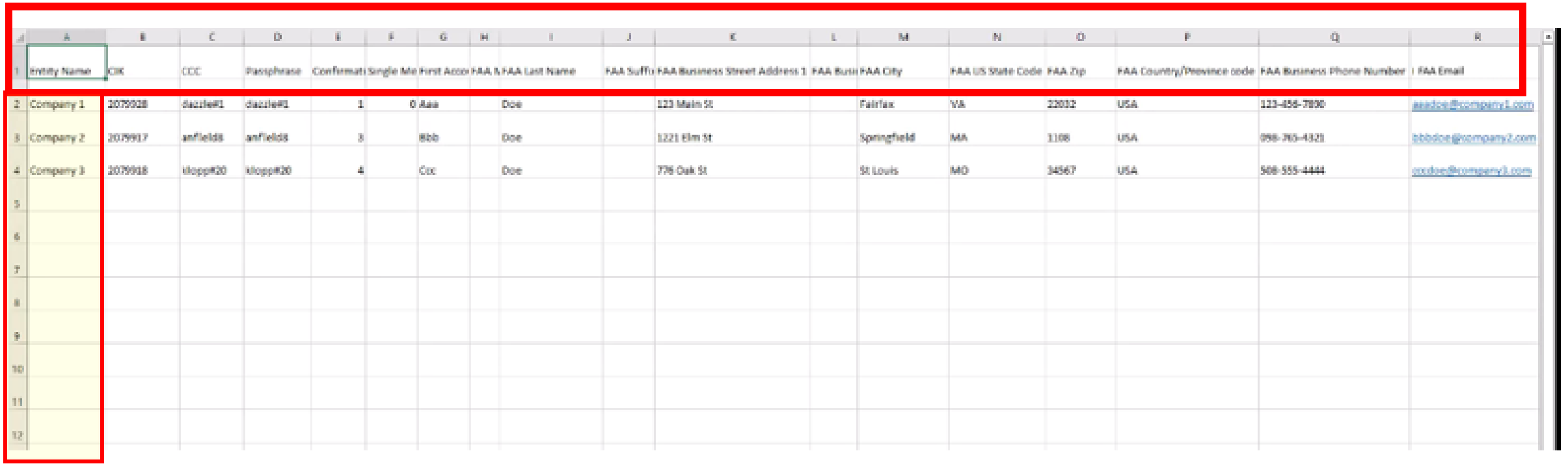
ENROLL IN EDGAR NEXT

BULK ENROLLMENT



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Entity Name	CIK	CCC	Passphrase	Confirmati	Single Me	First Acco	FAA N	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	2079018	dazzle#1	dazzle#1	1	0	Aaa		Doe		123 Main St		Fairfax	VA	22032	USA	123-456-7890	aadoe@company1.com
3	Company 2	2079917	anfield8	anfield8	3		Bbb		Doe		1221 Elm St		Springfield	MA	1108	USA	098-765-4321	bbbdoe@company2.com
4	Company 3	2079918	klopp#20	klopp#20	4		Ccc		Doe		778 Oak St		St Louis	MO	34567	USA	508-555-4444	cccdoe@company3.com
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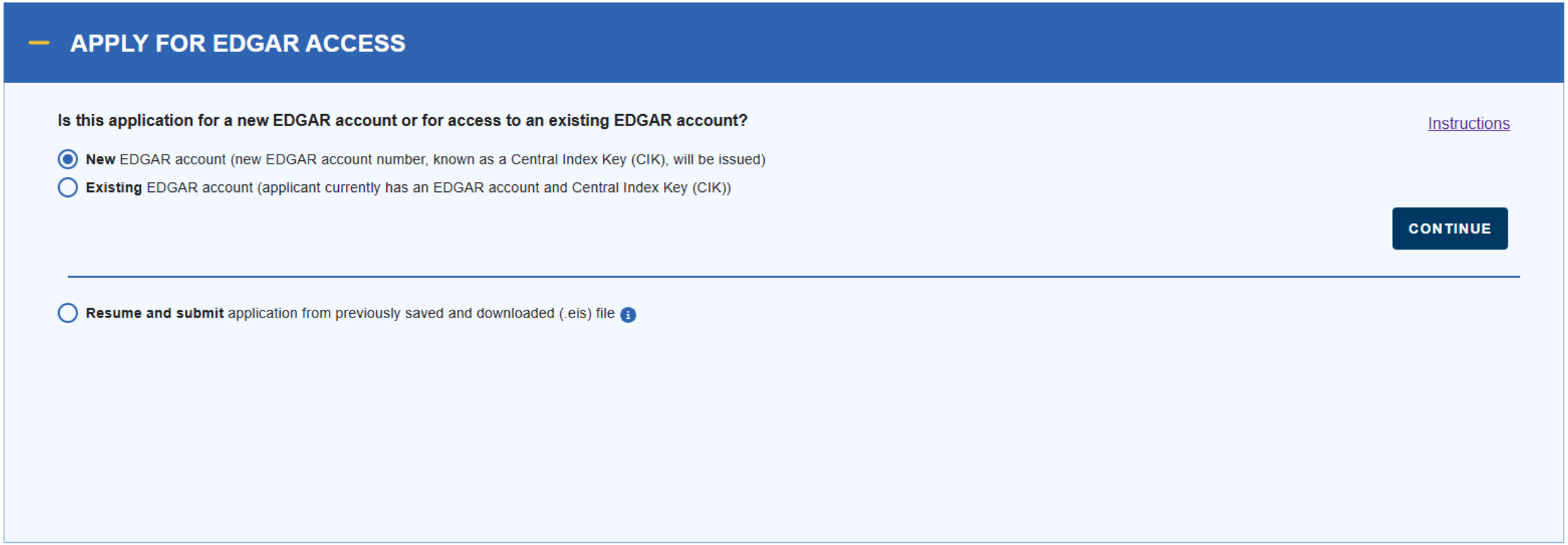
EDGAR NEXT- NEW FILERS



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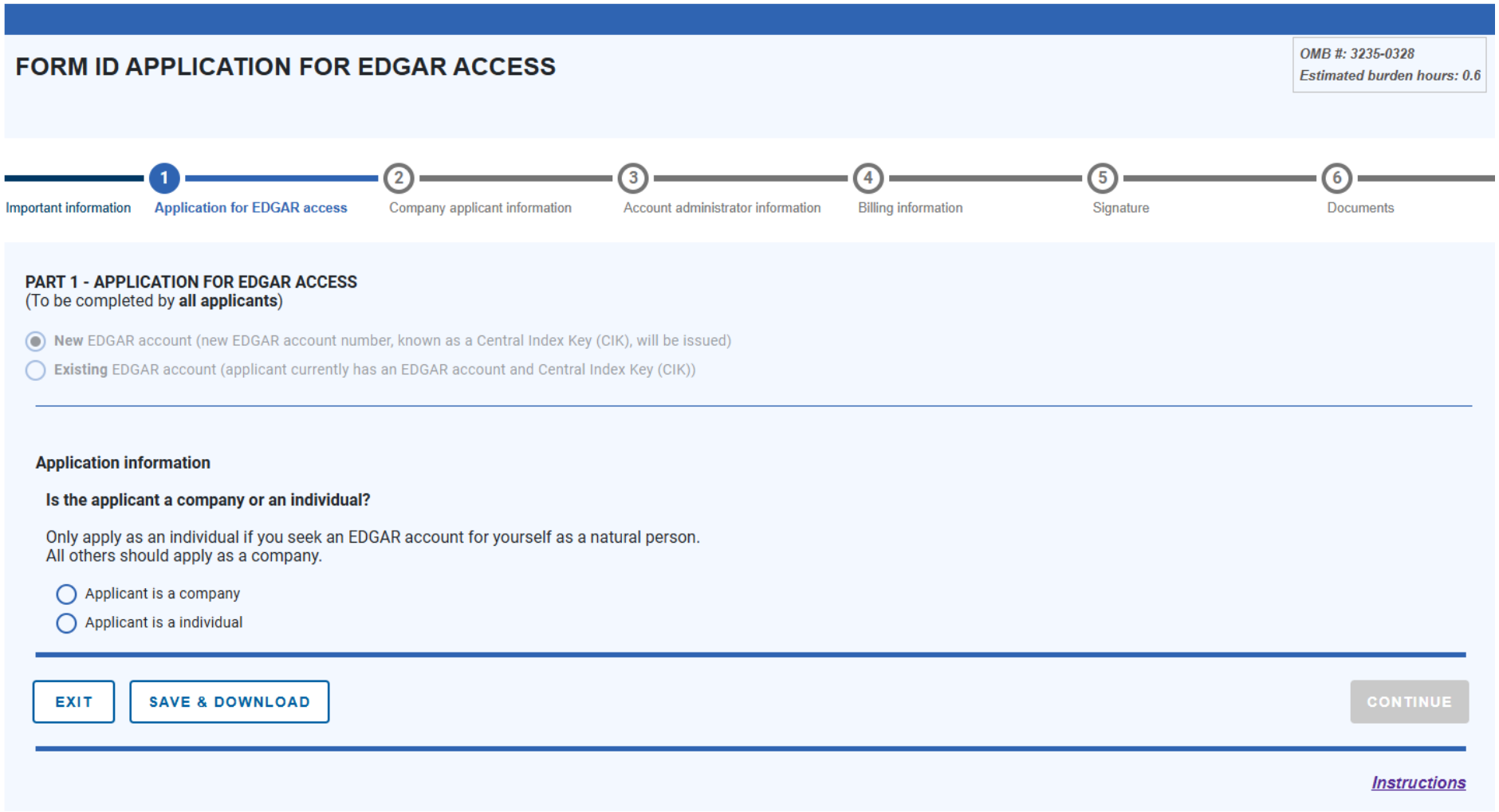
EDGAR NEXT – NEW FILERS



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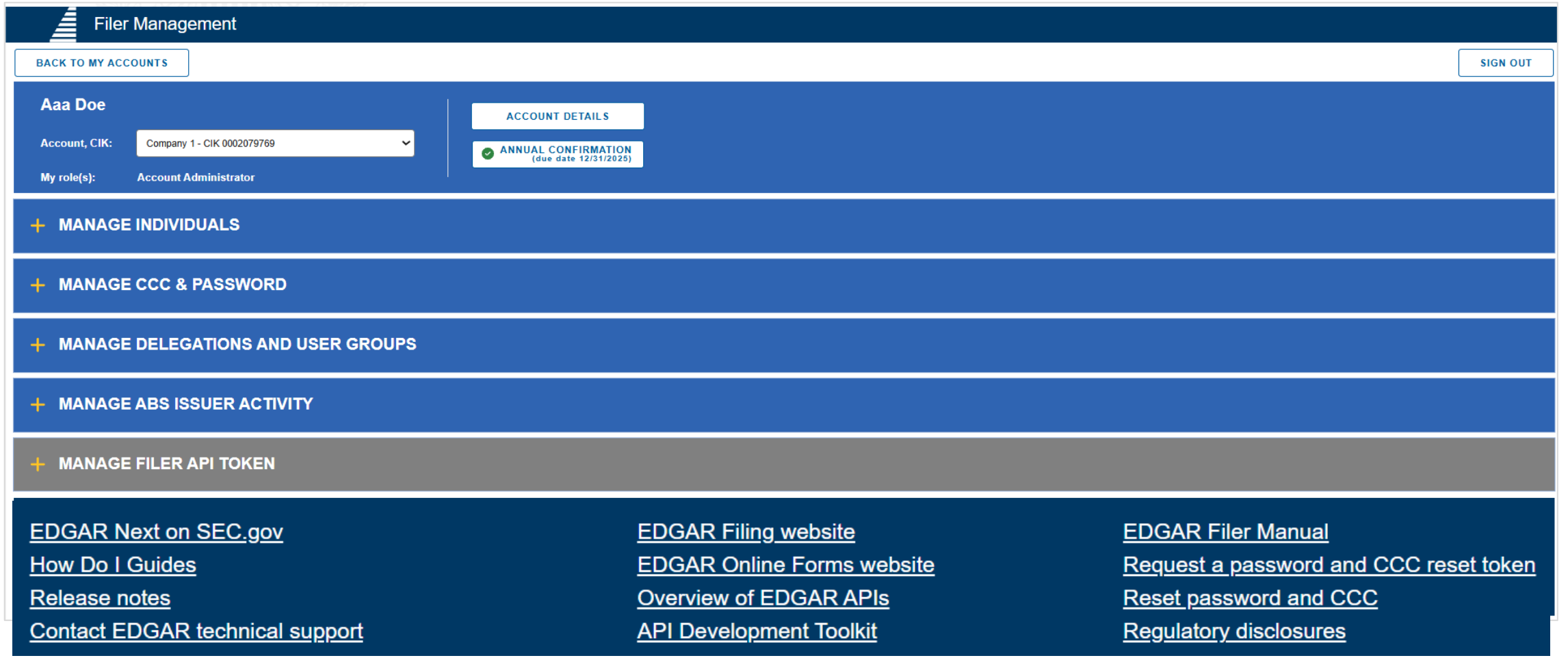
DASHBOARD – FILER VIEW



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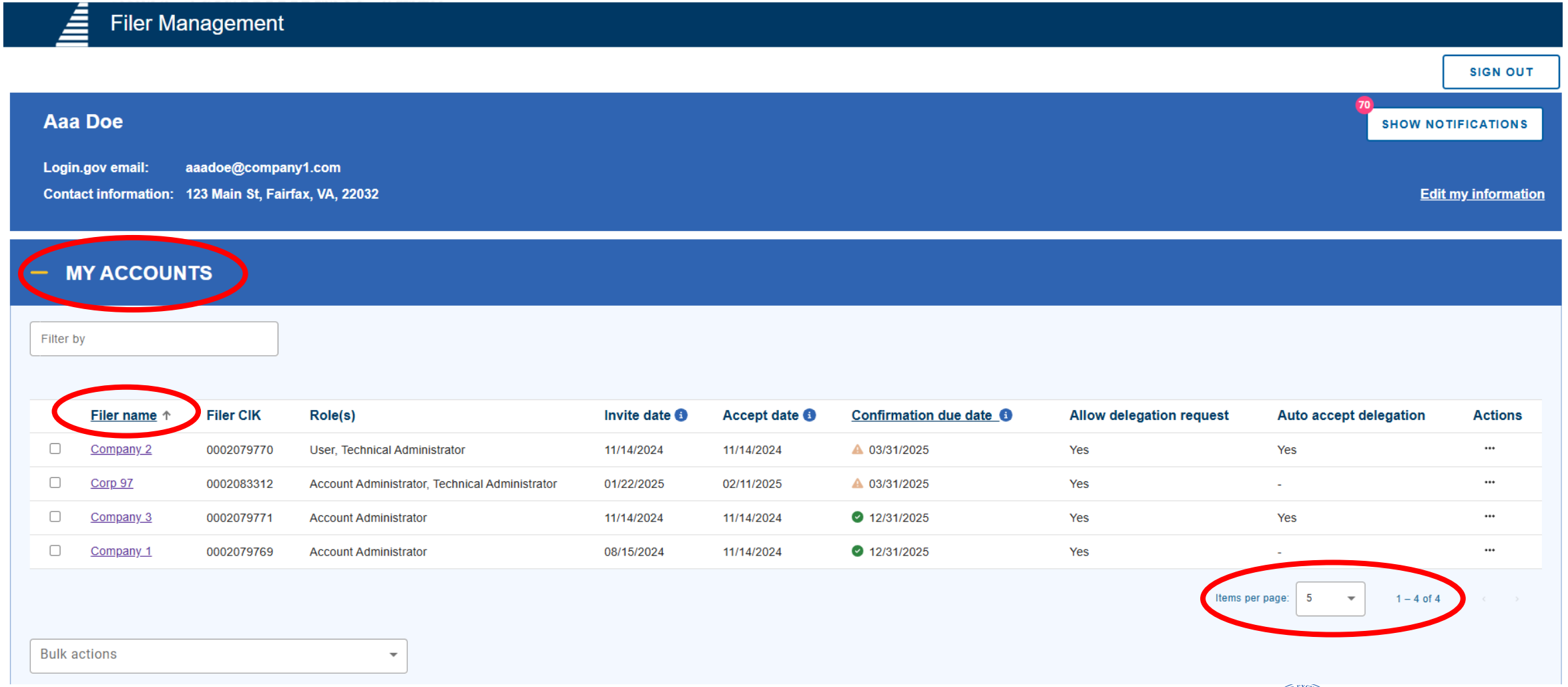
DASHBOARD – MY ACCOUNTS



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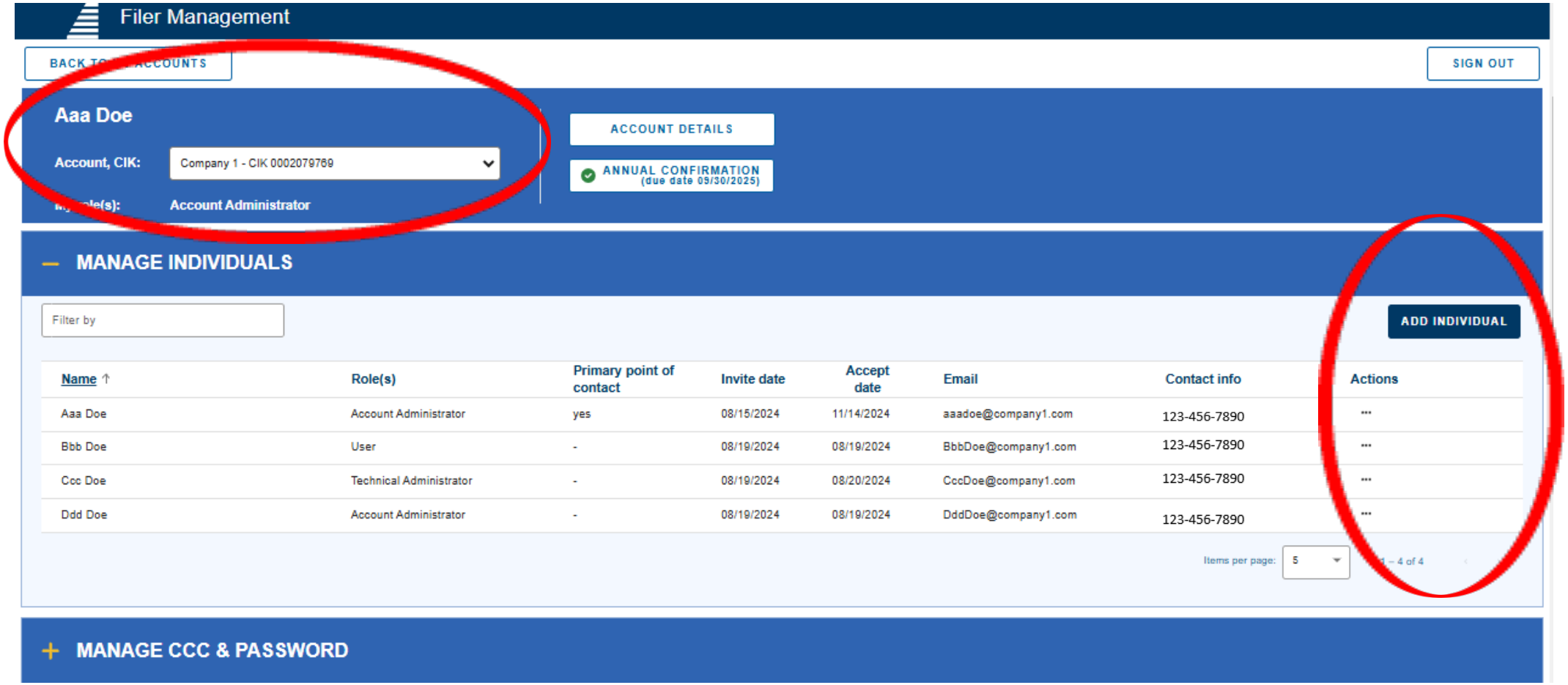
DASHBOARD – MANAGE INDIVIDUALS



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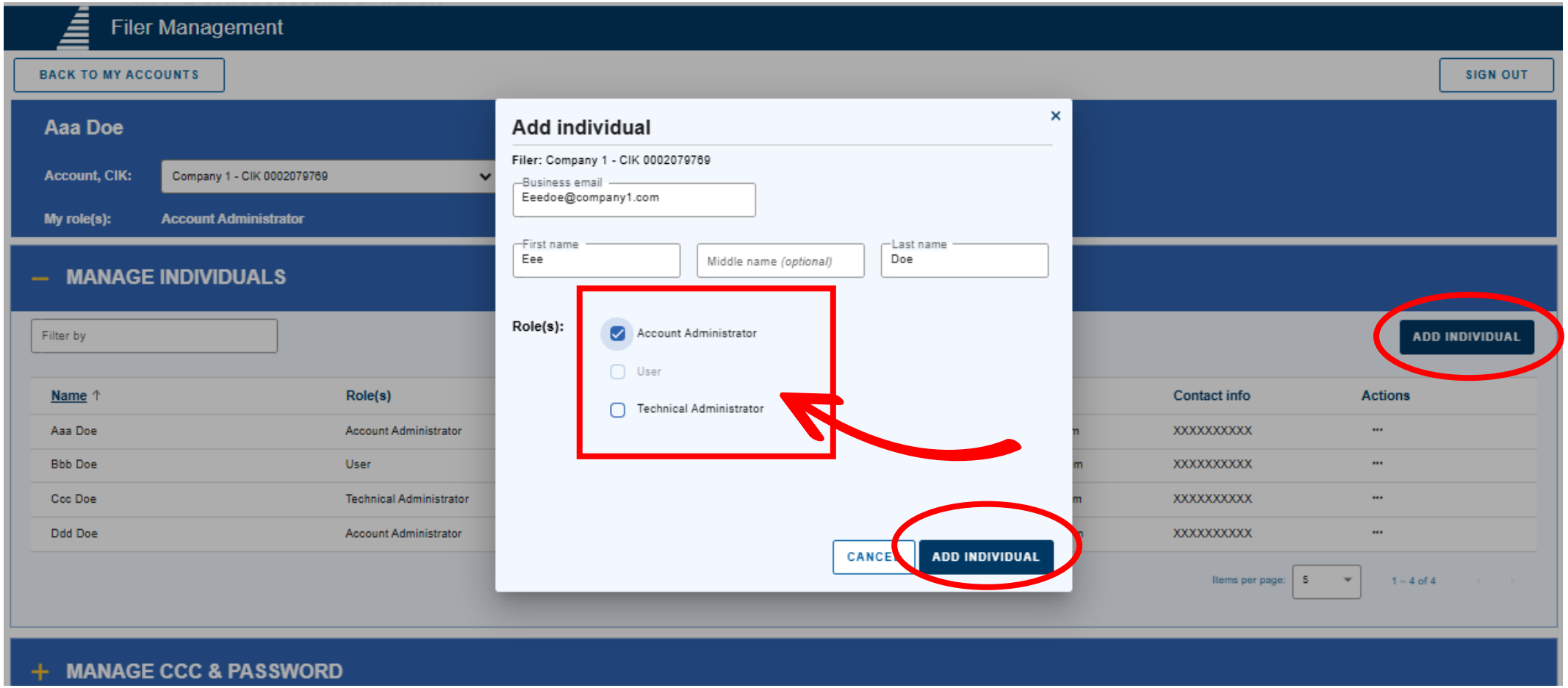
DASHBOARD – ADD INDIVIDUALS



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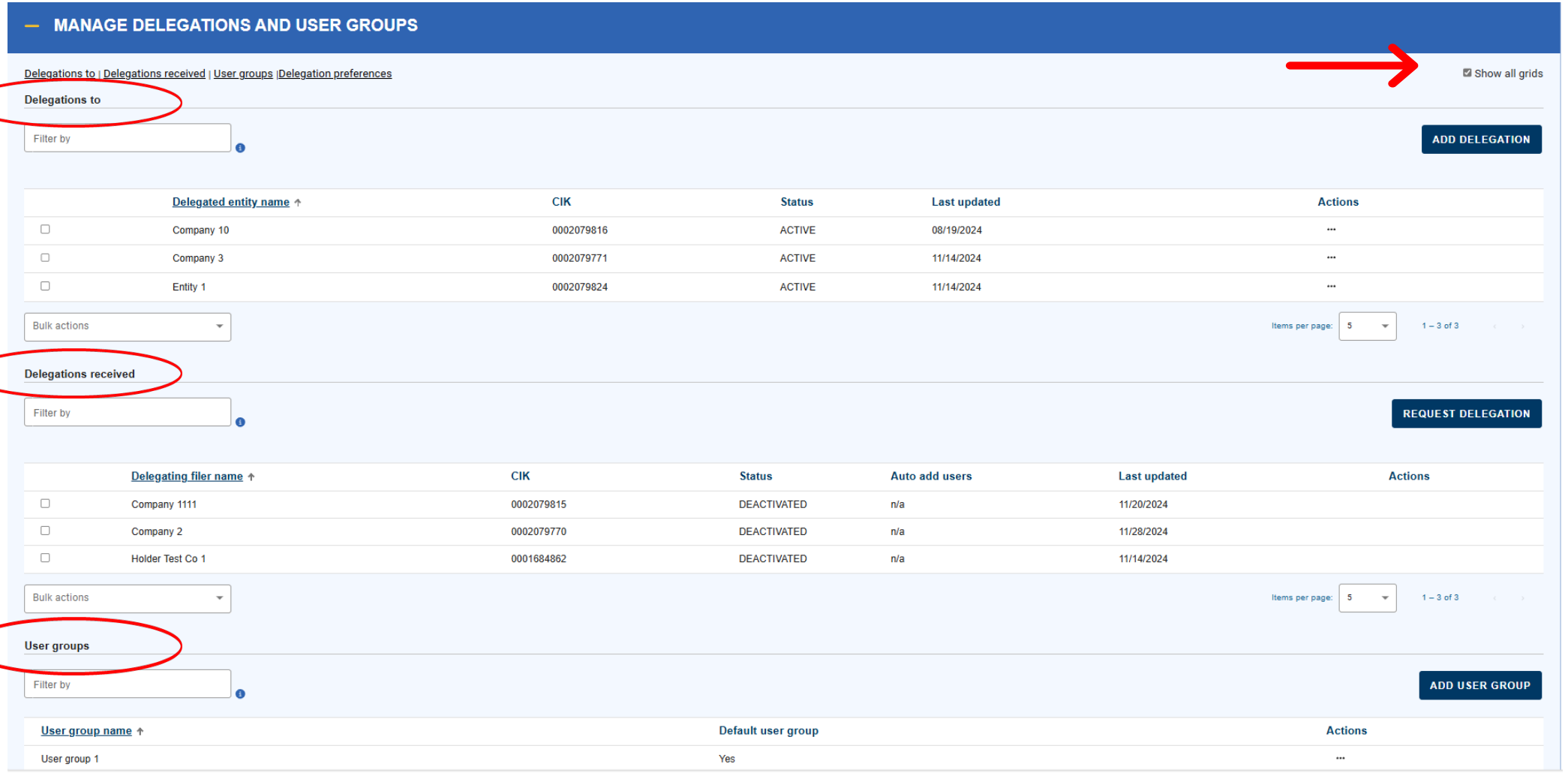
MANAGE DELEGATIONS



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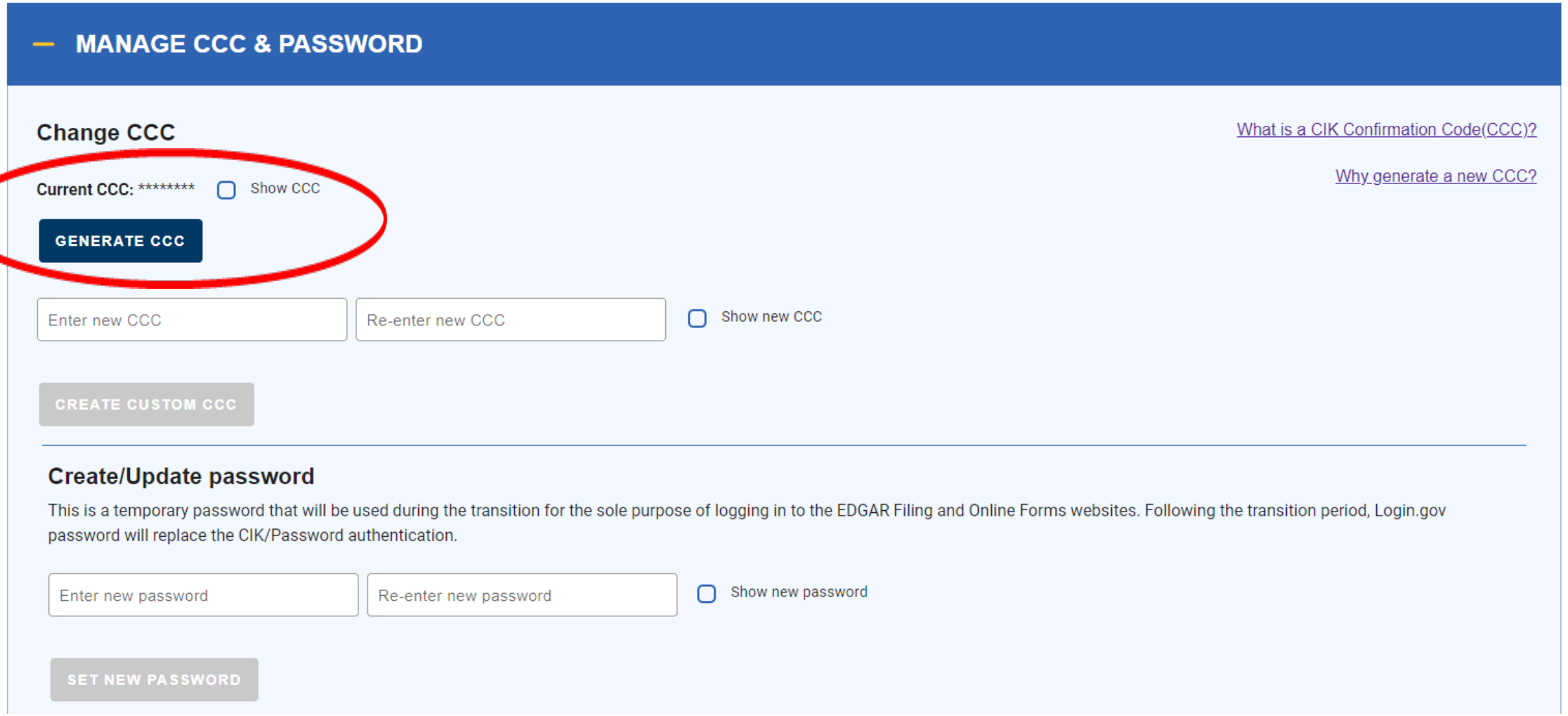
MANAGE CCC – VIEW AND GENERATE



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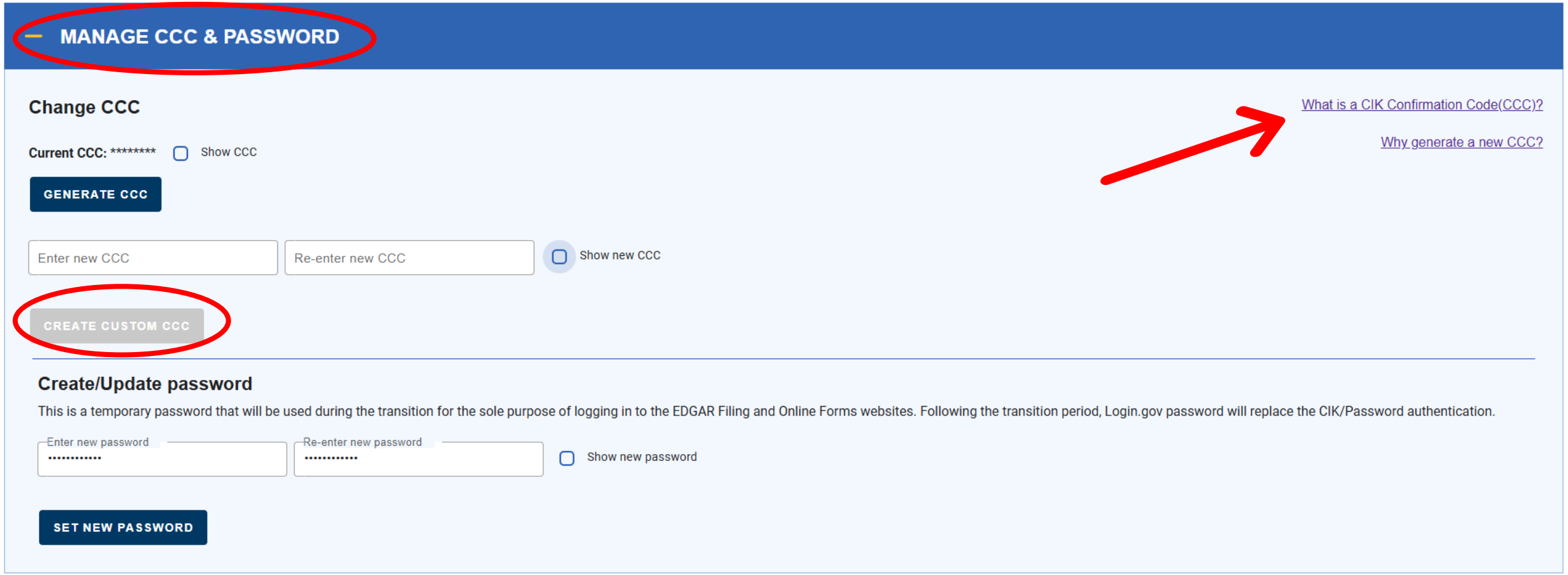
MANAGE CCC – CREATE CUSTOM CCC



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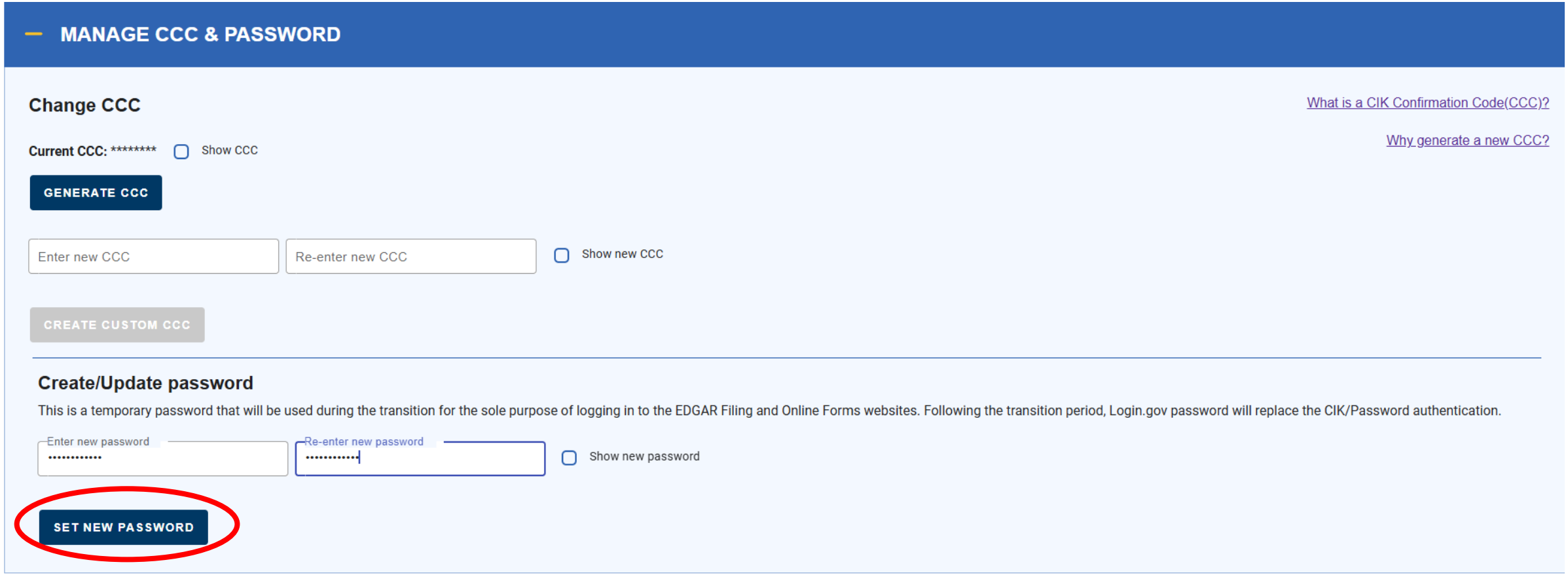
MANAGE PASSWORD



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DASHBOARD LANDING PAGE

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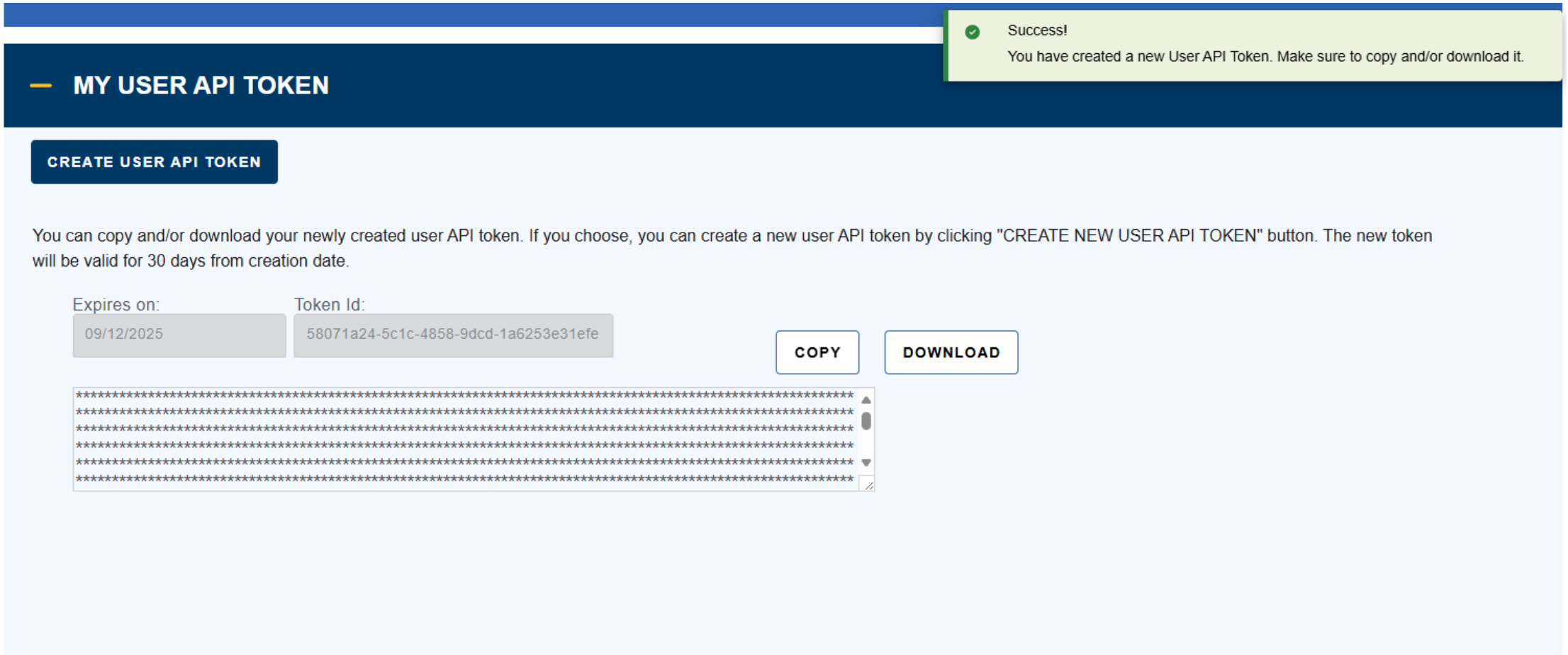
DASHBOARD – INDIVIDUAL VIEW



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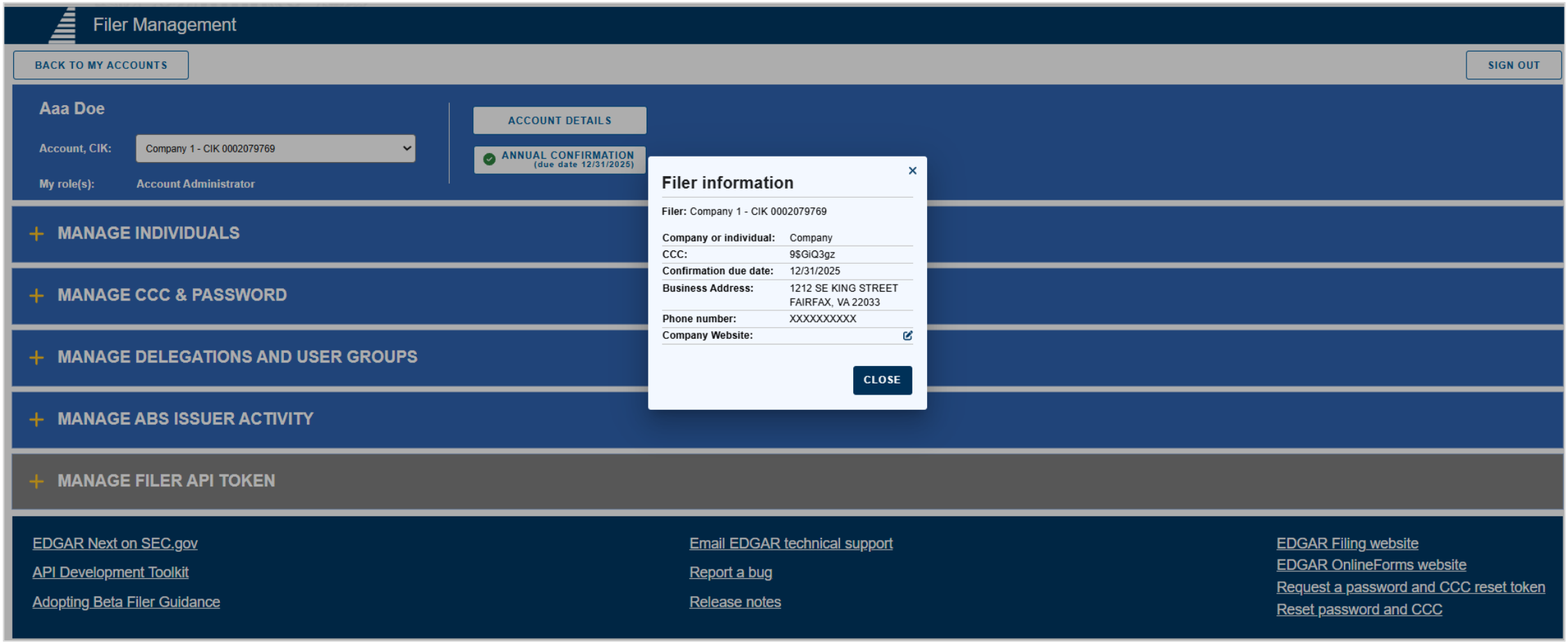
DASHBOARD LANDING PAGE

DASHBOARD – FILER VIEW



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ENROLLMENT
ENDS DECEMBER 19, 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 <u>not</u> attempt to "enroll" on Form ID.*

TIMING FOR ENROLLMENT

- Enrollment is required to file starting **September 15, 2025**.
  - Enrollment is required for all filers/CIKs created before March 24, 2025.
  - New filers/CIKs whose Form ID applications for EDGAR access were submitted and granted by SEC staff on or after March 24, 2025 are 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 will be unable to file on EDGAR until they have successfully enrolled or have obtained EDGAR access via a Form ID application that was granted by SEC staff on or after March 24, 2025.
  - Enrollment ends December 19, 2025. Filers that have not yet transitioned to EDGAR Next will need to submit Form ID in order to regain EDGAR access and file on EDGAR.

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 ENROLLMENT

- Filers that have successfully enrolled (or have been granted access after submitting Form ID on the dashboard on or after March 24, 2025) immediately have the option to use APIs.
    - Filers can make submissions and manage their accounts using APIs.
    - To use APIs, the Filer 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.

FREQUENTLY ASKED QUESTIONS

INDIVIDUAL ACCOUNT CREDENTIALS

- **Can I have more than one email address associated with my Login.gov account (for example, if I already have a Login.gov account that I use for personal purposes)?**
    - Yes, but you must log into EDGAR with the email address by which you were invited on Form ID and/or in the dashboard.
- **Can I use a group email box for my Login.gov account?**
    - No, you must use an individual email address (which will be used to identify you and send you EDGAR notifications). Your email address will be visible to others on the dashboard.
- **You do not need to be a U.S. citizen to create a Login.gov account.**

ENROLLMENT

- **Is there anything unenrolled filers should do before the Sept. 15, 2025, EDGAR Next compliance date?**
  - Ensure the filer, or its filing agent, can access the filer's EDGAR Point of Contact (POC) email address.
  - As of Sept. 15, 20205, filers without access to their POC email address will not be able to enroll and may need to submit Form ID to reapply for access to their account.
  - If the filer must submit Form ID to reapply for access to its EDGAR account, see How Do I Prepare and Submit My Form ID Application for instructions regarding applying for access to an existing EDGAR account and for current average Form ID processing times.

ENROLLMENT

- Starting Sept. 15, 2025, unenrolled filers will not be able to access the EDGAR filing websites. Before then, unenrolled filers should update their EDGAR POC email address so they can reset the access codes needed for enrollment or confirm that their codes are current.

- **What should the filer do if it cannot find the access codes needed to enroll (CCC and passphrase), or if those codes are outdated (they have not been reset since Sept. 2019)?**
  - The filer should not submit a Form ID. Instead, the filer should reset its access codes and then enroll itself in EDGAR Next.

RESOURCES

EDGAR NEXT WEB PAGE RESOURCES

www.sec.gov/edgar-next

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

- "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 Frequently Asked Questions

EDGAR NEXT WEB PAGE RESOURCES

www.sec.gov/edgar-next

API guidance:

- Overview of EDGAR APIs
- EDGAR API Developer Toolkit
- Sample Filing Application

EDGAR NEXT WEB PAGE RESOURCES

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 How to Enroll w/o Form ID
- If the filer cannot access its current EDGAR POC email address, the filer can update it before Sept. 15, 2025 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

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 How to Enroll w/o Form ID
- For more information, see Understand and Utilize EDGAR CIKs, Passphrases, and Access Codes

FILER SUPPORT FOR EDGAR NEXT

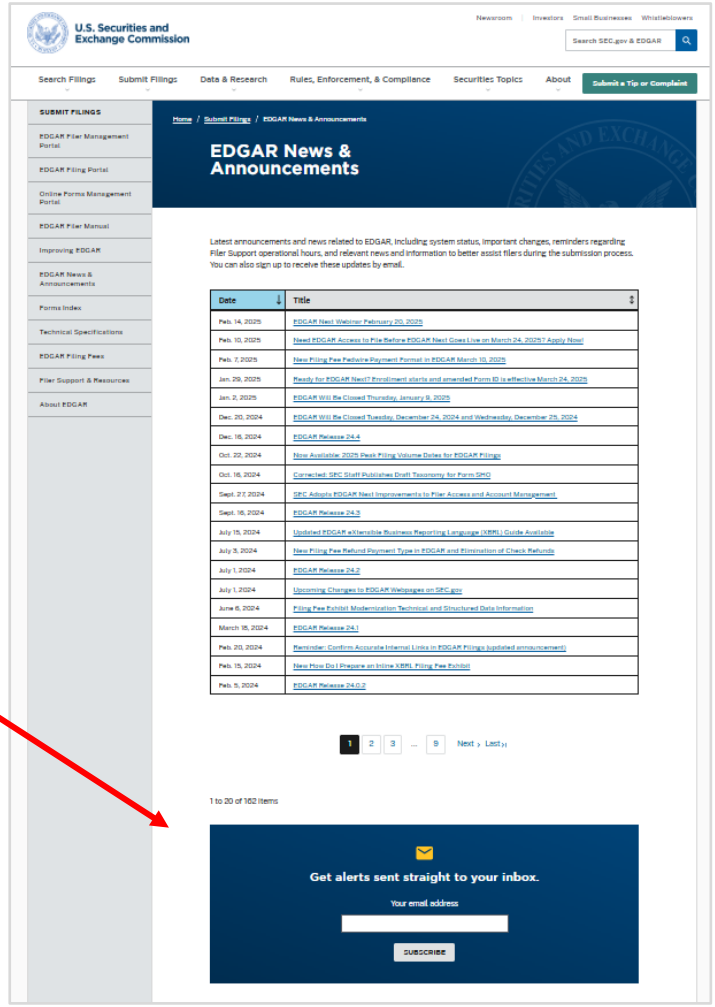
Filer Support Contacts:

- Email support: EDGARNext@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.



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QUESTIONS & ANSWERS

PLEASE TYPE YOUR QUESTIONS IN THE CHAT