

EDGAR Next

Overview and Resources

Overview

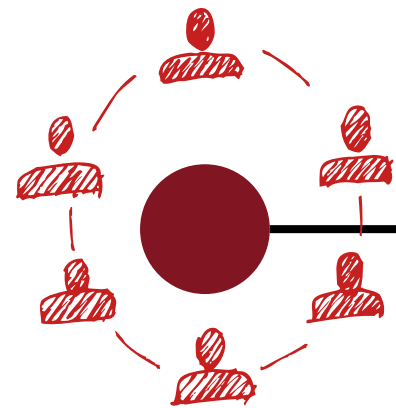
What is EDGAR Next?

The Securities and Exchange Commission (SEC) has adopted final rules and form amendments aimed at enhancing access to and the management of accounts within its Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system. These updates, collectively known as EDGAR Next, include technical changes to the system. The new rules amend Rules 10 and 11 of Regulation S-T, revise Form ID, and update the EDGAR Filer Manual, Volume I: “EDGAR Filing,” Version 42 (March 2025).



Overview Cont.

EDGAR Next does not change how filings are submitted, it will modernize how users log into the EDGAR platform.



Authorized Admins and Users

Only authorized admins and users can submit filings

Insider's Form ID must designate an admin

Admin can authorize additional admins and users



Multifactor Authentication

EDGAR login credentials established through login.gov

Login will require password and secondary authentication

All admins and users will need their own EDGAR login



Annual Confirmation

Annually confirm:

- Accuracy of insider accounts
- Authorized admins, users, and delegated entities

Important Dates

September 30, 2024

EDGAR Next Adopting Beta Launches

March 24, 2025

EDGAR Next is LIVE!

The EDGAR Filer Management dashboard will go live, and filers may begin to enroll on the dashboard while still being able to file pursuant to the legacy filing process.

Also starting on March 24, 2025, compliance with the amended Form ID, which must be submitted through the dashboard, will be required.

September 12, 2025

Last day to file via legacy process.

September 15, 2025

Compliance with EDGAR Next will be required

December 19, 2025

Last day to enroll in the new dashboard



EDGAR Next | Roles

INSIDER Account Owner	ACCOUNT ADMINISTRATOR Maximum Access	USER Limited Access	TECHNICAL ADMINISTRATOR Limited Access	DELEGATED ENTITY Limited Access
No access to EDGAR unless authorized as an account administrator or user	Authorized to: <ul style="list-style-type: none">• Submit filings• Authorize and deauthorize administrators, users, and delegated entities• Complete annual confirmations	Authorized to submit filings and manage own account	Manages API tokens for access through third-party filing tools	Another EDGAR Filer
Does not need a login.gov account unless account access is desired	One administrator is designated as the point of contact for the SEC	Not authorized to do anything else	Contact your third-party filer to determine if you'll need a technical administrator	Admins and users of the entity are authorized to: <ul style="list-style-type: none">• Submit filings• Manage admins and users for its own account
		*An individual can have more than one role for each filer Exceptions: <ul style="list-style-type: none">• Account Admin. can be a Technical Admin. but not a User• Technical Admin. can be a User but not an Account Admin.		

EDGAR Next Individual Roles in EDGAR Next

Diagram 1: Authorization of Individual Roles

Account Administrator (20 Max)

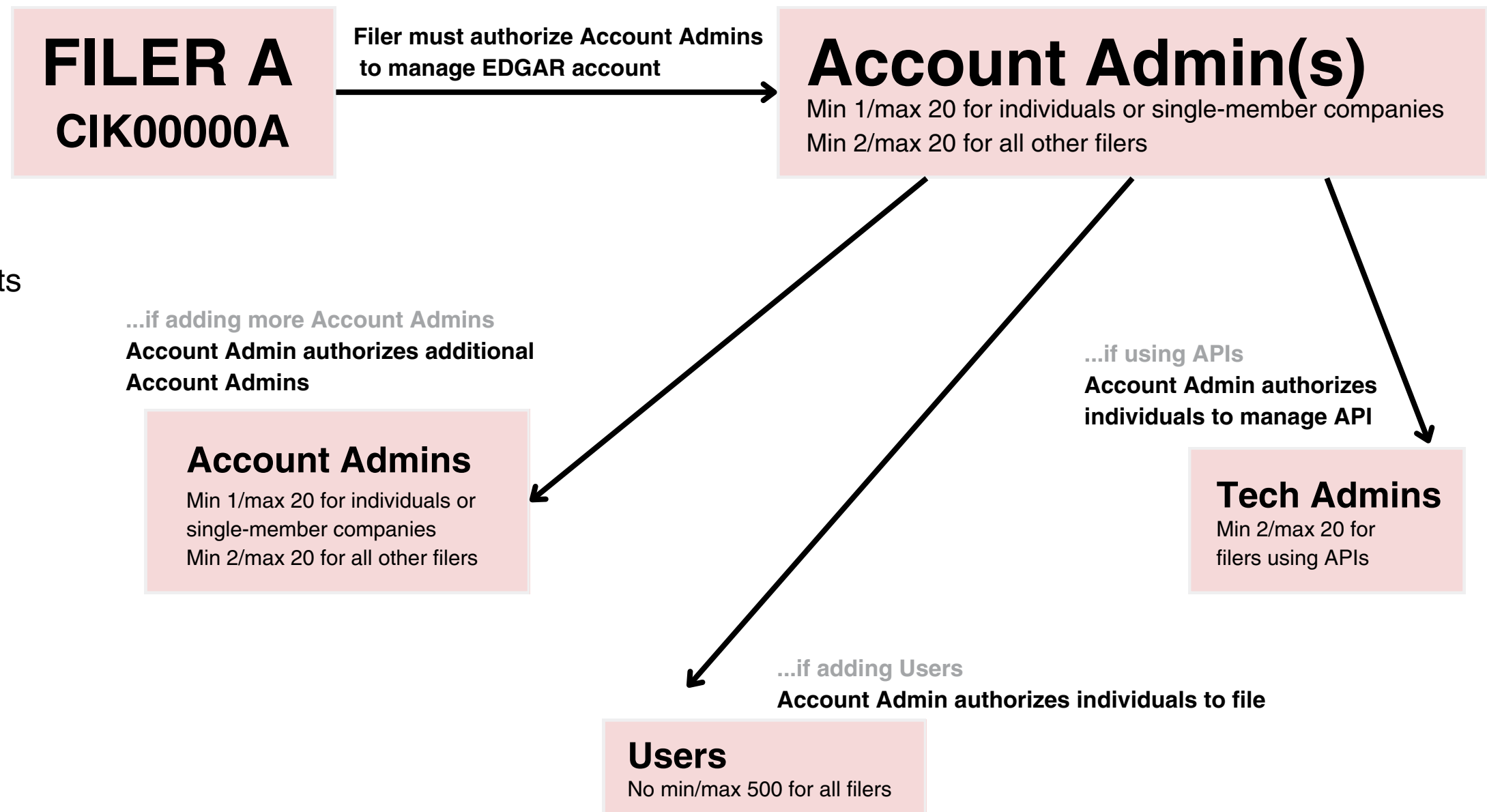
- Manages the filer's account on the dashboard, including adding and removing individuals
- Performs annual confirmation
- Delegates authority to file to other EDGAR accounts
- Generates or creates custom CCC

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



How Should I Prepare?

Filers & Filing Agents Using 3rd Party Software

Communicate with the filing software provider (presumably a filing agent):

- Ask what enrollment services they will provide and determine whether to authorize them to enroll your CIK.
- Ask what services they will provide regarding their employees serving as your account administrator(s), user(s), and/or technical administrator(s) and determine whether to authorize their employees in relevant roles.
- Ask whether you will need to provide them any new documentation/information, such as a new service agreement, filer and/or user API tokens, or enrollment credentials and provide documentation/information.
- Ask whether they will be offering to serve as a delegated entity, and determine whether to delegate to them.
- Ask whether they will be offering the use of their API connections and filer API tokens and determine whether you will be using them.



How Should I Prepare? Cont.

FAQS: Filers & Filing Agents Using 3rd Party Software

Q: Does CCRcorp provide enrollment services via The Section 16 Filer?

A: We do not provide enrollment services, nor do we enroll your CIK. Filer users should [enroll in EDGAR Next](#) using the [EDGAR dashboard](#). Users will need to create [Login.gov](#) accounts to enroll.

Q: What is CCRcorp's or The Section 16 Filer software's role in filing?

A: The Section 16 Filer software enables transmission of created forms using the EDGAR APIs. We do not assist with the content of filings. Our software provides a convenient way to create, store, and transmit forms to EDGAR.

Q: Are we offering to serve as a Delegated Entity?

A: No. Filer software customers will be responsible for delegating/accepting delegation of Filing authority and maintaining their EDGAR account, users, and administrators.

Q: Does CCRcorp provide any new documentation/information, such as a new service agreement?

A: Our Filer software requires no new service agreement, and we provide documentation to customers.

Q: Does CCRcorp provide Filer or User API Tokens?

A: No. Technical Administrators will obtain and maintain the Filer API Token associated with the submitting CIK, and the individual performing the filing will obtain the User API Token. Our software provides fields for the user to enter and verify these tokens.

Q: Can I continue to use Legacy EDGAR filing using the Section 16 Filer software?

A: Yes, the Filer software will continue to operate in Legacy EDGAR mode until September 12, 2025. The EDGAR Next changes will be fully incorporated well in advance of the required compliance date.

Key Actions for Transition (aka Your To-Do List)



- **Obtain Login.gov Credentials:**
 - All individuals submitting on behalf of a company or its Section 16 officers/directors, including corporate secretaries and financial reporting teams, should secure Login.gov credentials before March 24, 2025.
- **Familiarize with the New Dashboard:**
 - Use the beta environment to explore the dashboard—Login.gov credentials are required for access.
- **Authorize Account Administrators:**
 - Establish a process to authorize account administrators (e.g., via powers of attorney or informal authorization) who will manage EDGAR accounts, delegate filing authority, and add users as needed.
- **Update Onboarding Processes:**
 - Include account administrator designation in the amended Form ID for new Section 16 officers/directors. This form must be submitted through the dashboard starting March 24, 2025.
- **Review EDGAR Access Codes:**
 - Ensure all CIKs, CCCs, passphrases, and passwords are current. Legacy EDGAR codes will be deactivated on September 15, 2025.
- **Plan Enrollment Timing:**
 - Schedule enrollment for the company and Section 16 officers/directors—preferably after year-end reporting but before the September 15, 2025, deadline.
- **Incorporate Annual Confirmation:**
 - Assign an account administrator for annual confirmation and integrate this task into year-end reporting processes.



More Resources

Blog: [EDGARNext: Beware the Ides of March!](#)

[SEC's EDGAR Resources](#)

Blog: [EDGAR Next: What's Next for Filers?](#)

[SEC's EDGAR FAQ](#)

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Thank You!

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