



EDGAR Next: A Guide for Reporting Teams

The Securities and Exchange Commission (SEC) recently adopted amendments referred to as **EDGAR Next** to enhance the security and data integrity of its Electronic Data Gathering, Analysis, and Retrieval (EDGAR) system and improve filers' access and account management capabilities.

As a result, EDGAR Next will impact how companies and their filing agencies process SEC filings and electronically interact with regulatory authorities. Companies that embrace these changes as early adopters will position themselves as leaders in operational efficiency and compliance.

To succeed in this new filing era, you need a proven and trusted SEC EDGAR filing agent. To that end, **Edgar Agents** simplifies and expedites the SEC filing process with speed, precision, value and exemplary customer service. Our experts in regulatory filings and compliance knowledge can explain how these changes will affect your operations and provide actionable insights so corporate attorneys, CFOs and regulatory reporting professionals can file with confidence.

Step 1: Obtain Individual Credentials

- Under EDGAR Next, individual credentials will be required for each user filing on behalf of a company. Unlike the current system, where one login could be shared across a company, each authorized user must now create their own account at [Login.gov](https://login.gov) to ensure Multi-Factor Authentication (MFA) for security purposes.
- The email used for [Login.gov](https://login.gov) credentials must correspond to the email the person will use in connection with EDGAR when the EDGAR Next changes take effect in March 2025.
- If you already have a personal login.gov account used for other government agencies, consider providing to [Login.gov](https://login.gov) a different email address than that used for personal purposes because EDGAR uses the email address provided to Login.gov for identification and notification, and the email address is visible to others on the EDGAR Filer Management Dashboard.

Step 2: Enroll, Link and Learn

- **Enroll** your company in the EDGAR Next dashboard as soon as it becomes available in March 2025, as it will be the central hub to manage user permissions.
- **Link** your [Login.gov](https://login.gov) account with your company's EDGAR account and enroll using the CIK, CCC and passphrase. If registering as a new entity, submit the Form ID through EDGAR to ensure your credentials link to the correct entity.
- **Learn** how to manage authorizations, update codes and keep your account updated and familiarize yourself with the new dashboard during beta testing, which is now available.

Step 3: Designate and Delegate

- **Designate** a minimum of two account administrators and up to 20. Choose trusted individuals who will maintain proper access and ensure only authorized users can log into the account and file on behalf of your company.
- **Delegate** to authorized filers such as Edgar Agents.

Step 4: Comply, Authenticate and Submit

- **Comply** with all requirements of Rule 10 and the EDGAR Filer Manual.
- For EDGAR Next, credentials obtained from Login.gov will link to each filer's account and will be used to **authenticate** and **submit** documents.
 - *Legacy EDGAR access codes (password, passphrase and PMAC) will be deactivated for filing, but will remain available until Dec. 19, 2025, to allow filers who have not enrolled by the compliance date to reset the needed codes and submit their enrollment. Filers who have not enrolled and need to file may enroll on the dashboard between Sept. 15, 2025, and Dec. 19, 2025.*

Step 5: Confirm, Verify and Edit

- **Confirm** authorized users annually to maintain security and ensure compliance.
- **Verify** that administrators are still authorized to file on behalf of your company each year.
- **Edit** or revoke access, ensure user permissions and contact details are accurate.

Step 6: Key Dates

The SEC began the beta testing phase for the updated system on Sept. 30, 2024. This testing period allows filers to become familiar with the changes and provide feedback before the new rules take effect. Other important deadlines to remember:

1. **March 24, 2025:** New dashboard goes live at the beginning of the enrollment period and compliance with amended Form ID will be required.
2. **Sept. 15, 2025:** Final deadline for full compliance with all EDGAR Next amendments.
3. **Dec. 19, 2025:** Filers who missed the Sept. 15 deadline must submit an amended Form ID to regain access to their account.

Questions?

Navigating these changes requires careful planning and Edgar Agents is here to help. We are currently an active pilot participant in the EDGAR Next beta testing and can help you manage a seamless transition so you can file with confidence. Give us a call at **212.265.3347** or email **edgarnext@edgaragents.com**.