

edgar agents

EDGAR Next Enrollment Guide for Existing Filers

Version 2.0



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What is Enrollment and Who is it For?

What is Enrollment and Who is it For?



What is Enrollment?

Enrollment is a streamlined process that allows EDGAR filers to transition to EDGAR Next without completing Form ID, notarizing documents, or presenting a power of attorney to SEC staff. Each filer may only enroll once by one individual and enrollment is typically processed and effective the same day.

Who is Enrollment for?

Enrollment is for existing EDGAR filers who already have a CIK and EDGAR Access codes.

Who can perform enrollment?

Any authorized individual with login.gov credentials can perform the enrollment registration for a Filer – single-individual or entity – given all verifying information is provided.

What is Enrollment and Who is it For?



When must enrollment be completed by?

All filers must enroll in EDGAR Next by September 15, 2025. After September 15th, existing filers will not be able to file until they enroll in EDGAR Next by December 22, 2025.

What if the filer already has a CIK but lost EDGAR Access?

If an existing filer with a CIK loses EDGAR Access, then they must follow the “Apply for EDGAR Access” for an existing CIK process in the EDGAR Next dashboard. See Guide: Applying for EDGAR Access.



Manual Enrollment

Manual Enrollment



To complete EDGAR Next enrollment, you must have login.gov credentials and it must be completed by September 15th 2025 to avoid disruptions in filing.

- Go to filermanagement.edgarfiling.sec.gov
- Sign in with Login.gov credentials.
- Click on “Enroll in EDGAR Next.”

The screenshot displays the 'Filer Management' dashboard. At the top, there is a dark blue header with the text 'Filer Management' and a 'SIGN OUT' button. Below the header, a white bar contains a 'SHOW NOTIFICATIONS' button with a red notification icon. The main content area is a dark blue sidebar with several menu items, each preceded by a yellow plus sign: 'MY ACCOUNTS', 'RETRIEVE SUBMISSION INFORMATION', 'MY USER API TOKEN', 'APPLY FOR EDGAR ACCESS', and 'ENROLL IN EDGAR NEXT'. The 'ENROLL IN EDGAR NEXT' item is circled in red. Below this item, a white box contains the text 'ENROLL IN EDGAR NEXT - Expand section'. In the top right corner of the main content area, there is a 'Login.gov email: @edgaragents.com' and 'Contact information: no contact information available' with an 'Edit my information' link.

- Click on “Manual 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.

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

NOTES:

1. You can reset your passphrase by clicking “Passphrase Reset.”
2. See the “Bulk Enrollment” section of this document for guidance on enrolling multiple CIKs.
3. For information on EDGAR code definitions and resetting guidance visit <https://www.sec.gov/submit-filings/filer-support-resources/how-do-i-guides/understand-utilize-edgar-ciks-passphrases-access-codes>

Manual Enrollment



- Enter CIK, CCC, and passphrase.
- Click “Verify Entity.”

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

ENTER ACCESS CODES

Central Index Key (CIK)

CIK Confirmation Code (CCC)

Passphrase

VERIFY ENTITY

ENTITY INFORMATION

Entity name	CIK	Filer type	City	State	Zip code
Enrollment 136	*****711	Company	FAIRFAX	Indiana	1234567

Manual Enrollment

- Confirm whether you are a single-member company or not. This will be a Y/N selection.


Single-Member Company?

You should select "Yes" if the company only has a single individual who acts as the sole equity holder, director, and officer (or, in the case of an entity without directors and officers, holds position(s) performing similar activities as a director and officer).

Yes

No

- Enter Account Administrator(s) email address, name, business address, and telephone number.

Account Administrator (1)  The account administrator is authorized by the filer to manage the filer's EDGAR account on the dashboard

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:

email Re-enter 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

United States

Telephone number

Manual Enrollment

- Select an annual confirmation date.

You must also select an annual confirmation date.

Select ▼

Select

March 31

June 30

September 30

December 31

- Allow delegation requests? Y/N.

Allow delegation requests ⓘ

- Yes
- No

Selecting this option will allow other EDGAR accounts to send you requests to authorize them to file on your behalf. If you do not select this option, these requests will be blocked.

Ensure this box is checked to ensure you can receive EdgarAgents' request for delegation.



Bulk Enrollment

Bulk enrollment enables multiple EDGAR accounts to be enrolled concurrently. This process benefits entities that manage various EDGAR accounts.

SEC has a limits of 100 row entries for each CSV bulk enrollment form.

- Click on “Bulk Enrollment.”
- Download the bulk enrollment CSV template file.
- Fill the columns for each CIK.
- Save the completed bulk enrollment CSV file to your desktop to upload to EDGAR Next.
- Click “Choose from folder” to browse to the completed bulk enrollment CSV on your desktop. Select the file and click “Open.”
- Click “Enroll Now.”
- After enrollment, the entities can be viewed in the Dashboard under “My Accounts”.

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

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

CSV ?

UPLOAD THE COMPLETED TEMPLATE

File information

Drag one file at a time here or [choose from folder](#)
EdgarNext Bulk Enrollment Template.csv

ENROLL NOW



Filing Delegation

What is Filing Delegation?

Filing delegation allows a Filer to grant an EDGAR account the authority to make filings on their behalf. This can include delegating authority to a filing agent, law firm, broker-dealer, or related entity. The delegated entity can then perform tasks such as submitting filings to the SEC.

Who Can Delegate Authority?

Only the account administrators of a Filer's account can delegate filing authority. This ensures that the delegation process is controlled and secure.

Key Points to Remember

- Only account administrators can delegate filing authority.
- Delegation must be confirmed in the EDGAR Next dashboard by the Compliance date - September 15th, 2025.
- Filing submissions will be blocked after the compliance date if the delegation process to a delegated entity such as EdgarAgents is incomplete.

Follow this guide to learn how to delegate filing authority to EdgarAgents after enrolling the existing EDGAR account or upon the activation of EDGAR access in [the Filer Management website](#) after a Form ID application or restore of access.

[Note: Throughout this guide and in the context of EDGAR Next, the term "filer" refers to any entity or individual that submits filings through the EDGAR system. This includes companies, individuals, and other entities that are required to file documents with the SEC.]

Filing Delegation



After successful enrollment, the Filers' Account Administrators can delegate filing authority via the dashboard to any EDGAR account, allowing multiple filing agents.

- From your dashboard, select the filer name under "My Accounts." You will now be able to access the EDGAR account for the selected filer.

The screenshot shows the 'Filer Management' dashboard. At the top, there is a 'SIGN OUT' button and a 'SHOW NOTIFICATIONS' button with a '99+' notification badge. Below this, the user's login information is displayed: 'Login.gov email: @edgaragents.com' and 'Contact information: no contact information available'. There is also a link to 'Edit my information'. The main section is titled 'MY ACCOUNTS' and contains a 'Filter by' input field. Below the filter is a table with the following columns: Filer name, Filer CIK, Role(s), Invite date, Accept date, Confirmation due date, Allow delegation request, Auto accept delegation, and Actions. The first row in the table has 'Enrollment 128' circled in red, and a tooltip is visible over it that says 'Click to manage Enrollment 128 (CIK *****702) account'. The second row has 'Edg LLC' circled in red.

Filer name	Filer CIK	Role(s)	Invite date	Accept date	Confirmation due date	Allow delegation request	Auto accept delegation	Actions
Enrollment 128	*****702	Account Administrator	03/06/2025	03/06/2025	06/30/2025	Yes	-	...
Edg LLC		technical Administrator	10/30/2023	10/31/2023	12/31/2025	-	-	...

Filing Delegation



The screenshot displays the 'Filer Management' interface. At the top, there is a dark blue header with the text 'Filer Management'. Below the header, there are two buttons: 'BACK TO MY ACCOUNTS' on the left and 'SIGN OUT' on the right. The main content area is divided into two columns. The left column shows 'Account, CIK:' with a dropdown menu displaying 'Enrollment 128 - CIK *****702' and 'My role(s):' with the text 'Account Administrator'. The right column shows 'ACCOUNT DETAILS' and a green checkmark icon next to 'ANNUAL CONFIRMATION (due date 05/30/2023)'. Below these sections is a list of management options, each with a plus sign icon: 'MANAGE INDIVIDUALS', 'MANAGE CCC & PASSWORD', 'MANAGE DELEGATIONS AND USER GROUPS' (circled in red), 'MANAGE ABS ISSUER ACTIVITY', and 'MANAGE FILER API TOKEN'. A small tooltip is visible over the 'MANAGE DELEGATIONS AND USER GROUPS' option, displaying the text 'MANAGE DELEGATIONS AND USER GROUPS - Expand section'.

- Click on the “Manage Delegations and User Groups” tab.

Filing Delegation

- Click “Add Delegation” to delegate filing authority to another entity.



MANAGE DELEGATIONS AND USER GROUPS

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

Delegations to
(none - you have not authorized any entities to file on behalf of you)

ADD DELEGATION

Delegated entity name	CIK	Status	Last updated	Actions
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Items per page: 5 0 of 0

Filing Delegation



- Enter CIK number or Name of the delegated entity.
- To delegate to **EdgarAgents LLC**, add these 2 CIKs:
 1. **CIK: 0001213900**
Name: EdgarAgents LLC
 2. **CIK: 0001013762**
Name: EdgarAgents LLC 2
- Review delegated Filer information and click “Delegate”

Disclaimer: EdgarAgents LLC uses multiple filing CIKs to ensure continuity and reliability during unforeseen disruptions. The use of multiple CIKs helps safeguard our clients' filing processes and uphold the integrity and reliability of our services. Clients are instructed to delegate to both CIKs to maintain secure and uninterrupted service.

Delegate authority to file

To delegate authority to file on your behalf to another filer, enter the CIK number or name 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) ABCDE Limited - CIK 000*****

Enter your delegated entity's CIK or Name
0001213900

There may be multiple filers with similar names, so please confirm the CIK is correct.

Name	EdgarAgents LLC
CIK	0001213900
City	OLD BRIDGE
State	NJ
Zip code	08857
State of Incorporation	

Delegated filer(s): ABCDE Limited - CIK 000*****

Enter your delegated entity's CIK or Name
0001013762

Name	EdgarAgents LLC 2
CIK	0001013762
City	NEW YORK
State	NY
Zip code	10001
State of Incorporation	NY

CANCEL

DELEGATE



THANK YOU

For additional assistance with EDGAR Next contact your representative or email
edgarnext@edgaragents.com

For general queries contact info@edgaragents.com