## EDGAR Next compliance roadmap



On Sept. 27, 2024, the SEC announced the <u>EDGAR Next final rule</u> which significantly impacts all active SEC filers. Filers can begin enrolling in EDGAR Next starting March 24, 2025, and must enroll and comply by Sept. 15, 2025.

Get Login.gov credentials



## **Prepare for EDGAR Next**

- Identify all users who will access EDGAR Next and require Login.gov credentials
- Identify and document all CIKs that will need to enroll in EDGAR Next
- Identify/locate the CCC and Passphrase for each CIK
  NOTE: If a filer has not reset its CCC and/or Passphrase since
  Sept. 2019, the filer should reset these codes prior to enrolling.
- Communicate with your Officers and Directors or other filers that you manage to coordinate EDGAR Next preparation and enrollment
- 5. Designate a minimum of two Account Administrators for each CIK
- Communicate with each of your service providers (filing agents/SaaS platforms) to understand how the filing process will change under EDGAR Next—this will vary by provider

## **Enroll on EDGAR Next**

- 1. Create Login.gov credentials
- 2. Enroll into **EDGAR Next Filer Management**
- 3. Share updated CCCs with all necessary individuals
- 4. Delegate filing authority
- 5. Begin voluntary EDGAR Next filings

**Note:** You can continue to submit filings through the current EDGAR system using your existing EDGAR access codes.

## **EDGAR Next mandatory compliance begins**

- 1. Begin filing on the EDGAR Next platform
- 2. Annual confirmation

**Note:** Filers who have not enrolled on EDGAR Next by Dec. 19, 2025, will be required to complete an amended Form ID application for existing filers to reactivate their CIK.



