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
- 2. Identify and document all CIKs that will need to enroll in EDGAR Next
- Identify/locate the CCC and Passphrase for each CIK
- 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
- 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.



