

EDGAR Next Transition and Enrollment



Edgar Next Transition and Enrollment

As part of the SEC's EDGAR Next transition, the new **EDGAR [Filer Management website](#)** and **EDGAR Next dashboard** went live on **March 24, 2025**. This update brings changes to how filers access and manage their EDGAR accounts which is **mandatory** for all current EDGAR filers.

The **difference between EDGAR Next and Traditional EDGAR** lies primarily in how filers interact with the SEC's EDGAR (Electronic Data Gathering, Analysis, and Retrieval) system. EDGAR Next is a **modernized version** being developed by the SEC to improve security, usability, and filer access management. Here's a breakdown:

User Access & Authentication		
Feature	Traditional EDGAR	EDGAR Next
Access Method	CIK + Password + CCC	Login with username/password + MFA
Credential Sharing	Often shared among multiple users	Individual user accounts; no shared credentials
Security	Basic password system	Stronger authentication (Multi-Factor Authentication)

Key Dates:

- **March 24, 2025:** EDGAR Next went live. Filers began the enrollment process.
- **September 12, 2025:** Recommended deadline to enroll to avoid filing interruptions.
- **September 15, 2025:** Compliance required; non-enrolled filers cannot make submissions.
- **December 19, 2025:** Final deadline for enrollment; post this date, a new Form ID application will be necessary for EDGAR access.

Early enrollment ensures **uninterrupted filing capabilities, avoid last minute rushes/traffic** and provides time to **familiarize yourself with the new system** before the mandatory deadline.

Each individual accessing **EDGAR Next** must create a [Login.gov](#) account with multifactor authentication.

Should Designate at least two individuals as **Account Administrators** (or one for single-member entities) to manage the EDGAR account and authorize users.

Next Steps

1. [Creating Login.gov credentials](#)

Each individual accessing EDGAR Next must create a **Login.gov** account with multifactor authentication.

2. [Enrollment](#)

- Enrollment is required for all EDGAR filers who wish to continue filing uninterrupted on EDGAR.
- Companies can do the enrollment at their own or DataTracks initiate the enrollment process for their customers.
- DataTracks will get the [necessary information](#) from the customer/company to create the Account Administrators.
- Company Admins to register by [creating a Login.gov account](#) with multifactor authentication and [accept entity invite](#).
- Company to [Delegate filing authority](#) to **DataTracks (CIK - 0001575872)**.
- Companies to [Create User](#) and technical administrators for DataTracks to manage the APIs and make submissions on behalf of the company.

3. [Delegate Filing Authority](#)

A filer's account administrators may delegate authority to file on behalf of the filer to another CIK (which may belong to a filing agent, law firm, broker-dealer, or other entity that will be filing on the delegating filer's behalf).

Creating Login.gov credentials

Instructions to Creating Login.gov credentials.

1. Go to [Login.gov](https://login.gov)
2. Click **Create an Account**
3. Enter your email address
4. Use the company email address that you will utilize within EDGAR Next
5. Complete the remaining fields
6. Click **Submit**
7. Navigate to your email inbox, click **Confirm email address**
8. Create your Login.gov password
9. Click **Continue**
10. Complete the Multifactor Authentication selection

See also the SEC's '[Obtaining individual account credentials instructional video](#)'.

The screenshot shows the 'Create an account for new users' page on Login.gov. At the top, there are two buttons: 'Sign in' and 'Create an account'. A red arrow labeled '1' points to the 'Create an account' button. Below this is the heading 'Create an account for new users' and the prompt 'Enter your email address'. A text input field is shown with a red box labeled '2' around it. Underneath is the section 'Select your email language preference' with the text 'You will receive emails from Login.gov in the language you choose.' There are four radio button options: 'English (default)', 'Español', 'Français', and '中文 (简体)'. A red arrow labeled '3' points to the 'English (default)' option. Below the language options is a checkbox labeled 'I read and accept the Login.gov Rules of Use' with a link to the rules. A red arrow labeled '4' points to the 'Submit' button at the bottom of the form.

EDGAR Next enrollment – existing filers

To complete EDGAR Next enrollment, you must have **Login.gov** credentials.

- Go to the [Filer Management website](#)
- Click **Sign in with LOGIN.GOV**
- Enter Login.gov credentials
- Click **Sign In**
- Click **ENROLL IN EDGAR NEXT**

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)
Please enter a valid CCC

Passphrase
Please enter a valid passphrase

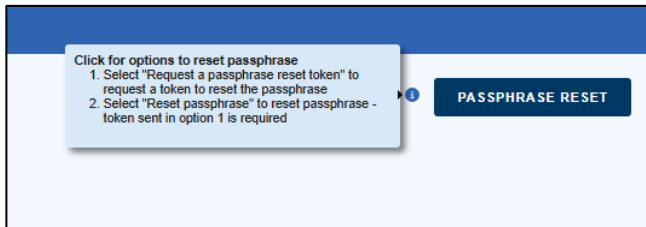
VERIFY ENTITY

PASSPHRASE RESET

- Select the **Manual enrollment** radio button

➤ Enter Access Codes

- If a filer has not reset its CCC and/or Passphrase since September 2019, the filer should reset these codes prior to enrolling



➤ Click **VERIFY ENTITY**

filermanagement-bravo.edgarfiling.sec.gov/homePage

VERIFY ENTITY

ENTITY INFORMATION

Entity name	CIK	Filer type	City	State	Zip code
Enrollment 753	0003001554	Company	FAIRFAX	Indiana	1234567

ENROLL IN NEW ACCESS AND ACCOUNT MANAGEMENT PROCESS

Each filer must authorize at least two account administrators to manage the filer's EDGAR account, unless the filer is an individual or a single-member company, in which case only one account administrator is required.

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

Account Administrator (1) ⓘ

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

Telephone number

ENROLL IN NEW ACCESS AND ACCOUNT MANAGEMENT PROCESS

Each filer must authorize at least two account administrators to manage the filer's EDGAR account, unless the filer is an individual.


Single-Member Company?

A single-member company is a company that 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). This box should only be checked if the CIK belongs to an entity; it should not be checked if the CIK belongs to an individual who is making filings in their personal capacity.

You should select "Yes" if the company is a single-member company.

- Yes
 No

- Select annual confirmation date from drop-down
- Indicate whether filer is a single-member company
- Enter account administrator details
 - Note: Two account administrators will be required if filer is not a single-member company

Account Administrator (2) 

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


Telephone number

You must also select an annual confirmation date.
Select

Allow delegation requests 
 Yes
 No

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 PO


Account Administrator (2)  The account administrator is authorized by the filer to manage the filer's EDGAR account on the dashboard

- Click **Enroll now**
 - A message will display indicating a successful enrollment
- Repeat steps 6 – 12 for each CIK

Note: CCC is updated upon enrollment for each CIK. Locate the updated CCC in EDGAR Filer Management Dashboard.

This must be shared with Filing Agents to ensure traditional filings can continue through September 12, 2025.

- Allow delegation requests.

Allow delegation requests  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.

Yes

No

Administrator 1

ENROLL IN NEW ACCESS AND ACCOUNT MANAGEMENT PROCESS

Each filer must authorize at least two account administrators to manage the filer's EDGAR account, unless the filer is an individual or a single-member company, in which case only one account administrator is required.

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

Account Administrator (1)

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:

<input type="text" value="email"/>	<input type="text" value="Re-enter email"/>
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Enter full legal name, including middle name or initial:

<input type="text" value="First name"/>	<input type="text" value="Middle name"/>	<input type="checkbox"/> No middle name	<input type="text" value="Last name"/>	<input type="text" value="Suffix"/>
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Enter business address:

Address is for a non-U.S. location (do not select if address is for U.S. territory).

<input type="text" value="Street address (line 1)"/>	<input type="text" value="Street address (line 2) (optional)"/>
--	---

<input type="text" value="City"/>	<input type="text" value="U. S. State/Territory Select"/>	<input type="text" value="Zip/Postal code"/>	<input type="text" value="Province/Country United States"/>
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Administrator 2

Account Administrator (2) ?

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

Telephone number

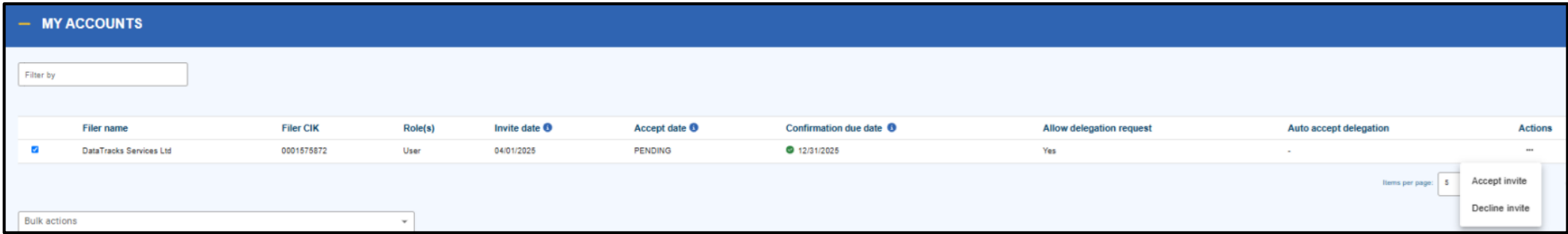
Accepting invitations

When an Account Administrator invites you to have access to a CIK, you must accept the invitation before you have access to the CIK.

You must have Login.gov credentials and another account administrator must assign a role of Account Administrator, User, or Technical Administrator to you on behalf of a CIK. You will also receive an email if invitation notifications are turned on.

1. Go to the [Filer Management website](#)
2. Click Sign in with Login.gov
3. Enter Login.gov credentials
4. Click Submit
5. Click **My Accounts**
6. Click on the ellipses under the Actions column on the row of the new entity. The Filer's name will not have a link until you accept the invitation.
7. Click Accept Invitation in the drop-down

Note: The invitation expires after two weeks and must be accepted before you have access to the CIK.



MY ACCOUNTS

Filter by

Filer name	Filer CIK	Role(s)	Invite date ⓘ	Accept date ⓘ	Confirmation due date ⓘ	Allow delegation request	Auto accept delegation	Actions
<input checked="" type="checkbox"/> DataTracks Services Ltd	0001575872	User	04/01/2025	PENDING	12/31/2025	Yes	-	⋮ Accept invite Decline invite

Bulk actions

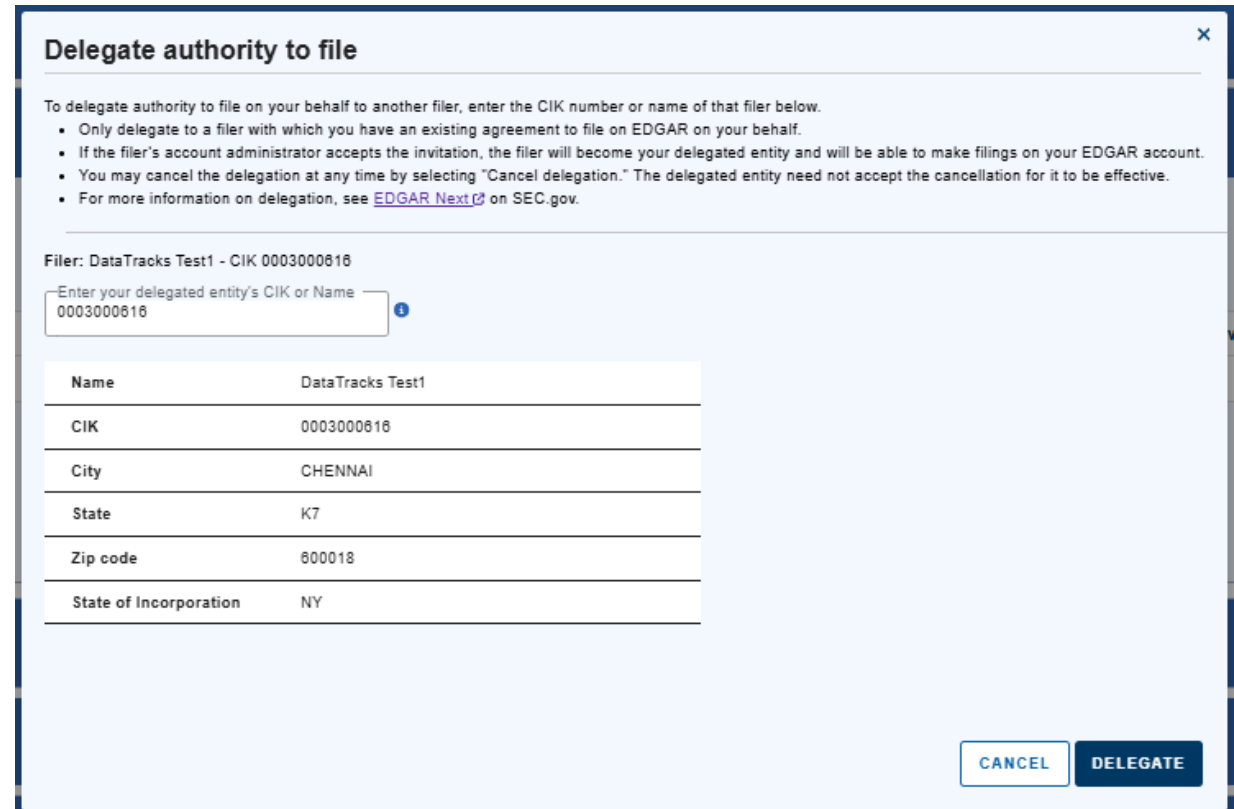
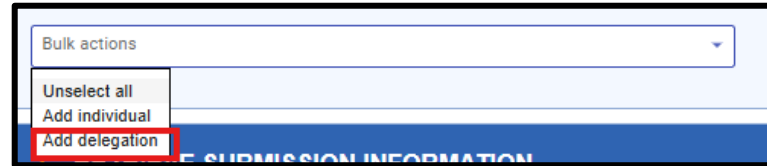
Items per page: 5

Delegate filing authority

Delegate directly to **DataTrack's Filing Agent CIK (0001575872)**

To complete Delegation, you must have **Login.gov** credentials and enrolled Filer CIK(s) into EDGAR Next.

1. Go to the [Filer Management website](#)
2. Click **Sign in with Login.gov**
3. Enter Login.gov credentials
4. Click **Sign In**
5. Expand the **My Accounts** section.
6. Check the box next to each Filer that will delegate filing authority
7. Click the Bulk actions drop-down
8. Select **Add delegation**

A screenshot of a dialog box titled 'Delegate authority to file'. The dialog contains instructions for delegating authority to file on behalf of another filer. It includes a list of bullet points: '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.', and 'For more information on delegation, see EDGAR Next on SEC.gov.' Below the instructions, there is a section for 'Filer: DataTracks Test1 - CIK 0003000616'. This section includes a text input field with the value '0003000616' and a table with the following details:

Name	DataTracks Test1
CIK	0003000616
City	CHENNAI
State	K7
Zip code	600018
State of Incorporation	NY

At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'DELEGATE'.

Adding Individual

Add DataTracks (support@datatracks.com) as User to manage the APIs and make submissions on behalf of the company.

- Go to MY Accounts
- Click the Entity Name

— MY ACCOUNTS

Filter by

	Filer name ↑	Filer CIK	Role(s)	Invite date ⓘ	Accept date ⓘ
<input type="checkbox"/>	DataTracks Test1	0003000816	Account Administrator, Technical Administrator	10/23/2024	01/16/2025
<input type="checkbox"/>	Enrollment 756	0003001587	Account Administrator, Technical Administrator	04/03/2025	04/03/2025
<input type="checkbox"/>	Enrollment 754	0003001585	Account Administrator	03/26/2025	03/26/2025

- Click on the **ADD INDIVIDUAL** Option at the top right corner.

— MANAGE INDIVIDUALS

Filter by ⓘ

ADD INDIVIDUAL

Name ↑	Role(s)	Primary point of contact	Invite date	Accept date	Email	Contact info	Actions
GauTest Personal	User, Technical Administrator	-	12/04/2024	12/04/2024	vityoons@gmail.com	-	...
Gokul J	User	-	04/01/2025	04/01/2025	gokulnath.j@datatracks.com	-	...
Rakesh NA T	Account Administrator, Technical Administrator	yes	10/23/2024	01/16/2025	rakesh.t@datatracks.com	-	...
Thoufeeq OPD	User, Technical Administrator	-	12/04/2024	12/04/2024	mohammed.t@datatracks.com	-	...

➤ Enter the required details, select “User” and Click ADD INDIVIDUAL.

Add individual ✕

Filer: DataTracks Test1 - CIK 0003000818

Email
support@datatracks.com

First name
DataTracks

Middle name (optional)

Last name
Services Pvt Ltd

Role(s):

- Account Administrator
- User
- Technical Administrator

CANCEL ADD INDIVIDUAL