EDGAR Next Tips for Section 16 Filers

☑ **Make a list** of your Section 16 Reporting Owners (and their CIK/CCC/Passphrase)

☑ All admins and users who will process filings need to [obtain login.gov individual account credentials](#)

☑ If your current Reporting Owners are already filing using Workiva, a Workspace Owner can [utilize the Workiva platform to simplify the enrollment process](#)!

☑ Log in to EDGAR® system and [check that contact information is correct](#) for every CIK
   - [According to the SEC](#), "Filers who have not reset their passphrase or CCC since September 2019 should [obtain a new passphrase](#) and a [new CCC](#)"
   - **Verify and update email addresses and contact details within the EDGAR system, including CCC and passphrase**

☑ **Enroll and assign Administrators on the [EDGAR Next Dashboard](#)** (Ex. Themselves, your company, a law firm, a filing agent.)
   - One or more per Issuer company where they are Officer or Director
   - **Account administrators** choose annual confirmation window (3/30, 6/30, 9/30, 12/31)
   - Choose one of four quarterly dates for ongoing confirmation - **Mark your calendars!**

☑ **Delegation** is recommended to file Section 16 reporting owners as the process requires association with issuer (CIK, CCC for RO) per the EDGAR Business Office
   - Reporting Owner [delegates](#) to the Issuer's CIK to use the Issuer's Filer API token
   - Reporting Owner delegates to Workiva CIKs 0001628280 & 0001628279 in [Filer Management Dashboard](#) to use File With Workiva

☑ **Enroll** Reporting Owners as soon as possible. You can continue to file using legacy EDGAR even after being enrolled in EDGAR Next until September 15, 2025.

👆 Additional tips from Workiva

- We recommend using a business email for Login.gov

- Remember to accept delegation requests sent to the Issuer, as those are not defaulted to auto-accept.

- Enrolling in EDGAR Next will automatically reset the CCC code for each account (CIK). Before enrolling, communicate the new CCC to any filing agent or entity that submits on your behalf or an account admin can change it back to the original value.

- ****Technical admins** are required if you choose to not delegate and use your own **filer token**, and **account admins** can also be assigned as **technical admins -** This is rare for Section 16 filers, most will use Issuer tokens.

- The EDGAR Business Office documented that a [POA is not generally required](#) for delegation of account management, but check with your legal counsel for guidance.

For all things EDGAR Next, visit our [Community page](#) for information and FAQs.

Helpful Videos

[Resetting your CCC and passphrase](#)

[Manual enrollment walkthrough](#)

[Workiva platform enhancements](#)

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