

Steps to Prepare for EDGAR Next

- ✓ Identify who should be authorized to submit SEC filings at your company
- ✓ All admins and users who will process filings need to obtain login.gov individual account credentials
- ✓ Log in to EDGAR® 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**
- ✓ Identify a minimum of two people at your company to be **account administrators**
- ✓ **Account administrators** identify a minimum of two **technical administrators****
 - **Technical administrators** will create **filer token**
 - **Filer token** identifies entity making submission and expires yearly
 - **User token** identifies the individual making submission
 - Managed by the user
 - Expires every 30 days
- ✓ **Account administrators** choose annual confirmation window
 - Choose one of four quarterly dates for ongoing confirmation
- ✓ **Delegate** to Workiva (CIKs 0001628280 & 0001628279)**
 - [Delegation](#) allows use of the Workiva **filer token** and "File with Workiva"
- ✓ Enroll as soon as possible. You can continue to file using legacy EDGAR even once enrolled in EDGAR Next until September 15, 2025



Additional tips from Workiva

- Enrolling in EDGAR Next will automatically reset your CCC code for each account (CIK). Before enrolling, communicate the new CCC to any filing agent or entity that submits on your behalf or change it back to the original value
- We recommend using your business email for Login.gov
- ****Technical admins** are required if you choose to not delegate and use your own **filing token**, and **account admins** can be assigned as **technical admins**

Helpful Videos

[Resetting your CCC and passphrase](#)

[Manual enrollment walkthrough](#)

[Workiva platform enhancements](#)

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

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