

MSRB Gateway User Manual for Issuers, Obligated Persons, and Agents

Version 3.0, May 2023



Revision History

Version	Date	Description of Changes
1.0	April 2012	Initial version. Created to accommodate increased account management for Issuers, Obligated Persons, and Agents.
1.1	July 2012	Update Gateway Main Menu images.
1.2	August 2015	Updated the Resources and Support section to reflect the change in hours of operation for E-mail Support.
1.3	June 2016	Updated to reflect the user navigation changes to the MSRB.org homepage, MSRB Gateway Login and Main Menu pages.
2.0	December 2019	Updated to reflect registration page changes for Continuing Disclosure accounts and Issuers and Obligated persons.
3.0	May 2023	Updated to reflect the elimination of individual account registration

Resources and Support

MSRB Website: www.msrb.org

EMMA Website: emma.msrb.org

For assistance, contact MSRB Support at 202-838-1330 or MSRBsupport@msrb.org.

Live Support: 7:30 a.m. – 6:30 p.m. ET

E-mail Support: 7:00 a.m. – 7:00 p.m. ET

Municipal Securities Rulemaking Board

1300 I Street NW, Suite 1000

Washington, DC 20005

Tel: 202-838-1500

Disclaimer

This resource is for informational purposes only and should be considered in conjunction with the applicable MSRB rules and any related interpretations. The complete text of all MSRB rules and interpretations is available at <http://MSRB.org/Rules-and-Interpretations/MSRB-Rules.aspx>.

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Introduction

The MSRB protects investors, state and local governments and other municipal entities, and the public interest by promoting a fair and efficient municipal securities market. The MSRB fulfills this mission by regulating the municipal securities firms, banks and municipal advisors that engage in municipal securities and advisory activities. To further protect market participants, the MSRB provides market transparency through its Electronic Municipal Market Access (EMMA®) website, the official repository for information on all municipal bonds. The MSRB also serves as an objective resource on the municipal market, conducts extensive education and outreach to market stakeholders, and provides market leadership on key issues. The MSRB is a self-regulatory organization governed by a 21-member board of directors that has a majority of public members, in addition to representatives of regulated entities. The MSRB is overseen by the Securities and Exchange Commission and Congress.

This manual describes how issuers, obligated persons and agents set up and maintain a Gateway account. The manual also describes how to convert a continuing disclosure account into an organization account and consolidate continuing disclosure accounts into an organization account. Instructions are also given on how to manage agent relationships.

Part 1: Gateway Account Overview

MSRB Gateway is a single secure access point for all MSRB applications. Issuers and obligated persons must register for an Organization Account to be able to make submissions on the MSRB's Electronic Municipal Market Access (EMMA) system. Formerly, users could register for a second type of account, but as of May 10, 2023, continuing disclosure account registration is no longer supported.

Organization Account

An organization account is established in order to enable users to manage all disclosure submission activities made by any user in a single organization. Before the account is activated, the organization must submit the required documentation to the MSRB for authorization. This information is detailed in the account set-up section of this manual.

The organization account is managed by the Master Account Administrator (MAA) who is appointed during the account set-up process. The MAA is responsible for the following:

- Creating new user accounts
- Managing EMMA submission rights
- Managing agent relationships
- Consolidating other continuing disclosure accounts
- Transferring the MAA role to another user at anytime

The following EMMA submissions can be made by users with an organization account:

- Continuing Disclosure Submissions (SEC Rule 15c2-12 disclosures) and additional voluntary continuing disclosures
- Voluntary Financial Information
- Voluntary Official Statement and Advanced Refunding Documents (OS/ARD) Submissions
- Voluntary Preliminary Official Statement Submissions

Users with an organization account have a shared EMMA Dataport submission history. EMMA Dataport displays all submissions made to EMMA under one organization account. These submissions can be accessed and amended by any user in the organization who has the appropriate access rights.

Users with an organization account have access to the EMMA Trade Monitor, which provides state and local governments with the capability to analyze data from the EMMA website in support of, among other things, evaluating pricing for new issues.

Issuer Organizations can create and manage a customized Issuer homepage. Customized issuer homepages give investors access to consolidated information about each issuer's securities on EMMA. Issuer homepages are accessed through an interactive map that allows investors to browse a comprehensive directory of state, city, county, and other issuers in a particular state.

Users also have access to any CUSIP group created in the organization account and share in CUSIP group management. Below is a chart that displays the account management functions and roles in an organization account.

Gateway Functions	Master Account Administrator	Account Administrator
Create User Accounts	✓	✓
Manage Agent Relationships	✓	
Manage Consolidations	✓	
Manage Organization Details	✓	
Manage User Account Access Rights	✓	✓
Update User Account Details	✓	✓

Continuing Disclosure Account

As of May 10th, 2023, continuing disclosure account registration is no longer supported. To ensure access to MSRB systems to make submissions is not disrupted, continuing disclosure accounts will need to upgrade or consolidate to an organization account.

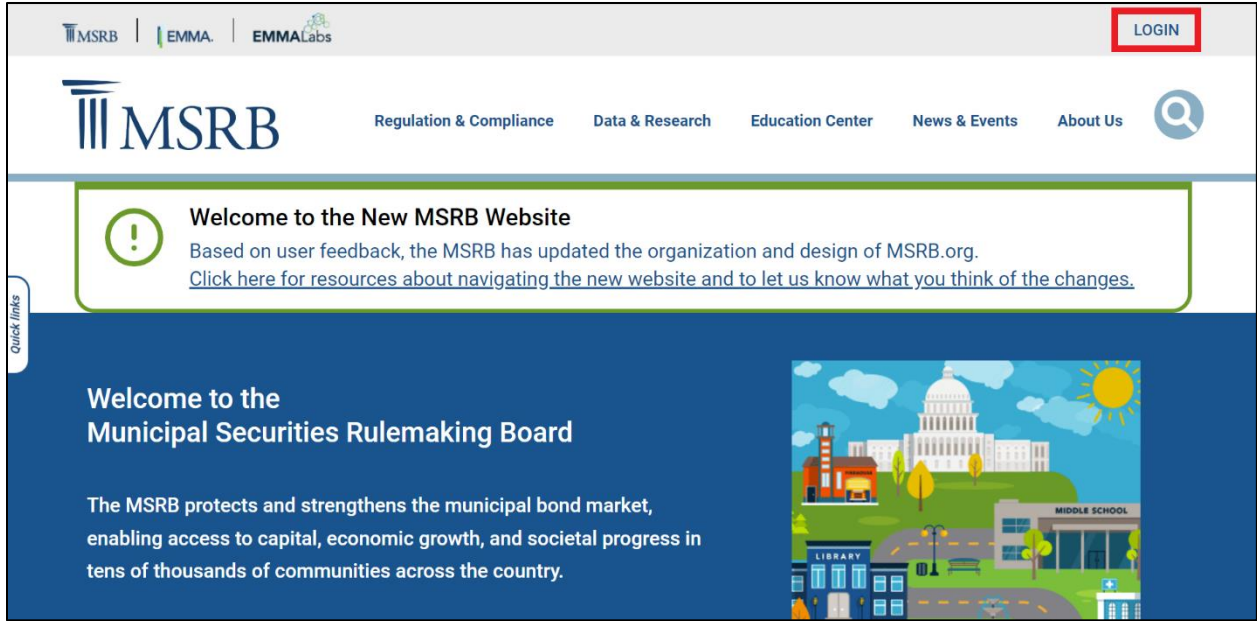
Converting to an organization account allows users to have expanded submission rights as well as the ability for multiple staff in that organization to view and manage submissions. Refer to Part 6 for instructions on converting a continuing disclosure account to an organization account. A user may also request to consolidate with another organization account. Refer to Part 7 for instructions on how to consolidate Gateway accounts. If you have any questions about your continuing disclosure account and need assistance, please call MSRB Support at 202-838-1330.

Part 2: Organization Account Set-up for Issuers and Obligated Persons

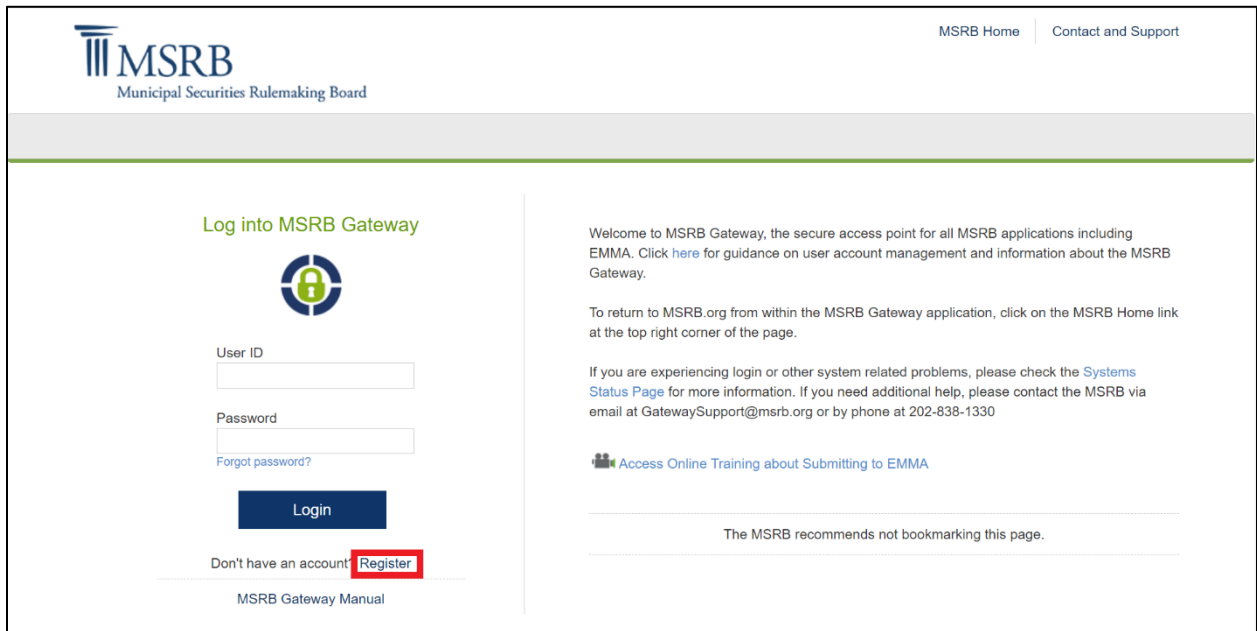
An organization account can be used to submit all types of continuing disclosure as well as voluntary CD disclosure filings to EMMA. Shared access by multiple users allows the organization to better manage the disclosure filings. An individual in the organization will serve as the Master Account Administrator and can create additional user accounts, grant, or remove user access rights, and manage relationships with designated agents of the organization.

Complete the following steps to establish an organization account as an issuer or obligated person.

Go to www.msrb.org and the **Login** link.



Then, click the **Register** Link.



Under the Issuers and Obligated Persons section, click the radio button to create an organization account option, then click **Next**.

Welcome to MSRB Online Registration and Organization Account Set-up

If you already have an MSRB account click [here](#) to log in.

If you need to establish an MSRB account, please select the applicable option from the list below.

Issuers and Obligated Persons

Create an organization account to:

- Submit all type of continuing disclosure and primary market filings to EMMA. Shared access by multiple users allows the organization to better manage the disclosure filings.

Dealers and Municipal Advisors

- Register as a broker, dealer, municipal securities dealer or municipal advisor. Your organization must already be registered with the SEC and the appropriate enforcement agency (e.g., FINRA or a bank regulatory agency).

Agents

- Create an account to make submissions on behalf of designating organizations. Create this account if you are not an issuer, obligated person, dealer or municipal advisor.

Exit

Next

Click **Continue** to read the guidelines for establishing an organization Account. The guidelines describe the required documentation that must be provided to the MSRB and explain other important aspects of setting up an account. When you have read the guidelines, click **Accept**.

MSRB Organization Account Setup**Organization Account Set-up Guidelines**

Welcome to MSRB's organization account setup for issuers and obligated persons.

To set up an organization account, please read the guidelines below and have the necessary information available, including your federal tax employer identification number and another form of identification (e.g., an official statement). You will be required to acknowledge that you have read and understand the account setup guidelines before you can proceed.

Required Documents

To help the MSRB identify your organization, you will be required to provide your federal tax Employer Identification Number (EIN) on your organization's letterhead, along with another form of identification for your organization (e.g., a page from the official statement that identifies you as the obligated person, a federal or state tax document, or a letter from the conduit issuer stating that you are an obligated person). The MSRB requires that you upload copies of those documents in PDF format.

Master Account Administrator

When setting up an account, each organization must designate an MSRB Master Account Administrator who will be responsible for the management of the organization's account and the creation and maintenance of the organization's users. This administrator may be changed at any time. If you wish to have additional users making submissions for your organization, it will be the role of the Master Account Administrator to add new users.

Fees to Set Up an Organization Account

There are no fees associated with setting up an organization account.

Account Status


Upon completing the online account setup process, your account will be placed in "pending" status until the MSRB verifies the information provided. The MSRB may contact the individual identified as your Master Account Administrator as needed to acquire and/or validate information.

[Cancel](#) [Print](#) [Accept](#)

If this is a new organization account, indicate that you do not have an existing user account and click **OK**.

MSRB Organization Account Set-up

Please indicate if you have an existing CD submission user account. If yes, you will be asked to provide your log-in credentials. Your log-in credentials will be validated against information in Gateway. Providing the identity of your existing CD submission account will allow you to keep your current username and password and to incorporate prior submissions into the new organization account.

- I have an existing user account that will be used for the new registration
- I do not have an existing user account 

[Cancel](#)

[OK](#)

Provide or correct organization details on the following screen:

MSRB Organization Account Set-up - Organization Information

Please provide information about your organization. The address and phone numbers provided should be for the organization's main office or headquarters.

Organization Name:* Issuer XYZ

Phone Number:* 111 - 222 - 3333 **Ext.**

Fax Number: - -

Address 1:* 101 Main Street

Address 2:

City:* City

State:* ST

Zip:* 12345


Country:

* required

Identify the individual in your organization who will serve as the Master Account Administrator. Complete the contact information for the Master Account Administrator. If the contact phone number and address are the same as that of the organization, select **Copy** to copy this information from the organization details.

MSRB Organization Account Set-up - Add Master Account Administrator Information

Please provide contact details for the Master Account Administrator. If the address is the same as your organization's information, click 'Copy' to copy from your organization's details.



Master Account Administrator:

First Name:* Bob

Middle Name:

Last Name:* Doe

Name Suffix:

Email Address:* bdoe@issuenyz.com

Confirm Email:* bdoe@issuenyz.com

Phone Number:* 111 - 222 - 3333 **Ext.**

Address1:* 101 Main Street

Address2:

City:* City

State:* ST

Zip:* 12345

Country:

*required

On the next screen, select the organization type that you are registering for on the screen shown below:

- My organization is an issuer
- My organization is an obligor

Also on this screen, provide the Federal Tax Employer Identification Number (EIN or Tax ID) for the organization. The tax ID is a unique identifier for the organization and facilitates verification of your organization's information.

MSRB Organization Account Set-up - Organization Type and Employer Identification Number

Please indicate your organization type. Choose the type which best identifies the role your organization serves in the municipal market.
Please note that you are responsible for ensuring that the organization type(s) selected accurately reflect your organization's activities.

My organization type is identified below:

My organization is an issuer
ISSUER - A state, political subdivision, municipality, or governmental agency or authority that raises funds through the sale of municipal securities.

My organization is an obligor
OBLIGOR - The party having an obligation with respect to the payment of debt service on bonds, typically but not always the borrower (such as a conduit borrower) of bond proceeds.

Please provide your organization's federal tax employer identification number (EIN). For issuers, this number can be found in Part I of IRS Form 8038.

The organization's EIN will help MSRB uniquely identify your organization and facilitate verification of your organization's information.

Federal Tax EIN (XX-XXXXXXX): -

Provide the following required documentation:

- The tax EIN number on your organization's letterhead
- Another form of identification for your organization (e.g., a page from an official statement that identifies you as the obligated person, a federal or state tax document, or a letter from the conduit issuer stating that you are an obligated person).

Upload the electronic versions of the documents in portable document format (PDF). Click **OK** when done.

MSRB Organization Account Set-up - Required Documentation

In order to process your organization account setup, the MSRB requires a copy of your organization's federal tax EIN on letterhead, along with another form of identification for your organization (e.g., a page from the official statement that identifies you as the obligated person, a federal or state tax document, or a letter from the conduit issuer stating that you are an obligated person). These documents will help to uniquely identify your organization.

Upload the EIN information provided on letterhead in pdf format

Letterhead: No file chosen

Upload secondary form of identification in pdf format

Second Form of Identification: No file chosen

Review the Organization Summary screen for accuracy. If necessary, update the information by clicking **Edit** in the applicable section. To change the organization type, tax ID or documentation method, you must contact the MSRB. Click **Confirm** to proceed.

MSRB Organization Account Set-up - Organization Summary	
<p>Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."</p>	
<p>Organizational Details: Edit</p> <p>Organization Name: Issuer XYZ MSRB ID: P000258 Phone Number: 111 - 222 - 3333 Ext. Fax Number: Address 1: 101 Main Street Address 2: City: City State: ST Zip: 12345 Country:</p>	<p>Additional Information: Edit</p> <p>Organization Type: Municipal Security Issuer</p> <p>Federal Tax EIN: 43-6767676</p>
<p>Master Account Administrator: Edit</p> <p>First Name: BOB Middle Name: Last Name: DOE Name Suffix: Email Address: bdoe@issuerxyz.com Phone Number: 111 - 222 - 3333 Ext. Address1: 101 MAIN STREET Address2: City: CITY State: ST Zip: 12345 Country:</p>	<p>Required Documentation:</p> <ol style="list-style-type: none"> 1. Information on Letterhead - Verified by MSRB 2. Second Form of Identification - Verified by MSRB
<p><input type="button" value="Cancel"/> <input type="button" value="Confirm"/></p>	

Identify the person who set up the organization account. Click **Submit** to submit the information to the MSRB.

MSRB Organization Account Setup – Submitter Information

Please provide the name, title and telephone number of the person who completed the information for this organization account.

First Name:* Tom

Middle Name:

Last Name:* Doe

Name Suffix: Mr.

Title:* President

Phone Number:* 111 - 222 - 3333 Ext.

*required

After information is submitted to the MSRB, a confirmation screen will appear stating that the MSRB has received your account information and display your pending MSRB ID.

Congratulations, you have successfully completed the first step toward establishing an organization account with the MSRB. Your information and supporting documentation will be reviewed and you will be notified when the account is activated or if additional information is needed. Your MSRB Number (MSRB ID) is P000258. [P003340](#).

Account Summary Please print a copy of the account summary for your records:

You will receive an email acknowledging receipt of your account documentation.

On the Confirmation Screen, click **Summary** to view a summary of the account details and display the date and time that the account was created and submitted to the MSRB.

Print a copy of the organization account summary for recordkeeping purposes.

After the account information is submitted, the MSRB sends an acknowledgement e-mail to the Master Account Administrator at the e-mail address provided. The e-mail should be retained for recordkeeping purposes and will be needed for any future changes the master account administrator would like to make to your registration before approval.

This completes the account set-up process; the account will be pending until the MSRB verifies the information provided. The MSRB may contact the Master Account Administrator to acquire or validate information. Once the account has been approved, update the Master Account Administrator Account to suit your organizational needs.

MSRB Organization Account - Printable Summary	
<div style="display: flex; justify-content: space-between;"> Print Close </div>	
<p>MSRB records include the following information for your organization as of 7/2/2012 5:01:35 PM EST:</p>	
<p>Organizational Details:</p> <p>Organization Name: Issuer XYZ MSRB ID: P000258 Phone Number: 111 - 222 - 3333 Fax Number: Address 1: 101 Main Street Address 2: City: City State: ST Zip: 12345 Country:</p>	<p>Additional Information:</p> <p>Organizational Type Municipal Security Issuer</p> <p>Federal Tax EIN: 43-6767676</p>
<p>Master Account Administrator:</p> <p>First Name: Bob Middle Name: Last Name: Doe Name Suffix: Email Address: bdoe@issuerxyz.com Phone Number: 111 - 222 - 3333 Ext. Address1: 101 Main Street Address2: City: City State: ST Zip: 12345 Country:</p>	<p>Required Documentation:</p> <ol style="list-style-type: none"> 1. Information on Letterhead - Verified by MSRB 2. Second Form of Identification - Verified by MSRB

Organization Account Set-up for Agents

An agent organization is an organization that intends to make data or disclosure submissions on behalf of a dealer, municipal advisor, issuer or obligated person (“designating organizations”) where the agent organization is not itself a dealer, municipal advisor, issuer or obligated person. Agent organizations may initiate the set-up of an organization account, or at the request of the designating organization, the agent may receive an invitation to register. This section will describe both methods for establishing an MSRB Gateway organization account for agents.

For all submission types except SEC Rule 15c2-12 disclosures, the agent organization is not permitted to make submissions without first establishing an agent relationship in the MSRB Gateway system. Making SEC Rule 15c2-12 disclosures on behalf of an issuer only requires the establishment of an agent relationship in MSRB Gateway in cases where the issuer has elected to control its securities. In order for an agent relationship to be established, both the designating organization and the agent organization must have Gateway accounts.

Agent Is Invited to Set Up an Account by the Designating Organization

If you have been designated to act as an agent on behalf of an organization and do not have a Gateway account, you will receive an e-mail invitation requesting you to set up an account.

The e-mail will contain the organization that made the request, and the submission types the organization would like you to make on its behalf. The e-mail will also include a link to register a Gateway account.

From the e-mail, click the registration link as shown below.

Agent Relationship Requested By: Issuer XYZ

Please keep this information confidential to prevent unauthorized use.

Issuer XYZ (P000258) has invited your organization to establish an account in the MSRB Gateway system so that your organization can act as an agent on their behalf to make the following submission types to the Municipal Securities Rulemaking Board (MSRB): EMMA – Continuing Disclosure, EMMA Voluntary Financial Information. Before you can accept the designation(s) you must first establish an MSRB account. Please click on the link below to be directed to the registration landing page to start the registration process:
<http://www.msrb.org/msrb1/control/registration/default.asp>

Registering and accepting the offer will grant the staff of your organization permission to take actions on behalf of Issuer XYZ in connection with the submission, modification, or cancellation of municipal securities disclosures which Issuer XYZ may have an obligation to or may voluntarily submit to an information system operated by the MSRB. The MSRB Gateway system will allow you to revoke the agent relationship at any time.

If you need assistance please contact MSRB’s support line at 202-838-1330.

You may also obtain more information about MSRB Registration at
<http://www.msrb.org/Rules-and-Interpretations/MSRB-Registration.aspx>

This is a system-generated e-mail. PLEASE DO NOT REPLY, REPLIES ARE NOT MONITORED.
 GW#003

From the Registration page, select the option to register as an agent.

Welcome to MSRB Online Registration and Organization Account Set-up

If you already have an MSRB account click [here](#) to log in.

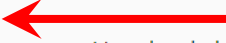
If you need to establish an MSRB account, please select the applicable option from the list below.

Issuers and Obligated Persons
 Create an organization account to:

Submit all type of continuing disclosure and primary market filings to EMMA. Shared access by multiple users allows the organization to better manage the disclosure filings.


Dealers and Municipal Advisors

Register as a broker, dealer, municipal securities dealer or municipal advisor. Your organization must already be registered with the SEC and the appropriate enforcement agency (e.g., FINRA or a bank regulatory agency).

Agents 

Create an account to make submissions on behalf of designating organizations. Create this account if you are not an issuer, obligated person, dealer or municipal advisor.

Follow the steps to set up an organization account for issuers and obligated persons.

 Agent organization account set-up differs from issuer and obligated person account set-up in the following respects:

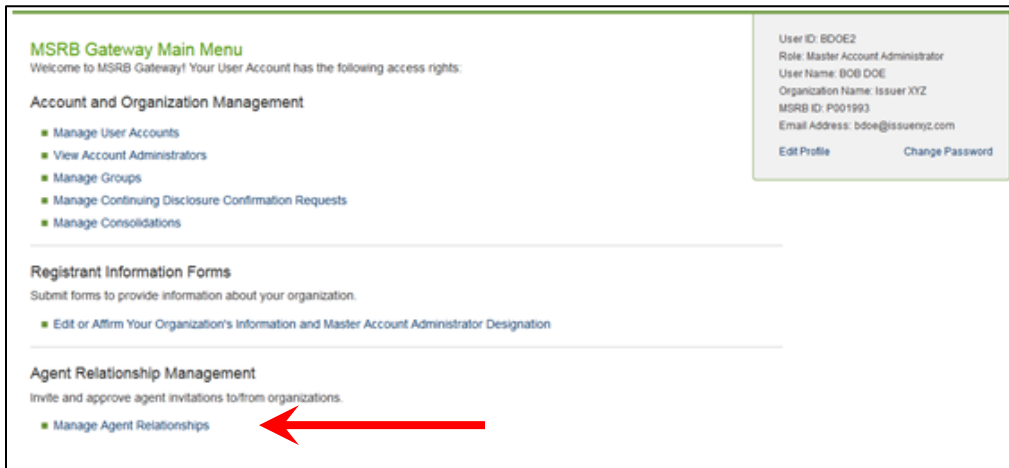
- The organization account set-up guidelines have content specific to agents
- You are not asked if you have an existing user account
- The documents required to upload are specific to agents

Upon verification of your account set-up documents and information, MSRB staff will establish your Gateway organization account.

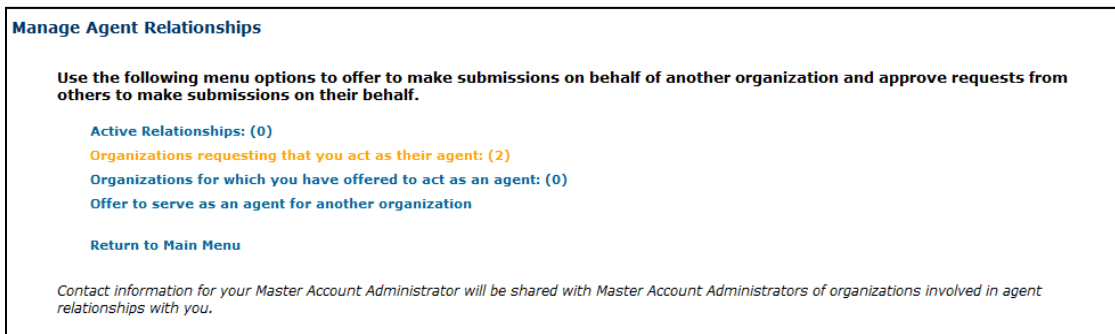
This completes the account set-up process; your account will be pending until the MSRB verifies the information provided.

After the Gateway account is established, the agent must log into their account and accept or decline the agent designation request(s).

Log into your Gateway account and click **Manage Agent Relationship**.



Click **Organizations requesting that you act as their agent**.



All pending request(s) appear on the screen; click on the applicable request.

Pending Agent Requests			
Organizations requesting that you act as their agent: (2)			
MSRB ID	Organization Name	Submission Type	Relationship Status
P000259	Organization XYZ	EMMA - Continuing Disclosure	Pending
P000259	Organization XYZ	EMMA Voluntary Financial Information	Pending

[Return to Agent Menu](#)
[Return to Main Menu](#)

Click on the submission type and click **Remove Relationship** or **Approve Relationship**. An e-mail will be forwarded to the designating agent informing them of your actions.

Relationship with Organization XYZ:	
MSRB ID: P000258 Phone Number: 111-222-3333 Fax Number: 999-999-9999 Address: 101 Main Street City, ST 12345	
Types of submissions for which you are currently an agent for this organization:	
Submission Type <input checked="" type="checkbox"/> EMMA - Continuing Disclosure <input checked="" type="checkbox"/> EMMA Voluntary Financial Information	Relationship Status Waiting for your approval Waiting for your approval
Remove Relationship Approve Relationship	
Types of submissions for which you would like to act as this organization's agent:	
<input type="checkbox"/> EMMA Voluntary OS/ARD Submission <input type="checkbox"/> EMMA Voluntary Preliminary OS Submission	
Add Submission Type	
Search Return to Agent Menu Return to Main Menu	

When the agent relationship is established in Gateway, your agent relationship pages will be updated accordingly as shown below.

Manage Agent Relationships

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

- [Active Relationships: \(2\)](#)
- [Organizations requesting that you act as their agent: \(0\)](#)
- [Organizations for which you have offered to act as an agent: \(0\)](#)
- [Offer to serve as an agent for another organization](#)

[Return to Main Menu](#)

Contact information for your Master Account Administrator will be shared with Master Account Administrators of organizations involved in agent relationships with you.

Organizations For Whom You Are An Agent

Organizations for whom you act as an agent: (2)

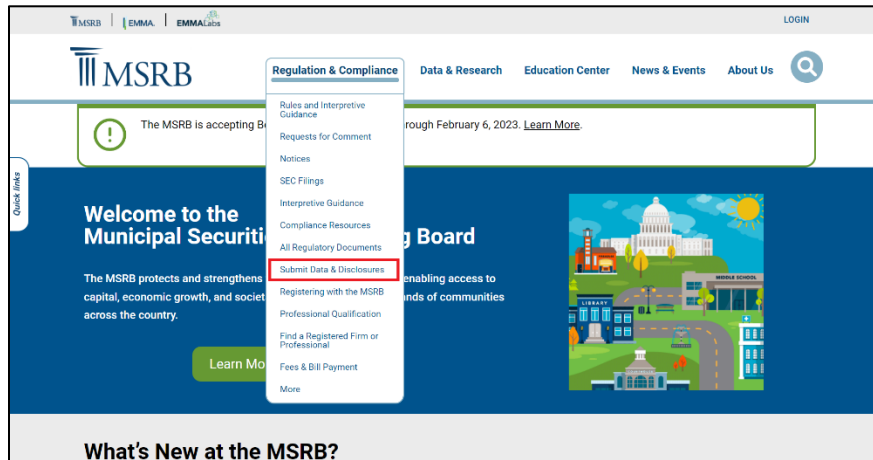
MSRB ID	Organization Name	Submission Type	Relationship Status
P000259	Organization XYZ	EMMA - Continuing Disclosure	Active
P000259	Organization XYZ	EMMA Voluntary Financial Information	Active

[Return to Agent Menu](#) [Return to Main Menu](#)

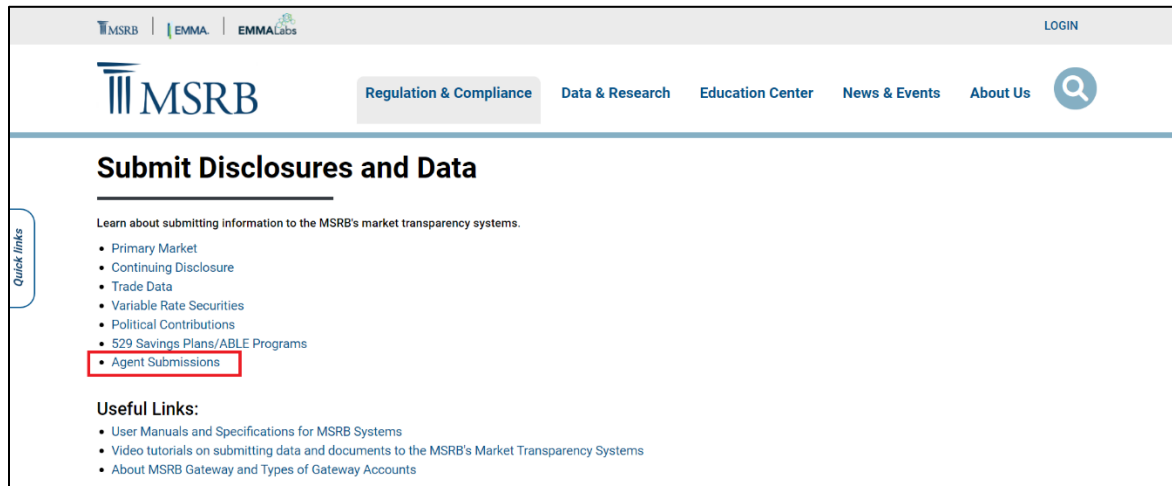
Agent Initiates Steps to Establish a Gateway Account

If the agent organization has not received an e-mail invitation but would like to establish an organization account, they may do so using the following steps.

[Click here](#) or go to www.msrb.org and click **Submit Data & Disclosures** on the **Regulation & Compliance** menu.



Click the **Agent Submissions** link.



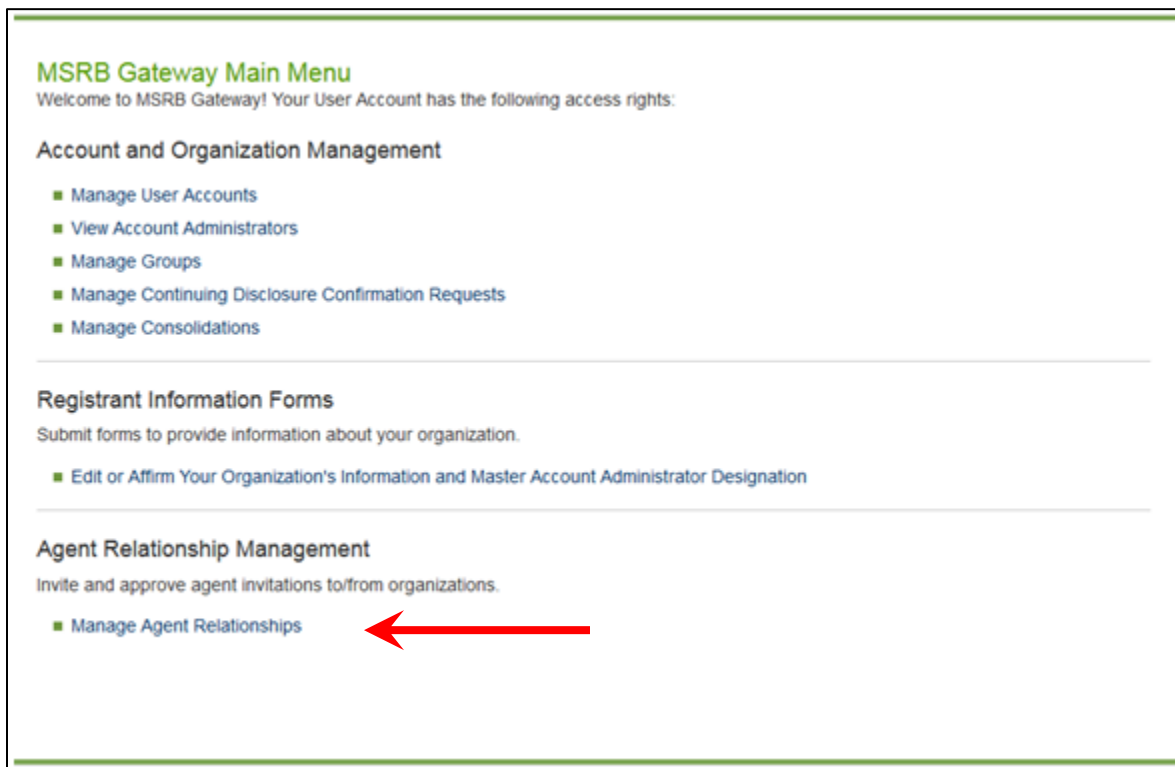
You will be directed to the Agents page. Read information about acting as an agent. To start the registration process, click **If you would like to create an agent account, click here**. You will be directed to the Gateway registration landing page. Proceed with registration steps.

Agent organization account set-up differs from issuer and obligated person account set-up in the following respects:

- The organization account set-up guidelines have content specific to agents
- You are not asked if you have an existing user account
- The documents you are required to upload are specific to agents

Once verification of your account set-up documents and information is complete, your Gateway organization account will be activated.

After establishing your Gateway account, log in and click **Manage Agent Relationships**.



Click the link **Offer to serve as an agent for another organization**.


Manage Agent Relationships

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

Active Relationships: (0)

Organizations requesting that you act as their agent: (2)

Organizations for which you have offered to act as an agent: (0)

[Offer to serve as an agent for another organization](#) 

[Return to Main Menu](#)

Contact information for your Master Account Administrator will be shared with Master Account Administrators of organizations involved in agent relationships with you.

Enter search criteria for the organization you wish to serve and click **Search**. Follow steps to request to act as an agent.

Organization Search

Organization Name:	<input type="text"/>
MSRBID:	<input type="text"/>
Email Address:	<input type="text"/>

<u>MSRB ID</u>	<u>Organization Name</u>

Part 3: Duplicate Tax ID

While rare, a user on behalf of the registering organization may enter a Tax ID that is already associated with another organization's account. If this occurs, the registration process cannot be completed. First, verify that the Tax ID is accurate. If the Tax ID is correct, the user may be trying to create an account for an organization with an existing account. To resolve the situation, click the **Contact** button to automatically send an e-mail to the account administrator of the registered organization to request the addition of an individual user account.

MSRB Organization Account - Federal Tax EIN

The federal tax employer identification number (tax EIN) you supplied has already been provided to the MSRB by another organization. Duplication of a tax EIN may occur if more than one person affiliated with the same organization attempts to establish an organization account using its tax EIN. Duplication may also occur if you have mistyped your number or if a prior organization account was set up with an incorrect tax EIN.

Please confirm that the tax EIN you entered is correct. You may click "Previous" to view and edit the tax EIN for this account. If it is incorrect, please update your EIN.

If your EIN is correct, someone affiliated with your organization has already established an account for your organization. You can use the "Contact" button below to send a message to the Master Account Administrator for the organization currently using this tax EIN. The message transmitted will request the contact person to verify the accuracy of the tax EIN used and add an individual user account to their existing organization for the individual you identified as your Master Account Administrator .

If you do not want to send this information, click "Cancel" to terminate your organization account setup.

After clicking **Contact**, a confirmation screen will appear stating that an e-mail was sent to the Master Account Administrator of the registered organization.

MSRB Registration - Contact Existing Registrant

An email has been sent to the Master Account Administrator of the organization whose MSRB account includes the federal tax EIN you provided. This email included a request for an MSRB Gateway user account to be set up for the contact you identified as your Master Account Administrator. A representative of this organization may contact this individual to request additional information.

The Master Account Administrator of the registered organization will receive the following e-mail and can take appropriate action.

An organization set-up request submitted to the MSRB includes the federal tax EIN registered to your organization. Please confirm that the federal tax EIN you used to set up your MSRB organization account is correct. If it is correct, the submitter requests that you add an MSRB Gateway user account for the following individual:

USER NAME: Bob Doe
 EMAIL ADDRESS: bdoe@agentxyz.com
 PHONE: (111) 222-3333
 ADDRESS: 101 Main Street
 City, ST 12345

This is a system-generated email. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance please contact the MSRB at 783-797-6668.

If issues arise among organizations regarding a duplicate Tax ID, contact MSRB Support at 202-838-1330.

Part 4: Amend a Pending Account

The MSRB's goal is to process pending accounts within five business days of receipt if there are no discrepancies. If you need to update some of the information prior to the MSRB's approval, follow the instructions below:

- Retrieve the acknowledgement e-mail received after the account information was submitted.
- Locate the following: MSRB ID, temporary key and registration link.
- Click the **Registration Link**.

Thank you for submitting your organization's registration to the Municipal Securities Rulemaking Board (MSRB). Activation of your account is pending review of your documentation. Upon activation of your account, you will receive an e-mail containing information on how to access your MSRB account.

MSRB NUMBER (MSRB ID): G00247
ORGANIZATION NAME: AGENT XYZ

Master Account Administrator: TOM DOE
Federal Tax EIN: 88-99999999

To change your organization's information prior to MSRB authorization, please click on the link below and authenticate using your MSRB Number (MSRB ID) and the temporary key below:

Temporary Key: FLAGRVMUKX
Temporary Key Expiration Date: 8/6/2012 4:17:44 PM Eastern
Registration Link: <http://www.msrb.org/msrb1/control/registration/FormalOAkey.asp>

Please keep this temporary key confidential to prevent unauthorized modification of your organization's information. This temporary key is valid for 45 days of the date of this e-mail.

If you need assistance, please contact MSRB's support line at 202-838-1330. This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.
gw#012

The following screen will appear. Enter the **MSRB ID** and the **Temporary Key** from the e-mail.

MSRB Organization Account

To amend your organization's account information, please use the MSRB Number (MSRB ID) and temporary key sent to you via email to log in below.

If you do not know your MSRB Number (MSRB ID), please contact MSRB's support line at 703-797-6668.

Login:

MSRB Number (MSRB ID):

Temporary Key:


The **Organization Summary** screen will appear. Click **Edit** in the applicable box. Note however that the Tax ID, Organization Type, documentation, or the option to provide documentation cannot be amended nor can an organization amend these items after the account is authorized. Contact MSRB Support to make these changes.

MSRB Organization Account Setup – Organization Summary	
Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."	
Organization Details Edit Organization Name: AGENT XYZ Phone Number: (111) 222-3333 Fax Number: Address 1: 101 MAIN STREET Address 2: City: CITY State: ST Zip: 12345 Country:	Additional Information Edit Organization Type: AGENT Federal Tax EIN: 88-9999999
Master Account Administrator Edit First Name: TOM Middle Name: Last Name: DOE Name Suffix: Email Address: tdoe@agentxyz.com Phone Number: (111) 222-3333 Address 1: 101 MAIN STREET Address 2: City: CITY State: ST Zip: 12345 Country:	Required Documentation Edit 1. Information on Letterhead delivered as Information on Letterhead.pdf 2. Second Form of Identification delivered as Second Form of Identification.pdf
<input type="button" value="Cancel Account Setup"/> <input type="button" value="Confirm"/>	

After clicking **Edit** for the information you wish to change, update the information and then click **OK**. In the example below, the user is making updates to the Organization Details information.

MSRB Organization Account Setup – Add Organization Details
Please provide information about your organization. The address and phone number provided should be for the organization's main office or headquarters.
Organization Name: * AGENT XYZ Phone Number: * 111 - 222 - 3333 Ext. <input type="text"/> Fax Number: <input type="text"/> - <input type="text"/> - <input type="text"/> Address1: * 101 MAIN STREET Address2: <input type="text"/> City: * CITY State: * ST Zip: * 12345 Country: <input type="text"/>
*required
<input type="button" value="Cancel"/> <input type="button" value="OK"/>

On the **Organization Summary** screen, click **Confirm** to save the changes.

MSRB Organization Account Setup — Organization Summary	
Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."	
Organization Details Edit	Additional Information Edit
Organization Name: AGENT XYZ Phone Number: (111) 222-3333 Fax Number: Address 1: 101 MAIN STREET Address 2: City: CITY State: ST Zip: 12345 Country:	Organization Type: AGENT Federal Tax EIN: 88-9999999
Master Account Administrator Edit	Required Documentation Edit
First Name: TOM Middle Name: Last Name: DOE Name Suffix: Email Address: tdoe@agentxyz.com Phone Number: (111) 222-3333 Address 1: 101 MAIN STREET Address 2: City: CITY State: ST Zip: 12345 Country:	1. Information on Letterhead delivered as Information on Letterhead.pdf 2. Second Form of Identification delivered as Second Form of Identification.pdf
Cancel Account Setup Confirm 	

Enter the required information for the person making the amendment and click **Submit**.

MSRB Organization Account Set-up - Account Information Provider

Please provide the name, title and telephone number of the person who completed the information for this organization account.

First Name:*

Middle Name:

Last Name:*

Name Suffix:

Title:*

Phone Number:* () -

Phone Extension:

***required**

A confirmation screen then states that the account was successfully updated.

Congratulations, you have successfully updated your account information with the MSRB. Your MSRB Number (MSRB ID) is P000260.

Account Summary Please print a copy of the account summary for your records:

Part 5: Master Account Administrator (MAA) Account Set-up

After the MSRB authorizes the account, the following actions must be taken by the Master Account Administrator to complete the account set-up process.

Create a Password to Access Your Gateway Account

The Master Account Administrator will receive an e-mail with a User ID and a link to create a password in order to access the new Gateway account.

Click the **Password Retrieval Link**.

Your MSRB Gateway account is now authorized. An organization account has been created for your organization and a user account has been created for you. As the Master Account Administrator for your organization, you may use your account to create and manage the user accounts of other staff working for your organization, update organization information on file with the MSRB, and request and accept agent designations related to data and disclosure submissions. You will also receive e-mails from time to time advising you of important changes or events occurring in MSRB system that may affect your organization.

To access your Gateway account you will first need to create a password. Please click on the link below and enter the user ID provided.

USER ID: JDOE17

PASSWORD RETRIEVAL LINK: <https://www.msrb.org/msrb1/control/forgotpassword.asp>

Please keep this information confidential to prevent unauthorized use of your account.

The registered information for this account is:

MSRB ORGANIZATION NUMBER (MSRB ID): G00243

ORGANIZATION NAME: AGENT 1234

ORGANIZATION TYPE: Agent

MASTER ACCOUNT ADMINISTRATOR: TOM DOE

E-MAIL ADDRESS: t DOE2@agentxyz.com

PHONE: (111) 222-3333

You can log in to the authenticated access area of the MSRB website through <https://www.msrb.org/msrb1/control/default.asp>

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

If you need assistance please contact MSRB's support line at 202-838-1330.

Enter the **User ID** and click **Submit**.

Retrieve Password

To validate your request for a new password, enter your User ID below.
If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

An e-mail containing the password reset link is sent. To ensure that the MSRB has the correct e-mail address in the system. Click the link in the e-mail to continue with the password creation process.

We have received your request for a new password. Please note that our records have been updated and we recommend that you change your password in our system within 7 days using the link below. The link will expire within 7 days and failure to reset your password within 7 days will require you to submit another request for a password change.

<http://www.msrb.org/msrb1/control/forgotpassword.asp?key=qTPdG9V9gNaZRNNANfvvFt1ryOnDac>

To change your password, follow these simple steps below:

1. Click on the password link above.
2. On the Password Change page, enter and confirm the password that satisfies the password criteria.
3. Click on the Continue button.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

If you need assistance please contact MSRB's support line at 202-838-1330.

The Reset Password screen will appear. Enter the **User ID** and click **Submit**.

Reset Password

To reset your password, enter your User ID below.
If you do not know your User ID or you need an MSRB Gateway account, contact a representative in the Market Information Department at (703)797-6668.

User ID:

On the Change Password screen, create a password based on the password criteria listed on the screen. Click **Continue** when done.

Change Password

THE MSRB REQUIRES THAT USERS CHANGE THEIR PASSWORDS PERIODICALLY FOR SECURITY PURPOSES.

USERS ARE ALSO ASKED TO CHANGE THEIR PASSWORD UPON INITIAL LOGIN OR AFTER USING THE 'Forgot your password?' FEATURE.

YOU MUST CHANGE YOUR PASSWORD NOW TO CONTINUE TO ACCESS THIS SYSTEM.

To change your password you must:

1. Enter your new password
2. Enter your new password again to confirm
3. Click "Continue"

New passwords must meet the following criteria:

1. Must be between eight (8) and fifteen (15) characters long
2. Must be different from your current password
3. Must not contain your User ID
4. Must contain characters from at least three of the following four categories:
 - Uppercase characters (A-Z)
 - Lowercase characters (a-z)
 - Numeric characters (0-9)
 - Special characters (!@#\$%^&*(), etc. excluding spaces)

New Password:

Retype New Password:

Continue

The next screen states that the password was successfully created and you can log into Gateway with the User ID and password that you just created.

Click the **Return** button to be directed to the MSRB Gateway Main Menu for your account.

Transaction Confirmation

You have successfully changed your password.

Return

Establish User Rights

After accessing your Gateway account, you must then grant yourself user account access rights for the document submissions you wish to make to EMMA.

To grant account access rights, click **Edit** in the **My Profile** box on the Gateway Main Menu page.

Welcome BDOE2 ▲, P001993. Logout

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

Registrant Information Forms
Submit forms to provide information about your organization.

- Edit or Affirm Your Organization's Information and Master Account Administrator Designation

Agent Relationship Management
Invite and approve agent invitations to/from organizations.

- Manage Agent Relationships

User ID: BDOE2
Role: Master Account Administrator
User Name: BOB DOE
Organization Name: Issuer XYZ
MSRB ID: P001993
Email Address: bdoe@issueryz.com

Edit Profile Change Password

On the next screen, click **Edit User Account**.

User Account Profile and Access Rights

Account Details

User ID: BDOE2
User Name: BOB DOE
MSRB ID: P001993
Group(s):
Email Address: bdoe@issueryz.com
Title:
Department:
Address: 101 MAIN STREET
CITY, ST 12345
Phone Number: 111-222-3333
Fax Number:
Last Updated by: BDOE2 **On:** 5/23/2016 12:08:51 PM

Account Access Rights
You have the following Access Rights in MSRB Gateway:

EMMA Continuing Disclosure Submissions [?]
EMMA Voluntary Financial Information [?]
EMMA Voluntary OS/ARD Submission [?]
EMMA Voluntary Preliminary OS Submission [?]
Master Account Administrator [?]

[View Profile History](#) [View Rights History](#) [Edit User Account](#)

[Return to Accounts](#) [Manage Groups](#) [Manage Groups by User](#) [Return to Main Menu](#)

Grant the account access rights by clicking the appropriate boxes on the right, then click **Continue**.

Edit User Account

Account Details

User ID: BDOE

MSRB ID: P000258

First Name:* Bob

Middle Name:

Last Name:* Doe

Email Address:*

Confirm Email:*

Title:

Department:

Phone Number:* - - **Ext.**

Fax Number: - -

Address1:*

Address2:

City:*

State:*

Zip:*

Country:

*required

Account Access Rights

Select the Access Rights to assign to your User Account.

You will have the following Access Rights in MSRB Gateway:

EMMA Continuing Disclosure Submissions [?]

EMMA Voluntary Financial Information [?]

EMMA Voluntary OS/ARD Submission [?]

EMMA Voluntary Preliminary OS Submission [?]

Master Account Administrator [?]

[Continue](#)

[Return to Account Profile](#)

[Return to Accounts](#)

[Return to Main Menu](#)

Click **Confirm User Account**.

Confirm User Account

Account Details

User ID: BDOE

User Name: Bob Doe

MSRB ID: P000258

Group(s):

Email Address: bdoe@issueryz.com

Title:

Department:

Address: 101 Main Street
City, ST 12345

Phone Number: 111-222-3333

Fax Number:

Account Access Rights:

Click on "Confirm User Account" to complete the process.

[Confirm User Account](#)

[Edit User Account](#)

[Return to Accounts](#)

[Return to Main Menu](#)

The User Account Update Results screen will appear confirming your user account was successfully updated. Click **Return to Main Menu**.

User Account Update Results

The following User Account was successfully updated. An email confirmation was sent to the user.

User ID: BDOE
MSRB ID: P000258
Name: Bob Doe
Email Address: bdoe@issuerxyz.com

[Return to Accounts](#)
[Return to Main Menu](#)

Access EMMA Dataport

After granting your EMMA submission rights, expand the **Market Transparency Systems** link and click **EMMA Dataport**.

Welcome BDOE2 ▲, P001993. [Logout](#)

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems

Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- [EMMA Dataport](#) ←

Account and Organization Management

- [Manage User Accounts](#)
- [View Account Administrators](#)
- [Manage Groups](#)
- [Manage Continuing Disclosure Confirmation Requests](#)
- [Manage Consolidations](#)

User ID: BDOE2
 Role: Master Account Administrator
 User Name: BOB DOE
 Organization Name: Issuer XYZ
 MSRB ID: P001993
 Email Address: bdoe@issuerxyz.com
[Edit Profile](#) [Change Password](#)

The EMMA Dataport Submission Portal will appear, which is used to make submissions to EMMA. The options displayed correspond to the rights granted to your account.

The screenshot shows the EMMA Dataport Submission Portal interface. At the top, it says "EMMA Dataport". Below that is a search bar with the placeholder text "What would you like to do today?". There are three main action buttons in the top row, each with an upward arrow icon: "Continuing Disclosure (Rule-based & Voluntary)", "SHORT Documents (Rule G-34)", and "Voluntary Financial Information: Timing, GAAP Undertaking & URL". Below these is a light blue bar containing four additional options, each with an icon: "Create an Organization Account to Streamline Disclosures" (people icon), "Manage Groups of Securities and Disclosure Permissions" (folder icon), "Manage Financial Disclosure Email Reminders" (calendar with clock icon), and "Access New Issue Calendar and Other Market Tools" (calendar with clock icon).

Part 6: Convert to an Organization Account

Organizations registered with a continuing disclosure account can convert to an organization account in order to take advantage of the additional account management features and submission rights available with an organization account. A user may also request to consolidate with another user in their organization who has converted their continuing disclosure account to an organization account.

The account conversion process is only available to issuers and obligated persons. To convert a continuing disclosure account to an organization account, navigate to the Registration and Organization Account Set-up screen and select the option to **Create an organization account** as shown below:

Welcome to MSRB Online Registration and Organization Account Set-up

If you already have an MSRB account click [here](#) to log in.

If you need to establish an MSRB account, please select the applicable option from the list below.

Issuers and Obligated Persons

Create an organization account to:

- Submit all type of continuing disclosure and primary market filings to EMMA. Shared access by multiple users allows the organization to better manage the disclosure filings.

Dealers and Municipal Advisors

- Register as a broker, dealer, municipal securities dealer or municipal advisor. Your organization must already be registered with the SEC and the appropriate enforcement agency (e.g., FINRA or a bank regulatory agency).

Agents

- Create an account to make submissions on behalf of designating organizations. Create this account if you are not an issuer, obligated person, dealer or municipal advisor.

Exit

Next

Click **Accept** to accept the registration guidelines.

MSRB Organization Account Setup

Organization Account Set-up Guidelines

Welcome to MSRB's organization account setup for issuers and obligated persons.

To set up an organization account, please read the guidelines below and have the necessary information available, including your federal tax employer identification number and another form of identification (e.g., an official statement). You will be required to acknowledge that you have read and understand the account setup guidelines before you can proceed.

Required Documents

To help the MSRB identify your organization, you will be required to provide your federal tax Employer Identification Number (EIN) on your organization's letterhead, along with another form of identification for your organization (e.g., a page from the official statement that identifies you as the obligated person, a federal or state tax document, or a letter from the conduit issuer stating that you are an obligated person). The MSRB requires that you upload copies of those documents in PDF format.

Master Account Administrator

When setting up an account, each organization must designate an MSRB Master Account Administrator who will be responsible for the management of the organization's account and the creation and maintenance of the organization's users. This administrator may be changed at any time. If you wish to have additional users making submissions for your organization, it will be the role of the Master Account Administrator to add new users.


Fees to Set Up an Organization Account

There are no fees associated with setting up an organization account.

Account Status

Upon completing the online account setup process, your account will be placed in "pending" status until the MSRB verifies the information provided. The MSRB may contact the individual identified as your Master Account Administrator as needed to acquire and/or validate information.

Select the option that indicates you have an existing Gateway account. Enter your user ID and Password.

-  By providing the username and password of an existing continuing disclosure account, you will cause that account to be converted to an organization account. The MSRB recommends converting or consolidating to organization accounts, which provide additional management features and submission rights.

MSRB Organization Account Set-up

Please indicate if you have an existing CD submission user account. If yes, you will be asked to provide your log-in credentials. Your log-in credentials will be validated against information in Gateway. Providing the identity of your existing CD submission account will allow you to keep your current username and password and to incorporate prior submissions into the new organization account.

I have an existing user account that will be used for the new registration
 I do not have an existing user account

Enter your User ID and Password

(If you do not remember your password, go to the Gateway log-in page and click "forgot password". If you do not know your user id, contact the MSRB's support line at (703) 797-6668.)

User ID:

Password:

The account information for your organization displays on the screen and may be updated as needed. Click **OK** to proceed.

Organization Information

Please review information about your organization and update accordingly. The address and phone numbers provided should be for the organization's main office or headquarters.

Organization Name:* Issuer XYZ

Phone Number:* 111 - 222 - 3333 **Ext.**

Fax Number: - -

Address 1:* 101 Main Street

Address 2:

City:* City

State:* ST

Zip:* 12345

Country: US

* required

Indicate your organization type and provide your Federal Tax EIN number. Click **OK**.

MSRB Organization Account Set-up - Organization Type and Employer Identification Number

Please indicate your organization type. Choose the type which best identifies the role your organization serves in the municipal market.

Please note that you are responsible for ensuring that the organization type(s) selected accurately reflect your organization's activities.

My organization type is identified below:

My organization is an issuer
ISSUER - A state, political subdivision, municipality, or governmental agency or authority that raises funds through the sale of municipal securities.

My organization is an obligor
OBLIGOR - The party having an obligation with respect to the payment of debt service on bonds, typically but not always the borrower (such as a conduit borrower) of bond proceeds.

Please provide your organization's federal tax employer identification number (EIN). For issuers, this number can be found in Part I of IRS Form 8038.

The organization's EIN will help MSRB uniquely identify your organization and facilitate verification of your organization's information.

Federal Tax EIN (XX-XXXXXXX): 56 - 6556655

Select the option to upload the required documents in a readable portable document format (PDF). Click **OK** when done.

MSRB Organization Account Set-up - Required Documentation

In order to process your organization account setup, the MSRB requires a copy of your organization's federal tax EIN on letterhead, along with another form of identification for your organization (e.g., a page from the official statement that identifies you as the obligated person, a federal or state tax document, or a letter from the conduit issuer stating that you are an obligated person). These documents will help to uniquely identify your organization.

Upload the EIN information provided on letterhead in pdf format

Letterhead: No file chosen

Upload secondary form of identification in pdf format

Second Form of Identification: No file chosen

Review the **Organization Summary** screen and make edits if necessary, then click **Confirm**.

MSRB Organization Account Set-up - Organization Summary	
<p>Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."</p>	
<p>Organizational Details: Edit</p> <p>Organization Name: Issuer XYZ MSRB ID: P000258 Phone Number: 111 - 222 - 3333 Ext. Fax Number: Address 1: 101 Main Street Address 2: City: City State: ST Zip: 12345 Country:</p>	<p>Additional Information: Edit</p> <p>Organization Type: Municipal Security Issuer</p> <p>Federal Tax EIN: 43-6767676</p>
<p>Master Account Administrator: Edit</p> <p>First Name: BOB Middle Name: Last Name: DOE Name Suffix: Email Address: bdoe@issuerxyz.com Phone Number: 111 - 222 - 3333 Ext. Address1: 101 MAIN STREET Address2: City: CITY State: ST Zip: 12345 Country:</p>	<p>Required Documentation:</p> <ol style="list-style-type: none"> 1. Information on Letterhead - Verified by MSRB 2. Second Form of Identification - Verified by MSRB
<p><input type="button" value="Cancel"/> <input type="button" value="Confirm"/></p>	

The person submitting the form must provide identifying information before submitting account information to the MSRB.

MSRB Organization Account Set-up - Account Information Provider	
<p>Please provide the name, title and telephone number of the person who completed the information for this organization account.</p>	
<p>First Name:* <input type="text" value="Bob"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name:* <input type="text" value="Doe"/></p> <p>Name Suffix: <input type="text"/></p> <p>Title:* <input type="text" value="President"/></p> <p>Phone Number:* (<input type="text" value="111"/>) <input type="text" value="222"/> - <input type="text" value="3333"/></p> <p>Phone Extension: <input type="text"/></p> <p>*required</p>	
<p><input type="button" value="Cancel"/> <input type="button" value="Previous"/> <input type="button" value="Submit"/></p>	

After the account information is submitted to the MSRB, a screen will appear confirming receipt of the request to convert your continuing disclosure account to an organization account. The new organization account will remain in pending status until approved. While in pending status, access to the upgraded organization account is prohibited, but the existing continuing disclosure account is still accessible. Any prior submissions made to EMMA will be reflected under your existing MSRB Gateway Account during this period. Once the upgraded account is active, new document submissions will reflect the upgraded MSRB ID.

Congratulations, you have successfully completed the first step toward establishing an organization account with the MSRB. Your information and supporting documentation will be reviewed and you will be notified when the account is activated or if additional information is needed. Your MSRB Number (MSRB ID) is P000258. [P003340](#).

Account Summary Please print a copy of the account summary for your records:

[Summary](#)

You will receive an email acknowledging receipt of your account documentation.

[Exit](#)

You will also receive an e-mail regarding receipt of your request to convert to an organization account.

We have received your request to upgrade your existing "CD Submission Account to an Organization Account". Your submission will be placed in "pending" status until the MSRB verifies the documentation you submitted. Once the documentation is verified the account will become active and the old registration will be automatically withdrawn.

After the new account is active the following will occur:

1. You will be designated as the Master Account Administrator. As the Master Account Administrator you will manage the organization account and user accounts.
2. Users may be granted permission to make the following type of submissions to EMMA.
 - preliminary official statements (and other presale documents)
 - voluntary primary market information (including official statements, advance refunding documents or 529 college savings plan disclosure documents)
 - information about the timing and accounting standard used in annual financial filings
 - continuing disclosure event and financial filings
3. All users in the organization will share the same EMMA submission dashboard and controlled groups.
4. EMMA submissions made under the old MSRB account will be associated with the new MSRB account.

The submission information for this account is:

MSRB ORGANIZATION NUMBER (MSRB ID): P00258
ORGANIZATION NAME: ISSUER XYZ

To change the submission information for the organization details prior to MSRB verification, please click the registration link below and authenticate using the MSRB Registration Number in this e-mail (MSRB ID), and the temporary key below:

Temporary Key: ZY2F6C8R4X
Temporary Key Expiration Date: 06/30/2012 12:32:00 PM Eastern
Registration Link: <http://www.msrb.org/msrb1/control/registration/FormalOAkey.asp>

Please keep this temporary key confidential to prevent unauthorized modification of your organization's information. This temporary key is valid for 45 days or until your first successful submission using it.

If you need assistance please contact MSRB's support line at 202-838-1330. This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.
gw#012

After the MSRB approves the conversion. Your existing MSRB ID will be automatically withdrawn and a new MSRB ID will be generated to identify the account as an organization account. However, your user ID and password will remain the same.

Part 7: Consolidate Gateway Accounts

Consolidating Gateway accounts allows users to operate as one organization rather than several single user accounts. Once an organization account is established, both the Master Account Administrator of the organization account and the single user of the continuing disclosure account must take action to effect the consolidation. Either party can initiate the request and acceptance process to consolidate the accounts.

Only staff of the same organization should take action to consolidate Gateway accounts. In situations where one organization is making data and document submissions on behalf of another organization, the two organizations should establish an agent relationship, not a consolidated org account.

Once accounts have been consolidated, the consolidation cannot be undone. The steps below describe how to invite others to consolidate into one organization account, and how to request to be consolidated into an organization account.

Invite Others to Consolidate Into Your Organization Account

This function is only available to the Master Account Administrator of the organization account.

From the Gateway Main Menu, click **Manage Consolidations** under the **Account and Organization Management**.

The screenshot displays the MSRB Gateway Main Menu interface. At the top right, it shows 'Welcome BDOE2 ▲, P001993.' and a 'Logout' link. The main content area is divided into two sections. On the left, under 'MSRB Gateway Main Menu', there is a 'Market Transparency Systems' section with a sub-item 'EMMA Dataport'. Below that is the 'Account and Organization Management' section, which contains a list of options: 'Manage User Accounts', 'View Account Administrators', 'Manage Groups', 'Manage Continuing Disclosure Confirmation Requests', and 'Manage Consolidations'. A red arrow points to the 'Manage Consolidations' option. On the right side of the page, there is a user profile box containing the following information: 'User ID: BDOE2', 'Role: Master Account Administrator', 'User Name: BOB DOE', 'Organization Name: Issuer XYZ', 'MSRB ID: P001993', and 'Email Address: bdoe@issueryz.com'. At the bottom of this box are two links: 'Edit Profile' and 'Change Password'.

Enter search criteria to find the account that you wish to consolidate into your organization. From the search results, select the name of the organization that you wish to consolidate with and click **Invite**.

Consolidation Requests

Search and Send | View

Manage Consolidations
Search for one or more active informal accounts to be consolidated into the organization.

Search for an account (at least one required)

By Organization Name: By MSRB ID:

By Email Address: By User Last Name:

Search Results

Organization Name	MSRB ID	User Name
<input type="checkbox"/> <input type="button" value="-"/> Organization XYZ	D009I2	NANCY DOE

Address: 101 MAIN STREET , CITY, ST, 12345 **Phone:** (111) 222-3333

The following message appears that explains the impacts of consolidating. Click **OK** to proceed.

Consolidation Requests

Search and Send | View

Manage Consolidations
Search for one or more active informal accounts to be consolidated into the organization.

Search for an account (at least one required)

By Organization Name: By MSRB ID:

By Email Address: By User Last Name:

Search Results

Organization Name	MSRB ID	User Name
<input type="checkbox"/> <input type="button" value="-"/> Organization XYZ	D009I2	NANCY DOE

Address: 101 MAIN STREET , CITY, ST, 12345 **Phone:** (111) 222-3333

By sending a consolidation invitation to the selected user(s) you are acknowledging that the person receiving the invitation is an employee, consultant or temporary staff employed by your organization. You further acknowledge that the person receiving the invitation is authorized to make data and document submissions to an MSRB market transparency system on behalf of your organization. If the invited person ceases to be employed by your organization, it is the responsibility of your account manager to disable that person's MSRB Gateway account.

Do you wish to continue?

Your pending request will appear under the **View** tab. Prior to the acceptance of the request, if you decide that the request was sent in error, it can be removed or cancelled by clicking **Remove**.

Consolidation Requests

Search and Send | **View**

A consolidation request has been sent to the following: D009I2.

Manage Consolidations

Organization Name	MSRB ID	User Name	Action
+ Organization XYZ	D009I2	NANCY DOE	Remove

[Return to Main Menu](#)

The invited organization will receive an e-mail stating the intent to consolidate them into your organization account.

The following user requests to have their MSRB Gateway user account into your MSRB organization account:

MSRB ID: D009I2
Issuer XYZ
101 Main Street
City, ST 12345

Agreeing to consolidate organization accounts will permit the MSRB to more effectively structure your user accounts in MSRB Gateway and allow for greater shared functionality in MSRB Market Transparency programs.

By accepting this invitation to consolidate your account, you are acknowledging that BOB DOE is an employee, consultant or temporary staff employed by the same organization as the requestor. You further acknowledge that the person making this request is authorized to make data and document submissions to MSRB information systems on behalf of your organization. If the invited person ceases to be employed our organization, it will become the responsibility of you or your account manager to disable that person's MSRB Gateway user account.

After your account is consolidate the following occur:

1. You can continue to use the same username and password. Users will also continue to have any submission groups you may have established in the EMMA Dataport.
2. Your account is now one of several accounts associated with the same organization and certain functions on EMMA will become a shared resource of the organization:
 - Other users within your organization will be able to access and modify any groups you have create, and you will be able to access and modify any groups other users in your organization created.
 - Other users will be able to update disclosure submissions you have made, and vice versa.
3. The Master Account Administrator may grant you permission to make the following types of submission to EMMA (if applicable):
 - preliminary official statements (and other presale documents)
 - Voluntary primary market information (including official statements, advance refunding documents or 529 college savings plan disclosure documents)
 - Information about the timing and accounting standard used in annual financial filings
 - Continuing disclosure event and financial filings
4. Upon acceptance, YOU WILL NOT BE ABLE TO UNDO THE ACCOUNT CONSOLIDATION.

If you have any questions regarding the account consolidation request please contact BOB DOE at (111) 222-3333.

For further information about this and other MSRB Gateway functions, go here: <http://www.msrb.org/Market-Disclosures-and-Data/MSRB-Gateway.aspx>

If you need further assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

The pending request will display under the invited user's **View** tab.
(This user cannot receive nor make additional consolidation requests while a request is pending).

Consolidation Requests

Search and Send **View**

Manage Consolidations

Organization Name	MSRB ID	User Name	Action
+ Organization XYZ	D009I2	NANCY DOE	Remove

[Return to Main Menu](#)

Request to Be Consolidated into an Organization Account

From the Gateway Main Menu, click **Manage Consolidations** under the **Account and Organization Management**.

Welcome BDOE2 ▲, P001993. [Logout](#)

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations ←

User ID: BDOE2
Role: Master Account Administrator
User Name: BOB DOE
Organization Name: Issuer XYZ
MSRB ID: P001993
Email Address: bdoe@issuenyz.com
[Edit Profile](#) [Change Password](#)

Enter search criteria to find the organization with which you wish to consolidate.
From the search results, select the organization and click **Send Request**.

Consolidation Requests
Search and Send | View

Request Consolidation
Select an organization to initiate your account consolidation.

Search for an account (only one required)

By Organization Name: By MSRB ID:

By Email Address: By User Last Name:

Search Results

	Organization Name	MSRB ID	User Name
<input type="radio"/>	<input type="button" value="+"/> AGENT XYZ	G00247	TOM DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7243	JOHN DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7254	John Doe
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7257	JAMES DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7260	JOHN DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7261	JOHN DOE
<input type="radio"/>	<input type="button" value="+"/> Issuer XYZ	P000258	BOB DOE
<input type="radio"/>	<input type="button" value="+"/> Organization XYZ	P000259	Jane Thomas

The following message appears that explains the impacts of consolidating. Click **OK** to proceed.

Consolidation Requests
Search and Send | View

Request Consolidation
Select an organization to initiate your account consolidation.

Search for an account (only one required)

By Organization Name: By MSRB ID:

By Email Address: By User Last Name:

Search Results

	Organization Name	MSRB ID	User Name
<input type="radio"/>	<input type="button" value="+"/> AGENT XYZ	G00247	TOM DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7243	JOHN DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7254	John Doe
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7257	JAMES DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7260	JOHN DOE
<input type="radio"/>	<input type="button" value="+"/> Dealer XYZ	A7261	JOHN DOE
<input checked="" type="radio"/>	<input type="button" value="-"/> Issuer XYZ	P000258	BOB DOE
<input type="radio"/>	<input type="button" value="+"/> Organization XYZ	P000259	Jane Thomas

Consolidation Requests
Search and Send | View

By sending a consolidation invitation to the selected organization you are acknowledging that you are an employee, consultant or temporary staff employed by that organization. You accept that the account administrators for that organization will be able to manage your MSRB Gateway account, up to and including disabling your account completely. You are also representing that you are authorized to make data and document submissions to an MSRB market transparency system on behalf of that organization.

Do you wish to continue?

Your pending request will appear under the **View** tab. Prior to having the request accepted, if you decide that your request was sent in error, you can remove the request by clicking **Remove**.

Consolidation Requests

Search and Send | **View**

Pending Request

The organization listed here is one in which you are employed as an employee, consultant or staff, and which has previously established an organization account not associated with your MSRB account. Accepting consolidation will move your user account to this organization's account.

Organization Name	MSRB ID	User Name	Action
+ Issuer XYZ	P000258	BOB DOE	Remove

[Return to Main Menu](#)

While in pending status, additional requests to be consolidated cannot be sent. Nor will other organizations have the ability to send a consolidation request. If they attempt to do so, the message below will appear.

Consolidation Requests

Search and Send | **View**

You already have a pending consolidation request.

[Return to Main Menu](#)

The organization that you requested to consolidate will receive an e-mail stating your wish to consolidate.

The following user requests to have their MSRB Gateway user account into your MSRB organization account:

MSRB ID: D009I2
 Issuer XYZ
 101 Main Street
 City, ST 12345

Agreeing to consolidate organization accounts will permit the MSRB to more effectively structure your user accounts in MSRB Gateway and allow for greater shared functionality in MSRB Market Transparency programs.

By accepting this invitation to consolidate your account, you are acknowledging that MIKE DOE is an employee, consultant or temporary staff employed by the same organization as the requestor. You further acknowledge that the person making this request is authorized to make data and document submissions to MSRB information systems on behalf of your organization. If the invited person ceases to be employed our organization, it will become the responsibility of you or your account manager to disable that person's MSRB Gateway user account.

After your account is consolidate the following occur:

1. You can continue to use the same username and password. Users will also continue to have any submission groups you may have established in the EMMA Dataport.
2. Your account is now one of several accounts associated with the same organization and certain functions on EMMA will become a shared resource of the organization:
 - Other users within your organization will be able to access and modify any groups you have create, and you will be able to access and modify any groups other users in your organization created.
 - Other users will be able to update disclosure submissions you have made, and vice versa.
3. The Master Account Administrator may grant you permission to make the following types of submission to EMMA (if applicable):
 - preliminary official statements (and other presale documents)
 - Voluntary primary market information (including official statements, advance refunding documents or 529 college savings plan disclosure documents)
 - Information about the timing and accounting standard used in annual financial filings
 - Continuing disclosure event and financial filings
4. Upon acceptance, YOU WILL NOT BE ABLE TO UNDO THE ACCOUNT CONSOLIDATION.

If you have any questions regarding the account consolidation request please contact MIKE DOE at (111) 222-3333.

For further information about this and other MSRB Gateway functions, go here: <http://www.msrb.org/Market-Disclosures-and-Data/MSRB-Gateway.aspx>

If you need further assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

Approve or Decline Consolidation Requests

A consolidation request must be accepted before consolidation can occur. Alternatively, the consolidation request can be declined. When a consolidation request is made, the party that must accept or decline the request will receive an e-mail notification.

To accept or decline the consolidation request, log into your MSRB Gateway account. Click the **Manage Consolidations** link.

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

User ID: BDOE2
Role: Master Account Administrator
User Name: BOB DOE
Organization Name: Issuer XYZ
MSRB ID: P001993
Email Address: bdoe@issueryz.com
Edit Profile Change Password

Click the **View** tab to display requests received, as well as any requests made. For requests that you have received, two options are available, accept or decline. Click **Accept** to accept a consolidation request. Click **Decline** to decline the consolidation request. For requests that you initiated, the option to remove the request can be executed by clicking **Remove**.

The impacted organization will be notified via e-mail of the actions that were taken.

Consolidation Requests

Search and Send View

Manage Consolidations

Organization Name	MSRB ID	User Name	Action
+ Organization XYZ	D00912	NANCY DOE	Remove
+ Organization XYZ	D00913	MIKE DOE	Accept Decline

Return to Main Menu

Impacts on Your User Account Post-Consolidation

After an account is consolidated, the user that was consolidated will receive the e-mail below. The e-mail contains details about the new organization account and how the consolidation will impact their user account. Their previous MSRB registration will be automatically withdrawn. The user will now assume the MSRB ID of the organization account into which they were consolidated. Any account access rights that were previously granted to the user will transfer to the new organization account. The user will maintain their user ID and password, which can be used to log into the new account. The user will share the EMMA Dataport submission history with other users in the organization. They will also have access to modify EMMA submissions made by other users in the organization and can access all CUSIP groups.

This e-mail is for your information only. No action is required.

BOB DOE has accepted your request to consolidate MSRB Gateway accounts. As a result, the organization information associated with your user account has changed to the following:

- MSRB ID: P00248
- Name: Bob Doe

Please be advised of the following:

1. You can continue to use the same username and password. You will also continue to have access to any submission groups you may have established in the EMMA Dataport.
2. Your account is now one of several accounts associated with the same organization and certain functions on EMMA will become a shared resource of the organization:
 - Other users within your organization will be able to access and modify any groups you have create, and you will be able to access and modify any groups other users in your organization created.
 - Other users will be able to update disclosure submissions you have made, and vice versa.
3. The Master Account Administrator may grant you permission to make the following types of submission to EMMA (if applicable):
 - preliminary official statements (and other presale documents)
 - Voluntary primary market information (including official statements, advance refunding documents or 529 college savings plan disclosure documents)
 - Information about the timing and accounting standard used in annual financial filings
 - Continuing disclosure event and financial filings
4. You cannot undo the account consolidation.

For further information about this and other MSRB Gateway functions, go here: <http://www.msrb.org/Market-Disclosures-and-Data/MSRB-Gateway.aspx>

If you need further assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

Impacts on Agent Relationships Post-Consolidation

All agent relationships will be transferred to the new organization account after the consolidation occurs. The agent relationships will be managed by the Master Account Administrator of the organization account. If a designating organization consolidates with, the agent(s) will be notified of the change via e-mail. Similarly, If the agent consolidates, the designating organization will be notified.

Submission rights associated with the continuing disclosure account as a result of being designated as an agent will also transfer with the user and become available as right(s) that the Master Account Administrator can grant to other users in the organization account.

The impacted agents described above will be notified of impacts of the consolidation via the e-mail below.

This e-mail is for your information only. No action is required.

BOB DOE has accepted your request to consolidate MSRB Gateway accounts. As a result, the organization information associated with your user account has changed to the following:

- MSRB ID: P00258
- Name: Nancy Doe

Please be advised of the following:

1. You can continue to use the same username and password. You will also continue to have access to any submission groups you may have established in the EMMA Dataport.
2. Your account is now one of several accounts associated with the same organization and certain functions on EMMA will become a shared resource of the organization:
 - Other users within your organization will be able to access and modify any groups you have create, and you will be able to access and modify any groups other users in your organization created.
 - Other users will be able to update disclosure submissions you have made, and vice versa.
3. The Master Account Administrator may grant you permission to make the following types of submission to EMMA (if applicable):
 - preliminary official statements (and other presale documents)
 - Voluntary primary market information (including official statements, advance refunding documents or 529 college savings plan disclosure documents)
 - Information about the timing and accounting standard used in annual financial filings
 - Continuing disclosure event and financial filings
4. You cannot undo the account consolidation.

For further information about this and other MSRB Gateway functions, go here: <http://www.msrb.org/Market-Disclosures-and-Data/Submit-Data/Gateway.aspx>

If you need further assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

Part 8: Agent Designation Overview

An issuer can designate an agent to make submissions to EMMA. Organizations can control the types of submissions an agent can make on their behalf. Once submission rights are designated, the agent has control over the submission types it accepts.

An organization can only delegate rights that are inherent to its organization type as shown below.

Organization Roles and Their Inherent Submission Rights				
Organization Roles	EMMA Continuing Disclosure Submissions	EMMA Voluntary Financial Information	EMMA Voluntary OS/ARD Submission	EMMA Voluntary Preliminary OS Submission
Agent with Organization Account	✓			
Issuer with Organization Account	✓	✓	✓	✓
Obligated Person with Organization Account	✓			✓

Submission rights cannot be delegated to an agent if the delegating organization cannot make the submissions itself. For example, an issuer can designate an agent to make EMMA voluntary primary market submissions on its behalf. An obligated person cannot make EMMA primary market submissions and therefore cannot designate an agent for that purpose. An obligated person can make primary market submissions only if an issuer has designated the obligated person to do so.

Only issuers may designate agents to make continuing disclosure submissions on their behalf.

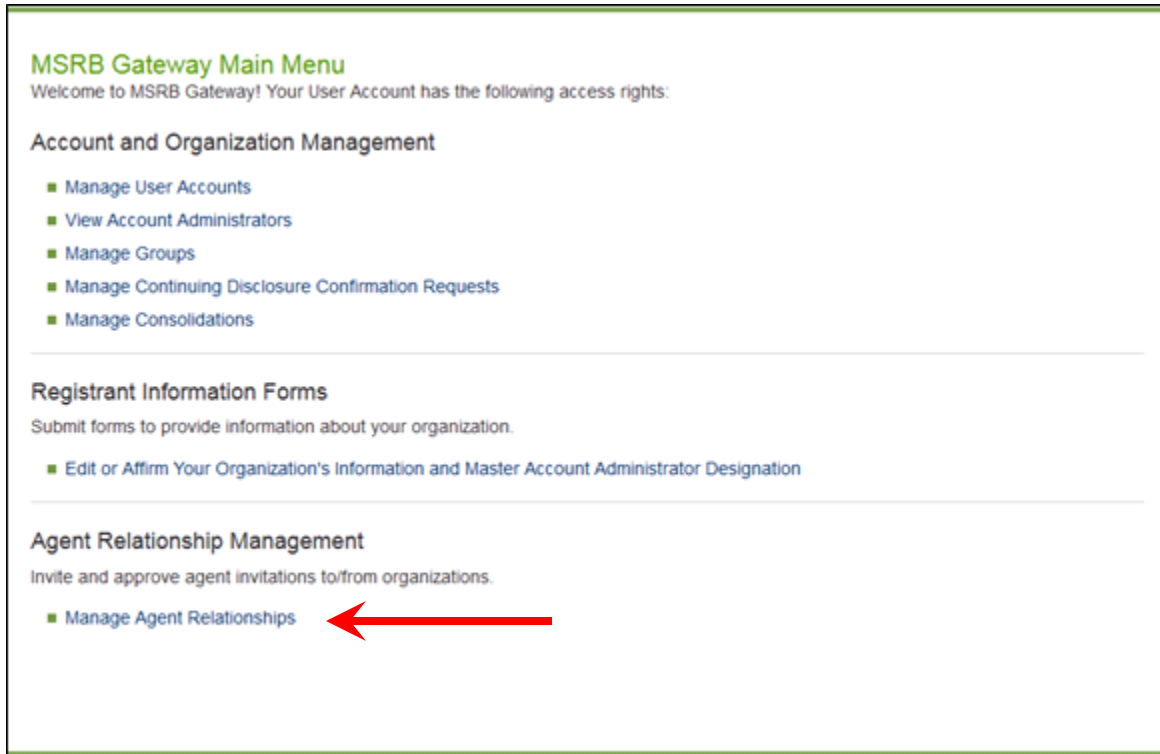
Agent designation can be reciprocal. An organization can request another organization to make EMMA submissions as its agent; an organization can also offer to make submissions as agent for another organization.

Parties involved in agent designations receive Gateway e-mails to notify them of actions taken by other parties. These actions include requests to become an agent and responses to requests and updates to submission rights.

Only Master Account Administrators can manage an organization's agent relationships.

Agent Relationships Overview

To view the agent relationships with other organizations, go to the Gateway Main Menu and click **Manage Agent Relationships** under the **Agent Relationship Management** section.



MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

Registrant Information Forms
Submit forms to provide information about your organization.

- Edit or Affirm Your Organization's Information and Master Account Administrator Designation

Agent Relationship Management
Invite and approve agent invitations to/from organizations.

- Manage Agent Relationships ←

The **Manage Agents Relationships** screen will appear. It is divided into two sections.

Manage Agent Relationships

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

- Active relationships: (2)
- Organizations you have requested to act as your agent: (0)
- Organizations offering to act as your agent: (0)
- Designate an organization to act as your agent

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

- Active Relationships: (0)
- Organizations requesting that you act as their agent: (0)
- Organizations for which you have offered to act as an agent: (0)
- Offer to serve as an agent for another organization

[Return to Main Menu](#)

The first section shows your relationships with organizations that act as your agent:

Menu option	Definition
Active relationships	View active relationships with agents you have approved to submit on your behalf
Organizations you have requested to be your agent	View pending designations to organizations that you are waiting to accept/decline your designation request
Organizations offering to serve as your agent	View pending designations from organizations that are waiting for you to accept or decline their offer to act as your agent
Designate an organization to act as your agent	Send a request for an organization to act as your agent

The second section of the Manage Agent Relationships screen shows agent relationships where your organization plays the role of an agent:

Menu option	Definition
Active relationships	Shows organizations for which you currently act as an agent, and shows the types of submissions you can make on that organization's behalf
Organizations requesting that you act as their agent	View pending requests from organizations that you act as their agent. You can accept or decline the designation
Organizations for which you have offered to act as an agent	View pending requests where you have offered to act as an agent and you are waiting for the organization to accept or decline your offer
Offer to serve as an agent for another organization	Request to act as an agent for another organization

View Agents Relationships

Click the **Active Relationships** link on the top section of the Manage Agent Relationships screen to view agents you have designated to submit on your behalf. Click on any organization's name to see more about the relationship.

Active Relationships			
Organizations who can act as your agent: (2)			
MSRB ID	Organization Name	Submission Type	Relationship Status
G00244	AGENT 1234	EMMA Voluntary Financial Information	Active
G00244	AGENT 1234	EMMA - Continuing Disclosure	Active
Return to Agent Menu Return to Main Menu			

The lower section lists the submissions that you can make on behalf of other organizations as their agent, if any.

Relationship with AGENT 1234:	
MSRB ID: G00244 Phone Number: 111-222-3333 Fax Number: 999-999-9999 Address: 101 MAIN STREET CITY, ST 12345	
You have designated this organization to act as your agent for the following types of submissions:	
Submission Type EMMA - Continuing Disclosure EMMA Voluntary Financial Information	Relationship Status Active Active
Update Submission Types	
You act as an agent for this organization for the following types of submissions:	
Submission Type -- No submission types authorized --	Relationship Status
Update Submission Types	
Search Return to Agent Menu Return to Main Menu	

Manage Agent Submissions Rights

The upper section of this screen displays the submission types the agent makes for your organization. You may add or remove submission rights from the agent at any time.

To remove submission rights from an agent, select the submission type to be removed, and then click **Remove Relationship**.

Relationship with AGENT 1234:

MSRB ID: G00244
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 MAIN STREET
 CITY, ST 12345

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Continuing Disclosure	Active
<input type="checkbox"/> EMMA Voluntary Financial Information	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

EMMA Voluntary OS/ARD Submission
 EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The submission type drops to the lower section of the screen, as it is now available for delegation.

Relationship with AGENT 1234:

MSRB ID: G00244
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 MAIN STREET
CITY, ST 12345

Modifications successfully processed

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA Voluntary Financial Information	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

EMMA - Continuing Disclosure
 EMMA Voluntary OS/ARD Submission
 EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

To delegate additional submission rights to an agent, select from the submission rights listed in the lower section then click **Add Submission Type**.

Relationship with AGENT 1234:

MSRB ID: G00244
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 MAIN STREET
CITY, ST 12345

Modifications successfully processed

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA Voluntary Financial Information	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

EMMA - Continuing Disclosure
 EMMA Voluntary OS/ARD Submission
 EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The selected submission moves to the upper section under **Types of submissions this organization can make on your behalf**. The relationship status then denotes “Waiting for agent’s approval.”

Relationship with AGENT 1234:

MSRB ID: G00244
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 MAIN STREET
CITY, ST 12345

Modifications successfully processed

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Continuing Disclosure	Waiting for agent's approval
<input type="checkbox"/> EMMA Voluntary Financial Information	Active
<input type="checkbox"/> EMMA Voluntary OS/ARD Submission	Waiting for agent's approval

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

Request Agent Designation Rights

An agent has the ability to request additional submission rights for another organization.

Use the lower section of the screen to manage the delegated rights. To request the right to make a new type of submission, click **Update Submission Type**.

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
 City, ST 12345

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
-- No submission types authorized --	

[Update Submission Types](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The lower section lists the organization's inherent submission types that you can request to submit on their behalf. Select one or more of the types of submissions then click the **Add Submission Type** button.

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
 City, ST 12345

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
-- No current agent relationship with this organization --	

Types of submissions for which you would like to act as this organization's agent:

- EMMA - Continuing Disclosure
- EMMA Voluntary Financial Information
- EMMA Voluntary OS/ARD Submission
- EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

[Search](#) [Return to Agent Menu](#) [Return to Main Menu](#)

The submission status changes to “Waiting for their approval.” (In the example below, you are waiting for approval to make Continuing Disclosure and Voluntary Preliminary OS submissions.)

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
City, ST 12345

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Continuing Disclosure	Waiting for their approval
<input type="checkbox"/> EMMA Voluntary Preliminary OS Submission	Waiting for their approval

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

EMMA Voluntary Financial Information
 EMMA Voluntary OS/ARD Submission

[Add Submission Type](#)

If the request is approved, the submission type status changes to “Active.”

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
City, ST 12345

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
EMMA - Continuing Disclosure	Active
EMMA Voluntary Financial Information	Active
EMMA Voluntary OS/ARD Submission	Active

[Update Submission Types](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

If the request is declined, the submission type moves to the lower section of the screen.

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
City, ST 12345

Modifications successfully processed

Types of submissions for which you are currently an agent for this organization:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Continuing Disclosure	Active

[Remove Relationship](#)

Types of submissions for which you would like to act as this organization's agent:

- EMMA Voluntary Financial Information
- EMMA Voluntary OS/ARD Submission
- EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)

Accept or Decline Agent Designation Rights

From the Manage **Organization Relationships** screen, select an organization for which you act as agent.

Organizations For Whom You Are An Agent

Organizations for whom you act as an agent: (4)

MSRB ID	Organization Name	Submission Type	Relationship Status
P000259	Organization XYZ	EMMA - Continuing Disclosure	Active
P000259	Organization XYZ	EMMA Voluntary Financial Information	Active
P000259	Organization XYZ	EMMA Voluntary OS/ARD Submission	Active
P000259	Organization XYZ	EMMA Voluntary Preliminary OS Submission	Active

[Return to Agent Menu](#)
[Return to Main Menu](#)

Click **Update Submission Types**.

Relationship with Organization XYZ:

MSRB ID: P000259
Phone Number: 111-222-3333
Fax Number: 999-999-9999
Address: 101 Main Street
 City, ST 12345

You act as an agent for this organization for the following types of submissions:

Submission Type	Relationship Status
EMMA - Continuing Disclosure	Active
EMMA Voluntary Financial Information	Active
EMMA Voluntary OS/ARD Submission	Active
EMMA Voluntary Preliminary OS Submission	Active

[Update Submission Types](#)

[Search](#)
[Return to Agent Menu](#)
[Return to Main Menu](#)

Requests from organizations that are waiting for your approval are shown in the upper section of your Relationships screen. Click either **Remove Relationship** to decline the request or **Approve Relationship** to accept the request.

Relationship with AGENT XYZ:

MSRB ID: G00247
 Phone Number: 111-222-3333
 Fax Number:
 Address: 101 MAIN STREET
 CITY, ST 12345

Modifications successfully processed

Types of submissions this organization can make on your behalf:

Submission Type	Relationship Status
<input type="checkbox"/> EMMA - Continuing Disclosure	Active
<input type="checkbox"/> EMMA Voluntary Financial Information	Active

[Remove Relationship](#)

Types of submissions for which you would like this organization to act as your agent:

EMMA Voluntary OS/ARD Submission

EMMA Voluntary Preliminary OS Submission

[Add Submission Type](#)


[Search](#)

[Return to Agent Menu](#)

[Return to Main Menu](#)

After you accept a delegated right, you may reverse the decision and remove the right.

The Master Account Administrator of an agent organization will be warned of the implications for their users and will be asked to confirm this action should they remove an agent relationship. This will remove all related submission rights from users within the organization. If the rights removed are the only rights for an individual account, the account becomes disabled and the user will no longer be able to log into Gateway.

 The user account remains enabled if it has inherent rights in your organization or rights delegated from someone else.

Edit Agent Relationship with Issuer XYZ:

MSRB ID: P000258
Phone Number: 111-222-3333
Fax Number:
Address: 101 Main Street
City, ST 12345

You have chosen to remove the following agent relationships with this organization:

Submission Type	Relationship Status
EMMA Voluntary Preliminary OS Submission	Active


The affected users will receive an e-mail advising them of the change to their rights.

Your organization is no longer authorized to submit certain submission types as an agent for Issuer XYZ (P00247). As a result, your MSRB Gateway account (userid: BDOE) has been modified to remove the following rights:

EMMA Voluntary Annual filing and GAAP Undertaking

If you need further assistance please contact MSRB's support line at 202-838-1330.

This is a system-generated e-mail. PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED.

 A deactivated account can be re-enabled by the Master Account Administrator.

Part 9: Master Account Administrator: Update Organization Account

An organization can have only one Master Account Administrator at a time. Only a Master Account Administrator can update the organization account details. The Master Account Administrator can transfer the Master Account Administrator role to another user.

From the Gateway Main Menu, click **Edit or Affirm Your Organization's Information and Master Account Administrator Designation**.

The screenshot displays the MSRB Gateway Main Menu interface. At the top right, it says "Welcome BDOE2 ▲, P001993." and "Logout". The main content area is divided into several sections:

- MSRB Gateway Main Menu**: Welcome to MSRB Gateway! Your User Account has the following access rights.
- Market Transparency Systems**: Access MSRB systems to submit documents and data related to municipal market activity and political contributions.
 - EMMA Dataport
- Account and Organization Management**:
 - Manage User Accounts
 - View Account Administrators
 - Manage Groups
 - Manage Continuing Disclosure Confirmation Requests
 - Manage Consolidations
- Registrant Information Forms**: Submit forms to provide information about your organization.
 - Edit or Affirm Your Organization's Information and Master Account Administrator Designation** (highlighted with a red arrow)
- Agent Relationship Management**: Invite and approve agent invitations to/from organizations.
 - Manage Agent Relationships

On the right side of the page, there is a user profile box containing the following information:

- User ID: BDOE2
- Role: Master Account Administrator
- User Name: BOB DOE
- Organization Name: Issuer XYZ
- MSRB ID: P001993
- Email Address: bdoe@issueryz.com
- Buttons: Edit Profile, Change Password

To update organization details, click **Edit** in the organization details box. Make appropriate updates to the organization details then click **OK** to confirm the changes.

Transfer Master Account Administrator's Rights

To transfer Master Account Administrator rights to another user, click **Edit** in the Master Account Administrator's box. Make the appropriate updates, then click **OK** to confirm the changes.

MSRB Organization Account Set-up - Organization Summary	
<p>Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."</p>	
<p>Organizational Details: Edit</p> <p>Organization Name: Issuer XYZ MSRB ID: P000258 Phone Number: 111 - 222 - 3333 Ext. Fax Number: Address 1: 101 Main Street Address 2: City: City State: ST Zip: 12345 Country:</p>	<p>Additional Information: Edit</p> <p>Organization Type: Municipal Security Issuer</p> <p>Federal Tax EIN: 43-6767676</p>
<p>Master Account Administrator: Edit</p> <p>First Name: BOB Middle Name: Last Name: DOE Name Suffix: Email Address: bdoe@issuerxyz.com Phone Number: 111 - 222 - 3333 Ext. Address1: 101 MAIN STREET Address2: City: CITY State: ST Zip: 12345 Country:</p>	<p>Required Documentation:</p> <ol style="list-style-type: none"> 1. Information on Letterhead - Verified by MSRB 2. Second Form of Identification - Verified by MSRB
<p>Cancel Confirm</p>	

Click **Replace Contact**.

MSRB Organization Account Set-up - Add Master Account Administrator Information

Please provide contact details for the Master Account Administrator. If the address is the same as your organization's information, click 'Copy' to copy from your organization's details. You may replace this contact if needed.

[Copy](#)

Master Account Administrator:

First Name:* BOB
Middle Name:
Last Name:* DOE
Name Suffix:
Email Address:* bdoe@issuexyz.com
Confirm Email:*
Phone Number:* 111 - 222 - 3333 **Ext.**
Address1:* 101 Main Street
Address2:
City:*
State:* ST
Zip:* 12345
Country:

*required

[Previous](#) [OK](#) [Replace Contact](#)

Choose an existing user in the organization or create a new user account.

Formal Registration - Replace Organizational Primary Contact

Please select a current user from the list below or click the "NEW" button to create a new user.

Name	Email	Phone Number
JANE DOE	jndoe@issuexyz.com	(111) 222-3333
LISA DOE	ldoe@issuexyz.com	(111) 222-3333
NANCY DOE	ndoe@issuexyz.com	(111) 222-3333
TOM DOE	tdoe@issuexyz.com	(111) 222-3333

<< < > >> Page: 1 of 1

[Previous](#) [New User](#)

The user's details appear in the Master Account Administrator contact screen. If needed, amend the details. Enter the e-mail address again as confirmation. When complete, click **OK**.

MSRB Organization Account Set-up - Add Master Account Administrator Information

Please provide contact details for the Master Account Administrator. If the address is the same as your organization's information, click 'Copy' to copy from your organization's details. You may replace this contact if needed.

[Copy](#)

Master Account Administrator:

First Name:* NANCY

Middle Name:

Last Name:* DOE

Name Suffix:

Email Address:*

Confirm Email:*

Phone Number:* - - **Ext.**

Address1:*

Address2:

City:*

State:*

Zip:*

Country:

*required

[Previous](#)
[OK](#)
[Replace Contact](#)

The new Master Account Administrator will be reflected on the Organization Summary. Click **Confirm** to save the changes.

MSRB Organization Account Set-up - Organization Summary	
<p>Click on "Edit" to make changes to your information. Once edits are complete, click "OK" to return to this summary page. To accept this information click "Confirm." Your changes will not be accepted if you do not click "Confirm."</p>	
<p>Organizational Details: Edit</p> <p> Organization Name: Issuer XYZ MSRB ID: P000258 Phone Number: 111 - 222 - 3333 Ext. Fax Number: Address 1: 101 Main Street Address 2: City: City State: ST Zip: 12345 Country: </p>	<p>Additional Information: Edit</p> <p> Organization Type: Municipal Security Issuer Federal Tax EIN: 43-6767676 </p>
<p>Master Account Administrator: Edit</p> <p> First Name: NANCY Middle Name: Last Name: DOE Name Suffix: Email Address: ndoe@issuerxyz.com Phone Number: 111 - 222 - 3333 Ext. Address1: 101 MAIN STREET Address2: City: CITY State: ST Zip: 12345 Country: </p>	<p>Required Documentation:</p> <ol style="list-style-type: none"> 1. Information on Letterhead - Verified by MSRB 2. Second Form of Identification - Verified by MSRB
<p> <input type="button" value="Cancel"/> <input type="button" value="Confirm"/> </p>	

The confirmation screen states the update is successful.

Logged in as TJOE1 for P000244 Logout	
<p>Congratulations, you have successfully updated your account information with the MSRB. Your MSRB Number (MSRB ID) is <u>P000244</u>.</p>	
<p>Account Summary Please print a copy of the account summary for your records:</p> <p><input type="button" value="Summary"/></p>	
<p><input type="button" value="Return to Gateway"/></p>	

The user's profile will reflect that they are the Master Account Administrator in their My **Profile** box.

Welcome BDOE2 ▲, P001993. [Logout](#)

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

- Manage User Accounts
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

Registrant Information Forms
Submit forms to provide information about your organization.

- Edit or Affirm Your Organization's Information and Master Account Administrator Designation

User ID: BDOE2
Role: Master Account Administrator
 User Name: BOB DOE
 Organization Name: Issuer XYZ
 MSRB ID: P001993
 Email Address: bdoe@issuerxyz.com
[Edit Profile](#) [Change Password](#)

The former Master Account Administrator's profile reflects the new role of user.

Welcome MDOE1 ▲, P001993. [Logout](#)

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

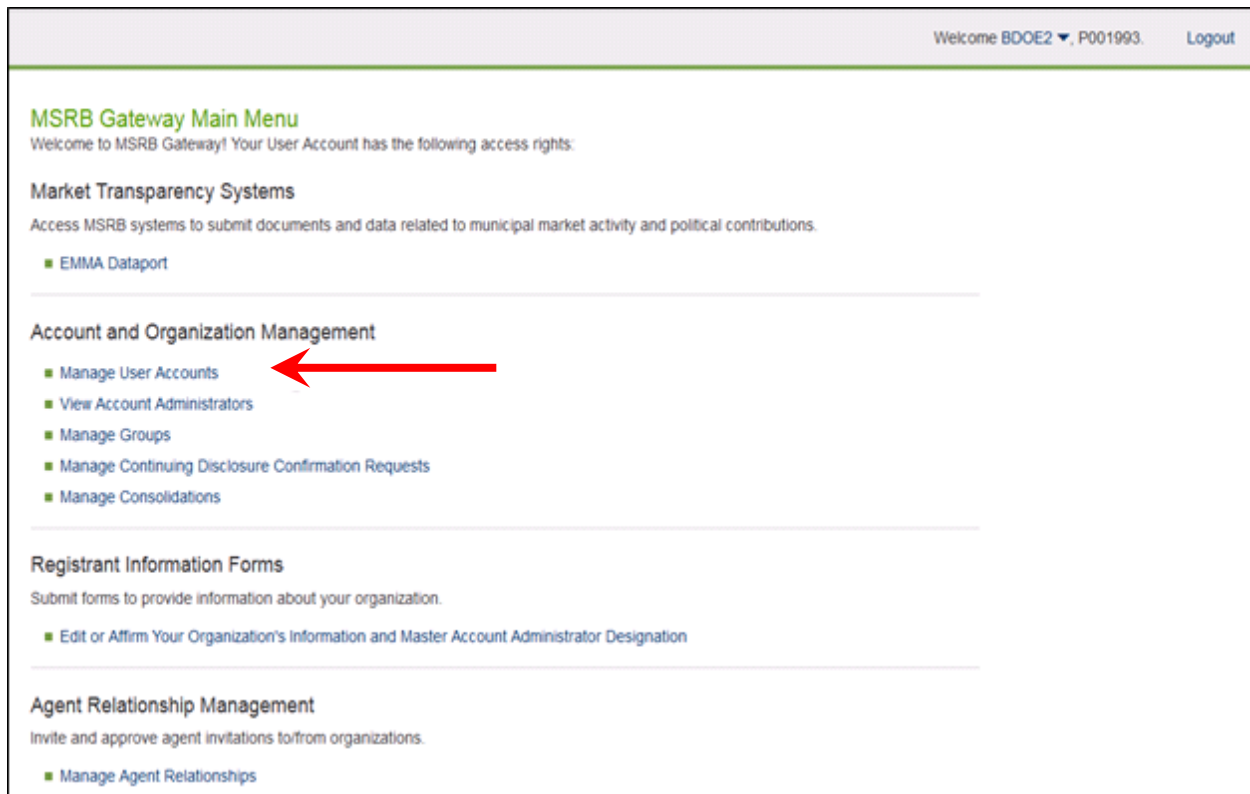
- View Account Administrators
- Manage Continuing Disclosure Confirmation Requests

User ID: MDOE1
Role: User
 User Name: MIKE DOE
 Organization Name: Issuer XYZ
 MSRB ID: P001993
 Email Address: mdoe@issuerxyz.com
[Edit Profile](#) [Change Password](#)

Create New Accounts

Only an Account Administrator's can create a new account. To create a new user account, complete the following steps.

From the Gateway Main Menu, click **Manage User Accounts** under the **Account and Organization Management**.



Welcome BDOE2 ▾, P001993. [Logout](#)

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

- Manage User Accounts** ←
- View Account Administrators
- Manage Groups
- Manage Continuing Disclosure Confirmation Requests
- Manage Consolidations

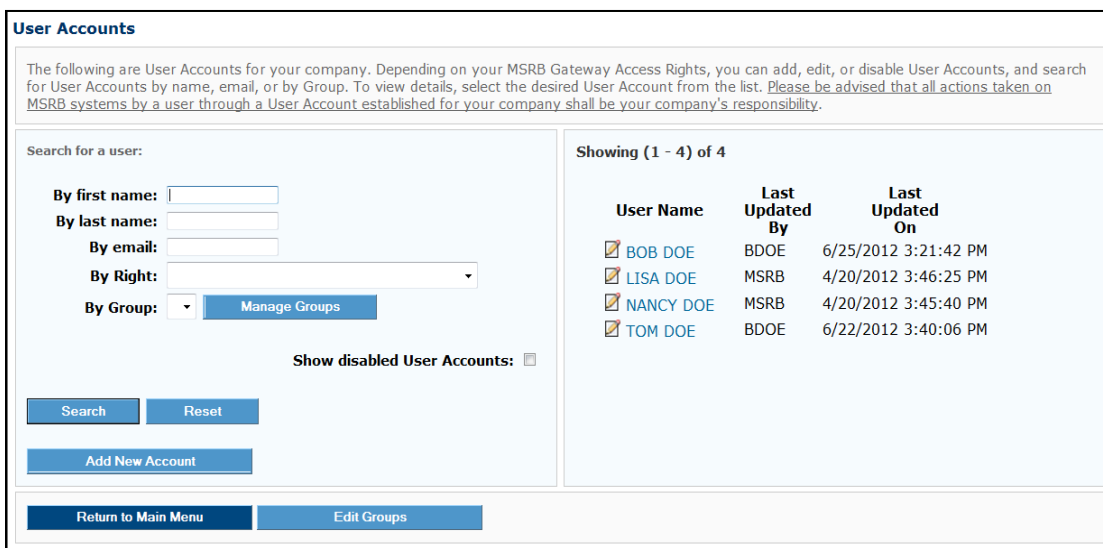
Registrant Information Forms
Submit forms to provide information about your organization.

- Edit or Affirm Your Organization's Information and Master Account Administrator Designation

Agent Relationship Management
Invite and approve agent invitations to/from organizations.

- Manage Agent Relationships

Click **Add New Account**.



User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

[Return to Main Menu](#) [Edit Groups](#)

Showing (1 - 4) of 4

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BOB DOE	BDOE	6/25/2012 3:21:42 PM
<input checked="" type="checkbox"/> LISA DOE	MSRB	4/20/2012 3:46:25 PM
<input checked="" type="checkbox"/> NANCY DOE	MSRB	4/20/2012 3:45:40 PM
<input checked="" type="checkbox"/> TOM DOE	BDOE	6/22/2012 3:40:06 PM

Enter user details and check the box next to one or more of the access rights to assign to the user. A user can be granted some or all rights. A user can also be granted rights as an Account Administrator and will be able to assist the Master Account Administration in managing other user accounts. Click **Continue**.

Add User Account

Complete all required information below and assign one or more Access Rights to create a new User Account. If no Access Rights are given, the User Account will be automatically disabled.

<p>Account Details</p> <p>User ID: JDOE27 MSRB ID: P000258 Group(s): No groups set up. First Name:* <input type="text" value="Jane"/> Middle Name: <input type="text"/> Last Name:* <input type="text" value="Doe"/> Email Address:* <input type="text" value="jndoe@issueryz.com"/> Confirm Email:* <input type="text" value="jndoe@issueryz.com"/> Title: <input type="text"/> Department: <input type="text"/> Phone Number:* <input type="text" value="111"/> - <input type="text" value="222"/> - <input type="text" value="3333"/> Ext. <input type="text"/> Fax Number: <input type="text"/> - <input type="text"/> - <input type="text"/> Address1:* <input type="text" value="101 Main Street"/> Address2: <input type="text"/> City:* <input type="text" value="City"/> State:* <input type="text" value="ST"/> Zip:* <input type="text" value="12345"/> Country: <input type="text"/></p> <p><small>*required</small></p>	<p>Account Access Rights</p> <p>Select the Access Rights to assign to this User Account. This user will have the following Access Rights in MSRB Gateway:</p> <p style="text-align: center;">Account Administrator <input type="checkbox"/> [?] EMMA Voluntary Financial Information <input type="checkbox"/> [?] EMMA Continuing Disclosure Submissions <input type="checkbox"/> [?] EMMA Voluntary OS/ARD Submission <input type="checkbox"/> [?] EMMA Voluntary Preliminary OS Submission <input type="checkbox"/> [?]</p>
---	--

You must grant at least one account access right to the new user. If no rights are granted, a message will display that the account will be disabled because no rights have been assigned.

Confirm User Account

<p>Account Details</p> <p>User ID: JDOE27 User Name: Jane Doe MSRB ID: P000258 Group(s): Email Address: jndoe@issueryz.com Title: Department: Address: 101 Main Street City, ST 12345 Phone Number: 111-222-3333 Fax Number:</p>	<p>Account Access Rights:</p> <p>This User Account will be disabled because no Rights have been assigned. To grant an account access right(s), click on "Edit User Account".</p> <p>User will be forced to change their password on next login. Click on "Confirm User Account" to complete the process.</p>
---	--

Click **Edit User Account** to add account access rights. Click **Continue**.

Edit User Account	
Account Details	Account Access Rights
User ID: JDOE25	Select the Access Rights to assign to this User Account.
MSRB ID: P000258	This user will have the following Access Rights in MSRB Gateway:
Group(s): No groups set up.	Account Administrator <input checked="" type="checkbox"/> [?]
First Name:* JANE	EMMA Continuing Disclosure Submissions <input checked="" type="checkbox"/> [?]
Middle Name:	EMMA Voluntary Financial Information <input checked="" type="checkbox"/> [?]
Last Name:* DOE	EMMA Voluntary OS/ARD Submission <input checked="" type="checkbox"/> [?]
Email Address:* <input type="text" value="jndoe@issuexyz.com"/>	EMMA Voluntary Preliminary OS Submission <input checked="" type="checkbox"/> [?]
Confirm Email:* <input type="text" value="jndoe@issuexyz.com"/>	<input type="checkbox"/> Force password change on next login.
Title: <input type="text"/>	<input type="checkbox"/> Disable the user account.
Department: <input type="text"/>	
Phone Number:* <input type="text" value="111"/> - <input type="text" value="222"/> - <input type="text" value="3333"/> Ext. <input type="text"/>	
Fax Number: <input type="text"/> - <input type="text"/> - <input type="text"/>	
Address1:* <input type="text" value="101 MAIN STREET"/>	
Address2: <input type="text"/>	
City:* <input type="text" value="CITY"/>	
State:* <input type="text" value="ST"/>	
Zip:* <input type="text" value="12345"/>	
Country: <input type="text"/>	
*required	
<input type="button" value="Continue"/> <input type="button" value="Return to Account Profile"/>	
<input type="button" value="Return to Accounts"/> <input type="button" value="Return to Main Menu"/>	

Click **Confirm User Account**.

Confirm User Account	
Account Details	Account Access Rights:
User ID: JDOE25	Click on "Confirm User Account" to complete the process.
User Name: JANE DOE	
MSRB ID: P000258	
Group(s):	
Email Address: jndoe@issuexyz.com	
Title:	
Department:	
Address: 101 MAIN STREET CITY, ST 12345	
Phone Number: 111-222-3333	
Fax Number:	
<input type="button" value="Confirm User Account"/> <input type="button" value="Edit User Account"/>	
<input type="button" value="Return to Accounts"/> <input type="button" value="Return to Main Menu"/>	

The results screen will confirm that the user account was successfully created.

User Account Update Results	
The following User Account was successfully updated. An email confirmation was sent to the user.	
User ID:	JDOE25
MSRB ID:	P000258
Name:	JANE DOE
Email Address:	jndoe@issuerxyz.com
<div style="display: flex; justify-content: space-around;"> Return to Accounts Return to Main Menu </div>	

The new user will receive an e-mail stating that the account has been created. The e-mail will contain the User ID, a link to create the password and a list of the account access rights.

Please keep this information confidential to prevent unauthorized use of this account.

The MSRB account registered for this e-mail address: jndoe@issuerxyz.com has been updated by Bob Doe (BDOE)

Your account currently has no rights assigned. You will not be able to access your account until at least one right is granted.

Your new user ID is: JDOE25

You may retrieve your password by going to: <http://www.msrb.org/msrb1/control/forgotpassword.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact an account manager at your organization. You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

After the new user creates a password and logs into Gateway, the MSRB Gateway Main Menu will appear.

In the example, the user is an Account Administrator. As such, the **Manage User Accounts** link is used to manage other user accounts. This user can also use the EMMA Dataport link located under **Market Transparency Systems** to make EMMA Voluntary Submissions.

Welcome MDOE1 ▲, P001993 Logout	
<p>MSRB Gateway Main Menu</p> <p>Welcome to MSRB Gateway! Your User Account has the following access rights:</p> <p>Market Transparency Systems</p> <p>Access MSRB systems to submit documents and data related to municipal market activity and political contributions.</p> <ul style="list-style-type: none"> ■ EMMA Dataport ← <p>Account and Organization Management</p> <ul style="list-style-type: none"> ■ Manage User Accounts ← ■ View Account Administrators ■ Manage Continuing Disclosure Confirmation Requests 	<p>User ID: MDOE1</p> <p>Role: Account Administrator</p> <p>User Name: MIKE DOE</p> <p>Organization Name: Issuer XYZ</p> <p>MSRB ID: P001993</p> <p>Email Address: mdoe@issuerxyz.com</p> <p>Edit Profile Change Password</p>

In the example below, the account was created for an ordinary user that has fewer rights than an administrator. Under **Account and Organization Management**, this user can view the names and contact information of the organization's Account Administrator's and can access EMMA Dataport.

The screenshot shows the MSRB Gateway Main Menu for a user. The top right corner displays "Welcome MDOE1 ▲ P001993." and a "Logout" link. The main content area is divided into three sections: "MSRB Gateway Main Menu" with a welcome message and access rights; "Market Transparency Systems" with a description and a link to "EMMA Dataport"; and "Account and Organization Management" with links to "View Account Administrators" and "Manage Continuing Disclosure Confirmation Requests". A user profile sidebar on the right lists: User ID: MDOE1, Role: User, User Name: MIKE DOE, Organization Name: Issuer XYZ, MSRB ID: P001993, Email Address: mdoe@issueryz.com, and links for "Edit Profile" and "Change Password".

Instructions for how to maintain individual user accounts are at the end of this section. Users can maintain their own account details, but cannot manage their access rights. Alternatively, an Account Administrator can maintain other users' account details.

Add or Remove Account Access Rights

From the Gateway Main Menu, click **Manage User Accounts** under **Account and Organization Management**.

The screenshot shows the MSRB Gateway Main Menu for a user with the role of "Account Administrator". The top right corner displays "Welcome MDOE1 ▲ P001993." and a "Logout" link. The main content area is divided into three sections: "MSRB Gateway Main Menu" with a welcome message and access rights; "Market Transparency Systems" with a description and a link to "EMMA Dataport"; and "Account and Organization Management" with links to "Manage User Accounts", "View Account Administrators", and "Manage Continuing Disclosure Confirmation Requests". A user profile sidebar on the right lists: User ID: MDOE1, Role: Account Administrator, User Name: MIKE DOE, Organization Name: Issuer XYZ, MSRB ID: P001993, Email Address: mdoe@issueryz.com, and links for "Edit Profile" and "Change Password". A red arrow points to the "Manage User Accounts" link in the "Account and Organization Management" section.

Click the user account you wish to update.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 5) of 5

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BOB DOE	BDOE	6/28/2012 9:31:33 AM
<input checked="" type="checkbox"/> JANE DOE	BDOE	6/28/2012 10:18:44 AM
<input checked="" type="checkbox"/> LISA DOE	LDOE2	6/28/2012 9:33:47 AM
<input checked="" type="checkbox"/> NANCY DOE	NDOE	6/28/2012 9:33:06 AM
<input checked="" type="checkbox"/> TOM DOE	TDOE1	6/28/2012 9:32:29 AM

[Return to Main Menu](#)
[Edit Groups](#)

Click **Edit User Account**.

User Account Profile and Access Rights

Account Details

User ID: NDOE

User Name: NANCY DOE

MSRB ID: P000258

Email Address: ndoe@issuexyz.com [Email User ID](#)

Title:

Department:

Address: 101 MAIN STREET
CITY, ST 12345

Phone Number: 111-222-3333

Fax Number:

Last Updated by: BDOE **On:** 6/28/2012 10:26:15 AM

Account Access Rights

This user has the following Access Rights in MSRB Gateway:

Account Administrator [?]

EMMA Continuing Disclosure Submissions [?]

EMMA Voluntary Financial Information [?]

EMMA Voluntary OS/ARD Submission [?]

EMMA Voluntary Preliminary OS Submission [?]

[View Profile History](#)
[View Rights History](#)
[Edit User Account](#)

[Return to Accounts](#)
[Manage Groups](#)
[Manage Groups by User](#)
[Return to Main Menu](#)

Add or remove rights as appropriate. At least one account access right must be granted to the user to keep the account active. Click **Continue** and confirm the update. You may also update the user details as necessary.

Edit User Account

Account Details

User ID: NDOE
MSRB ID: P000258
Group(s): No groups set up.
First Name:* NANCY
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Voluntary Financial Information [?]
EMMA Voluntary OS/ARD Submission [?]
EMMA Voluntary Preliminary OS Submission [?]

Force password change on next login.
 Disable the user account.

Disable User Account

A user account can never be deleted from Gateway, but the account can be disabled and hidden from view on the User Account Profile page. An account can be disabled by an Account Administrator or will automatically be disabled if all access rights are removed from the user account.

To disable a user account, click **Edit User Account**.

User Account Profile and Access Rights

Account Details

User ID: NDOE
User Name: NANCY DOE
MSRB ID: P000258
Email Address: ndoe@issuexyz.com
Title:
Department:
Address: 101 MAIN STREET
CITY, ST 12345
Phone Number: 111-222-3333
Fax Number:
Last Updated by: BDOE **On:** 6/28/2012 10:26:15 AM

Account Access Rights

This user has the following Access Rights in MSRB Gateway:

Account Administrator [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Voluntary Financial Information [?]
EMMA Voluntary OS/ARD Submission [?]
EMMA Voluntary Preliminary OS Submission [?]

Click the box **Disable the user account**. Click **Continue**.

Edit User Account	
<p>Account Details</p> <p>User ID: NDOE</p> <p>MSRB ID: P000258</p> <p>Group(s): No groups set up.</p> <p>First Name:* NANCY</p> <p>Middle Name:</p> <p>Last Name:* DOE</p> <p>Email Address:* <input type="text" value="ndoe@issuexyz.com"/></p> <p>Confirm Email:* <input type="text" value="ndoe@issuexyz.com"/></p> <p>Title: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>Phone Number:* <input type="text" value="111"/> - <input type="text" value="222"/> - <input type="text" value="3333"/> Ext. <input type="text"/></p> <p>Fax Number: <input type="text"/> - <input type="text"/> - <input type="text"/></p> <p>Address1:* <input type="text" value="101 MAIN STREET"/></p> <p>Address2: <input type="text"/></p> <p>City:* <input type="text" value="CITY"/></p> <p>State:* <input type="text" value="ST"/></p> <p>Zip:* <input type="text" value="12345"/></p> <p>Country: <input type="text"/></p> <p><small>*required</small></p>	<p>Account Access Rights</p> <p>Select the Access Rights to assign to this User Account.</p> <p>This user will have the following Access Rights in MSRB Gateway:</p> <p>Account Administrator <input type="checkbox"/> [?]</p> <p>EMMA Continuing Disclosure Submissions <input type="checkbox"/> [?]</p> <p>EMMA Voluntary Financial Information <input checked="" type="checkbox"/> [?]</p> <p>EMMA Voluntary OS/ARD Submission <input checked="" type="checkbox"/> [?]</p> <p>EMMA Voluntary Preliminary OS Submission <input checked="" type="checkbox"/> [?]</p> <p><input type="checkbox"/> Force password change on next login.</p> <p><input checked="" type="checkbox"/> Disable the user account.</p>
<p><input type="button" value="Continue"/> <input type="button" value="Return to Account Profile"/></p> <p><input type="button" value="Return to Accounts"/> <input type="button" value="Return to Main Menu"/></p>	

Click **Confirm User Account** to confirm the change.

Confirm User Account	
<p>Account Details</p> <p>User ID: NDOE</p> <p>User Name: NANCY DOE</p> <p>MSRB ID: P000258</p> <p>Group(s):</p> <p>Email Address: ndoe@issuexyz.com</p> <p>Title:</p> <p>Department:</p> <p>Address: 101 MAIN STREET CITY, ST 12345</p> <p>Phone Number: 111-222-3333</p> <p>Fax Number:</p>	<p>Account Access Rights:</p> <p>This User Account will be disabled.</p> <p>Click on "Confirm User Account" to complete the process.</p>
<p><input type="button" value="Confirm User Account"/> <input type="button" value="Edit User Account"/></p> <p><input type="button" value="Return to Accounts"/> <input type="button" value="Return to Main Menu"/></p>	

A confirmation screen will confirm that the account was disabled.

User Account Update Results

The following User Account was successfully disabled. An email confirmation was sent to the user.

User ID: NDOE
MSRB ID: P000258
Name: NANCY DOE
Email Address: ndoe@issuerxyz.com

Return to Accounts
Return to Main Menu

The user of the disabled account will receive an e-mail stating that the account was disabled. The user will no longer be able to log into Gateway.

Please keep this information confidential to prevent unauthorized use of this account.

The MSRB Gateway Account registered for this e-mail address: jndoe@issuerxyz.com has been updated by Bob Doe (BDOE)

Your account has been disabled.

You may login and check your account details and update history by going to: <http://www.msrb.org/msrb1/control/default.asp>

This is a system-generated e-mail PLEASE DO NOT REPLY. REPLIES ARE NOT MONITORED. If you need assistance with your account please contact an account manager at your organization. or You may also obtain more information about MSRB Gateway at: <https://www.msrb.org/msrb1/control/default.asp>.

The user will no longer appear on the **User Accounts** page.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: Manage Groups

Show disabled User Accounts:

Search Reset

Add New Account

Showing (1 - 4) of 4

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BOB DOE	BDOE	6/28/2012 9:31:33 AM
<input checked="" type="checkbox"/> JANE DOE	BDOE	6/28/2012 10:18:44 AM
<input checked="" type="checkbox"/> LISA DOE	LDOE2	6/28/2012 9:33:47 AM
<input checked="" type="checkbox"/> TOM DOE	TDOE1	6/28/2012 9:32:29 AM

Return to Main Menu
Edit Groups

Re-enable User Account

To re-enable the user account (for example, if the user has returned from a long absence), click the box **Show disabled User Accounts**. Click **Search**.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 4) of 4

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BOB DOE	BDOE	6/28/2012 9:31:33 AM
<input checked="" type="checkbox"/> JANE DOE	BDOE	6/28/2012 10:18:44 AM
<input checked="" type="checkbox"/> LISA DOE	LDOE2	6/28/2012 9:33:47 AM
<input checked="" type="checkbox"/> TOM DOE	TDOE1	6/28/2012 9:32:29 AM

[Return to Main Menu](#)
[Edit Groups](#)

The disabled user's name will appear grayed out. Click on the user to edit the account.

User Accounts

The following are User Accounts for your company. Depending on your MSRB Gateway Access Rights, you can add, edit, or disable User Accounts, and search for User Accounts by name, email, or by Group. To view details, select the desired User Account from the list. Please be advised that all actions taken on MSRB systems by a user through a User Account established for your company shall be your company's responsibility.

Search for a user:

By first name:

By last name:

By email:

By Right:

By Group: [Manage Groups](#)

Show disabled User Accounts:

[Search](#) [Reset](#)

[Add New Account](#)

Showing (1 - 5) of 5

* disabled accounts shown in gray

User Name	Last Updated By	Last Updated On
<input checked="" type="checkbox"/> BOB DOE	BDOE	6/28/2012 9:31:33 AM
<input checked="" type="checkbox"/> JANE DOE	BDOE	6/28/2012 10:18:44 AM
<input checked="" type="checkbox"/> LISA DOE	LDOE2	6/28/2012 9:33:47 AM
<input checked="" type="checkbox"/> NANCY DOE	BDOE	6/28/2012 10:44:15 AM
<input checked="" type="checkbox"/> TOM DOE	TDOE1	6/28/2012 9:32:29 AM

[Return to Main Menu](#)
[Edit Groups](#)

Uncheck the **Disable the user account** option then click **Continue**.

Edit User Account

Account Details

User ID: NDOE
MSRB ID: P000258
Group(s): No groups set up.
First Name:* NANCY
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Account Access Rights

Select the Access Rights to assign to this User Account.
This user will have the following Access Rights in MSRB Gateway:

Account Administrator [?]
EMMA Continuing Disclosure Submissions [?]
EMMA Voluntary Financial Information [?]
EMMA Voluntary OS/ARD Submission [?]
EMMA Voluntary Preliminary OS Submission [?]

Force password change on next login.
 Disable the user account.

Click **Confirm User Account** to complete the process.

Confirm User Account

Account Details

User ID: NDOE
User Name: NANCY DOE
MSRB ID: P000258
Group(s):
Email Address: ndoe@issueryz.com
Title:
Department:
Address: 101 MAIN STREET
CITY, ST 12345
Phone Number: 111-222-3333
Fax Number:

Account Access Rights:

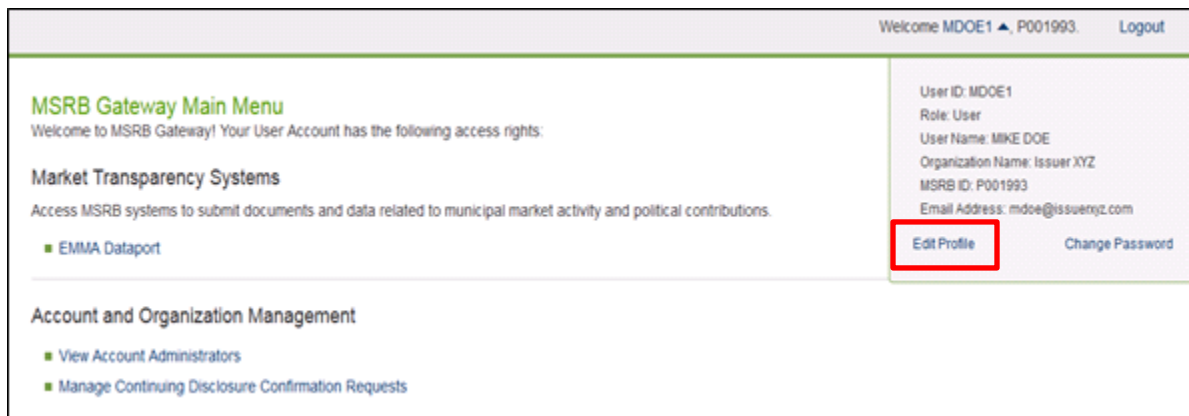
Click on "Confirm User Account" to complete the process.

Part 10: Update User Account

A user can perform some account management functions for their user account without the assistance of the Master Account Administrator. Users can update the following user account details in their Organization Account:

- E-mail address
- Phone number(s)
- Address

On the Gateway Main Menu, go to the My Profile box in the upper right and click **Edit Profile**.



Welcome MDOE1 ▲ P001993 Logout

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

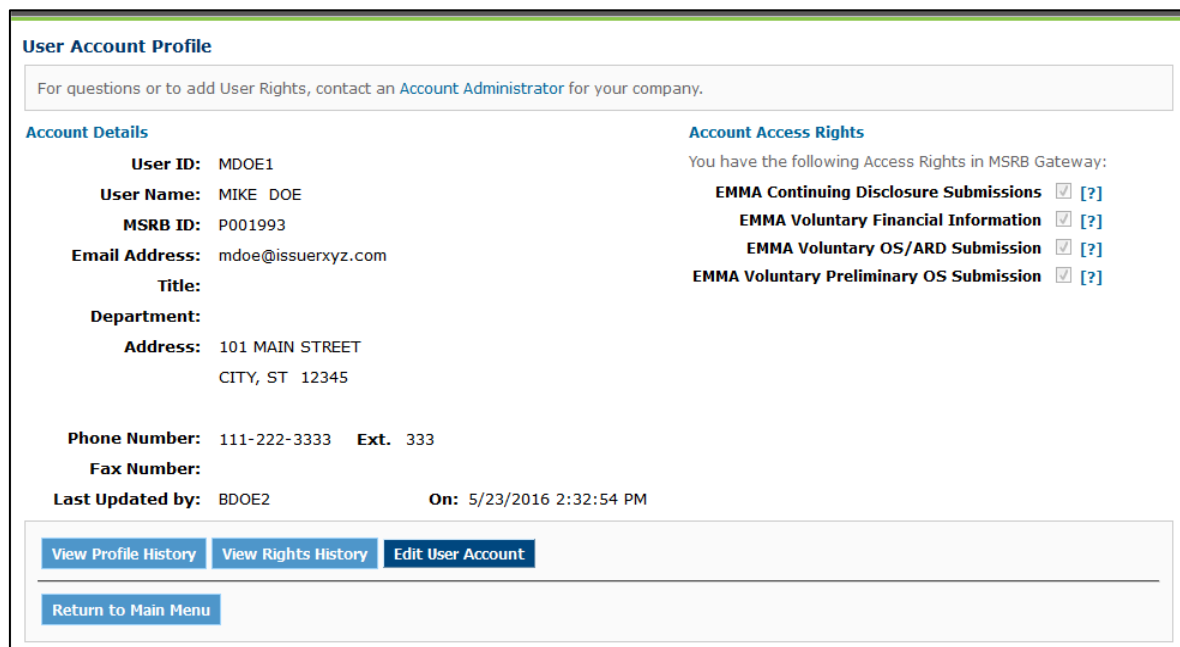
Account and Organization Management

- View Account Administrators
- Manage Continuing Disclosure Confirmation Requests

User ID: MDOE1
Role: User
User Name: MIKE DOE
Organization Name: Issuer XYZ
MSRB ID: P001993
Email Address: mdoe@issuerxyz.com

Edit Profile Change Password

Click **Edit User Account**



User Account Profile

For questions or to add User Rights, contact an [Account Administrator](#) for your company.

Account Details

User ID: MDOE1
User Name: MIKE DOE
MSRB ID: P001993
Email Address: mdoe@issuerxyz.com
Title:
Department:
Address: 101 MAIN STREET
CITY, ST 12345
Phone Number: 111-222-3333 **Ext.** 333
Fax Number:
Last Updated by: BDOE2 **On:** 5/23/2016 2:32:54 PM

Account Access Rights
You have the following Access Rights in MSRB Gateway:

- EMMA Continuing Disclosure Submissions** [?]
- EMMA Voluntary Financial Information** [?]
- EMMA Voluntary OS/ARD Submission** [?]
- EMMA Voluntary Preliminary OS Submission** [?]

[View Profile History](#) [View Rights History](#) **[Edit User Account](#)**

[Return to Main Menu](#)

Updates to e-mail address, phone number or address can be made. After the updates are made, click **Continue**.

Edit User Account

For questions or to add User Rights, contact an [Account Administrator](#) for your company.

Account Details

User ID: MDOE1
MSRB ID: P001993
First Name:* MIKE
Middle Name:
Last Name:* DOE
Email Address:*
Confirm Email:*
Title:
Department:
Phone Number:* - - **Ext.**
Fax Number: - -
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required

Click **Confirm User Account** to complete the process.

Confirm User Account

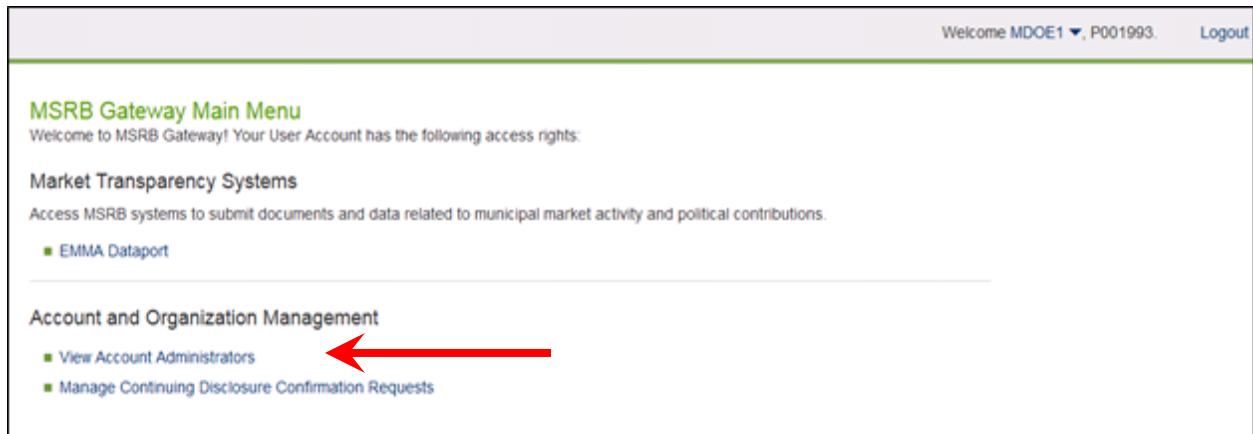
Account Details

User ID: MDOE1
User Name: MIKE DOE
MSRB ID: P001993
Email Address: mdoe@issuerxyz.com
Title:
Department:
Address: 101 MAIN STREET
 CITY, ST 12345
Phone Number: 111-222-3333 **Ext.** 333
Fax Number:

View Account Administrators

Users can view Account Administrators within their organization if there are questions about the user account or if they need EMMA submission rights. Go to the MSRB Gateway Main Menu and expand **Account and Company Management**, then select **View Account Administrators**. The following screen will appear.

From the Gateway Main Menu expand the link **Account and Organization Management** and click **View Account Administrators**.



Welcome MDOE1 ▾, P001993. Logout

MSRB Gateway Main Menu
Welcome to MSRB Gateway! Your User Account has the following access rights:

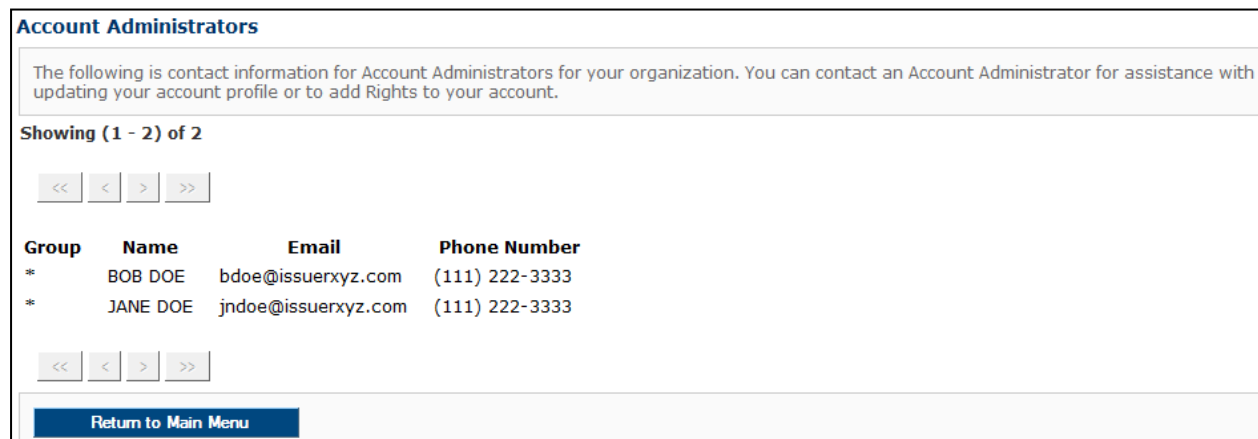
Market Transparency Systems
Access MSRB systems to submit documents and data related to municipal market activity and political contributions.

- EMMA Dataport

Account and Organization Management

- View Account Administrators** ←
- Manage Continuing Disclosure Confirmation Requests

The Account Administrators will be listed with relevant contact information.



Account Administrators

The following is contact information for Account Administrators for your organization. You can contact an Account Administrator for assistance with updating your account profile or to add Rights to your account.

Showing (1 - 2) of 2

<< < > >>

Group	Name	Email	Phone Number
*	BOB DOE	bdoe@issuerxyz.com	(111) 222-3333
*	JANE DOE	jndoe@issuerxyz.com	(111) 222-3333

<< < > >>

[Return to Main Menu](#)

View Account Profile History and Rights History

Users can view a history of changes that were made to their account profile or to their account access rights. On the Gateway Main Menu, go to the My Profile box in the upper right and click **Edit**. On the User Account Profile screen, click **View Profile History** the dates that the user account was amended; and **View Rights History** for a history of when access rights were granted or removed.

User Account Profile

For questions or to add User Rights, contact an [Account Administrator](#) for your company.

<p>Account Details</p> <p>User ID: NDOE</p> <p>User Name: NANCY DOE</p> <p>MSRB ID: P000258</p> <p>Email Address: ndoe@issueryz.com</p> <p>Title:</p> <p>Department:</p> <p>Address: 101 MAIN STREET CITY, ST 12345</p> <p>Phone Number: 111-222-3333</p> <p>Fax Number:</p> <p>Last Updated by: BDOE On: 6/28/2012 11:36:11 AM</p>	<p>Account Access Rights</p> <p>You have the following Access Rights in MSRB Gateway:</p> <p>EMMA Voluntary Financial Information <input checked="" type="checkbox"/> [?]</p> <p>EMMA Voluntary OS/ARD Submission <input checked="" type="checkbox"/> [?]</p> <p>EMMA Voluntary Preliminary OS Submission <input checked="" type="checkbox"/> [?]</p>
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View Profile History
View Rights History
Edit User Account

Return to Main Menu

Reset Password

Users can reset their password if they feel their password has been compromised or if they wish to change it to a new password.

Locate the My Profile box on the Gateway Main Menu. Click **Change Password**.

The screenshot shows the MSRB Gateway Main Menu interface. At the top right, the user is logged in as 'BDOE2' with MSRB ID 'P001993'. A 'Logout' link is visible. The main menu is divided into three sections: 'Market Transparency Systems', 'Account and Organization Management', and 'Registrant Information Forms'. On the right side, there is a 'My Profile' box containing user details: User ID: BDOE2, Role: Master Account Administrator, User Name: BOB DOE, Organization Name: Issuer XYZ, MSRB ID: P001993, and Email Address: bdoe@issueryz.com. The 'Change Password' link in the profile box is highlighted with a red rectangle.

Enter your current password, your new password, and then click **Continue**.

The 'Change Password' form contains the following instructions and criteria:

To change your password you must:

1. Enter your current password to confirm your identity
2. Enter your new password
3. Enter your new password again to confirm
4. Click "Continue"

New passwords must meet the following criteria:

1. Must be between eight (8) and fifteen (15) characters long
2. Must be different from your current password
3. Must not contain your User ID
4. Must contain characters from at least three of the following four categories:
 - Uppercase characters (A-Z)
 - Lowercase characters (a-z)
 - Numeric characters (0-9)
 - Special characters (!@#%&^*(), etc. excluding spaces)


Below the instructions are three input fields labeled 'Current Password:', 'New Password:', and 'Retype New Password:'. At the bottom of the form are two buttons: 'Continue' and 'Cancel'.

Forgot User ID or Password

If you forget your password, reset the password by clicking **Forgot password?** link on the Gateway login page. Follow on-screen instructions to create a new password.

If you forget your User ID, contact the MSRB at 202-838-1330.

Log into MSRB Gateway



User ID

Password

[Forgot password?](#)


[Don't have an account? Register](#)

[MSRB Gateway Manual](#)

Welcome to MSRB Gateway, the secure access point for all MSRB applications including EMMA. Click [here](#) for guidance on user account management and information about the MSRB Gateway.

To return to MSRB.org from within the MSRB Gateway application, click on the MSRB Home link at the top right corner of the page.

If you are experiencing login or other system related problems, please check the [Systems Status Page](#) for more information. If you need additional help, please contact the MSRB via email at GatewaySupport@msrb.org or by phone at 202-838-1330

 [Access Online Training about Submitting to EMMA](#)

The MSRB recommends not bookmarking this page.
