



# How to Set Up an Organization Account

## Getting Started with Organization Accounts

Complete the following steps to establish an organization account as an issuer or obligated person. An individual will serve as the Master Account Administrator and manage access to the account. [Learn more about streamlining account management with organization accounts.](#)

1. Go to [www.msrb.org](http://www.msrb.org) and click the "Register" link.

The screenshot shows the MSRB website homepage. At the top right, there are navigation links: ABOUT MSRB, EMMA®, MUNIEDPRO®, LOGIN, REGISTER (highlighted with a red box), and CAREERS. Below these is the MSRB logo and the text "Municipal Securities Rulemaking Board". A search bar is located to the right of the logo. Below the search bar is a horizontal menu with tabs: Rules and Guidance, Compliance Center, Transparency, Education Center, Policy and Analysis, and News and Events. The main content area features a "Municipal Market Benchmarks" section with a text box and two line graphs. Below this are four tiles: "MuniEdPro" (Market Education), "ABOUT THE MSRB" (with a play button icon), "MSRB RULES" (with a scale icon), and "VISIT THE EMMA WEBSITE" (with the EMMA 10 YEARS logo).



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2. Select the organization account option for issuers and obligated persons then click the "Next" button.

**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.

Create an individual user account to:

- Immediately make continuing disclosure filings to EMMA. No other EMMA filings can be made with an individual user account, but the account can later be upgraded to an organization account.

**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](#)

3. Click the "Continue" button to read the registration guidelines. The guidelines describe 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 the "Accept" button.

**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 recommends that you upload copies of those documents in PDF format during the setup process. Alternative means of delivery will be identified during the organization account setup for those unable to upload these documents.

**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](#)



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4. Indicate whether you have an existing user account. If you do have an existing account, you will be prompted to enter your user ID and password. If you do not have an existing account, click OK to proceed to the next step.

**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

5. Provide or correct your organization's information.

**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:** \*

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

**Fax Number:**  -  -

**Address 1:** \*

**Address 2:**

**City:** \*

**State:** \*

**Zip:** \*

**Country:**

\* required




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- 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, click the "Copy" button to copy this information from the organization details. Note: If you are upgrading an existing user account, you will skip this step.

**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:\*

Middle Name:

Last Name:\*

Name Suffix:

Email Address:\*

Confirm Email:\*

Phone Number:\*  -  -  Ext.

Address1:\*

Address2:

City:\*

State:\*

Zip:\*

Country:

\*required

- Select whether your organization is an issuer or obligor and provide the Federal Tax Employer Identification Number ("EIN" or "tax ID") for the organization.

**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):  -



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8. 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 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).

Upload the electronic versions of the documents in a portable document format (PDF) or send them via fax or mail. Indicate on the screen how you will provide the documents. Click the "OK" button 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. If you are unable to provide an electronic copy of these documents, you can fax or mail the documents to the MSRB by selecting the fax/mail option below. A cover sheet will be provided to assist with the timely processing of your documents.

**I will upload the EIN information provided on letterhead in pdf format**

Letterhead:  No file chosen

**I will fax or mail the EIN information provided on letterhead along with the cover sheet**

**I will upload my secondary form of identification in pdf format**

Second Form of Identification:  No file chosen

**I will fax or mail my secondary form of identification along with the cover sheet**



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- Review the Organization Summary screen for accuracy. If necessary, update the information by clicking the "Edit" link 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**

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><b>Organizational Details:</b> <a href="#">Edit</a></p> <p><b>Organization Name:</b> Issuer XYZ  <b>Phone Number:</b> 202 - 838 - 1500 <b>Ext.</b>  <b>Fax Number:</b>  <b>Address 1:</b> 101 Main Street  <b>Address 2:</b>  <b>City:</b> City  <b>State:</b> ST  <b>Zip:</b> 12345  <b>Country:</b></p>	<p><b>Additional Information:</b> <a href="#">Edit</a></p> <p><b>Organization Type:</b> Municipal Security Issuer</p> <p><b>Federal Tax EIN:</b> 43-6767676</p>
<p><b>Master Account Administrator:</b> <a href="#">Edit</a></p> <p><b>First Name:</b> Bob  <b>Middle Name:</b>  <b>Last Name:</b> Doe  <b>Name Suffix:</b>  <b>Email Address:</b> msrbcommunications@msrb.org  <b>Phone Number:</b> 202 - 838 - 1500 <b>Ext.</b>  <b>Address1:</b> 101 Main Street  <b>Address2:</b>  <b>City:</b> City  <b>State:</b> ST  <b>Zip:</b> 12345  <b>Country:</b></p>	<p><b>Required Documentation:</b> <a href="#">Edit</a></p> <ol style="list-style-type: none"> <li>Information on Letterhead - to be faxed or mailed</li> <li>Second Form of Identification - to be faxed or mailed</li> </ol>

[Cancel](#) [Confirm](#)

- Identify the person who set-up the organization account. Click the "Submit" button to submit the information to the MSRB. Note: If you are upgrading an existing user account, you will skip this step.

**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

[Cancel](#) [Previous](#) [Submit](#)



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11. After information is submitted to the MSRB, a confirmation screen will state that the MSRB has received your account information and will include your pending MSRB ID.

**Congratulations, you have successfully completed the first step toward establishing an organization account with the MSRB. If you elected to upload documents electronically, your information and supporting documentation will be reviewed and you will be notified when the account is activated or if additional information is needed. If you have elected to fax or mail your documents, along with the cover sheet provided below, your information and documents will be reviewed upon receipt. Your MSRB Number (MSRB ID) is P002139.**

**Cover Sheet** For organizations that intend to fax or mail the requested documentation, please print this document submission cover sheet and fax or mail the cover sheet together with the document(s) to the MSRB.

[Cover Sheet](#)

**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](#)

If applicable, on the Confirmation Screen click the “Cover Sheet” button to print a copy of the cover sheet that will be attached to documentation via fax or mail to the MSRB. Using the cover sheet will enable MSRB to quickly process the account approval. Note: This button will only appear if you opted to mail or fax documentation.

Click the “Summary” button to view a summary of the account details and display the date and time that the account was created and submitted to the MSRB.



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

**MSRB Organization Account - Printable Summary**

[Print](#) [Close](#)

MSRB records include the following information for your organization as of 2/16/2016 2:48:08 PM EST:

<b>Organizational Details:</b>  <b>Organization Name:</b> Issuer XYZ <b>MSRB ID:</b> P002139 <b>Phone Number:</b> 202 - 838 - 1500 <b>Fax Number:</b> <b>Address 1:</b> 101 Main Street <b>Address 2:</b> <b>City:</b> City <b>State:</b> ST <b>Zip:</b> 12345 <b>Country:</b>	<b>Additional Information:</b>  <b>Organizational Type</b> Municipal Security Issuer  <b>Federal Tax EIN:</b> 43-6767676
<b>Master Account Administrator:</b>  <b>First Name:</b> Bob <b>Middle Name:</b> <b>Last Name:</b> Doe <b>Name Suffix:</b> <b>Email Address:</b> msrbcommunications@msrb.org <b>Phone Number:</b> 202 - 838 - 1500 <b>Ext.</b> <b>Address1:</b> 101 Main Street <b>Address2:</b> <b>City:</b> City <b>State:</b> ST <b>Zip:</b> 12345 <b>Country:</b>	<b>Required Documentation:</b>  1. Information on Letterhead - To be faxed or mailed 2. Second Form of Identification - To be faxed or mailed

13. After the account information is submitted, the MSRB will send an acknowledgement email to the Master Account Administrator at the email address provided. The email should be retained for record-keeping purposes and will be needed for changes to your registration before approval.

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

MSRB NUMBER (MSRB ID): P002139  
ORGANIZATION NAME: Issuer XYZ

Master Account Administrator: Bob Doe  
Federal Tax EIN: 43-6767676

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 this temporary key:

Temporary Key: DHLPUZWARF

Temporary Key Expiration Date: 4/1/2016 2:46:39 PM Eastern

Registration Link: <https://gw.msrb.org/msrb1/control/registration/FormalOA/key.asp>

Please keep this temporary key confidential to prevent unauthorized modification of your organization's information. This temporary key is for one-time use only, within 45 days of the date of this email.

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

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



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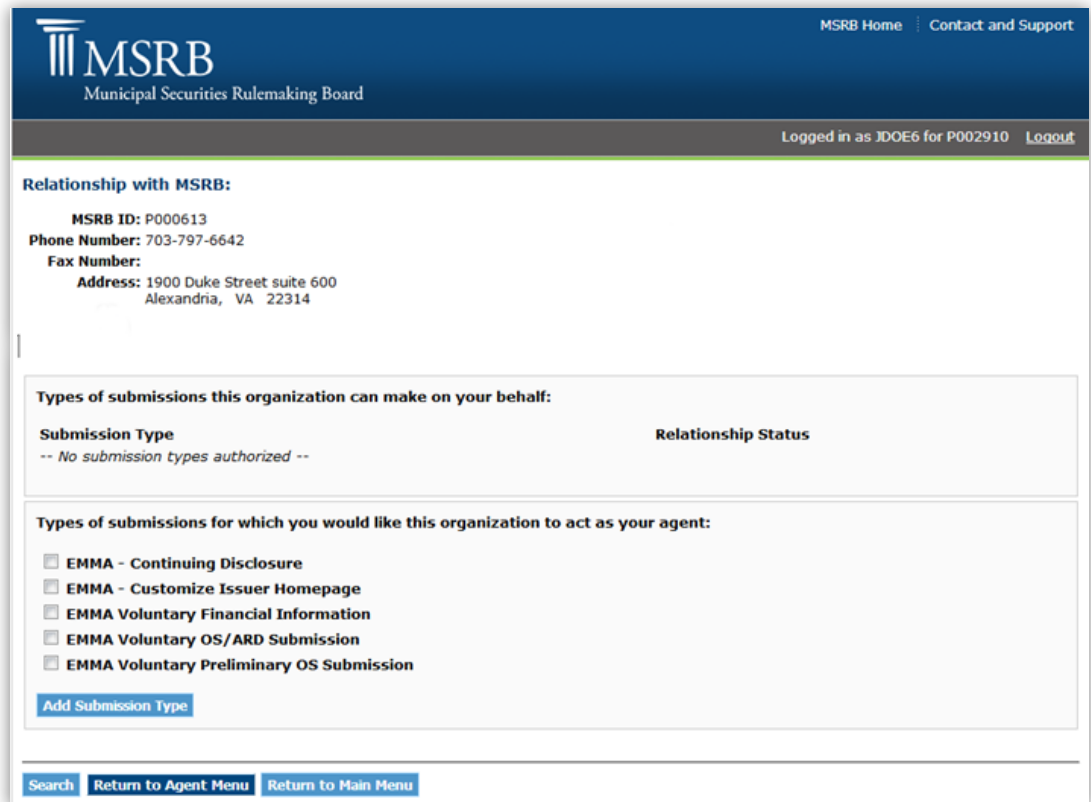
14. Issuers can now designate agents to customize homepages on their behalf. On MSRB Gateway, click "Manage Agent Relationships." On the following page, select "Designate an organization to act as your agent."

On the "Relationship with MSRB" page, select "Update Submission Types" to proceed with granting issuer homepage access to your agent.



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Check the second box, "EMMA - Customize Issuer Homepage," and then click "Add Submission Type."



The screenshot shows the MSRB website interface. At the top, there is a blue header with the MSRB logo and the text 'Municipal Securities Rulemaking Board'. To the right of the logo, there are links for 'MSRB Home' and 'Contact and Support'. Below the header, a dark grey bar indicates the user is logged in as 'JDOE6 for P002910' with a 'Logout' link.

The main content area is titled 'Relationship with MSRB:' and contains the following information:

- MSRB ID:** P000613
- Phone Number:** 703-797-6642
- Fax Number:**
- Address:** 1900 Duke Street suite 600  
Alexandria, VA 22314

Below this information is a section titled 'Types of submissions this organization can make on your behalf:'. It contains a table with two columns: 'Submission Type' and 'Relationship Status'. The table shows a single row with the value '-- No submission types authorized --' in the 'Submission Type' column and an empty cell in the 'Relationship Status' column.

Below the table is another section titled 'Types of submissions for which you would like this organization to act as your agent:'. It contains a list of five checkboxes, each followed by a submission type:

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


At the bottom of this section is a blue button labeled 'Add Submission Type'.

At the very bottom of the page, there is a dark blue footer with a search icon and three buttons: 'Search', 'Return to Agent Menu', and 'Return to Main Menu'.



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After the submission type has been checked and entered, the page will update its status to "Waiting for agent's approval." Your agent can now accept and confirm issuer homepage submission rights in their MSRB Gateway account.

 **MSRB**  
Municipal Securities Rulemaking Board

[MSRB Home](#) | [Contact and Support](#)

Logged in as JDOE6 for P002910 [Logout](#)

**Relationship with MSRB:**

**MSRB ID:** P000613  
**Phone Number:** 703-797-6642  
**Fax Number:**  
**Address:** 1900 Duke Street suite 600  
Alexandria, VA 22314

**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 checked="" type="checkbox"/> EMMA - Customize Issuer Homepage	Waiting for agent's approval

[Remove Relationship](#)

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

- 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](#)



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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.

Note: If you are upgrading an existing user account, you will receive a different acknowledgement email stating that the MSRB has received your request to upgrade your existing “CD Submission Account to an Organization Account.” After the MSRB approves the conversion, your existing MSRB ID will be automatically withdrawn. A new MSRB ID will be generated to identify the account as an organization account. Your user ID and password will remain the same.

For more information for Master Account Administrators on completing the organization account set-up, consolidating additional user accounts into your organization account and managing access, see the [MSRB Gateway User Manual for Issuers, Obligated Persons and Agents](#).

## MSRB Support

**Phone:**

202-838-1330

**Hours:**

7:30 a.m. – 6:30 p.m. ET

**Email:**

MSRBsupport@msrb.org

**Hours:**

7:00 a.m. – 7:00 p.m. ET



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