

Instructions to Upgrade or Consolidate an Individual Account

The MSRB is eliminating individual user accounts. If you have an individual user account, please follow the instructions below to either upgrade or consolidate your account. **The account upgrade process is only available to issuers and obligated persons.** If you are neither an issuer nor an obligated person, you will have to create a standalone organization account and use the consolidation method to join the existing individual account.

Upgrade Your Individual User Account to an Organization Account

Individual accounts can upgrade to an organization account in order to take advantage of the additional account management features and submission rights available with an organization account.

- To upgrade an individual account to an organization account, navigate to [Registration and Organization Account Set-up](#) and select the option to **Create an organization account**.
- Follow the steps as prompted to complete the conversion,
- Be sure to select the option that indicates you have an existing Gateway account and enter your user ID and Password.
- You will be required to provide your organization type and your Federal Tax EIN number, so make sure you have it available. **It is important to ensure your organization type is accurate before you proceed.**

After you submit the upgrade request, a new organization account will be created and remain in pending status until approved. While in pending status, access to the upgraded organization account is prohibited, but your existing individual 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.

After the MSRB approves the upgrade your existing MSRB ID will be automatically withdrawn and a new MSRB ID will be generated to identify the account as an organization account.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.

For more information on the upgrade process, refer to the [MSRB Gateway User Manual for Issuers, Obligated Persons, and Agents](#), pages 46 –52.

Consolidate Your Individual Account

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 individual account must act to affect 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 acting solely as an Agent by 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 how to request to be consolidated into an organization account.

- Log into [MSRB's Gateway System](#) using your user ID and password.
- From the main menu, click **Request Consolidation** under **Account and Organization Management**.
- Enter search criteria to find the organization with which you wish to consolidate.
- From the search results, select the organization and click **Send Request**.
- A pop-up message will appear that explains the impacts of consolidating. Click **OK** to proceed.
- 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**.
- *After receiving a notification email of the consolidation request The MAA for the organization will need to log into MSRB Gateway and accept the request*

While in pending status, additional requests to be consolidated cannot be sent.

For more information on the consolidation process, refer to the [MSRB Gateway User Manual for Issuers, Obligated Persons, and Agents](#), pages 53 – 64.