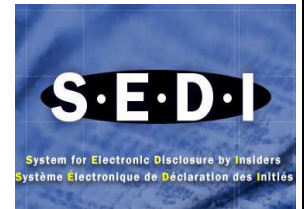# Logging in for the first time

Do I need to register to use SEDI?

You need to register on SEDI only if you need to file something on SEDI. If you simply want to search for information on the web site you do not need to be registered. You must be an individual to register on SEDI. An issuer that files information as an insider or issuer must use an individual that is an issuer representative or agent.

When do I need to register on SEDI?

For an issuer, you need to register before you file your issuer profiler supplement or issuer event report. For an insider, you need to register before you file your insider profile or initial insider report on SEDI.

How do I register on SEDI?

Before filing any information on SEDI, an insider, issuer representative or agent must have a valid and activated SEDI user account. The information required is prescribed by the SEDI User Registration Form (Form 55-102F5), posted under "Additional Information" on the SEDI Help page.

The following are the procedures to register as a SEDI user:
1. Go to the SEDI web site (www.sedi.ca) and click **"Register as a SEDI User"** in the top right navigation bar.
2. The **"Register as a SEDI user – Form 55-102F5"** screen opens.
3. Enter your personal information in the fields provided to complete Form 55-102F5.
4. Enter a question and answer, to which only you know the answer, in the confidential question and answer fields. This information will be used to confirm your identity should you contact the CSA Service Desk. Click **"Next"**.
5. The **"Accept terms of use – SEDI User"** screen opens. Review the terms of use and click **"Accept"**.
6. The **"Certify and submit registration information – Form 55-102F5"** screen opens. Verify the information and click **"Certify"**, then **"OK"**.
7. The **"Conditional registration completed"** screen opens and SEDI displays your User ID and Password. You need to make note of this information or you can print this page by selecting the print icon from your browser.
8. Scroll down the same screen and click the **"Printer friendly version"** button to generate a copy of your SEDI User Registration Form. You will need to sign and date the form in the space provided.
9. To complete your registration, fax, email or send the signed and dated form to the SEDI Operator, using the contact details provided on the form

The SEDI Operator will then process your registration by validating your information and activating your SEDI user account (this generally takes 24 hours). In order to submit filings, you must complete this registration process and have your account activated

Note: you should register only once on SEDI even though you may be an agent for many insiders

What information do I need to provide to register as a SEDI user?

You need to provide the following information:
1. your name
2. name of your employer and your position (if you are registering as an agent)
3. your address (your principal residence if you are an insider or your business address if you are an agent or issuer representative)
4. your daytime telephone number
5. your fax number if available
6. your email address if available (Note: if you would like to receive notification when your user account is activated, have the ability to reset your password online or receive filer bulletins via email, you will need to provide a personal email address. Users should avoid generic email addresses (e.g. "info@abc.ca") as the password reset link would be accessible to multiple parties.)
7. the capacity in which you will be using the system, i.e. as an insider, as an agent for an insider(s) and/or as an issuer representative. You can select more than one user classification by holding the **"CTRL"** key.
8. confidential question and answer (Note: enter a question and answer to which only you know the answer in the **Confidential question and answer** fields. This information will be used to confirm your identity should you need to reset your password online (see Forgot Your Password page) or contact the CSA Service Desk at 1-800-219-5381.)

What is the confidential question and answer I need to give?
If you forgot your password and have provided your email address in your profile, you will be able to reset your password online with the successful entry of the confidential question and answer you provided in your profile.

If you have not provided your email for an online password reset or you need to reset your access key, the SEDI operator will ask you a confidential question to verify that you are who you say you are. You should provide a question for which only you would know the answer. For example, "What is your favorite pet's name" etc. You must also provide an answer to the question.

In what capacity should I register on SEDI?
You should register either as an insider, issuer representative or agent user, or a combination of these. Each classification of user has different functions on SEDI that the user can access. Depending on the classification chosen, you will be able to log on to the relevant user home page with various functions available.

When should I register as an insider?
You should register as an insider if you are an insider and you will only be filing an insider profile and insider reports for yourself and no one else. Otherwise, if you are filing insider profiles and insider reports for one or several insiders (other than yourself), you should register as an agent, and not as an insider.

When should I register as an issuer representative?
You should register as an issuer representative when all you are going to do is file an issuer profile supplement and any issuer event reports for one issuer. If you are filing for more than one issuer, you should register as an agent, not as an issuer representative.

When should I register as an agent?
You should register as an agent when you will be filing:

- insider information for one or several insiders other than yourself,

- issuer information for more than one issuer,

- insider and issuer information for yourself, several insiders and an issuer.

When am I issued a password and User ID or an access key and Profile Number and how are they different?
You will be issued a password and a SEDI user ID after you complete, certify and submit your SEDI user registration on the system. The password is tied to the SEDI user ID and allows you, as that user, to log on to SEDI.

Each time you create an insider profile or an issuer profile supplement, SEDI will display an insider number (for the insider profile created) and an access key online (for the insider profile or issuer profile supplement created). In addition, SEDI will also send a letter containing the access key to the insider or issuer representative.

An access key is a case-sensitive, alpha-numeric code tied to either an insider or issuer profile supplement that allows you, as an agent, insider or issuer representative, to make a filing after the insider profile or issuer profile supplement is created. The system gives one access key per profile. Call the CSA Service Desk at 1-800-219-5381, if you forget your password or your access key.

How long will it take for the SEDI operator to validate my registration?
The SEDI operator anticipates a turnaround time of 24 hours, assuming your form is properly completed and signed. However, you are encouraged to register well before you need to file an insider report or an issuer profile and supplement.

How do I find out if my account has been activated?
The SEDI operator does not send notification when your account has been activated. To know if your account has been activated, log on SEDI and click on **"Your user information"**. Verify the **Registration status** field on the **"View your user information"** page. If your SEDI user account has been activated, your registration status should display the word **"Activated"**.

Can I submit my user registration without entering a postal/zip code because I reside outside North America?
Yes. You do not need to enter a postal code or zip code if you live outside North America. Complete the field by entering **"Not applicable"**.