

IFIC SEDAR+ Update

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Agenda

- SEDAR+ planning and upcoming changes
- Filer engagement and feedback
- Filer support
- Q&A



Planning

Through prioritization, we identify what will have the greatest impact on the largest number of users, while working within the limits of our available resources. In our planning, we seek input from our diverse group of users.

Our priorities include:

- Improving usability and performance
- Implementing regulation changes
- Ongoing system security monitoring and enhancements



Upcoming changes

- Address top filing issues:
 - Unacceptably slow for larger investment fund groups to file
 - General performance during filing
 - RED filing process
- Implement changes that support proposed CSA rule amendments (for example):
 - Extending the lapse date for investment fund prospectuses (published for comment Dec '22)
 - Filings for Well-Known Seasoned Issuer (WKSI) regulation (published for comment Sep '23)



IFG with 167 Issuers (000015857)

Create long form prospectus (NI 41-101)

Submitted at 12 Jun 2024 14:01 EDT

Long form prospectus (NI 41-101)

If fees are associated with the submission then the draft status on Dashboard will be updated and you will receive an email with new fees. If fees are associated with your submission, it will be sent to the filer.

[Take me to my dashboard](#)

Dashboard

Print

Welcome Your profiles Profiles you are watching **Drafts 2** Submitted work

Drafts 2

Search by profile name or number

Draft - fee calculation pending

List of profiles, projects, filings, or applications that are currently saved as drafts and not yet submitted or returned submissions.

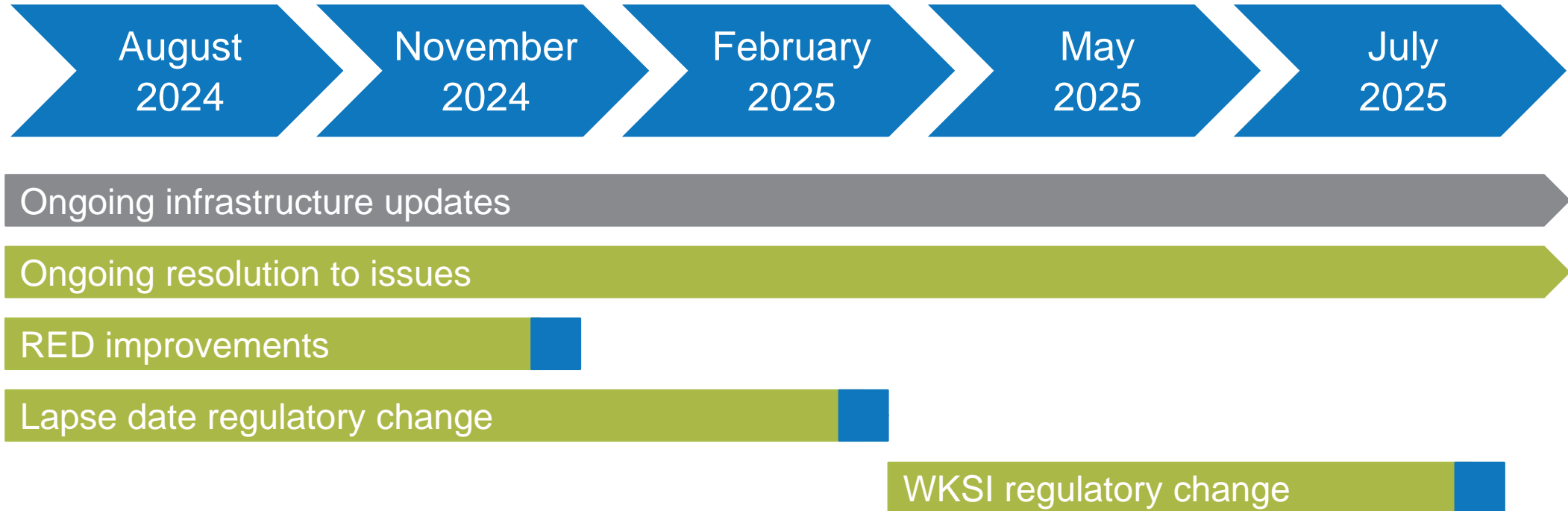
Displaying 1-2 of 2 results

Date created	Date last updated	Draft Status	Name	Description	Number	Expires in	Discard	Continue	Assign to me	Assigned to
15 May 2024 15:42 EDT	15 May 2024 15:42 EDT	Draft - fee calculation pending	IFG With 167 Issuers / IFG With 167 Issuers (000015857)	Create long form prospectus (NI 41-101)	TEMP00 2413	13 Aug 2024	Discard	Continue		ASU Mid EFA
17 May 2024 14:49 EDT	17 May 2024 14:49 EDT	Draft - fee calculation pending	IFG With 167 Issuers / IFG With 167 Issuers (000015857)	Create long form prospectus (NI 41-101)	TEMP00 2451	15 Aug 2024	Discard	Continue		ASU Mid EFA

Displaying 1-2 of 2 results



SEDAR+ Roadmap



Filer Engagement



Filer Engagement



SEDAR+ Updates webinars

- Held after each quarterly update



SEDAR+ User Community

- New forum started in May
- By invitation, ensuring fair representation, will evolve over time



SEDAR+ User Survey

- Every filing organization invited
- First survey in June/July



Feedback to CSA Service Desk

- Can be provided by email or phone
- Consolidated and provided to SEDAR+ team



Filer Support



Filing recommendations / tips

- SEDAR+ profile complete and accurate
- When you need fee exception codes
- Filing during off-peak hours for best system performance
- Set-up user accounts and secure authorizations ahead of filing
- View a RED filing before submission
- Find a fee grouping ID



Help and training resources

- **SEDAR+ support resources:**
 - Help articles: <https://www.sedarplus.ca/onlinehelp/>
 - Popular guides and resources: <https://www.sedarplus.ca/onlinehelp/guides-and-resources/>
 - Course videos: <https://www.sedarplus.ca/training/>
- **SEDAR+ Updates webinar recordings, presentations and Q&A summaries:**
 - <https://www.securities-administrators.ca/about-sedar/sedar-transition/sedar-events/>
- **CSA Service Desk:**
 - Get support or report technical problems to:
 - 1-800-219-5381 or sedarplus@csa-acvm.ca



CSA/ACVM

Canadian Securities
Administrators

Autorités canadiennes
en valeurs mobilières

Q&A

