



Email Reminders for Recurring Financial Disclosures

Email reminders on the [Electronic Municipal Market Access \(EMMA®\) website](#) can help ensure timely filing of annual and quarterly financial disclosures, including annual financial information, audited financial statements, annual budgets and quarterly financial statements.



This feature is available to municipal securities issuers, obligated persons and other continuing disclosure submitters that have an MSRB Gateway account and use this account to log in to EMMA Dataport. Additional email recipients can be added to a scheduled reminder. This helps ensure anyone with a role in preparing and filing financial disclosures is advised of upcoming filing deadlines.

About EMMA®

The EMMA website is funded and operated by the Municipal Securities Rulemaking Board (MSRB), the self-regulatory organization charged by Congress with promoting a fair and efficient municipal securities market. EMMA is designated by the U. S. Securities and Exchange Commission as the official source for municipal securities data and disclosure documents. The website provides free public access to objective municipal market information and interactive tools for investors, municipal entities and others. EMMA supports municipal market transparency but is not a platform for buying or selling bonds.

Access Email Reminders

1. Log in to the EMMA website at emma.msrb.org and click the "EMMA Dataport" tab.
2. Click on the "Login to MSRB Gateway" button. Enter your MSRB account user ID and password, and click "Login." You will be directed to the EMMA Dataport Submission Portal.
3. Select "Manage Financial Disclosure Email Reminders."

Schedule Email Reminders

1. From EMMA Dataport, click the link to "Manage Financial Disclosure Email Reminders."
2. Click the button to "Create Reminder."
3. The default email address is the one associated with the user logged into EMMA Dataport. Consider including additional recipient email addresses

for anyone with a role in preparing and filing financial disclosures, including internal staff, a municipal advisor and bond counsel.

4. Select the type of financial disclosure for which you wish to receive an email reminder. If you select "Other," you can provide notes about the type of disclosure in the description section at the end of the form.
5. Specify the due date of the filing.
6. Indicate when you wish to receive the email reminder by entering the number of days prior to the due date of the filing. Email recipients will receive an additional reminder one calendar day before the filing due date.
7. Select the frequency for a recurring submission from the Repeat options.
8. In the Description section, provide details about the filing or other relevant information that you would like to be included in the email reminder to



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assist with making the submission. For example, enter the issue description or the document name.

9. Once you have completed all of the fields, click the "Create Reminder" button. The reminder you just created will appear on the Financial Disclosure Email Reminder screen. You and any other designated email recipients will receive emails on the specified date and one day prior to the filing due date.

Manage Email Reminders

1. To make any changes to a scheduled reminder, click the "Edit" link to view and update the scheduling form.
2. Make the necessary changes and click the "Update Reminder" button. Changes are effective immediately.
3. To delete the reminder, click the "Delete" option on the right side of the reminder and click "Yes" when the confirmation screen appears.

► 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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