Creating a filing using the Form 13F-HR Assistant

The Form Assistants are useful tools that guide you through the process of creating a particular EDGAR form. When you add a software launcher to your Dashboard, any Form Assistants that are available for that software will also have buttons added to your Dashboard. These buttons will launch the software and automatically begin the process of creating a new submission for the selected EDGAR form type.

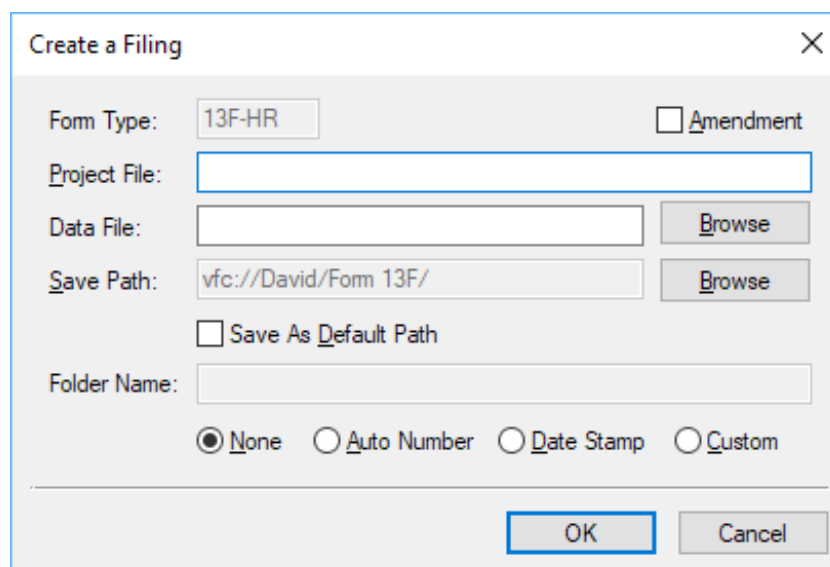The image below is the software launcher for the Form 13F software.
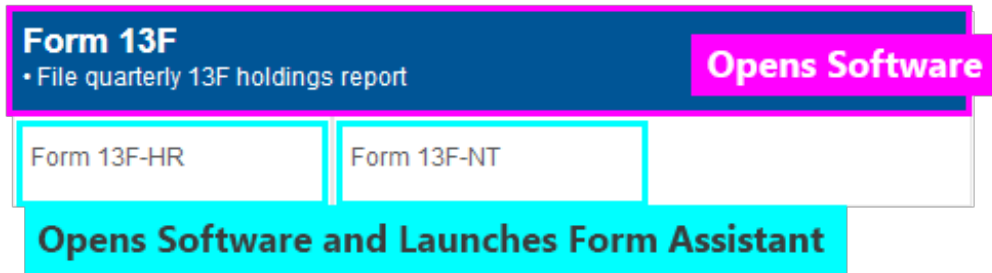
The 13F software has two Form Assistants:

- The **Form 13F-HR Assistant** guides you through the process of creating a 13F-HR or 13F-HR/A submission.

- The **Form 13F-NT Assistant** guides you through the process of creating a 13F-NT or 13F-NT/A submission.

The process for using both of these assistants is the same. To create a new 13F-HR filing using the Form 13F-HR Assistant:

1. Add the Form 13F software launcher to your Dashboard, if you have not already done so.

2. Click on the Form 13F-HR button.

3. In the dialog that appears, set all of the pertinent information.

Amendment	Check if your submission is a 13F-HR/A filing. Leave unchecked for a 13F-HR filing.
Project File	Enter the name you want to use for your submission. This should be an EDGAR compliant submission name.
Data File	Enter the path and filename of a document to use as your information table. This document must be a properly formatted CSV file for import into the 13F filing. If you leave this field blank, the information table in the submission will be empty. You can import an information table at any time after the submission has been created.
Save Path	Enter the location you wish to create the filing. By default, this location is your Form 13F folder on your Virtual File Cloud.
Folder Name	If you choose a folder option other than *None*, you can save your filing in a subfolder created specifically for your submission. You can set a Folder Name and then have the assistant auto number the folders or add a date stamp automatically.

4. Press the OK button to create your submission.

> **Helpful Hints:**
>
> - You can set default filer information in your Preferences on the GoFiler Online portal. This information will be added to your 13F-HR submission automatically in the *Filer Information* when you create a new project using the Form Assistant.