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Click this link to view timeline entries in [calendar format](#) or grouped by [phase](#).  
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Date	Phase	Information	Category	Audience
06/28/2021	2d	Test Environment Opens for Options Phase 2d reporting requirements	Testing & Readiness	<ul style="list-style-type: none"><li>Industry Members</li></ul>
12/13/2021	2d	Production Go-Live for Options 2d reporting requirements	Release Availability & Compliance	<ul style="list-style-type: none"><li>Large Industry Members</li></ul>
12/13/2021	2a	Small Firms: Production Go-Live for Equities 2a reporting requirements	Release Availability & Compliance	<ul style="list-style-type: none"><li>Small Non- OATS Reporters</li></ul>
12/13/2021	2b	Small Firms: Production Go-Live for Options 2b reporting requirements	Release Availability & Compliance	<ul style="list-style-type: none"><li>Small OATS Reporters</li><li>Small Non- OATS Reporters</li></ul>
12/13/2021	2c	Small Firms: Production Go-Live for Equities 2c reporting requirements	Release Availability & Compliance	<ul style="list-style-type: none"><li>Small OATS Reporters</li><li>Small Non- OATS Reporters</li></ul>
12/13/2021	2d	Small Firms: Production Go-Live	Release Availability & Compliance	<ul style="list-style-type: none"><li>Small OATS</li></ul>

Date	Phase	Information for Options 2d reporting requirements	Category	Audience
12/13/2021	2d	LTID Account Information Reporting Go-Live for Phase 2d (Large Industry Members)	Release Availability & Compliance	<ul style="list-style-type: none"> <li>Reporters</li> <li>• Small Non-OATS Reporters</li> <li>• Developers</li> <li>• Large Industry Members</li> <li>• Plan Participants/Other Regulators</li> <li>• Service Bureaus</li> </ul>
		Topics		
		<a href="#">Q. Customer and Account Information</a>		
12/13/2021	2d	LTID Account Information Reporting Go-Live for Phases 2a, 2b, 2c and 2d (Small Industry Members)	Release Availability & Compliance	<ul style="list-style-type: none"> <li>• Developers</li> <li>• Small OATS Reporters</li> <li>• Small Non-OATS Reporters</li> <li>• Plan Participants/Other Regulators</li> <li>• Service Bureaus</li> </ul>
		Topics		
		<a href="#">Q. Customer and Account Information</a>		
01/31/2022	2e	Customer and	Testing & Readiness	

Date	Phase	Information	Category	Audience
		Account Information - Test Environment Opens		<ul style="list-style-type: none"> <li>Industry Members</li> </ul>

Topics

[Q. Customer and Account Information](#)

**07/11/2022**

2e

Customer and Account Information - Production Environment Go-Live

Release Availability & Compliance

- Industry Members

Topics

[Q. Customer and Account Information](#)