



Linda McCulloch

MONTANA SECRETARY OF STATE

SIMPLIFY YOUR BUSINESS FILINGS

Webinar: Preparing to File Online with the
MT Secretary of State's Office

May 2016



Montana Secretary of State
Information Management System

sos.mt.gov

For Business Owners with an **ENTITY ACTIVATION CODE**

Welcome to SIMS (BE)!



We are pleased to announce that we are updating our business filing system to allow for online business registration and management.

The Secretary of State Information Management System (SIMS) Business Entity (BE) system will allow you to file and maintain all of your business documents online 24/7 from the convenience of your home or office.

Save time, money, and get results in minutes instead of weeks!

Welcome to SIMS (BE)
Our new online business filing system

WHAT?
is SIMS (BE)
Simplify all your business filings. File business forms, request copies and certificates, access business reports, and more...

Simply File Online!

Hooray!
Coming this SUMMER!*

WHAT do I need to do now?

- 1 Save Your Code**
Save your **Activation Code**. You will need it to access the system after launch.
- 2 Learn More**
Visit sos.mt.gov to learn more. Read step-by-step instructions, watch a video, and connect with us. Coming soon...
- 3 Register**
Register and Login using ePass.
- 4 Enter Your Code**
Select your entity and enter your **Activation Code**.
- 5 Simply File Online**
View and maintain all entities you have been granted limited authority to.

After launch...

WHY should I file online?

SIMS (BE) will make filing business documents more efficient, convenient, and will be accessible 24/7.
Not a computer person? No problem. You can still file paper documents.

Save money (money bag icon)
Save time (clock icon)
Secure information (lock icon)
Access anytime (24/7 icon)
Get your documents faster (document icon)

Simply File Online



Agenda



Montana Secretary of State
Information Management System

- Welcome to SIMS (BE)!
- What's New? What's Not?
- About Authority
- Account Registration
- Q&A

What's New?

File Online	Assumed Business Names (ABN) Corporations (Profit, Nonprofit) Limited Liability Company (LLC) Partnerships (LP, LLP) Trademarks
ePass Integration	ePass Montana allows you to access authorized eGovernment services using one username and password
Order and download copies online	Business Documents Certificate of Fact Specialized Reports
Personalized Dashboard	Quickly access frequently used tasks with Do It Now Track the status of your document(s) Track your unfinished business Receive important business reminders Monitor your subscription services Monitor your online payments
Watchlist	Monitor your business or another business



What's Not?

The following items must be filed by paper:

Associations	Cooperative Associations Agricultural Associations Cooperative Agricultural Marketing Association Rural Cooperative Utilities Rural Cooperative Associations Water Users Association
Bonds	Geophysical Exploration Bonds School Text Book Bonds Pesticide Bonds
Corporation Authorities	Regional Water and Wastewater Authority Cemetery Associations Mausoleum-Columbarium Authorities Regional Resource Authorities Municipal Housing Authorities County Housing Authorities
Districts	Special Districts Resort Area Districts Water &/or Sewer Districts Conservation Districts Conservancy Districts Grazing Conservation Districts
Financial Institutions	Credit Unions Investment Companies Trust Companies (except Business Trust and Fiduciary Trusts may be filed online) Development Corporations Building and Loan Associations
Mergers	All Mergers

What's New?



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Business Entity
Registration

ONLINE SERVICES ▾

Dashboard

DO IT NOW

- Register an Assumed Business Name
- Register a Limited Liability Partnership
- Form a Domestic Limited Liability Company
- Form a Domestic Corporation
- Form a Domestic Nonprofit Corporation
- Qualify a Foreign Corporation
- Qualify a Foreign Limited Liability Company

My Items **11** Watchlist **6** Watched Items **0**

Displaying 1-11 of 11 results

Trademarks	ANDERSON STEEL & DESIGN (T016750)
Business Entities	Darkness Condominium Association (D1019909)
Business Entities	GREEN INVESTMENTS, LLP (P192683)
Business Entities	Jake C030 LLP (P1019912)
Business Names	MONTANA GRANITE (A090093)
Trademarks	MONTANA SANTA (T029220)
Trademarks	MONTANA'S BUSINESS LAW FIRM (T026387)

My Unfinished Business **1** My Recently Finished Business **24** My Reminders **0** My Subscriptions **0** My Service Orders **2**

Displaying 1-1 of 1 results

	Description	Status	Created	Due Date	Discard
Trademarks	Renew Mark for T028426 (ROCKY MOUNTAIN ROTORS MONTANA) REVISE REASON(S) sdfg <i>The business entity entered as an owner is not an active entity</i>	Revise	05/09/2016	06/07/2016	



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About Authority

What is Authority?

Authority is the ability to file documents online on behalf of a company.

Who can have Authority?

- Principals, Directors, Owners, Managers, Members, etc.
- Certain Authorized Persons (such as Registered Agents, Service Companies, etc.)

How do I get Authority?

Existing Companies

If the company was in existence before launch, authority must be established using an Activation Code as described in the Account Registration process of this presentation.

New Companies

The person who forms the company online will be automatically granted Authority. If that user has incorporated the company on behalf of an organization (for example, their employer), that user will then need to grant Authority to the principals of that organization.

About Authority





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Information Management System

ACCOUNT REGISTRATION

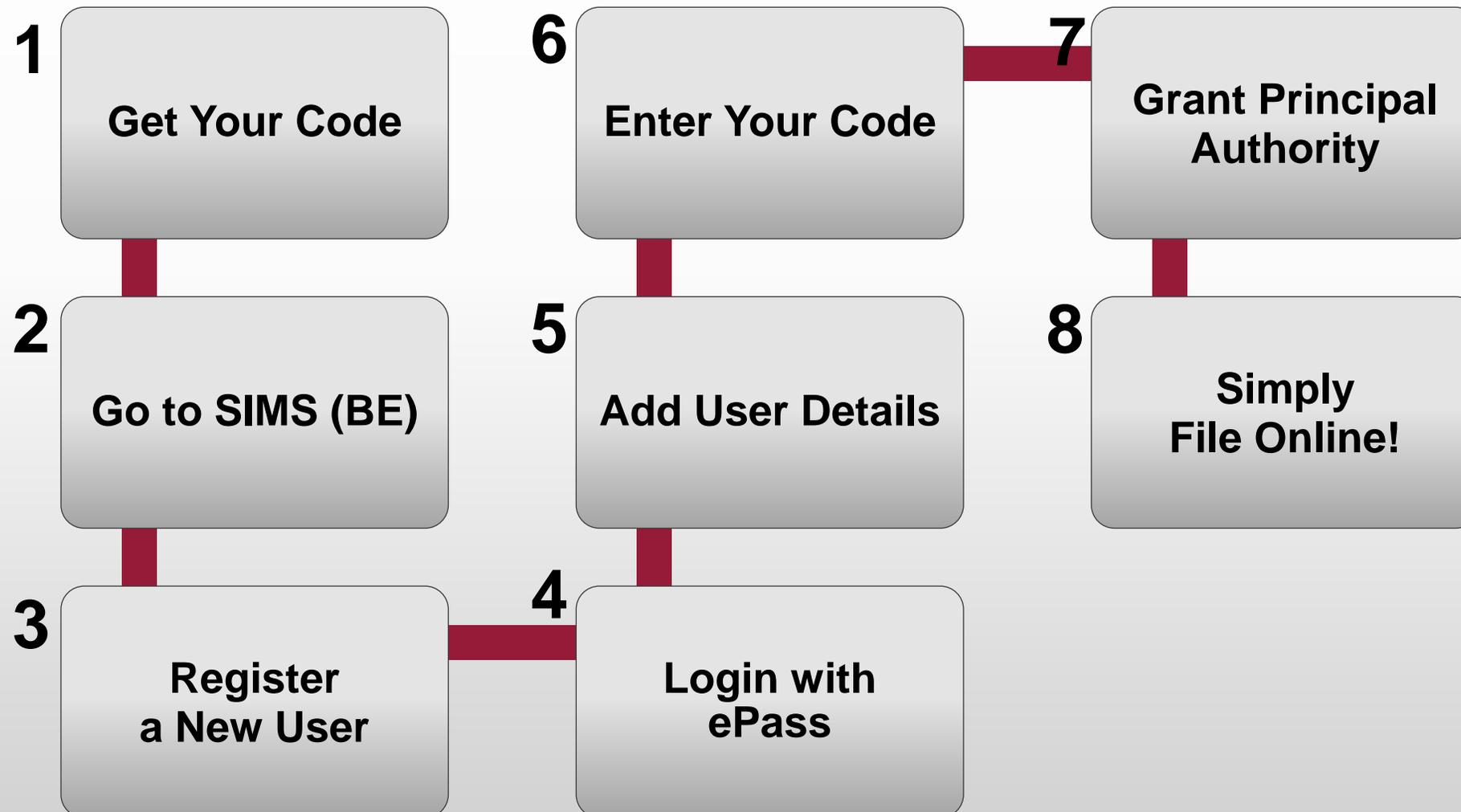
For Business Owners with an **ENTITY ACTIVATION CODE**



Montana Secretary of State
Information Management System

Account Registration

For Business Owners with an ENTITY ACTIVATION CODE



Account Registration

For Business Owners with an ENTITY ACTIVATION CODE



Dear Business Customer,

I'm pleased to announce that we are updating our business filing system to allow for online business registration and management.

The Secretary of State Information Management System (SIMS) Business Entity system will allow you to file and maintain all of your business documents online 24/7 from the convenience of your home or office. Save time, money, and get results in minutes instead of weeks.

To get started after launch, you will need the following ENTITY ACTIVATION CODE to establish your account.

ENTITY ACTIVATION CODE: XXXXXXXXXXXX

This code is unique to your business and **will be required** for online registration.

I have included more information about SIMS (BE) in this mailer. Please feel free to contact us directly with any questions you may have.

@SOSMcCulloch (406) 444-3665
 sosbusiness@mt.gov www.sos.mt.gov

STEP 1: Get Your Code

- Check your mailbox to receive your **ENTITY Activation Code.**

[I did NOT receive an ENTITY Activation Code.](#)

[Why did I receive MULTIPLE Activation Codes?](#)

- You must have **Authority** to access SIMS (BE) and file online.

[What is Authority?](#)

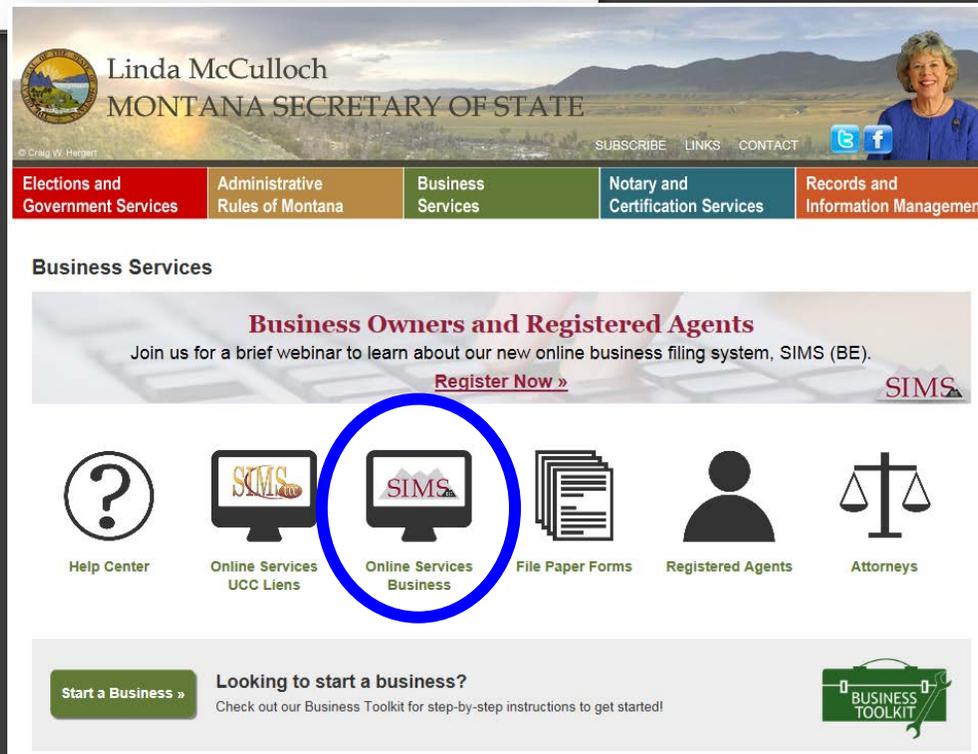
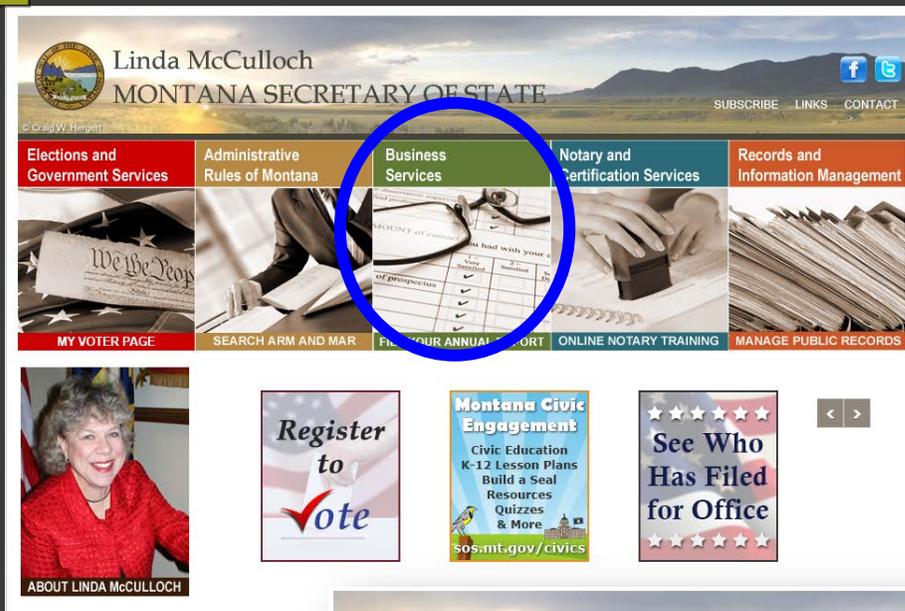


Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

STEP 2: Go to SIMS (BE)

- From sos.mt.gov, select **Business Services**.
- From the **Business Services** website, select **Online Services Business** to access **SIMS (BE)**.



Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

STEP 3: Register a New User

- From the **SIMS (BE)** website, click **Login with ePass** on the bottom right of the screen under **Register / Login**.
- You will be redirected to **ePass**.

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Draft

SIMS Business Entity Registration

ONLINE SERVICES ▾

Welcome to Montana Secretary of State's Online Business Filing System!
Simplify your business filings. File Business forms, request copies and certificates, access business reports, and more from the convenience of your home or office 24/7.

What's New? What's Not?

To Register a New Account:
1) Login with [ePass](#)
2) Register a New User
3) Enter your Activation Code

Need Help?
Check out our [Help Center](#) to find answers to frequently asked questions, step-by-step instructions, how-to videos, and contact information.

Already registered?
Existing users can simply Login with [ePass](#).

Get Started...

▶ Search for a Business Learn how...	▶ File & Maintain Business Documents Learn how...
▶ Search Name Availability Learn how...	▶ File Online Annual Report Learn how...
▶ Find a Commercial Agent Learn how...	▶ File Paper Annual Report Learn how...
▶ Request Business Information Learn how...	▶ Subscribe and Monitor Learn how...

Authorization Required!

Confirm Your Authority
You must have authority over a business in order to maintain company information. Authority is granted to Companies and Agents with an Activation Code. [Learn more...](#)

Register / Login

Register a New Account
The first time you login, you will need to register using a new or existing [ePass](#) account, create a new user and enter your activation code.

Login with ePass
[ePass](#) Montana allows you to access authorized government services with a single username and password. [What's ePass?](#)

[▶ Login with ePass](#)

Help Center | [sos.mt.gov](#)

SIMS Montana Secretary of State Information Management System

Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

STEP 4: Login with ePass

- From **ePass**, select **Login with ePass Montana**.
- Then, **Login with an Existing User Account**, or **Create a New User Account**.
- Enter **ePass** account information.
- **ePass** will redirect you back to SIMS (BE).

I am also a State Employee. How should I login?

Home » Welcome to ePass Montana

ePass Montana is a convenient and secure way to access Montana government services.

Instructions How Do I Feedback

ePass Montana Login Hide

Login with ePass Montana

Login with your ePass Montana account. If you do not have an account, you can create one here.

Login

State Employee Login Hide

Login with State Employee Account

Login with the username and password you use for the state network.

Login

Home » ePass Montana Login

ePass Montana provides access to all authorized eGovernment services using one username and password.

Instructions How Do I Feedback

Existing User

Username:

Password:

[Forgot your Username or Password?](#)

Login

New User

Create an ePass Montana account by selecting the button below:

Create an Account

Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

Security Activation code

New User Account

Please select from the following options.

I received a SECURITY Activation Code

I did not receive a SECURITY Activation Code

Register new user

Cancel

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STEP 5: Add User Details

- From the SIMS (BE) Security Activation Code screen, select the option:
*'I did **NOT** receive a **SECURITY Activation Code**'*
- Please note:** There are multiple types of Activation Codes. Your **ENTITY Activation Code** that you receive in the mail will be entered NEXT, *after* you create your account.
- Enter **User** and **Contact Details** to **Register a New User** with **SIMS (BE)**.
- Required fields are marked with an asterisk (*).
- Click **Create**.

Register New User

I also want to create an Organization

User Details

Title * -- Please Select --

First Name * John

Middle Name

Last Name * Smith

I use the following for navigation * Standard (i.e. keyboard & mouse)

Contact Details

Email Address * jsmith@mt.gov

Confirm Email *

Telephone Number

Country Area Phone Extension

Fax

Country Area Number

Mobile Number

Country Area Number

Physical Address

Country United States

Zip/Postal Code *

Address

City *

State/Province * -- Please Select --

Postal Address

Postal address is the same as physical address

Cancel Create

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Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

A

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ONLINE SERVICES ▾

- Form a New Business >
- Commercial Registered Agents >
- Trademarks >
- Request For Information >
- Payments >
- Subscriptions >
- Confirm Receipt Of ENTITY Authority**
- Search for an Entity

Business Names
Business Entities
Commercial Registered Agents
Trademarks

B

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ONLINE SERVICES ▾

Confirm Receipt of ENTITY Authority

Activation code *

Authority Type * Principal Authorized Person

[Cancel](#)

C

Confirm Receipt of Authority

CPV APR9 TEST FOREIGN CORP (E1111847) [Foreign Profit Corporation]

* I, Cora Org User, confirm that I am legally entitled to file documents in respect of this entity

[Cancel](#)

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Information Management System

STEP 6: Enter Your Code

- From the Online Services menu, select **'Confirm Receipt of ENTITY Authority'** and choose the appropriate register from the sub-menu.
- On the **'Confirm Receipt of Entity Authority'** page, enter the **ENTITY Activation Code** from your mailer and press **'Validate'**.
- On the **'Confirm Receipt of Authority'** page, check the confirmation box, and click **'Submit'**.

Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

View Business Entity

GREEN INVESTMENTS, LLP (P192683), Domestic Limited Liability Partnership

Maintain Authority ▾ Request Entity Information ▾ Maintain ▾

Grant Authority
View Authority Principals Documents History Details Activity

Entity Name	GREEN INVESTMENTS, LLP
Entity Status	Active Good Standing
Business Identifier	P192683
Entity Type	Domestic Limited Liability Partnership
Type of Limited Liability Partnership	Limited Liability Partnership
Formation Date	07/08/2011

Grant Authority

GREEN INVESTMENTS, LLP (P192683) [Domestic Limited Liability Partnership]

Authority Type Requested *

Principal Authorized Individual Agent Authorized Organization Agent

<input checked="" type="radio"/> Name	SUSAN GREEN
Residential Address	United States
Postal Address	16640 BECKWITH AVENUE, FRENCHTOWN, MT, 59834, United States
Email Address	[Not Provided]

Send authority request to *

[Cancel](#)

STEP 7: Grant Principal Authority

- After confirming receipt of authority, you must grant PRINCIPAL Authority to one or more Principals.
- To do this, select '**Grant Authority**' from the '**Maintain Authority**' menu on the '**View Business Entity**' page.
- Then, select '**Principal**' for the **Authority Type Requested**, select the name of the principal, enter an email address to send the authority request to, and click '**Submit**'.



Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

STEP 8: Simply File Online!

- Welcome to SIMS (BE)!
- You can **View and Maintain the Entity** you have been granted authority to from the 'My Items' tab on your **Dashboard**.

Check out our [Help Center](#) to learn more about how to get started.

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ONLINE SERVICES

Dashboard

DO IT NOW

- Register an Assumed Business Name
- Register a Limited Liability Partnership
- Form a Domestic Limited Liability Company
- Form a Domestic Corporation
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DID you know?

Our office currently processes
~315,000
paper business filings a year.



Time for an upgrade!

Our current paper-based legacy business system was created in

1977



Today filing a typical paper business document may take **weeks** to complete

After launch, you'll be able to do it online in **minutes!**



QUESTIONS?



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www.sos.mt.gov