



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 Registered Agents with a **REGISTERED AGENT 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...

After launch...

- 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.

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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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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ACCOUNT REGISTRATION

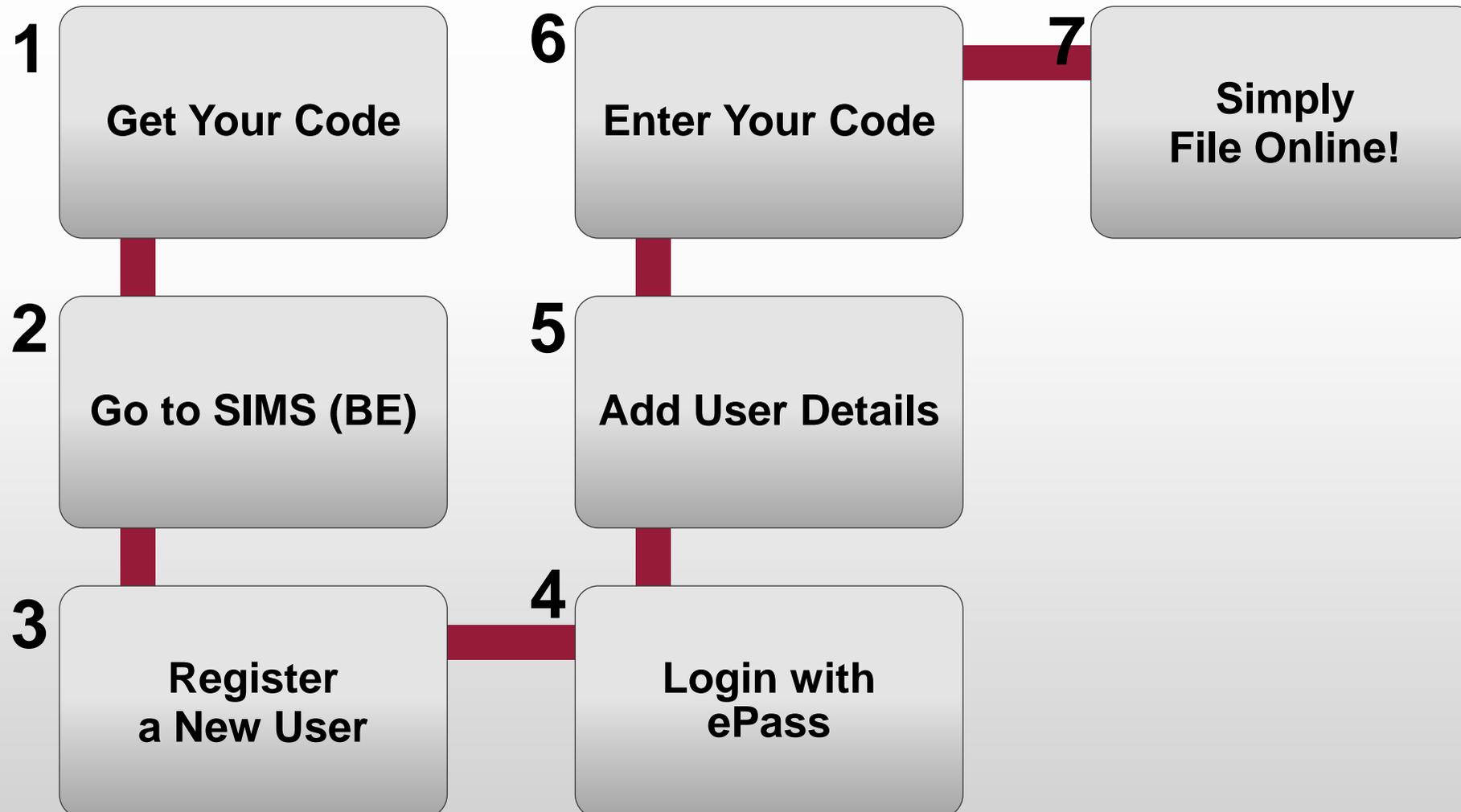
For Registered Agents with a **REGISTERED AGENT ACTIVATION CODE**



Montana Secretary of State
Information Management System

Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE



Account Registration

For Registered Agents with a REGISTERED AGENT 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 REGISTERED AGENT ACTIVATION CODE to establish your account. (Please note: this code is also your PID #.)

REGISTERED AGENT 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 **REGISTERED AGENT Activation Code.**

I did NOT receive a REGISTERED AGENT Activation Code.

Why did I receive MULTIPLE Activation Codes?

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

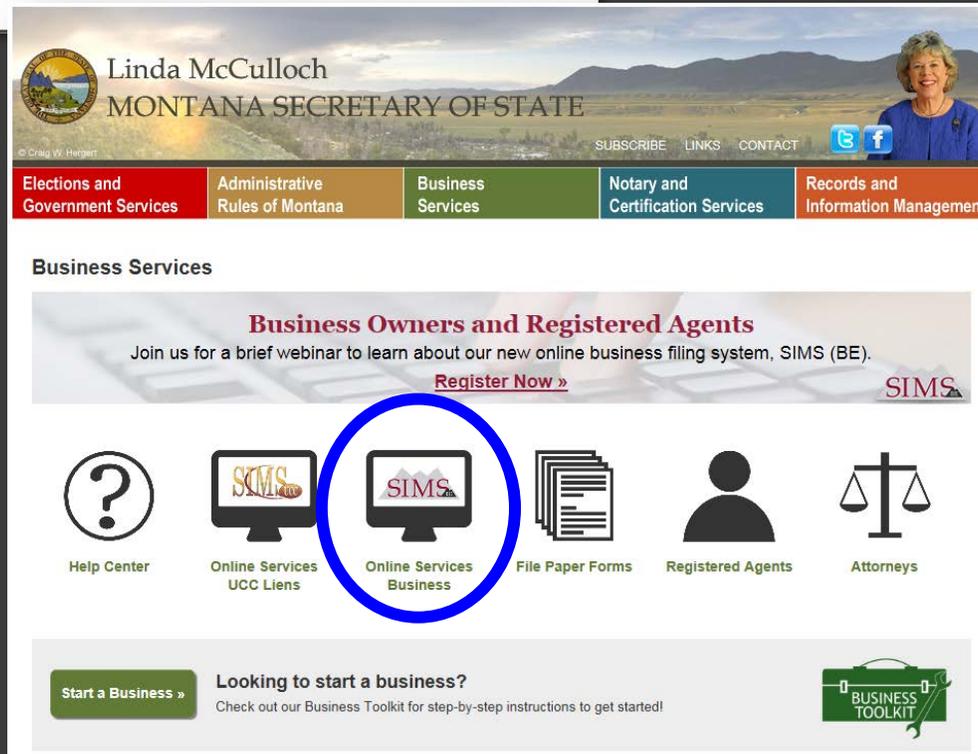
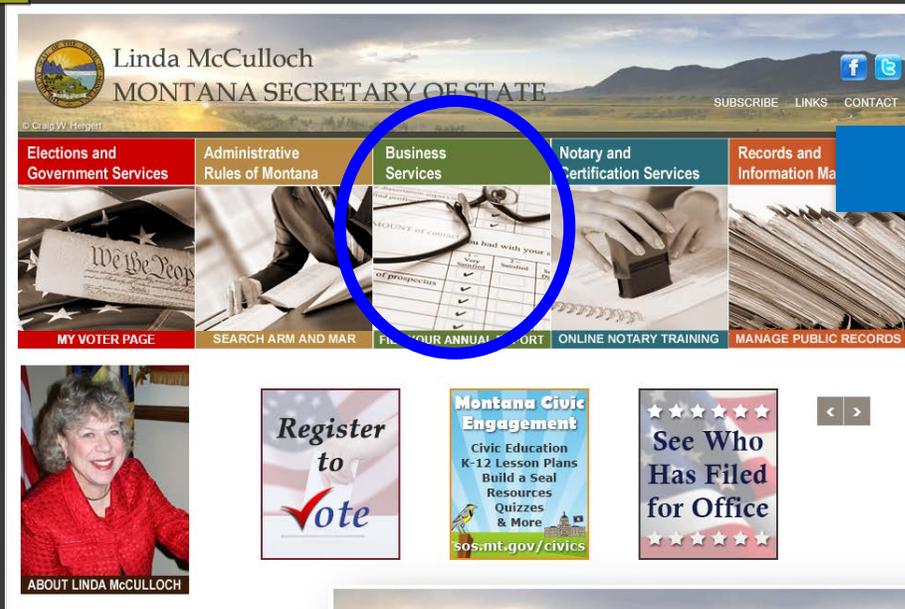
What is Authority?

Account Registration

For Registered Agents with a REGISTERED AGENT 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 Registered Agents with a REGISTERED AGENT ACTIVATION CODE

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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

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

Get Started...

- ▶ Search for a Business [Learn how...](#)
- ▶ Search Name Availability [Learn how...](#)
- ▶ Find a Commercial Agent [Learn how...](#)
- ▶ Request Business Information [Learn how...](#)
- ▶ File & Maintain Business Documents [Learn how...](#)
- ▶ File Online Annual Report [Learn how...](#)
- ▶ File Paper Annual Report [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](#)

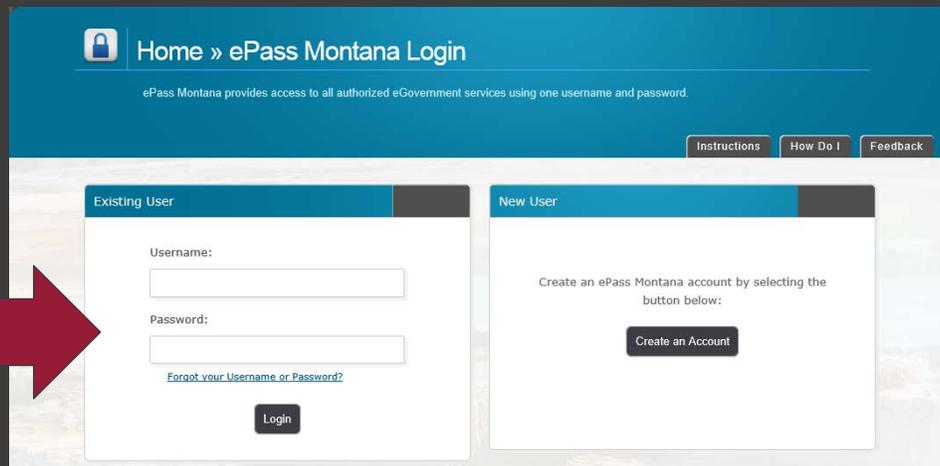
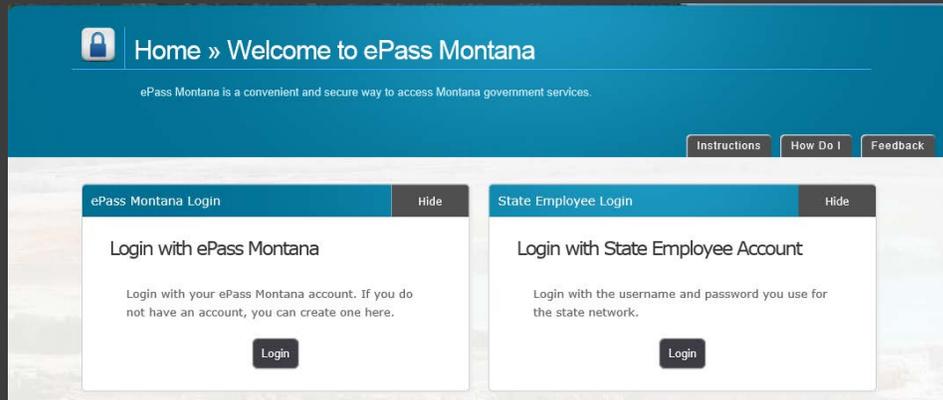
Help Center | [sos.mt.gov](#)

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**.

Account Registration

For Registered Agents with a REGISTERED AGENT 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?

Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

The screenshot shows the 'Security Activation code' screen. At the top, it says 'Security Activation code'. Below that, there's a section for 'New User Account'. There are two radio button options: 'I received a SECURITY Activation Code' and 'I did not receive a SECURITY Activation Code'. The second option is selected and highlighted with a blue box. There are buttons for 'Register new user' and 'Cancel'. At the bottom left is the SIMS logo and 'Montana Secretary of State Information Management System'. At the bottom right is 'Copyright © 2015'.

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 **REGISTERED AGENT 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**.

The screenshot shows the 'Register New User' screen. At the top, it says 'Register New User'. There's a checkbox 'I also want to create an Organization'. Below that is the 'User Details' section with fields for Title, First Name, Middle Name, Last Name, and a navigation preference. The 'Contact Details' section includes fields for Email Address, Confirm Email, Telephone Number, Fax, Mobile Number, and Physical Address (Country, Zip/Postal Code, Address, City, State/Province). There's a checkbox 'Postal address is the same as physical address'. At the bottom are 'Cancel' and 'Create' buttons. At the bottom left is the SIMS logo and 'Montana Secretary of State Information Management System'. At the bottom right is 'Copyright © 2015'.

A

Account Registration



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For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

- Form a New Business >
- Commercial Registered Agents >
- Trademarks >
- Request For Information >
- Payments >
- Subscriptions >
- Confirm Receipt Of ENTITY Authority >
- Search for an Entity**
- Assumed Business Names >
- Limited Liability Companies >
- Profit Corporations >
- Nonprofit Corporations >
- Partnerships >
- Trusts >
- Reserve a Business Entity Name
- Register a Foreign Business Name

STEP 6: Enter Your Code

- A. From the Online Services menu, select 'Search for an Entity'.
- B. On the 'Register Item Search' page, enter an Entity you represent as an agent. Click 'Search', and Select the Entity.

B



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ONLINE SERVICES ▾

Register Item Search

Item Search

Item Name or Number *

Select Register

System Through Date 04/11/2016

[Advanced](#)

[Cancel](#) [Reset Search](#) [Search](#)

Displaying 1-1 of 1 results

Business Entities
TREELINE SPRINGS, L.L.C. (C096587)
 Status Active Good Standing

Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

C



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View Business Entity

TREELINE SPRINGS, L.L.C. (C096587), Domestic Limited Liability Company

To maintain this entity you must [request authority](#)

[Add to My Watched Items](#) [Request Entity Information](#) **[Confirm Receipt Of REGISTERED AGENT Authority](#)**

General Details Documents History Details

Entity Name	TREELINE SPRINGS, L.L.C.
Entity Status	Active Good Standing
Business Identifier	C096587
Entity Type	Domestic Limited Liability Company

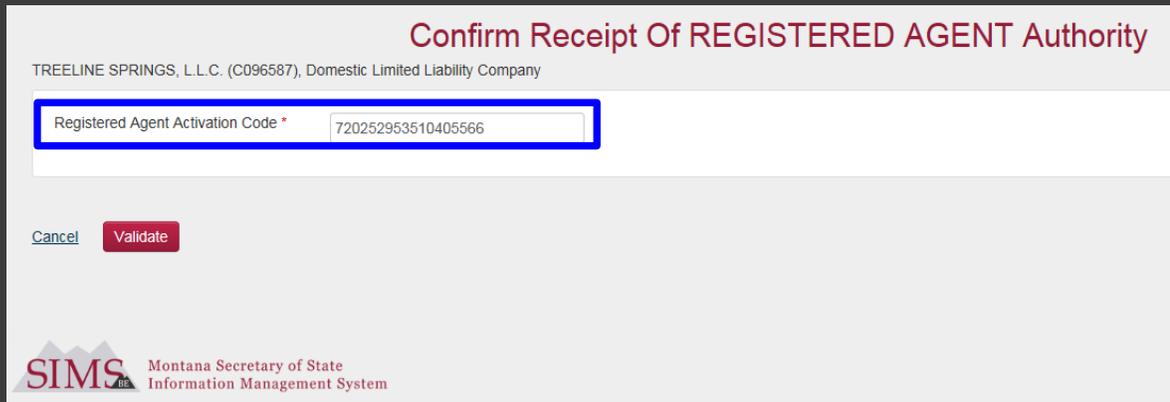
STEP 6: Enter Your Code, cont.

Once you have selected the entity...

C. On the 'View Business Entity' page, select the option 'Confirm Receipt of REGISTERED AGENT Authority'.

D. Then, on the 'Confirm Receipt of REGISTERED AGENT Authority' page, enter the **REGISTERED AGENT Activation Code** that you received in the mail and click 'Validate'.

D



Confirm Receipt Of REGISTERED AGENT Authority

TREELINE SPRINGS, L.L.C. (C096587), Domestic Limited Liability Company

Registered Agent Activation Code *

[Cancel](#) [Validate](#)

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Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

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ONLINE SERVICES ▾

View Business Entity

TREELINE SPRINGS, L.L.C. (C096587), Domestic Limited Liability Company

To maintain this corporation you must [request authority](#)

Request Entity Information ▾ Maintain ▾

- File Annual Report - Domestic Limited Liability Company
- Amend Annual Report
- Change of Registered Agent or Registered Office by Agent
- Resignation of Registered Agent (Voluntary)

General Details Principals

Entity Name
Entity Status Active Good Standing

Business Identifier C096587

Entity Type Domestic Limited Liability Company

Type of Limited Liability Company Limited Liability Company

Formation Date 11/25/1998

Expiration Date 12/31/2025

Last AR Filed Date 01/08/2016

State or Country of Jurisdiction

Country United States

State Montana

Registered Agent in Montana

Agent Name

STEP 7: Simply File Online!

- Welcome to SIMS (BE)!
- You can **View and Maintain Entities** you have been granted **LIMITED** authority to from the **'Maintain'** menu on the **'View Business Entity'** page.
- **LIMITED** authority enables you to file and amend an annual report, and change or resign an agent.
- The system will also grant you REGISTERED AGENT Authority for all other entities that contain your PID#.

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





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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