



Linda McCulloch

MONTANA SECRETARY OF STATE

SIMPLIFY YOUR BUSINESS FILINGS

Webinar: Preparing to File Online with the
MT Secretary of State's Office
October 2016



Montana Secretary of State
Information Management System

Audio Conference:
US Toll free: +1-855-797-9485
Event number: tbd#

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!

SIMS (BE) HAS LAUNCHED!

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. How will this work? Read step-by-step instructions, watch a video or connect with us.
- 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 the entity you have been granted authority to. Grant authority to one or more Principal(s).

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
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

What's Next?

Check out this section of our website for a list of planned enhancements and improvements that will be released in the upcoming weeks and months.

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

SIMS (BE) Welcome Page



Linda McCulloch
MONTANA SECRETARY OF STATE

Registry of Business
Services

🏠 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.

Need Help?

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

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 using a single username and password.

[What's ePass?](#)

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 & Monitor »](#)

[Learn how...](#)

SIMS (BE) Dashboard



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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	



Montana Secretary of State
Information Management System

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About Authority





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

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.

Activation Code Mailers

**Business
Owners**

**Registered
Agents**

**Registered
Agents**

*Representing 100
or more entities*

*Representing less
than 100 entities*

**ENTITY
ACTIVATION
CODE**

**SECURITY
ACTIVATION
CODE**

**REGISTERED
AGENT
ACTIVATION
CODE**

**PRINCIPAL
AUTHORITY**

**AUTHORIZED
AUTHORITY**

**REGISTERED
AGENT
AUTHORITY**



Montana Secretary of State
Information Management System

ACCOUNT REGISTRATION

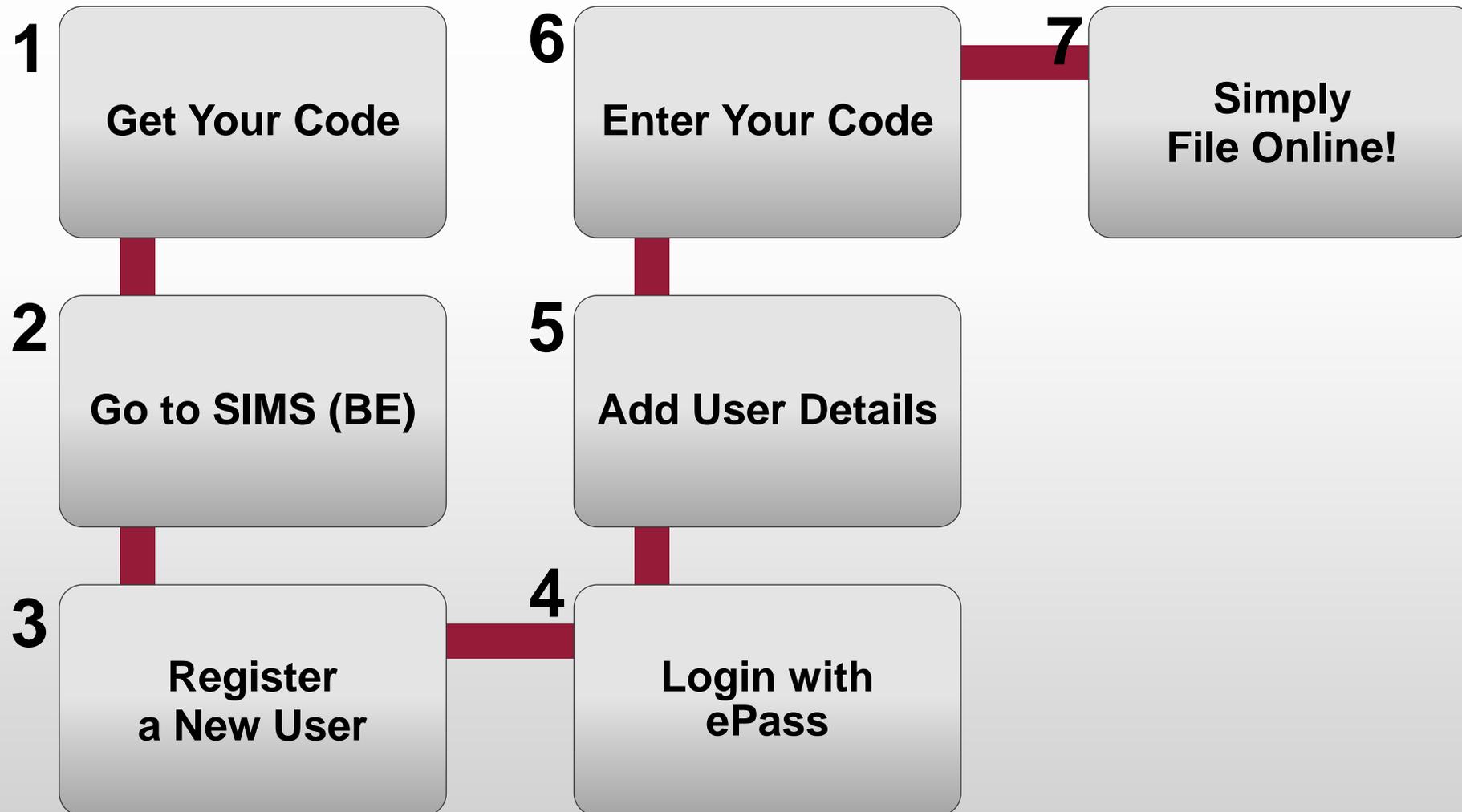
For Registered Agents with a **REGISTERED AGENT ACTIVATION CODE**



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)

- Go to sos.mt.gov
- Click on **Business Services**, or...
- Click on the **SIMS (BE)** icon in the middle of the page.

The screenshot shows the website for Linda McCulloch, Montana Secretary of State. The navigation menu includes: Elections and Government Services, Administrative Rules of Montana, Business Services (highlighted with a blue box), Notary and Certification Services, and RIM Government Employees. Below the menu are five main content areas: MY VOTER PAGE, SEARCH ARM AND MAR, FILE ONLINE WITH SIMS (BE) (circled in blue), ONLINE NOTARY TRAINING, and STATE & LOCAL GOV ONLY. At the bottom, there are three featured items: 'ABOUT LINDA McCULLOCH', a 'SIMS BE has launched! Are you ready?' announcement (circled in blue), 'MVP My Voter Page' with links to find polling places and track absentee ballots, and 'Montana Voter Information Pamphlet'.

Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

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MONTANA SECRETARY OF STATE

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SUBSCRIBE LINKS CONTACT

Elections and Government Services Administrative Rules of Montana Business Services Notary and Certification Services RIM Government Employees

Business Services

SIMS Business Entity Learn about SIMS (BE) activation codes, registration, FAQs, & more

Learn Learn about SIMS (BE) activation codes, registration, FAQs, & more

Start Login to form or maintain your business

Search Business Names or Name Availability

Request Login for Business Information (Copies, Certificates, Principals, & more)

UCC Liens Online Services File Paper Forms Registered Agents and Attorneys Business Toolkit Help Center

About Business Services

Flourishing businesses are critical to the economic vitality and stability of Montana. The Business Services Division is committed to working in close partnership with entrepreneurs who want to start, expand, or close a business in the state, as well as with out-of-state businesses seeking to open offices within Montana.

STEP 2: Go to SIMS (BE), cont.

- From the **SIMS (BE)** banner on the **Business Services** website, click on:
 - Learn:** to learn more about activation codes, registration, FAQs and more.
 - Start:** to login to **SIMS (BE)**.
 - Search:** to search for Business Names or Name Availability.
 - Request:** to find Business Information (Copies, Certificates, Principals, and more).
- Note:** the icons in the middle of the website allow quick access to the **UCC/Liens** system, **Paper Forms**, Resources for **Registered Agents and Attorneys**, our **Business Toolkit**, and the **Help Center**.

Account Registration

For Registered Agents with a REGISTERED AGENT 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.

I did NOT get redirected back to SIMS (BE).

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MONTANA SECRETARY OF STATE

ONLINE SERVICES

SIMS Business Entity Registration

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
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3. Enter your Activation Code

Need Help?
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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 & 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 using a single username and password.

[What's ePass?](#)

Login with 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?

Existing
ePass
Customer

New
ePass
Customer

Account Registration

For Registered Agents with a REGISTERED AGENT 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

SIMS Montana Secretary of State Information Management System

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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 **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**.

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

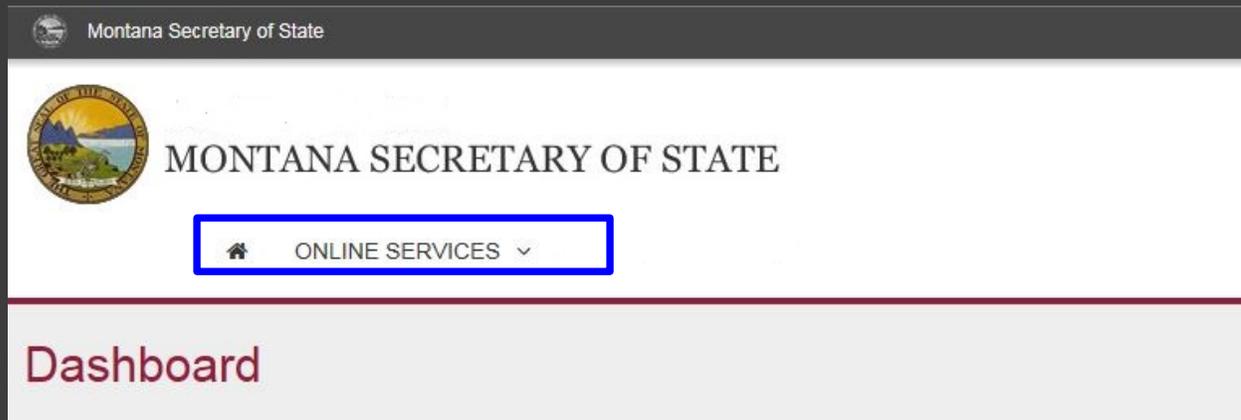
SIMS Montana Secretary of State Information Management System

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Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

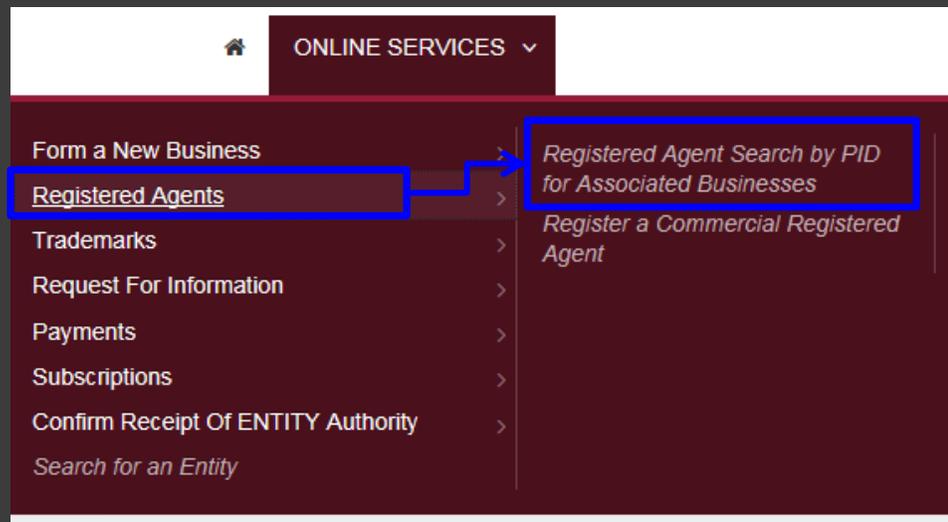
A



STEP 6: Enter Your Code

- A. From the **Dashboard**, Select **Online Services**.
- B. Next select **Registered Agents**.
- C. Then select **Registered Agent Search by PID for Associated Businesses**.

B



C

Account Registration

Registered Agent Search

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

Registered Agent Search

In compliance with Mont. Code Ann. § 35-7-105, this site provides a list of businesses that appointed you as their acting registered agent. You may access the information by entering your unique Personal ID Number (PID) that was assigned by the Secretary of State's office. If you don't know your PID number you may contact the Secretary of State's office through written request. To maintain the confidentiality of your PID number your unique number will be mailed to you.

Personal Identifier Number *

XXXXXX

[Cancel](#)

Reset Search

Search

Displaying 1-10 of 23,845 results

1- 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - ... - 2385 [Next >](#)

Select an Entity...

C T CORPORATION SYSTEM

Mailing Address Same as Physical
Street Address 3011 AMERICAN WAY, MISSOULA, Montana 59808, United States
Personal Identifier Number

[CCM LEASING COMPANY, LLC \(C105842\)](#)
Entity Type

Domestic
Limited Liability
Company

C T CORPORATION SYSTEM

Mailing Address Same as Physical
Street Address 3011 AMERICAN WAY, MISSOULA, Montana 59808, United States
Personal Identifier Number

[FLETCHER RANCHES, LLC \(C109224\)](#)
Entity Type

Domestic
Limited Liability
Company

C T CORPORATION SYSTEM

Mailing Address Same as Physical
Street Address 3011 AMERICAN WAY, MISSOULA, Montana 59808, United States
Personal Identifier Number

[WICKIUP CREEK RANCHES, LLC \(C107753\)](#)
Entity Type

Domestic
Limited Liability
Company

C T CORPORATION SYSTEM

Mailing Address Same as Physical
Street Address 3011 AMERICAN WAY, MISSOULA, Montana 59808, United States
Personal Identifier Number

[EAGLE'S REST, L.L.C. \(C145373\)](#)
Entity Type

Domestic
Limited Liability
Company

STEP 6: Enter Your Code

- D. On the **Registered Agent Search** page, enter the **REGISTERED AGENT Activation Code** that you received in the mail. (This is also your **PID#**.) Then, click **Search**.
- E. Next, select any entity from the search results.



Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

STEP 6: Enter Your Code, cont.

Once you have selected an entity...

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

G. 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'.

 Linda McCulloch
MONTANA SECRETARY OF STATE

ONLINE SERVICES ▾

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

Confirm Receipt Of REGISTERED AGENT Authority

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

Registered Agent Activation Code * 720252953510405566

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

 Montana Secretary of State
Information Management System

Account Registration

For Registered Agents with a REGISTERED AGENT ACTIVATION CODE

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MONTANA SECRETARY OF STATE

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.



Linda McCulloch
MONTANA SECRETARY OF STATE

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?



@SOSMcCulloch



(406) 444-3665



sosbusiness@mt.gov



www.sos.mt.gov

Frequently Asked Questions

- Why did I receive multiple activation codes?

There are several reasons why an entity may receive multiple activation codes.

- 1. If you own a business and are also a registered agent you will receive two activation codes one for your business and the other as a registered agent for the entities you represent.*
- 2. In addition, depending on how your name is registered with our office or the way the address is displayed may result in you receiving multiple activation codes.*

Frequently Asked Questions

- I do NOT have an activation code. What should I do?
 - *If you do not receive an Activation Code mailer by the launch date, please check with your registered agent or service company prior to contacting our office.*
 - *If you misplaced the notice you received, please email (sosbusiness@mt.gov), fax (406.444.3976) or mail, on your company letterhead, the following information:*
 - Business Name
 - Position/Role You Hold in Regards to the Business (e.g., Officer, Director, Member, Partner, Owner, Registered Agent, etc.)
 - Preferred Return Method for Activation Code: Email Address, Mailing Address or Fax Number
 - Contact Name and Phone Number.
 - Signature of Authorized Individual Making the Request
 - *You must have an ePass account and SIMS (BE) account setup prior to us granting you authority through the new business filing system.*



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MONTANA SECRETARY OF STATE

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www.sos.mt.gov