



Linda McCulloch

MONTANA SECRETARY OF STATE

SIMPLIFY YOUR BUSINESS FILINGS

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



Montana Secretary of State
Information Management System

sos.mt.gov

For Registered Agents with a **SECURITY 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



Linda McCulloch
MONTANA SECRETARY OF STATE



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

Copyright © 2015

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

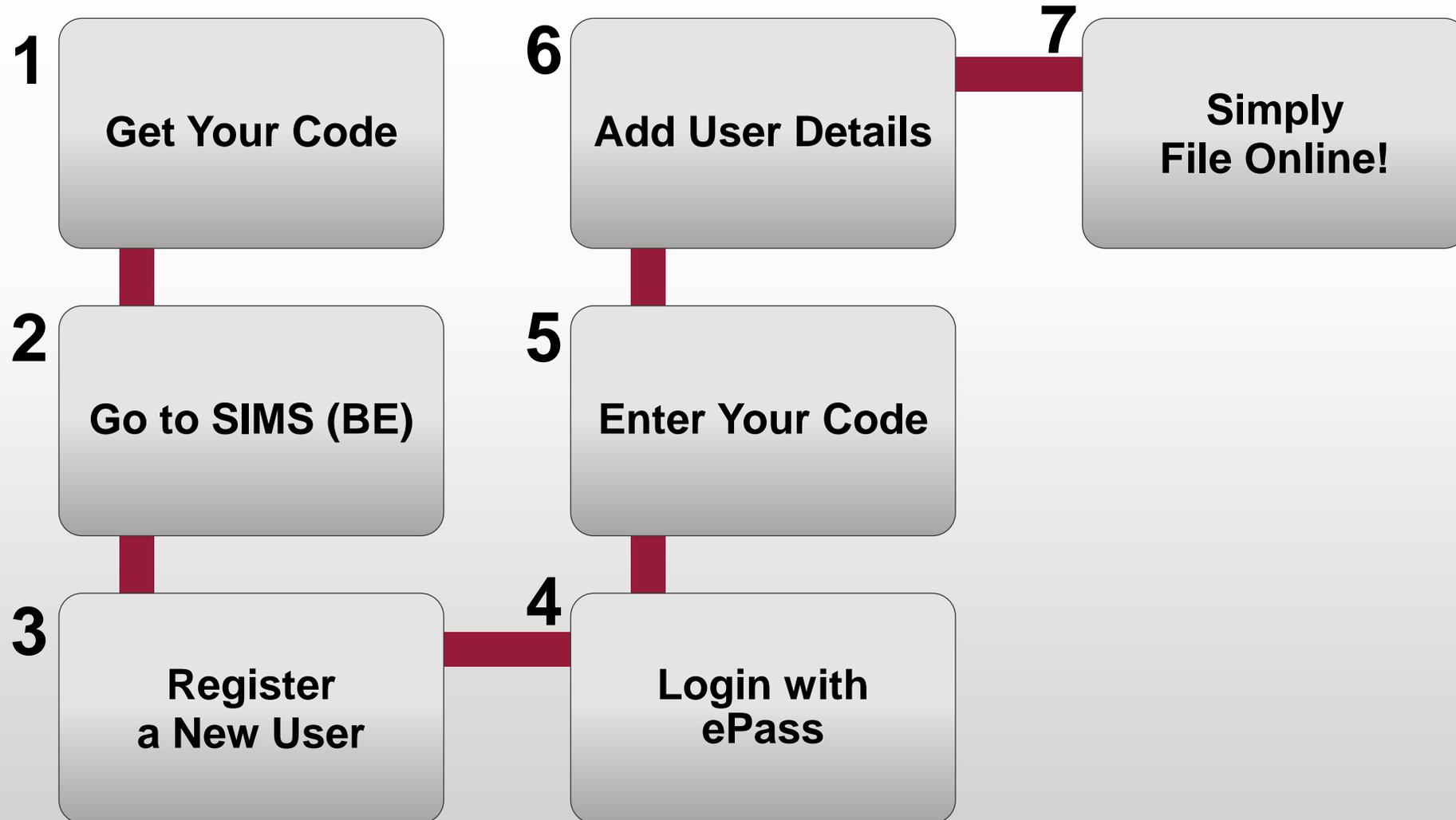
For Registered Agents with a **SECURITY ACTIVATION CODE**



Montana Secretary of State
Information Management System

Account Registration

For Registered Agents with a SECURITY ACTIVATION CODE



Account Registration

For Registered Agents with a SECURITY 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 SECURITY ACTIVATION CODE to establish your account.

SECURITY ACTIVATION CODE: XXXXXXXXXXXX

This code is unique to you for the *businesses you represent* 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 **SECURITY Activation Code.**

I did NOT receive a SECURITY 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 SECURITY ACTIVATION CODE

STEP 2: Go to SIMS (BE)

- From sos.mt.gov, select **Business Services**.
- From the **Business Services** website, click on the **Start** box in the middle of the page to access **SIMS (BE)**.

Linda McCulloch
MONTANA SECRETARY OF STATE

© Craig W. Hergert

SUBSCRIBE LINKS CONTACT

Elections and Government Services | Administrative Rules of Montana | **Business Services** | Notary and Certification Services | Records and Information Management

MY VOTER PAGE | SEARCH ARM AND MAR | FILE ONLINE WITH SIMS (BE) | ONLINE NOTARY TRAINING | MANAGE PUBLIC RECORDS

ABOUT LINDA McCULLOCH

SIMS (BE) has launched! Are you ready?

MVP My Voter Page
Find your polling place
Track absentee ballot
View a sample ballot

View 2016 Primary Election Results
Available after 8 p.m. June 7th

Linda McCulloch
MONTANA SECRETARY OF STATE

© Craig W. Hergert

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
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
Login »
UCC Liens Online Services

File Paper Forms

Registered Agents and Attorneys

BUSINESS TOOLKIT

Help Center

Account Registration

For Registered Agents with a SECURITY 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).

Montana Secretary of State

Linda McCulloch
MONTANA SECRETARY OF STATE

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

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.

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

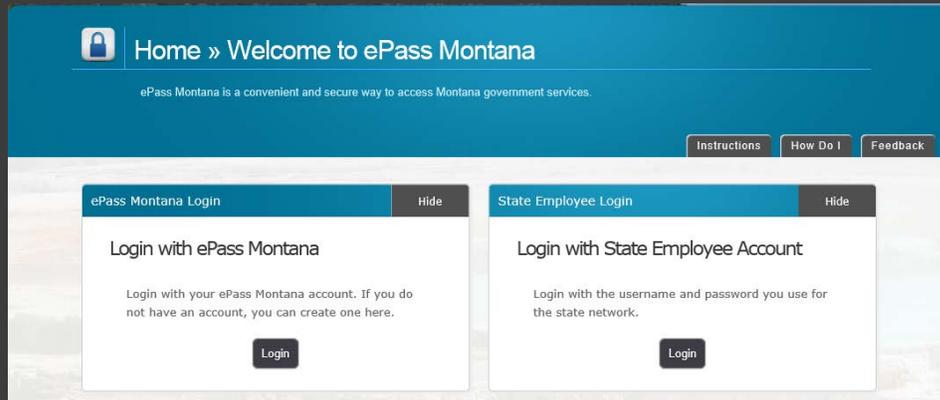
Account Registration

For Registered Agents with a **SECURITY 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.

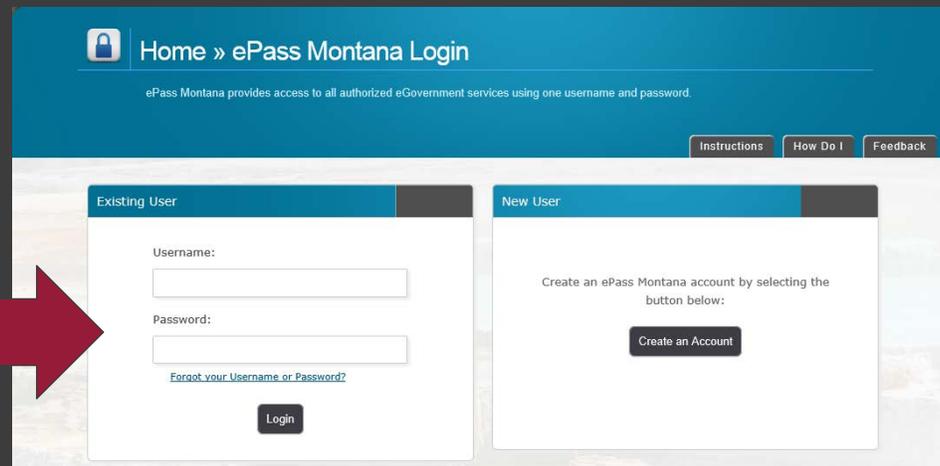
Login

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 Registered Agents with a **SECURITY ACTIVATION CODE**

STEP 5: Enter Your Code

- From SIMS (BE), select the option:
*'I received a **SECURITY Activation Code**'*
- Enter your **SECURITY Activation Code**.
- Click **Continue**.

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**

Activation Code *

[Cancel](#)

 Copyright © 2015

Account Registration

For Registered Agents with a **SECURITY ACTIVATION CODE**

Register New User

I also want to create an Organization

User Details

Title *

First Name *

Middle Name

Last Name *

I use the following for navigation *

Contact Details

Email Address *

Confirm Email *

Telephone Number

Country	Area	Phone	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fax

Country	Area	Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Mobile Number

Country	Area	Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Physical Address

Country

Zip/Postal Code *

Address

City *

State/Province *

Postal Address

Postal address is the same as physical address

[Cancel](#)

[Create](#)

STEP 6: Add User Details

- Enter **User and Contact Details to Register a New User with SIMS (BE)**.
- Required fields are marked with an asterisk (*).
- Click **Create**.



Account Registration

For Registered Agents with a SECURITY ACTIVATION CODE

STEP 7: Simply File Online!

- Welcome to SIMS (BE)!
- You can **View and Maintain Entities** 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.

Linda McCulloch
MONTANA SECRETARY OF STATE

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) sdif <i>The business entity entered as an owner is not an active entity</i>	Revise	05/09/2016	06/07/2016	

Copyright © 2015



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.*
- 3. If you received an orange activation code notice, you will also receive a blue activation code notice to activate your registered agent authority.*

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.*



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