



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 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!

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.

Simply File Online

- Save money
- Save time
- Secure information
- Access anytime 24/7
- Get your documents faster



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

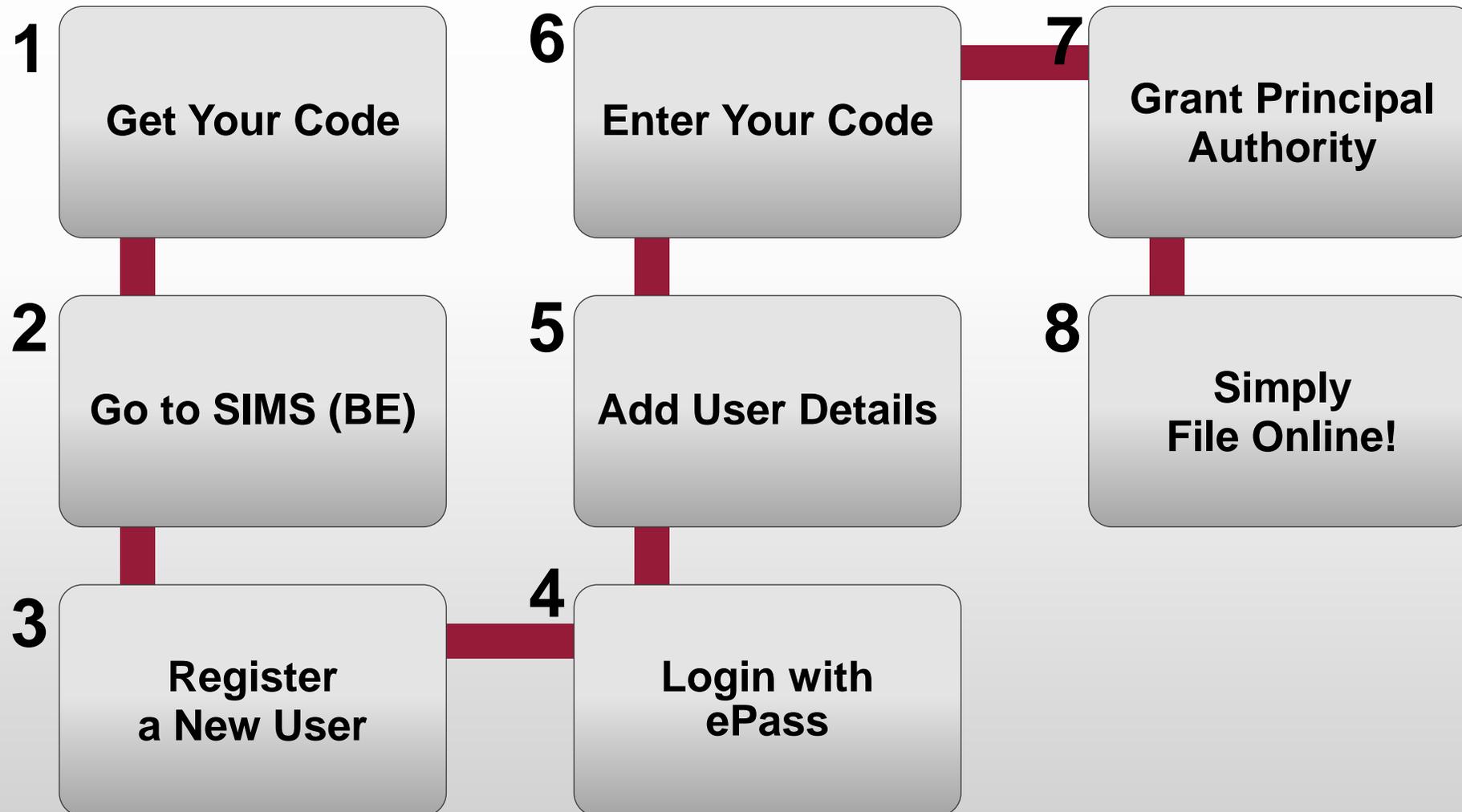
For Business Owners with an **ENTITY ACTIVATION CODE**



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)

- 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 border), Notary and Certification Services, and RIM Government Employees. Below the menu are five tiles: MY VOTER PAGE, SEARCH ARM AND MAR, FILE ONLINE WITH SIMS (BE) (circled in blue), ONLINE NOTARY TRAINING, and STATE & LOCAL GOV ONLY. Below the tiles are three promotional banners: 'ABOUT LINDA McCULLOCH', 'SIMS BE has launched! Are you ready?', and 'MVP My Voter Page'.

Account Registration

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

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**.

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 Liens Online Services Login »

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.

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**.

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

Linda McCulloch
MONTANA SECRETARY OF STATE

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 & 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 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

Existing
ePass
Customer

New
ePass
Customer

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

SIMS Montana Secretary of State Information Management System

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 **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

SIMS Montana Secretary of State Information Management System

Copyright © 2015

Account Registration

A

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



STEP 6: Enter Your Code

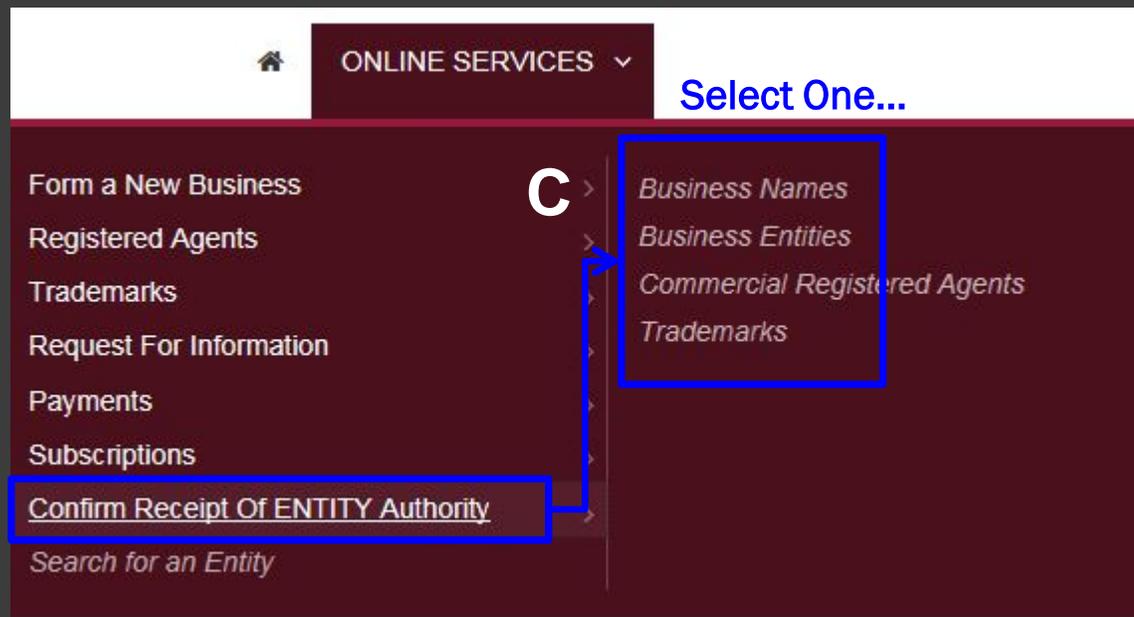
A. From the **Dashboard**, Select **Online Services**.

B. Then select '**Confirm Receipt of ENTITY Authority**'.

C. Choose one of the following from the sub-menu:

- **Business Names** for your Assumed Business Names.
- **Business Entities** for your Corporations, LLCs, etc.
- **Trademarks** for your Mark.

B



Account Registration

For Business Owners with an ENTITY ACTIVATION CODE

D



ONLINE SERVICES

Confirm Receipt of ENTITY Authority

Activation code *

Authority Type * Principal Authorized Person

E



Confirm Receipt of Authority

CPV APR9 TEST FOREIGN CORP (F1111847) [Foreign Profit Corporation]

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

STEP 6: Enter Your Code, cont.

- D. On the 'Confirm Receipt of Entity Authority' page, enter the **ENTITY Activation Code** from your mailer, your authority type, and click 'Validate'.
- E. 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.

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) sdfg <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!

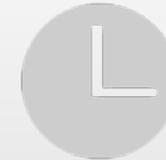
Our current paper-based legacy business system was created in

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.*

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