



California Secretary of State – Business Entities

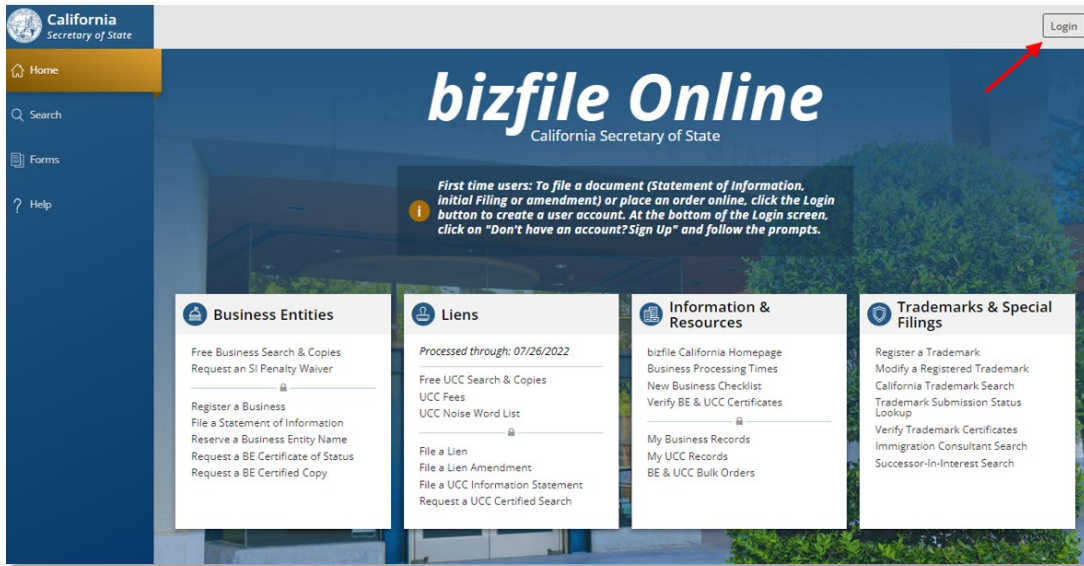
## **bizfile** Online Account Setup and User Access Guide

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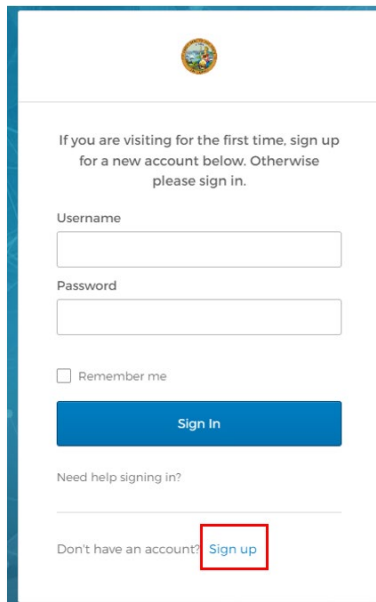
# 1. Create an Account

As of April 7, 2022, **bizfile Online** is the California Secretary of State’s new platform for online business filings and orders. You will need to create an Okta account to access the portal to file initial filings, amendments, Statements of Information, and to order certificates online. Follow the steps below to create an account.

1. From the [bizfileonline.sos.ca.gov](http://bizfileonline.sos.ca.gov) webpage, click the **Login** button in the upper right corner.



2. When the Okta screen appears, click **Sign Up** near the bottom.



3. Enter all the required fields and click **Register**. Please note, your email address will be your username for future logins. Important! Prior to clicking Register, please confirm that all information is entered correctly as you will not be able to make changes once your account has been created.

a. Below are the Password Requirements:

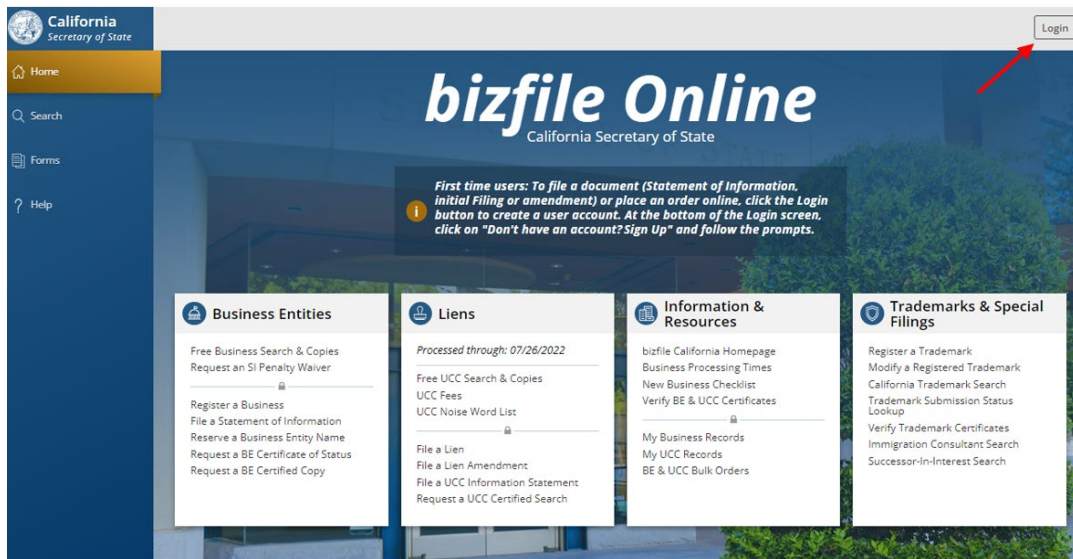
- At least 8 Characters
- At least 1 number
- At least 1 symbol(s)
- At least 1 lowercase letters(s)
- At least 1 uppercase letter(s)
- Does not contain part of username
- Does not contain 'First name'
- Does not contain 'Last name'

The image shows a 'Create Account' registration form. At the top center is a globe icon. Below it, the text 'Create Account' is centered. The form contains several input fields: 'Email \*', 'Password \*' (with a password strength indicator icon), 'First name \*', 'Last name \*', 'Phone number', and 'Organization'. Below the fields, a note states '\* indicates required field'. At the bottom of the form, a blue 'Register' button is highlighted with a red rectangular border. Below the button, there is a link that says 'Back to sign in'.

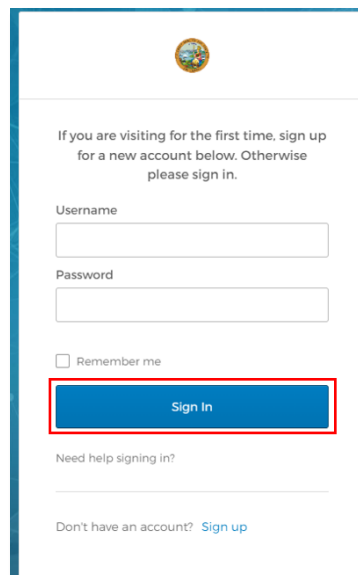
## 2. Log into your Account

As of April 7, 2022, **bizfile Online** is the California Secretary of State's platform for online business filings and orders. You will need to create an Okta account to file initial filings, amendments, Statements of Information, and to order certificates online. For instructions on creating a secure Okta Account, see section [1. Create an Account](#).

1. To log into your account, go to [bizfileonline.sos.ca.gov](http://bizfileonline.sos.ca.gov).
2. Click the **Login** button in the top right corner.



3. Enter the username and password you created in section [1. Create an Account](#) and click **Sign In**. Note: your username is an email address.



If you are visiting for the first time, sign up for a new account below. Otherwise please sign in.

Username

Password

Remember me

Need help signing in?

Don't have an account? [Sign up](#)

### 3. Access your online entity record to file an amendment

- To file an amendment on your entity, you must have an account and be logged in. For instructions on creating a secure Okta Account, see section [1. Create an Account](#).
- User Access Control was established to enhance the security of the **bizfile** Online system and your online entity record as well as to help prevent fraudulent or mistaken online business filings. You will need to obtain access to your online entity record to submit filings such as:
  - Amendments (General, Name Change, and Restated)
  - Conversions
  - Mergers
  - Mergers Interspecies
  - Terminations

Note: Initial filings require log in access; once an initial filing is approved, full access is granted to the submitter of the online initial filing.

#### 3.1 How to get access to your online entity record

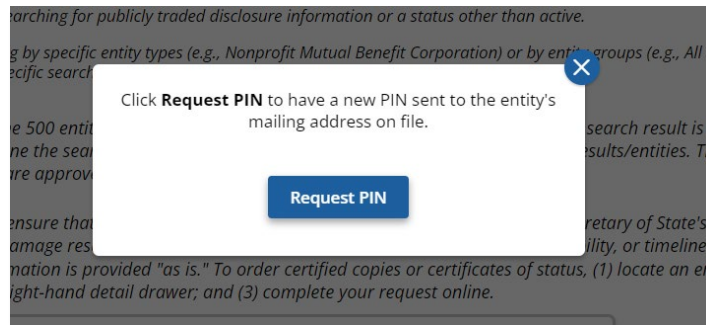
1. Go to [bizfileonline.sos.ca.gov](http://bizfileonline.sos.ca.gov) click the **Login** button on the upper right corner. If you do not have an account, see section [1. Create an Account](#) for instructions on creating a secure Okta Account.
2. On the **bizfile** Online homepage, navigate to the **Search** icon from the left-hand side, be sure the Business tab at the top of the page is selected.
3. On the Business Search page, search for the entity record using the entity number, if available or the entity name. Tip: If you use the entity name, make sure you select the correct entity record by confirming the jurisdiction and addresses.
4. Click on the entity name in the results and the entity record details will open to the right.

The screenshot displays the California Secretary of State's bizfile Online interface. On the left, a navigation menu includes Home, Search, Forms, My Work Queue, My Records, Data Requests, Forms Manager, and Help. The 'Business' tab is selected at the top. A search results table is shown with columns for Entity Information, Initial Filing Date, Status, Entity Type, Formed In, and Agent. The table lists several entities, with '123 corp (5000938)' highlighted. To the right, a detailed view for '123 corp (5000938)' is open, showing standing (Good), principal address (123 MAIN SAC, CA 95814), mailing address (123 MAIN SAC, CA 95814), and agent information (THE AGENCY REAL ESTATE GROUP INC, MARY ANN WEEKLEY, ZACH MARION CARPENTER). A red box highlights the 'Request Access' icon at the bottom of the right panel.

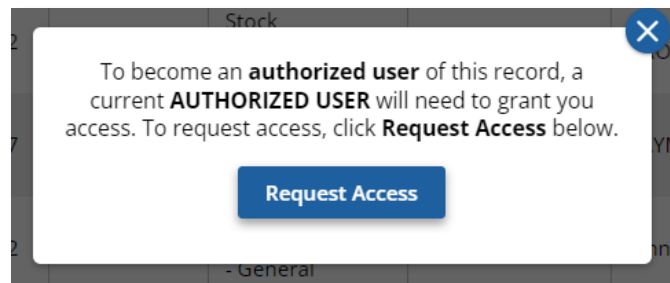
Entity Information	Initial Filing Date	Status	Entity Type	Formed In	Agent
0123456789 CORPORATION (4601795)	05/29/2020	Active	Stock Corporation - Out of State - Stock	DELAWARE	CORPORATION SERVICE COMPANY WHICH WILL DO BUSINESS IN CALIFORNIA AS CSC - LAWYERS INCORPORATING SERVICE
12/31 INVESTMENTS CORPORATION (3364777)	01/21/2011	Suspended - FTB	Stock Corporation - CA - General	CALIFORNIA	ALICIA CHAVEZ
1-2-3 ACUPUNCTURE CLINIC, PROFESSIONAL CORPORATION (2812426)	11/08/2005	Active	Stock Corporation - CA - Professional	CALIFORNIA	ZHIQIANG GUAN
123 corp (5000938)	02/07/2022	Active	Stock Corporation - CA - General	CALIFORNIA	THE AGENCY REAL ESTATE GROUP INC
1-2-3 EXPORT CORP. (1999198)	01/02/1997	Terminated	Stock Corporation - CA - General	CALIFORNIA	RAYMOND CHAO
123 Filing Corp (5001686)	03/18/2022	Active	Stock Corporation - CA - General	CALIFORNIA	John Doe
123 MEDICAL GROUP CORP. (3840813)	11/04/2015	Active	Stock Corporation - CA - General	CALIFORNIA	ALLAN CHI-CHIANG CHANG
123 PHOTO CORPORATION (2196552)	08/22/2000	Terminated	Stock Corporation - CA - General	CALIFORNIA	YANG QUACH
123 SLP SPEECH THERAPY CORPORATION (2276621)	02/19/2019	Terminated	Stock Corporation - CA - General	CALIFORNIA	DANIEL C SPARLING

5. On the right panel, click **Request Access** icon near the bottom.
6. Click **Request Pin** to have a new PIN sent to the entity's mailing address on file. A letter with a PIN will be mailed to the mailing address of the entity. Confirm the mailing address is

correct in the entity details. If the address is not current, then you may file a Statement of Information to update the address.



7. If access has already been established by another user, you will see the message below when requesting access to the online entity record.



8. Clicking the **Request Access** button will send the authorized user (user with Full Access) an email notification that you requested access to their online entity record.
9. When the full access user(s) of the online entity record grants permission, you will receive an email notifying that you have been granted access to the online entity record. The online entity record will be listed in **bizfile** Online under My Records (button on the left side of the home page). The full access user(s) can grant another user basic access, full access, or deny access.
  - a. Basic Access allows users to file all documents online on behalf of the entity. Users with basic access cannot grant access to other users. More than one user can have basic access.
  - b. Full Access allows the user to grant access to other requestors and file all documents online. More than one user can have full access.

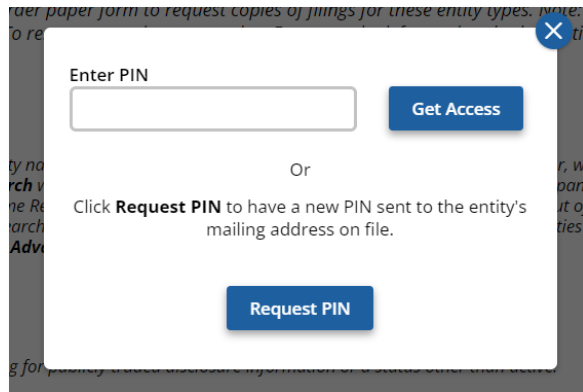
### 3.2 How to enter a PIN in the portal to get access

1. Once you have received your PIN letter by mail, go to [bizfileonline.sos.ca.gov](http://bizfileonline.sos.ca.gov) to enter the PIN. If you do not have a PIN, see section [3.1 How to get access to your online entity record](#) for instructions.
2. Click the **Login** button on the upper right corner. If you do not have an account, see section [1. Create an Account](#) for instructions on creating a secure Okta account.

3. On the **bizfile** Online homepage, navigate to the **Search** icon from the left-hand side, be sure the Business tab at the top of the page is selected.
4. On the Business Search page, search for the entity record using the entity number, if available or the entity name. Tip: If you use the entity name, make sure you select the correct entity record by confirming the jurisdiction and addresses.
5. Click on the entity name in the results and the entity record details will open to the right.

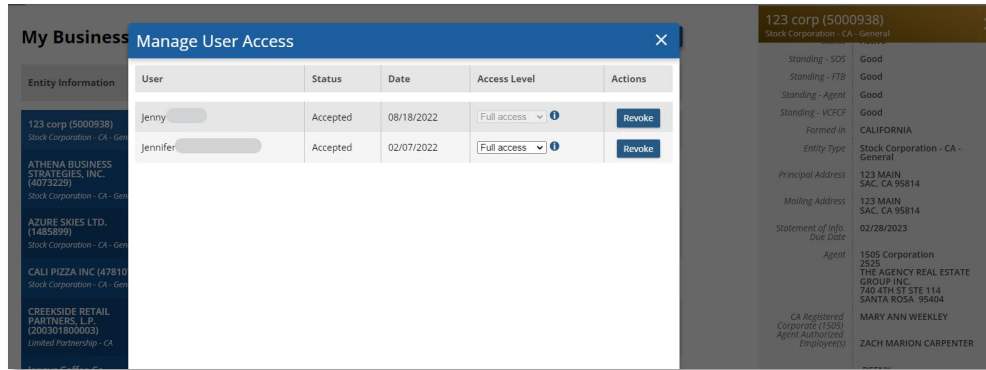


6. On the right panel, click **Request Access** icon near the bottom.
7. Enter your PIN and click **Get Access**.

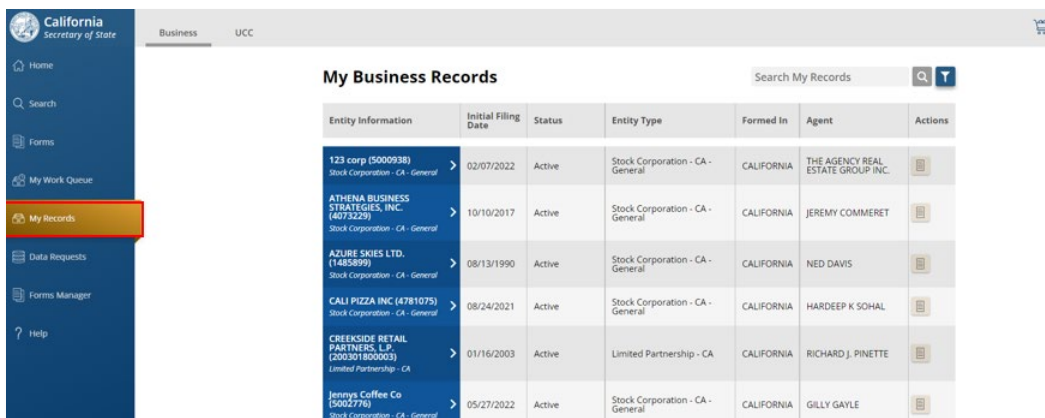


8. After the PIN is entered, the Manage User Access window will open. Full Access users can manage access control for other users.

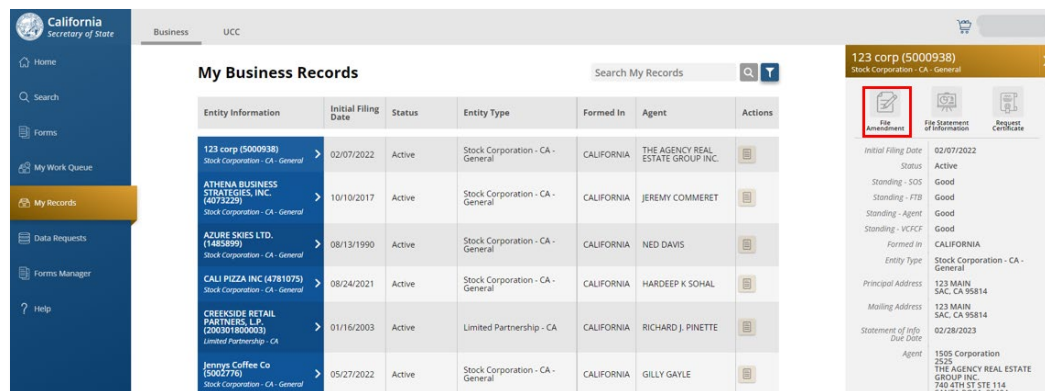




- a. Basic Access allows users to file all documents online on behalf the entity. Users with basic access cannot grant access to other users. More than one user can have basic access.
  - b. Full Access allows the user to grant access to other requestors and file all documents online. More than one user can have full access.
9. Once the PIN is entered, you will have full access to the online entity record and it will be listed under your My Record tab.
10. To file an amendment, go to **My Records** on the left-hand side of the page.

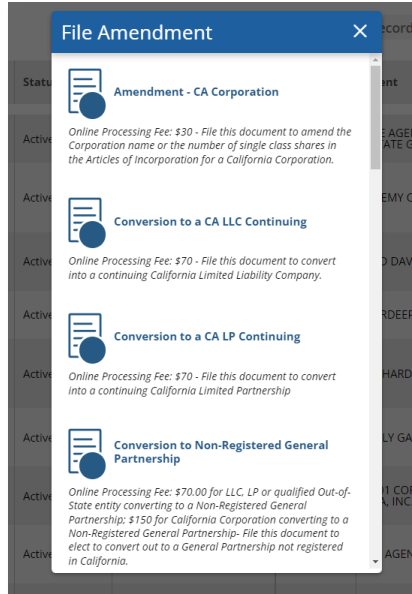


11. Click on the entity name and the entity record details will open to the right.





- At the top of the details, click the icon **File Amendment**. A window will appear with all amendments available to file online. Choose the desired amendment and click to open the form wizard. Note: only amendments available based on entity type and status will appear in the list. Follow all prompts.



- After submitting, you can check the status of the submission in the **My Work Queue** tab.

