California Secretary of State – Business Entities

# bizfile Online Account Setup and User Access Guide

1. Create an Account

As of April 7, 2022, **biz**file 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 **biz**fileonline.sos.ca.gov webpage, click the **Login** button in the upper right corner.
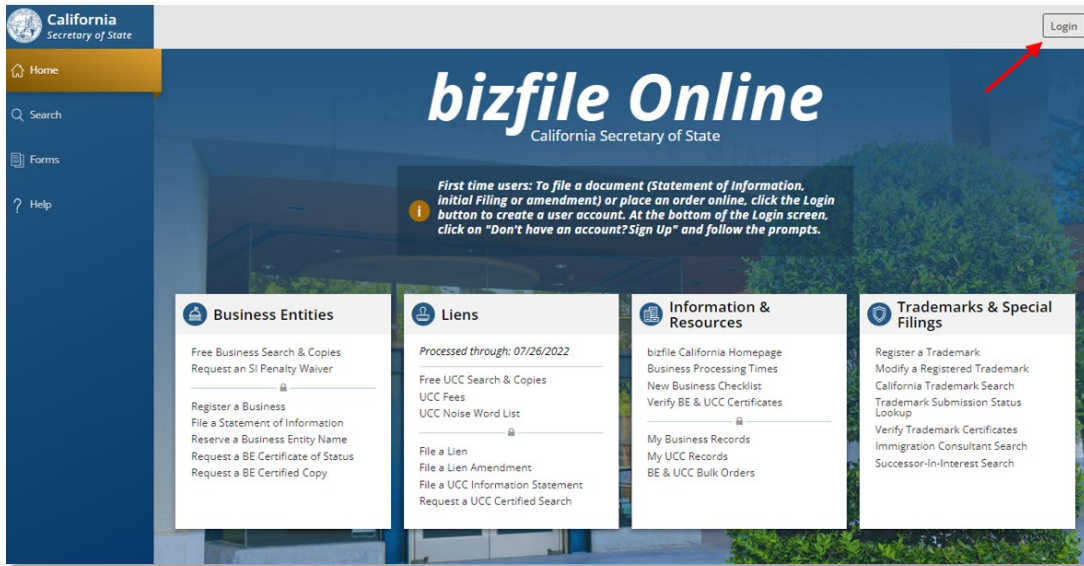
2. When the Okta screen appears, click **Sign Up** near the bottom.
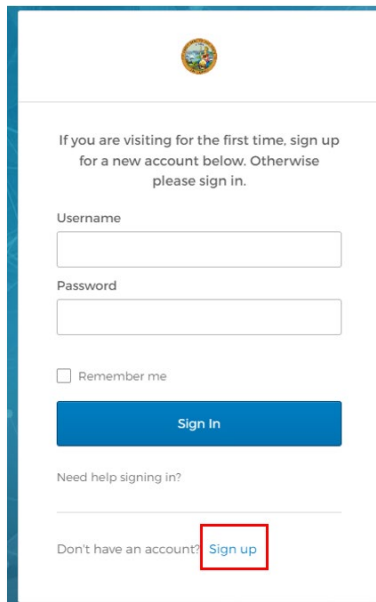
3. Enter all the required fields and click **Register**. Please note, your email address will be your username for future logins. Important! Prior to clicking Register, please confirm that all information is entered correctly as you will not be able to make changes once your account has been created.

    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'
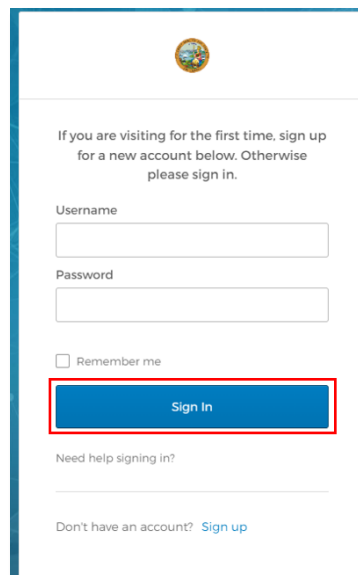   - Does not contain 'Last name'

2. Log into your Account

As of April 7, 2022, **biz**file 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 **biz**fileonline.sos.ca.gov.
2. Click the **Login** button in the top right corner.
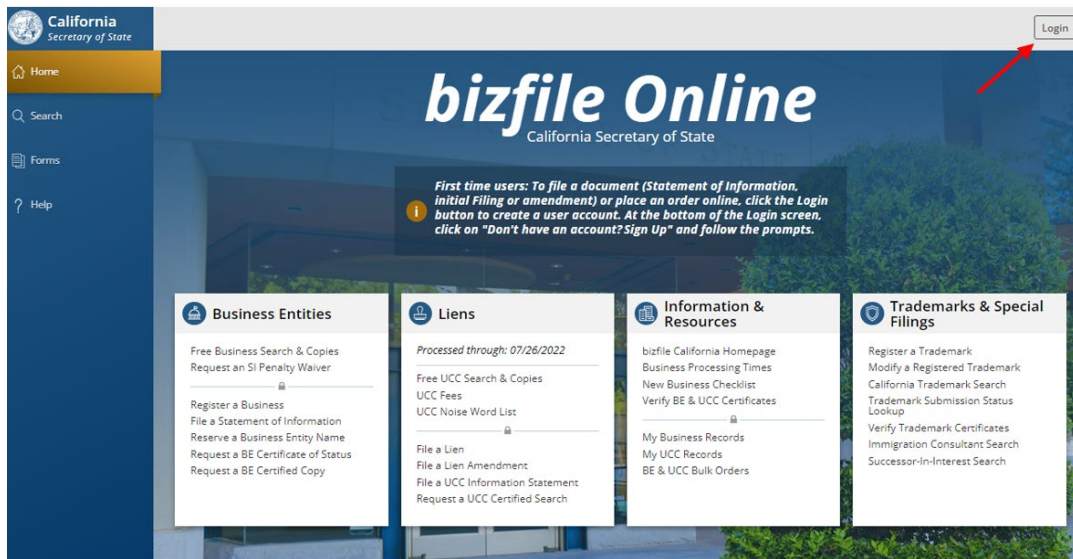
3. Enter the username and password you created in section 1. Create an Account and click **Sign In**. Note: your username is an email address.

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 **biz**file 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 **biz**fileonline.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 **biz**file 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.

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.
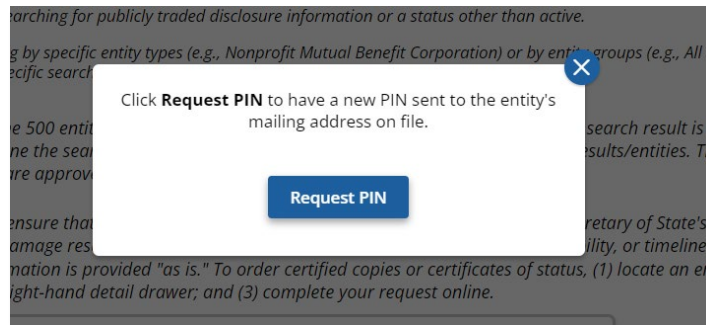
7. If access has already been established by another user, you will see the message below when requesting access to the online entity record.
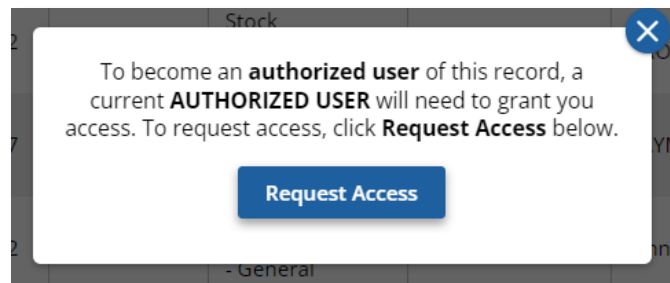
8. Clicking the **Request Access** button will send the authorized user (user with Full Access) an email notification that you requested access to their online entity record.

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 **biz**file 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 **biz**fileonline.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 **biz**file 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.
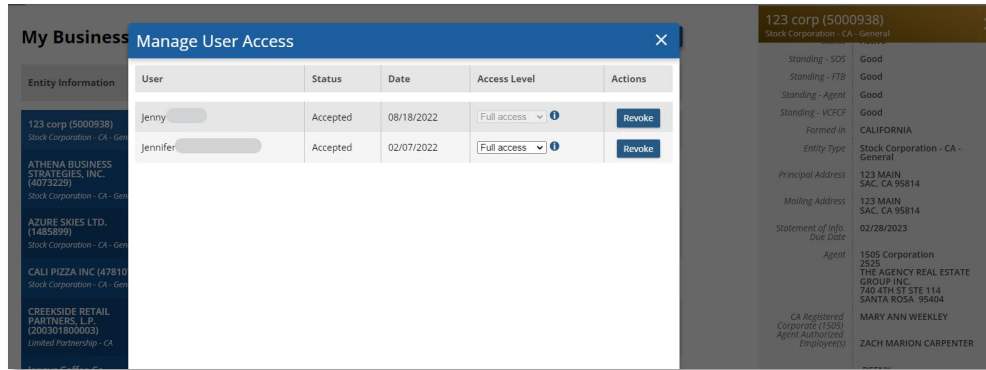

6. On the right panel, click **Request Access** icon near the bottom.
7. Enter your PIN and click **Get Access**.
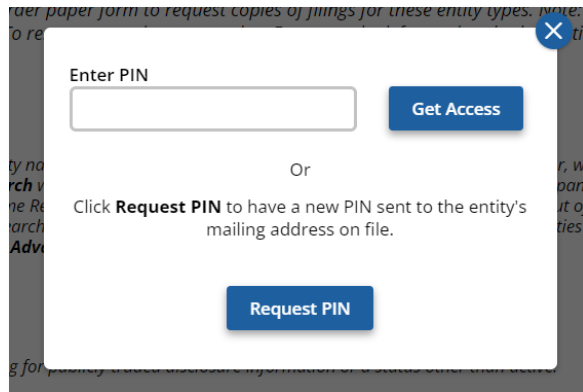
8. After the PIN is entered, the Manage User Access window will open. Full Access users can manage access control for other users.

    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.
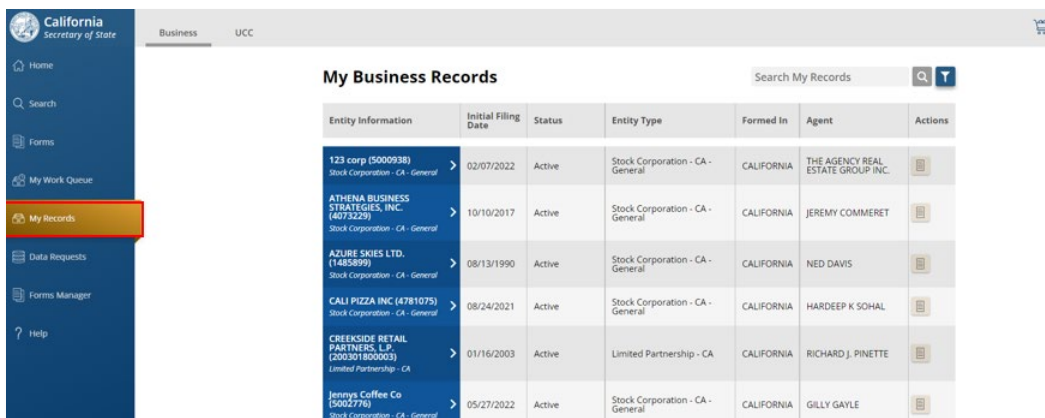
11. Click on the entity name and the entity record details will open to the right.
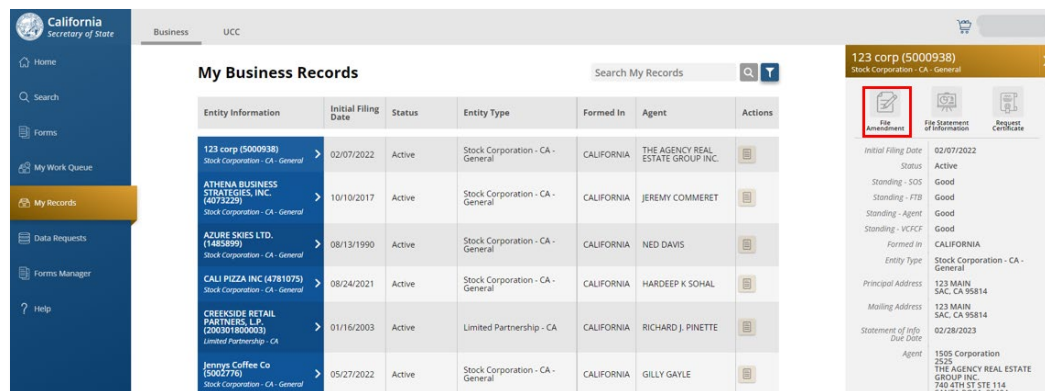
12. At the top of the details, click the icon **File Amendment**. A window will appear with all amendments available to file online. Choose the desired amendment and click to open the form wizard. Note: only amendments available based on entity type and status will appear in the list. Follow all prompts.
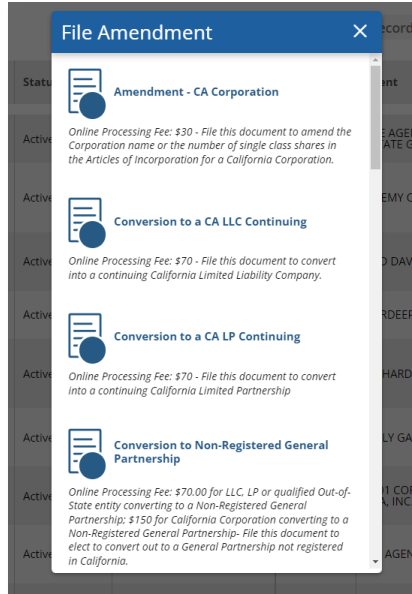
13. After submitting, you can check the status of the submission in the **My Work Queue** tab.