

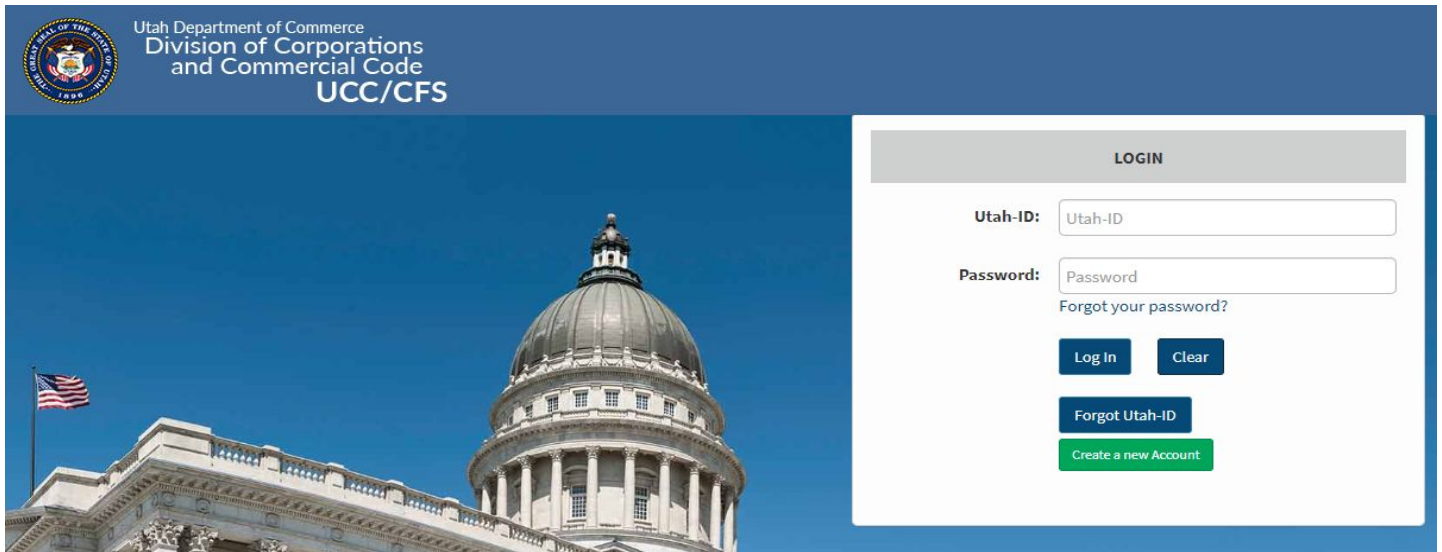
UTAH - ONLINE UCC/CFS FILING SYSTEM

User Guide - Online User - Basic Information and Navigation

1 Access the Utah Online UCC/CFS Filing System

1.1 Creating a Utah-ID and New User Account

Online users must create a Utah ID before they can access the system.




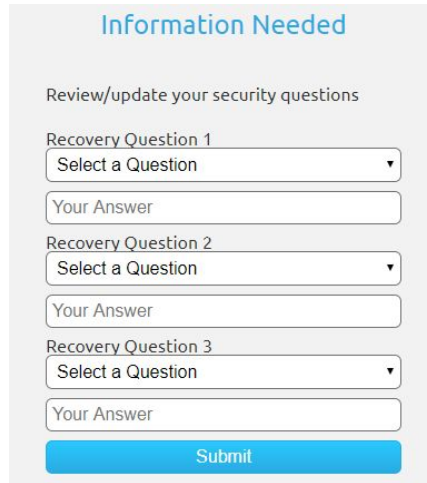
1. Click the  button.

Enter Your Utah-ID:*

Before you begin please have your Utah-ID account information available. If you do not have a Utah-ID account, please [click here](#).

2. Click on the [click here](#) link. This will redirect you to the **Utah ID Creation** page.

3. You will choose a Utah-ID, enter your name, submit an email address and password. Optional information includes: alternate email address and mobile phone number. Once you have entered the required information you will click on  .



Information Needed

Review/update your security questions

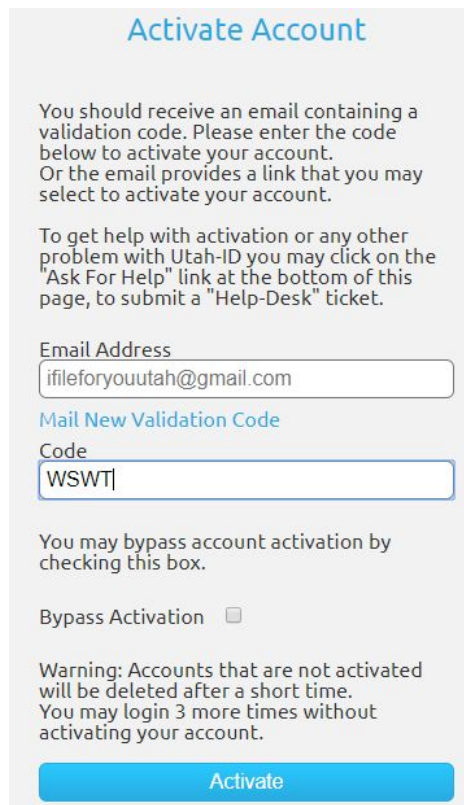
Recovery Question 1
Select a Question ▼
Your Answer

Recovery Question 2
Select a Question ▼
Your Answer

Recovery Question 3
Select a Question ▼
Your Answer

Submit

4. You will then create three password recovery questions and answers. Select  .



Activate Account

You should receive an email containing a validation code. Please enter the code below to activate your account. Or the email provides a link that you may select to activate your account.

To get help with activation or any other problem with Utah-ID you may click on the "Ask For Help" link at the bottom of this page, to submit a "Help-Desk" ticket.

Email Address
ifileforyoutah@gmail.com

[Mail New Validation Code](#)

Code
WSWT|

You may bypass account activation by checking this box.

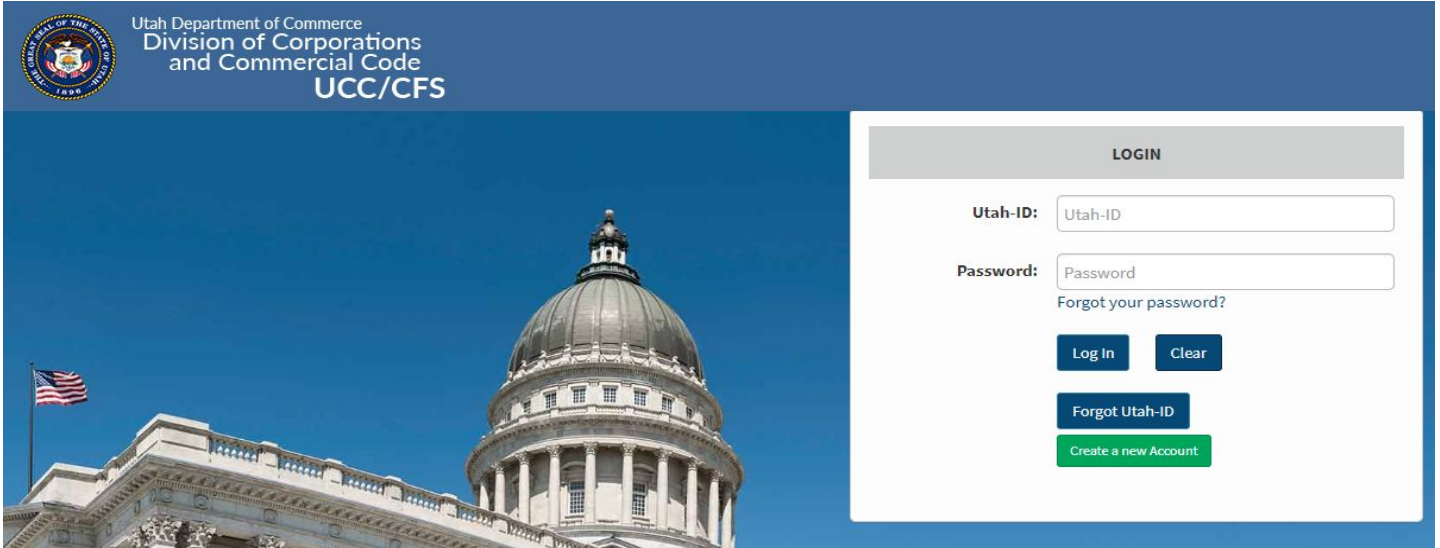
Bypass Activation

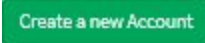
Warning: Accounts that are not activated will be deleted after a short time. You may login 3 more times without activating your account.

Activate

5. This will then send you to the **Activate Account** page. It will send a code to the email address associated with the Utah ID. Click on  .

NOTE: The **Authorization Code** may go to spam filter. If you do not see the code in your inbox check your spam folder.



6. Once you have activated your account you will return to the UCC/CFS filing page and click the  button.

Enter Your Utah-ID:*

IFileForYouUtah

IFileForYouUtah is available

Before you begin please have your Utah-ID account information available. If you do not have a Utah-ID account, please [click here](#).

Password:*


.....

Re-enter Password:*

.....

Back

Next

7. You will enter the Utah-ID and password and click the  button. The system displays the **Personal Details** screen.

Enter Your Personal Details

This is an Individual This is an Organization

Organization Name:*

Address Line 1:* Address Line 2:

Country:* Zip Code:*

City:* State:*

Contact Number:*

Email Address:* Confirm Email Address:*

ifileforyoutah@gmail.com is available

8. Complete the fields on the **Personal Details** screen. Click the button.

NOTE: The user may click the **Back** button to return to the Log In screen or the **Clear** button to clear all the fields on the Personal Details screen.

Your account has been created successfully, please note your information below.

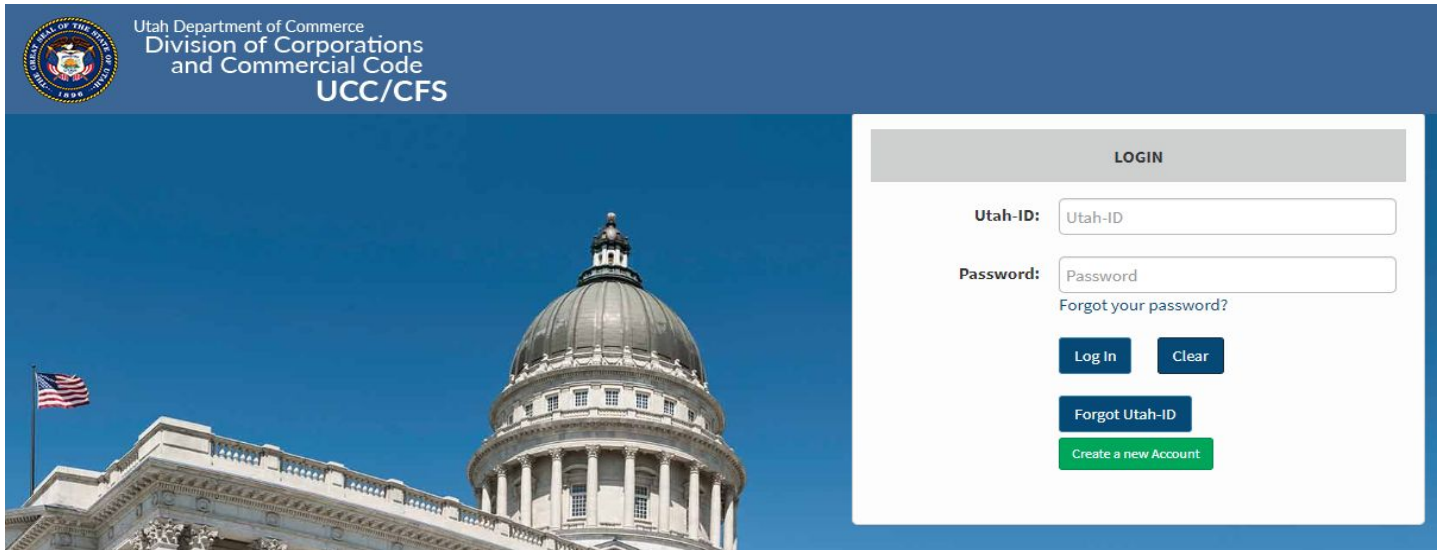
Utah-ID: **IFileForYouUtah**

Filer ID: **000876936**

9. Click the button, and you will be redirected to the Log In screen.

1.1 Logging In

The user may log in to the application from the Log In screen. This is the first screen displayed when the user visits the Business Services Filing System Online.



Utah Department of Commerce
Division of Corporations
and Commercial Code
UCC/CFS

LOGIN

Utah-ID:

Password:

[Forgot your password?](#)

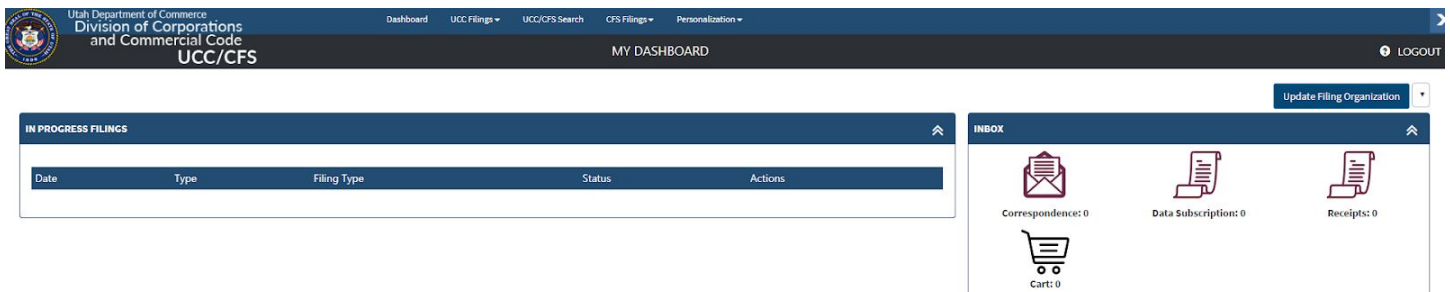
[Log In](#) [Clear](#)

[Forgot Utah-ID](#)

[Create a new Account](#)

1. Enter the **Utah-ID** in the **Utah-ID** field.
2. Enter the **password** in the **Password** field.
3. Click the  button.

NOTE: The system displays the Dashboard screen upon the user's successful log in.



Utah Department of Commerce
Division of Corporations
and Commercial Code
UCC/CFS

Dashboard UCC Filings UCC/CFS Search CFS Filings Personalization

MY DASHBOARD LOGOUT

Update Filing Organization

IN PROGRESS FILINGS

| Date | Type | Filing Type | Status | Actions |
|------|------|-------------|--------|---------|
|------|------|-------------|--------|---------|

INBOX

Correspondence: 0 Data Subscriptions: 0 Receipts: 0

Cart: 0

2 User Maintenance

2.1 Changing Account Information

The user may edit most of their online user information at any time. The user's address information, contact information.

NOTE: The user's **Utah-ID** may not be changed.

1. Select **Personalization > Change Account Information** from the header menu.

The system displays the **Change Account Information** screen with the user information prepopulated.

Account Information

| | | | |
|---------------------|--|-----------|-----------|
| Utah-ID: | <input type="text" value="IFileForYouUtah"/> | Filer ID: | 000876936 |
| Email Address:* | <input type="text" value="ifileforyoutah@gmail.com"/> | | |
| | <input type="radio"/> Individual <input checked="" type="radio"/> Organization | | |
| Organization Name:* | <input type="text" value="I File For You"/> | | |

Contact Information

| | | | |
|------------------|---|-----------------|------------------------------------|
| Address Line 1:* | <input type="text" value="163 E 300 S"/> | Address Line 2: | <input type="text"/> |
| Country:* | <input type="text" value="United States"/> | Zip Code:* | <input type="text" value="84111"/> |
| City:* | <input type="text" value="Salt Lake City"/> | State:* | <input type="text" value="Utah"/> |
| Contact Number:* | <input type="text" value="801"/> <input type="text" value="530"/> <input type="text" value="4849"/> | | |

2. Edit the user information as necessary.
3. Click the button.

The system saves the changes.

2.2 Changing a Password

The user may change their online password at any time.

Go to <https://login.utah.gov/user/portal>



1. Enter your **Utah-ID** and **Password** and click the **Login** button.
2. Click on **My Account** from the header menu.



3. Click on **Change Password** on the left hand side of the page.

Current Password

New Password ?

Password Strength

Verify Password

[Change Password](#)

4. Enter the current password and then the new password (verify the new password) and click on [Change Password](#) button.

2.2 Recovering a Utah-ID

If the user does not have their previously issued **Utah-ID**, they can initiate the Utah-ID recovery process.

1. Click the [Forgot User ID](#) button.

Forgot Utah-ID

Email Address:*

Please enter the email address you provided while creating your account or contact the State of Utah, Capital Help Desk at 801-538-3440 for help.

[Submit](#)

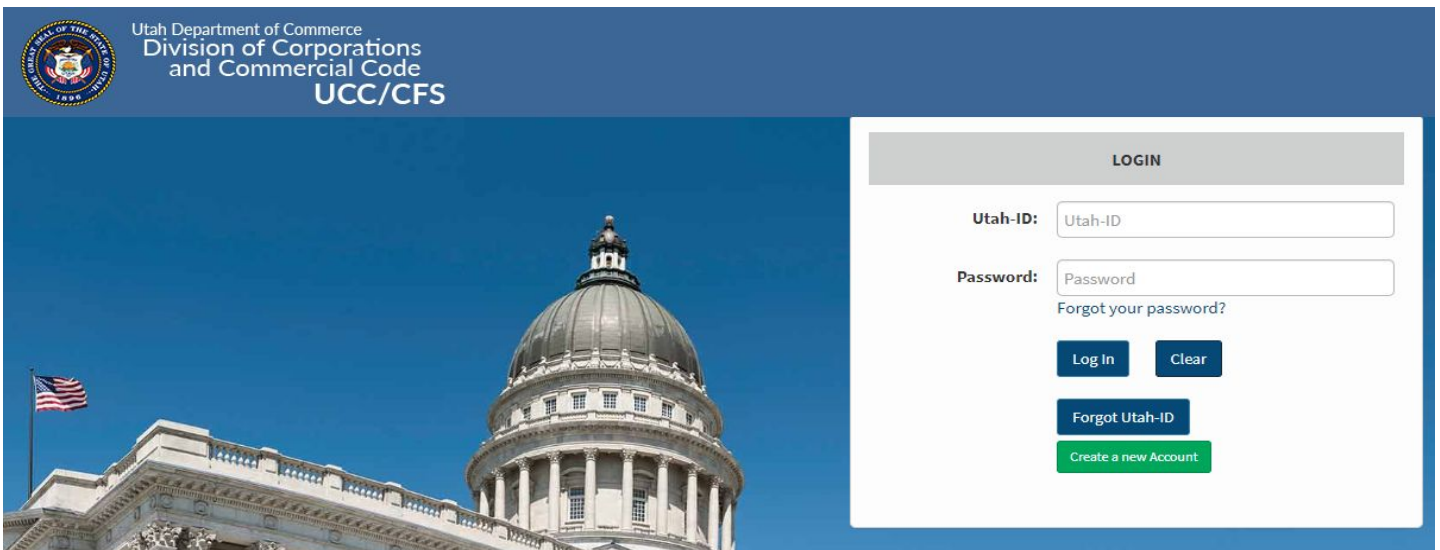
2. Enter the email address associated with the user ID in the **Email Address** field.
3. Click the **Submit** button.

The system sends an email to the provided email address that contains the user's name and Utah-ID.

NOTE: The **Utah-ID Recovery** email may go to spam filter. If you do not see the code in your inbox check your spam folder.

2.4 Recovering a Password

If the user does not have their current password, they can initiate the password recovery process.



The screenshot shows the login page for the Utah Department of Commerce, Division of Corporations and Commercial Code (UCC/CFS). The page features a blue header with the department's logo and name. Below the header is a large image of the Utah State Capitol building. On the right side, there is a white login form with the following elements:

- LOGIN** header
- Utah-ID:** Input field containing "Utah-ID"
- Password:** Input field containing "Password"
- [Forgot your password?](#) link
- Log In** button
- Clear** button
- Forgot Utah-ID** button
- Create a new Account** button

1. Click the **Forgot your password?** link.



The screenshot shows the "Recover Password" page. The title is "Recover Password" in blue. Below the title, the text reads: "To recover your password, please enter your Utah ID or email address and last name and press continue". There are two input fields: the first contains "IFileForYouUtah" and the second contains "Filer". Below the input fields are two blue buttons: "Home" and "Continue".

2. Enter the **Utah-ID** or associated email and the last name. Click the **Continue** button.

Security Question

Please answer a security question.

What school did you attend for sixth grade??

Answer

Home Continue

3. It will then bring up one of the three security questions that you entered when setting up your **Utah-ID**. Enter your answer and click the **Continue** button.

Recovery Code

A code has been sent to the email addresses on this account:

Email: if*****@gm***.***

Recovery Code

Home Continue

4. A **Recovery Code** will be sent to your email address. Enter the four digit code and click the **Continue** button.

NOTE: The **Recovery Code** email may go to spam filter. If you do not see the code in your inbox check your spam folder.

The image shows a 'Set Password' screen. At the top, the title 'Set Password' is displayed in blue. Below the title, there are two input fields: 'New Password' and 'Verify Password'. The 'New Password' field has a question mark icon to its right and a green progress bar below it labeled 'Password Strength'. The 'Verify Password' field is empty. At the bottom of the form is a large blue button labeled 'Finish'.

5. Enter the new password, verify it and click the **Finish** button.

3 Filing Organizations and Secondary User Creation

3.1 Creating a Filing Organization

All users must create a filing organization. The user is prompted to complete this process immediately upon logging into the system for the first time. This may also be accessed by clicking the **Personalization > Set Up Filing Organization** in the header menus.

1. Click the **Personalization > Set Up Filing Organization** in the header menus.



The system displays the Set Up Filing Organization screen.

The image shows the 'Set Up Filing Organization' screen. At the top, there is a dark blue header with the text 'Filing Organization'. Below the header, there is a checkbox labeled 'Same as Filer'. The main form area contains several input fields: 'Organization Name: *', 'Address Line 1:*', 'Country:*' (with a dropdown menu showing 'United States'), 'City:*', 'Contact Number: *', 'Address Line 2:', 'Zip Code:*' (with two input boxes), and 'State:*' (with a dropdown menu showing 'Utah'). Below the form fields are three buttons: 'Back', 'Save', and 'Clear'. At the bottom of the screen, there is a table with columns: 'No.', 'Name', 'Filers', 'Address', and 'Action'. The table is currently empty, with the text 'No records to view.' displayed below it.

2. Complete the required fields in the **Filing Organization** section.

NOTE: The user may select the **Same as Filer** checkbox to automatically populate the fields with the filer's information.

3. Click the **Save** button.

The system saves the filing organization information and displays it in the data grid.

| No. | Name | Filers | Address | Action |
|-----|--------------|--------|---|---|
| 1 | Filing Org | 0 | 123 Filing Org Lane Amery WI 54001 USA | Edit Delete |
| 2 | Filing Org 2 | 0 | 123 Filing Org Rd. Belgium WI 53004 USA | Edit Delete |

NOTE: The user may repeat steps 2 and 3 to enter multiple filing organizations after the initial filing organization is created.

3.2 Adding or Editing a Filing Organization Secondary User

Multiple users may be associated with the same filing organization.

3.2.1 Adding a Secondary User

1. Select **Personalization > User Creation** from the header menu.

NOTE: The **Search** button can be used to find a specific user for editing or to verify that a user has not already been entered before proceeding.

Secondary User Maintenance [Instructions](#)

User Search

| | |
|--|--|
| User ID: <input type="text"/> | First Name: <input type="text"/> |
| Middle Name: <input type="text"/> | Last Name: <input type="text"/> |
| Suffix: <input type="text"/> | |
| Status: <input type="text" value="Select"/> <input type="button" value="v"/> | Filing Organization: <input type="text" value="Filing Org Filing Org 2"/> i |

| User ID | Name | Status | Action |
|---------------------|------|--------|--------|
| No records to view. | | | |

2. Click on the **Add New User** button.

To add a secondary user, please ensure they have a valid Utah-ID account. To obtain a Utah-ID account please navigate to <https://login.utah.gov/user/create> or [click here](#).

3. If adding a new user they will need to have a **Utah-ID** as well (see section 1.1 Creating a Utah-ID...). To create a **Utah-ID** click on the [click here](#) link.

User Account Information

| | | | |
|------------------|---|-----------------------|---|
| Utah-ID:* | <input type="text" value="IFileForYouCFS"/> <small>To add a secondary user, please ensure they have a valid Utah-ID account. To obtain a Utah-ID account please navigate to https://login.utah.gov/user/create or click here.</small> | | |
| First Name:* | <input type="text" value="Francine"/> | Middle Name: | <input type="text"/> |
| Last Name:* | <input type="text" value="Filer"/> | Suffix: | Select ▾ |
| Contact Number:* | <input type="text" value="801"/> <input type="text" value="530"/> <input type="text" value="4849"/> | Email Address:* | <input type="text" value="ifileforyoucfs@gmail.com"/> |
| Status:* | <input checked="" type="radio"/> Active <input type="radio"/> Inactive | Filing Organization:* | <input type="text" value="I FILE FOR YOU"/> |

Contact Information

| | | | |
|------------------|--|-----------------|---|
| Address Line 1:* | <input type="text" value="163 E 300 S"/> | Address Line 2: | <input type="text"/> |
| Country:* | United States ▾ | Zip Code:* | <input type="text" value="84111"/> <input type="text"/> |
| City:* | Salt Lake City ▾ | State:* | Utah ▾ |

4. After obtaining a **Utah-ID** you will fill out the **User Account Information** page, and click on the button.

| Utah-ID | Name | Status | Action |
|----------------|----------------|--------|-------------------------------------|
| IFileForYouCFS | Francine Filer | Active | <input type="button" value="Edit"/> |

The user will now show up at the bottom of the **Secondary User Maintenance** page.

NOTE: They will log in with their Utah-ID and Password, but once logged in they will not have access to options found within the **Personalization** tab found in the header menu, with the exception of updating their personal information.

3.2.2 Editing a Secondary User

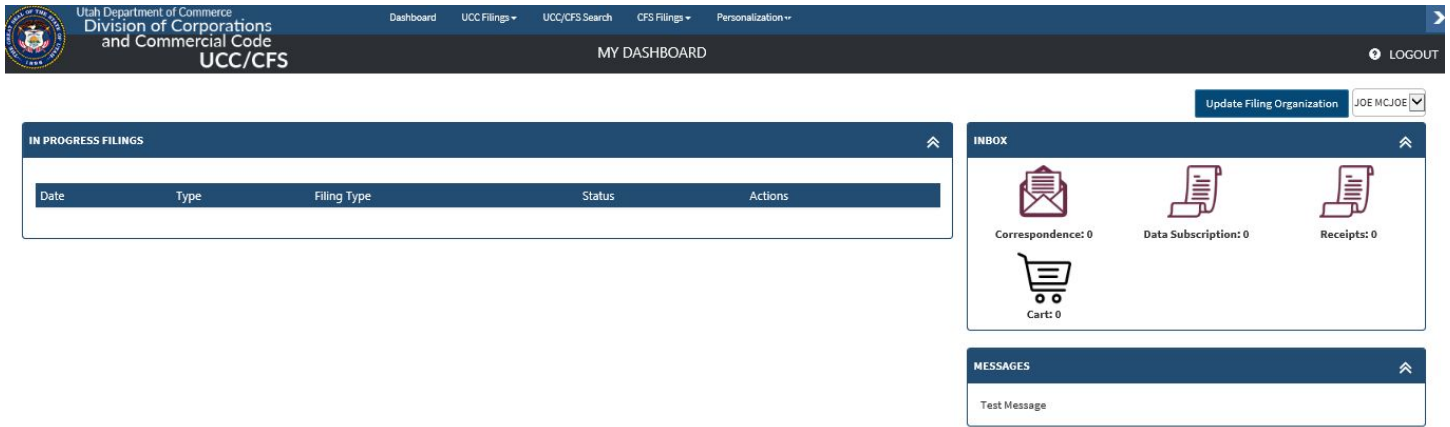
1. Select **Personalization > User Creation** from the header menu.
2. Click on the button.

3. Make changes on the **User Account Information** page and click the **Update** button.

4 Navigation

4.1 Dashboard

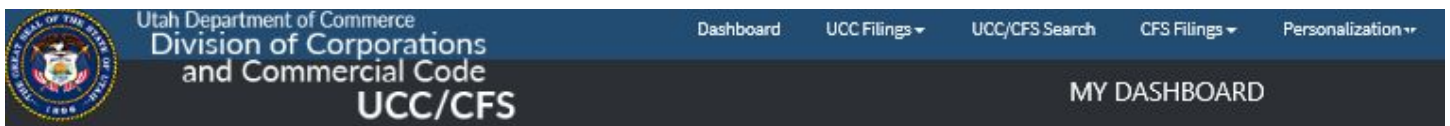
The Dashboard is the first screen that users see upon logging into the system. The user may navigate from this screen to any subsequent screen via the header menus.



4.2 Menus and Navigation

4.2.1 Menus

The Header Menus are displayed on every screen in the system. The user can hover over a menu item to expand the menu. The user may click the menu item to navigate to the selected screen.



4.2.2 Breadcrumbs

The user may use the system's breadcrumbs function to understand their progress in a particular filing.



The user can use the **Back** button to return to a previous page in the filing.




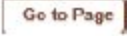
NOTE: Do not use the internet browser's Back button to attempt to return to a previous screen.

4.2.3 Pagination Controls

The system may display information like search results, work queue items, or filing history in a data grid consisting of lists of records spanning multiple pages. The current page is shown shaded brown.



The pagination control allows the user to navigate the data grid in the following ways:

- Click the page number to navigate to a specific page in the data grid.
- Click the  button to navigate to the previous page in the data grid.
- Click the  button to navigate to the next page in the data grid.
- Click the  button to show the next 5 pages in the pagination control.
- Enter a page number in the gray field and click the  button to go to a specific page in the data grid.

4.3 Session Timeout

The system will prompt the user to confirm that they wish to remain logged in if they are inactive for 15 minutes. The user will be logged out of the system automatically if they do not respond to the prompt within 30 seconds.

4.4 Logging Out

The user can click the Logout menu item on the right side of the header menu to log out of the system.

