

**SECRETARY OF STATE**  
**STATE OF INDIANA**  
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October 31, 2023

Legislative Council of the Indiana General Assembly  
Attn: George Angelone, Executive Director, Legislative Services Agency  
200 West Washington Street, Room 301  
Indianapolis, IN 46204

**2023 Annual Report**  
**Development of Multi-Agency "Business One-Stop" Internet Site**  
**Pursuant to IC 4-5-10-1(e)**

Reporting Period: November 1, 2022 – October 31, 2023

Members of the Indiana Legislative Council:

Pursuant to Indiana Code 4-5-10-1 (e), the Indiana Secretary of State (SOS) herewith submits a report on the progress of the development of Indiana's Business One Stop ("INBiz") platform. On behalf of our office, we are pleased to report the progress that has been made since last report.

**Background**

Ind. Code 4-5-10-1, as amended in 2011, charges the Secretary of State, in collaboration with other state agencies, to develop and maintain an Internet web site ("portal") with which a business may establish a single user account to conduct transactions such as registration, permitting, report filings, payments and account history inquiries with multiple government agencies. Stated differently, the objective of INBiz is to provide Hoosier businesses with a "one-stop shop" for all transactions with state government. A one-stop shop provides a streamlined, customer-centric experience that reduces confusion, stress, and delays for Hoosier business owners.

**INBiz 2023 Statistics**

- 1,095,020 active user accounts
- 550 to 650 new users per day
- 630,232 active businesses
- 100,719 new businesses registered
- 137,011 UCC filings
- 415,637 filings submitted on INBiz

**Projects Completed in Reporting Period**

This reporting period saw continued growth in the online service offerings from the Secretary of State Business Services Division and partner agencies,

which include Department of Revenue (DOR), Department of Workforce Development (DWD), Indiana Office of Technology (IOT), Indiana Professional Licensing Agency (IPLA), Office of the Attorney General (OAG) and Indiana Small Business Development Center (SBDC).

Major INBiz accomplishments from this reporting period include:

- Launch of Indiana Business Roadmap
- Overhaul of Online Services Page
- INBiz infrastructure enhancements
- Overhaul of the Business Entity Report Page
- Introduction of DWD Office for Career and Technical School information to INBiz
- Increased functionality on Bulk Data Page
- Updated alert for Continuing Education for Notaries
- Legislative Updates for DOR
- Expanded customer demographics and utilization data
- Planning and assessments for technical upgrades

### **Launch of Indiana Business Roadmap**

In January 2023, the Indiana Business Roadmap was released. This new functionality guides users through the process needed to register a business. Each step provides detailed information and instructions to guide the user through the process and fully integrates with the partner agencies. The Business Roadmap includes a section on Business Security that is designed to help users gain awareness of scams and be aware of the free and low-cost services provided through INBiz. This new functionality simplifies the process of registering for a business and provides a more streamlined user experience.

### **Complete Overhaul of Online Services Portal in INBiz**

In June 2023, the INBiz site was updated to enhance functionality of the Online Services section of the portal. The information was organized by agency and the filing types were reorganized to provide a more user-friendly order. Color coding was added to further enhance user experience and improve site navigation. Descriptions were added beneath filing types to define the menu option and assist users with their filing selections more clearly.

### **INBiz Infrastructure Enhancements**

Monthly deployments are made to address any bugs and scheduled system enhancements. During the reporting period, multiple changes were made to INBiz to improve the customer experience. Highlights include:

- Improvements to the notary application process
- New process for ordering custom Certificate of Facts
- Landing page improvements
- Filing documents, certificates, and email content updates

### **Business Entity Report Landing Page Improvements**

The Business Entity Report landing page was overhauled in December of 2022. The information

was updated into easy-to-understand headers such as “Who Files a Report” and “What Info is Required”. The information on each tab has been simplified to provide clear information regarding business entity report filing requirements. The page is now a comprehensive resource for businesses and the INBiz call center.

#### **Introduction of DWD Office for Career and Technical School information to INBiz**

In March 2023, the INBiz site was updated with new content for the DWD Office for Career and Technical Schools as well as an updated logo for the DWD. The new content was added to the DWD section within the Online Services menu and included updates to the submenu. Additionally, the step for the DWD on the Indiana Business Roadmap was updated with additional information.

#### **Increased Functionality on Bulk Data page on INBiz**

The Bulk Data Page of INBiz was updated in June to include all the available bulk data for Business Entity, UCC and Trademark. Content was updated to provide more concise and easily understandable information regarding the options for procuring bulk data.

#### **Updated Alert for Continuing Education for Notaries**

In July 2023 INBiz was updated with additional functionality to alert Notary Publics of the need to complete CE requirements, and again on the completion of requirements. This change improved user experience and reduced calls and emails to INBiz.

#### **Legislative Updates for DOR**

On behalf of DOR the INBiz site has been updated to provide tax jurisdiction changes on an annual basis. Changes were also made to comply with the Dubois County ordinance for innkeeper tax collection.

#### **Public Outreach**

During the reporting cycle, the INBiz staff provided information at the Small Business Week event hosted by the Small Business Association in May and presented to the SCORE Foundation in June.

#### **Customer Demographics and Utilization Data**

This reporting period also saw a continued effort in understanding customers through online new user surveys and chatbot surveys. Customer demographic and user data was collected from 232,123 new user surveys and 104,731 chatbot conversations (See **Attachment A**).

#### **Plans for Upcoming Period (November 2023- October 2024)**

The INBiz program is maturing its processes and aims to complete several major initiatives through the next reporting period while exploring future horizons. All these projects will help in cementing Indiana’s reputation for a business-friendly environment, which include:

### **Corporate Transparency Act Preparation**

The Corporate Transparency Act (“CTA”) was enacted by Congress on January 1, 2021. The CTA is intended to help prevent and combat money laundering, terrorist financing, corruption, and tax fraud. The CTA establishes the requirements for reporting beneficial ownership information for corporations, limited liability companies, and other business entities formed or registered to do business in the United States. Beneficial ownership reports must be filed with the Financial Crimes Enforcement Network (FinCEN), a bureau within the U.S. Department of Treasury.

The reporting requirements under the CTA go into effect on January 1, 2024. New businesses will have 30 days after formation or registration to report beneficial owner information to FinCEN. Business entities formed or registered prior to January 1, 2024, will have until January 1, 2025, to comply with the beneficial owner reporting requirements. Note: FinCEN has a pending rule change to increase the timeline to 90 days.

To help inform the business community of the federal requirements, the Secretary of State plans the following updates to INBiz:

- Add informational links to FinCEN and the Small Business Guide developed by FinCEN.
- Update the confirmation email businesses receive after formation or registration to include basic information on beneficial owner filing requirements and links to FinCEN.
- Update the Indiana Business Roadmap to include beneficial owner filing requirement icon and information.
- Create knowledge articles for the INBiz call center to address questions related to beneficial owner filing requirements.

States and service companies, such as CT Corporation, are predicting call volume to increase anywhere from 5%-10% to upwards of 10%-20%.

### **Cloud Migration**

A major project to migrate the INBiz system to the Cloud has been initiated to drive innovation and efficiency to better serve our customers. The migration offers flexibility to adapt to changing business needs, system scalability on demand, accessibility, compliance, and security advantages. Additionally, the migration will enable streamlined integrations with other state agencies and organizations to further the INBiz mission. A modern cloud platform provides better reliability, disaster recovery, reduction in maintenance overhead, and fosters greater innovation to take advantage of the latest cutting-edge technologies like Artificial Intelligence (AI), Machine Learning, and big Data Analytics.

### **Department of Revenue NextDOR**

The Indiana Department of Revenue (DOR) requested additional changes to INBiz to comply with ordinances for the city of Jasper in Dubois County and Columbia City in Whitley County. Additionally, the DOR expressed interest in pursuing the use of an Application Programming Interface (API) for data sharing. This is being assessed.



**Professional Licensing Agency (PLA) Expanded Integration**

PLA is in the midst of an infrastructure upgrade for their INVERIFICATION database. INBiz has tested the interface and is ready to implement the changes upon PLA's request.

**Data Sharing via API**

The development of a new webservice and Application Processing Interface (API) will allow for a quick, safe and reliable way to share various INBiz data sets with interested parties. The office has received requests for this functionality from public agencies, such as the Department of Revenue (DOR) and private industries such as the Indiana Economic Development Corporation (IEDC). This project would provide an efficient means to share data and simplify processes.

**Additional Planned Projects**

Additional planned projects that would improve the functionality and utility of the INBiz site including the following:

- Working with partner State agencies to further integrate systems and portals across the state ensuring a greater efficient user experience
- Update the site to make the content more easily viewable through mobile devices
- Create a Domestication/Conversion wizard and content page
- Redevelop the Remote Notary system and host on INBiz
- Increase the online capabilities for UCC
- Construct comprehensive data dashboards

**Analysis and Update of INBiz Customer Experience**

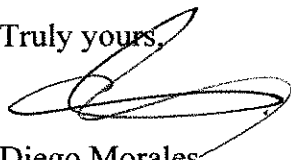
The Secretary of State will undertake a project to fully analyze the existing INBiz content, customer service modalities (call center, chat bot, outreach, and education, etc.), and User Interface/User Experience (UI/UX) of the INBiz system. The customer journey will be identified and mapped to identify areas for improvement to ensure the best possible experience for the users.

**Next Steps**

The Secretary of State looks forward to continued engagement with members of the Legislative Council and Indiana General Assembly regarding the positive short-term and long-term impact the INBiz program will have on Hoosier businesses, key state agencies, and Indiana's overall technological and financial efficiency.

In conclusion, we would like to assure you of the committed efforts of the agency staff members who appreciate and support this innovative, worthwhile project.

Truly yours,



Diego Morales  
Indiana Secretary of State

## Attachment A

INBiz Customer Demographic and Utilization Data identified the following key factors related to INBiz customers:

- 82% of users are business owners or employees
- 10% of users are Registered agents or service providers
- 93% of users identified as small businesses (0-25 employees)
- 87% of users are domestic businesses (in state)
- 58% of users are starting a business
- 17% of users are filing their business entity report
- 7% of users are filing a tax registration
- 14% of users identified as notary public commissions
- 5% of users are obtaining or updating a professional license

### INBiz Constituent Services

#### Call Center

Call Volume	2020	2021	2022	2023
Totals	130,065	124,489	122,203	105,873

#### Chatbot

# of Chats	2020	2021	2022	2023
Totals	79,929	91,296	112,526	104,731

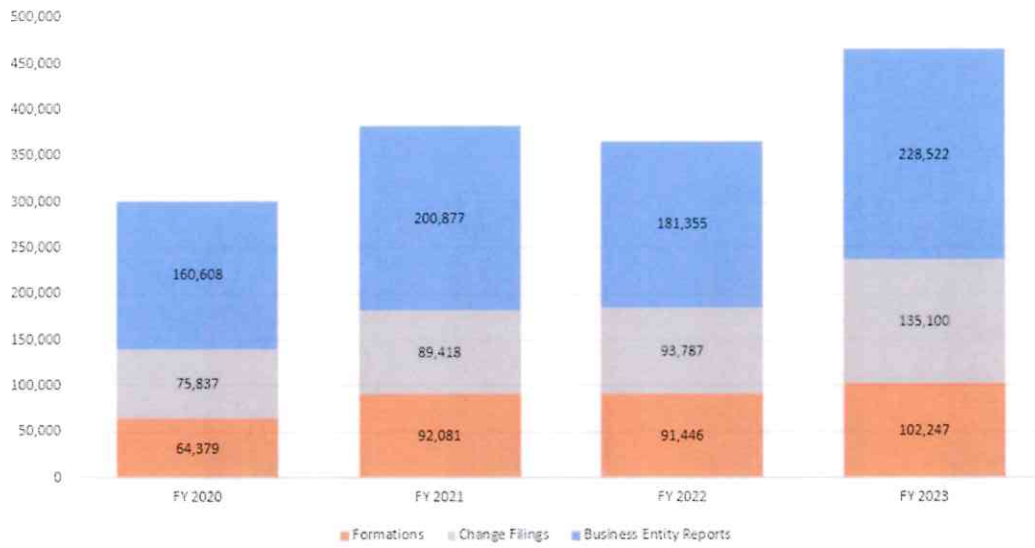
#### INBiz Adoption Rates

The adoption rates reflect the percentage of filings submitted on INBiz in comparison to paper. The Secretary of State saw increased adoption rates for Business Entity and UCC filings during this reporting period.

#### Business Entity Fiscal Year Data (July 1- June 30)

**Number of Active Business Entities:** 630,232

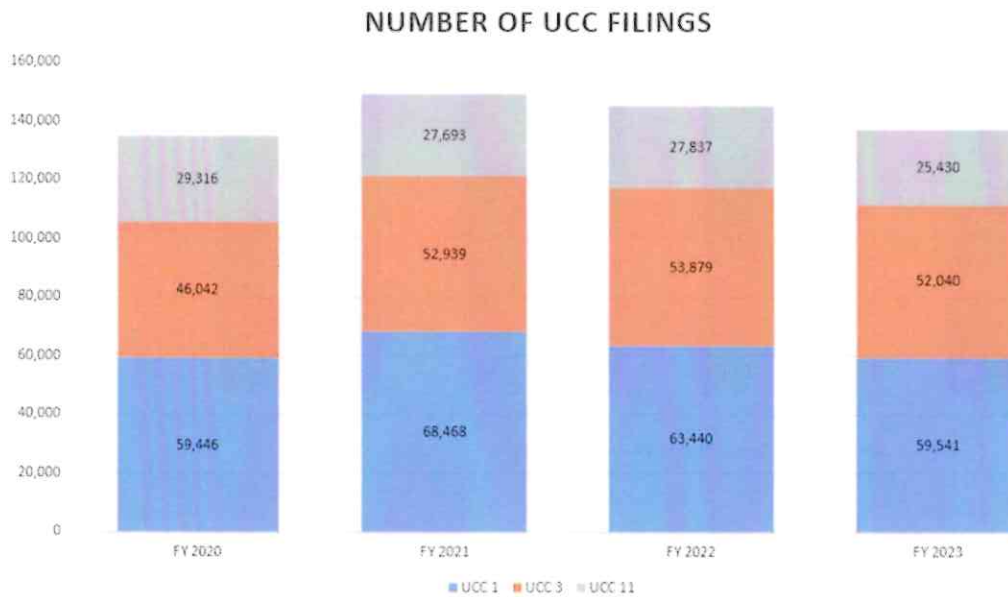
### NUMBER OF BUSINESS ENTITY FILINGS



Filing Type	2020	2021	2022	2023
Formation	94.3%	96.8%	96.4%	95.7%
Change Filings	90.5%	94.4%	85.1%	89.9%
Business Entity Report	99.1%	99.1%	99.5%	99.0%

## UCC Fiscal Year Data

**Number of Active Financing Statements: 832,886**



UCC 1 = financing statements, UCC 3 = amendments to financing statements, UCC 11 = search certificates.

Filing Type	2020	2021	2022	2023
UCC Filings	85.0%	87.0%	88.0%	88.3%
Search Certificates	99.7%	99.8%	99.9%	99.9%

**Trademark Registration – 100%**

**Number of Active Trademarks and Service Marks: 4,686**

**Notary Public Commissions – 100%**

**Number of Active Notaries: 67,680**