CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts

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Updated: March 6, 2024

MA CPCS

User Guide

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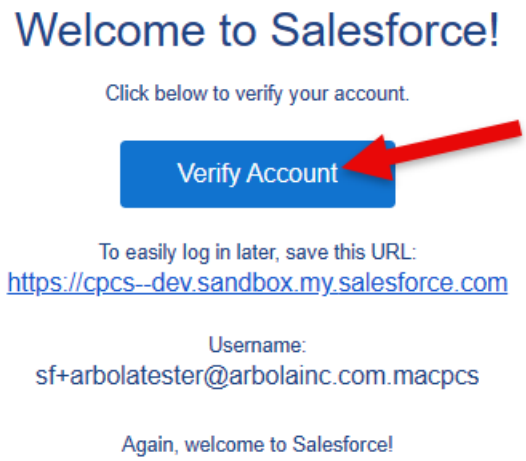
Getting Started

Verifying Account

An email was sent to you from Salesforce. The email has the subject "**Welcome to Salesforce: Verify your account**." Please check your spam folder if you do not initially see this email. If you cannot find it, please contact your help desk.

Right click on the **Verify Account** button and copy it into your **Chrome** browser and follow the steps in your browser to verify your username and set your password.



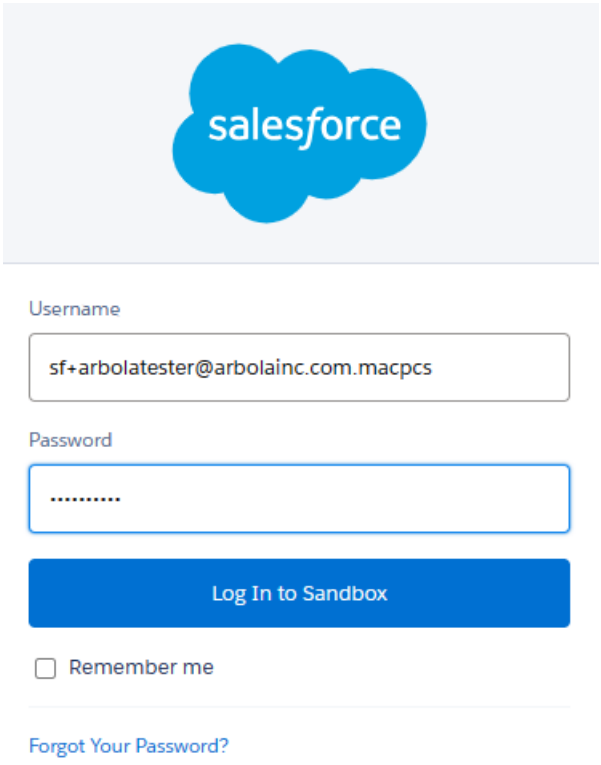
Tips

- ✓ **Salesforce** recommends using the **Google Chrome** browser for the best experience.

- ✓ Create a bookmark for the **Salesforce** site for quick, access.

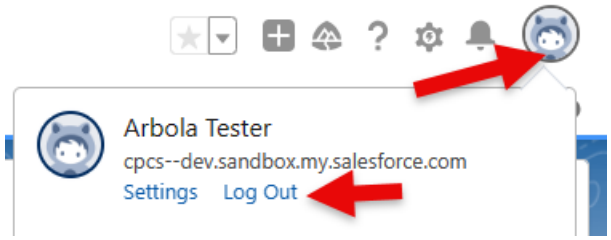
Logging In

Launch your browser and navigate to the Salesforce URL you received in your welcome email. Enter your **Username** and **Password** then click the Login button.



Logging Out

Click the **Avatar** button in the upper right corner of any Salesforce screen and then click the **Log Out** link.

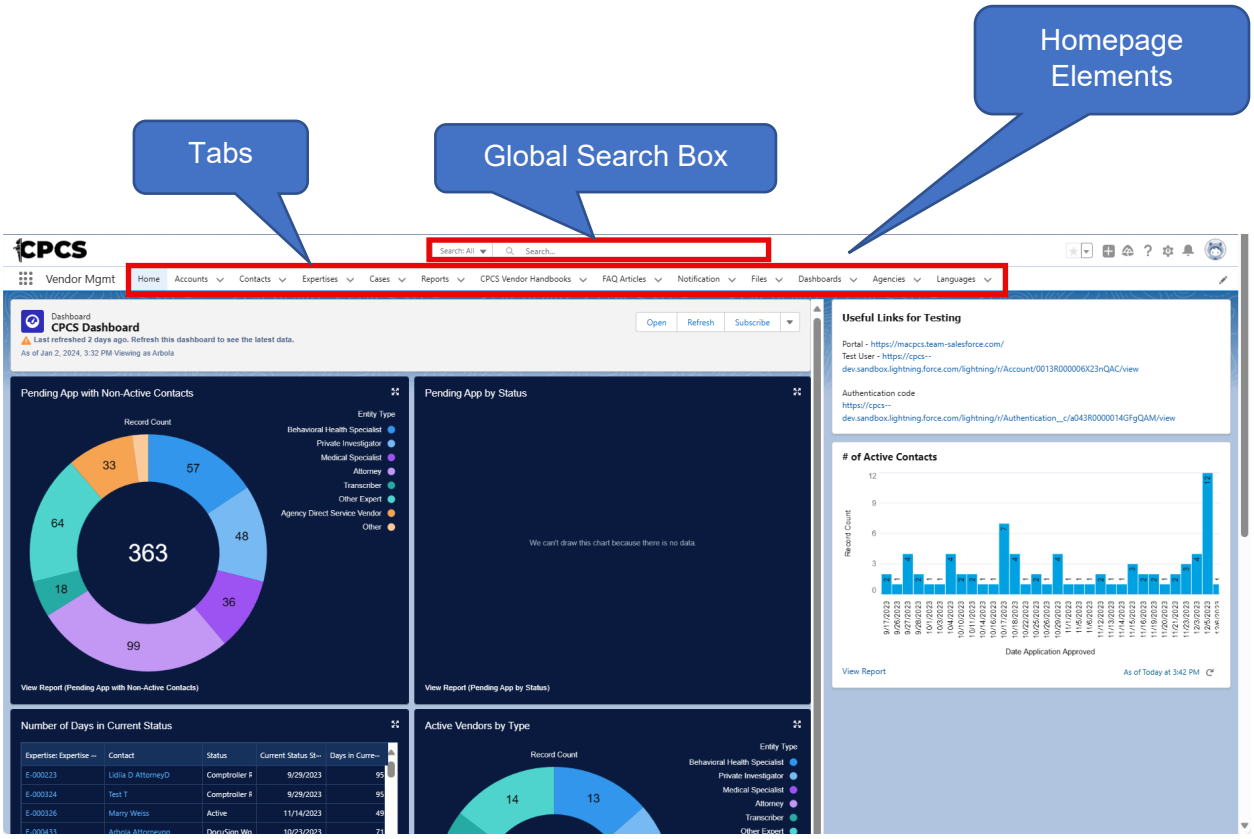


The Homepage

The Homepage serves as your main dashboard and is customized. It provides easy access to expertises, reports, and dashboards by clicking on **Tabs**.

The **Global Search Box** appears on the Homepage and all other pages so that existing expertises can be rapidly found and processed.

The **Homepage Elements** provides at-a-glance information about applications and contacts.



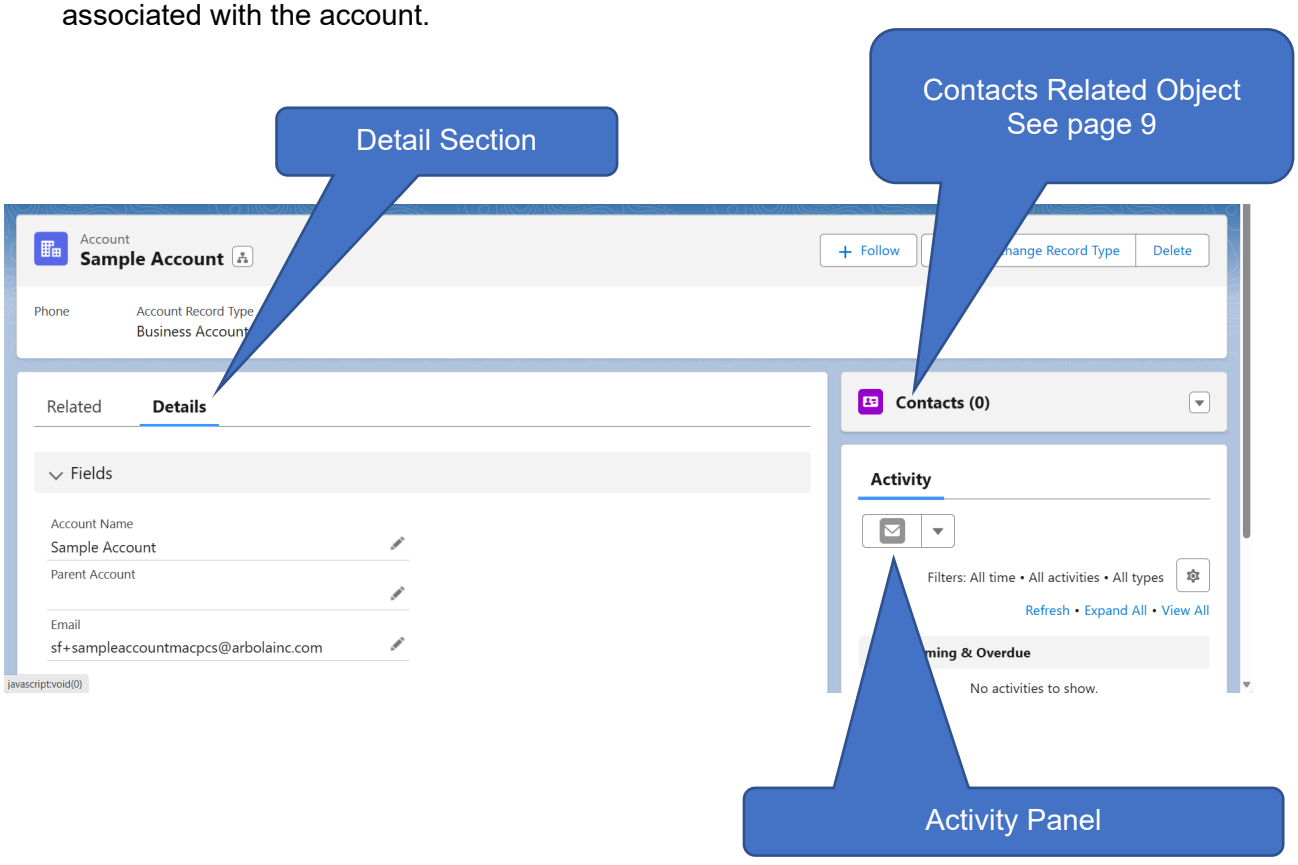
Accounts

Applicants will submit the application via the portal. An account, contact, and expertise record will automatically be created for each application. Accounts are the vendor's company; if the vendor is an individual, the account is the vendor's name. Accounts can be manually created.

Accounts Screen Layout

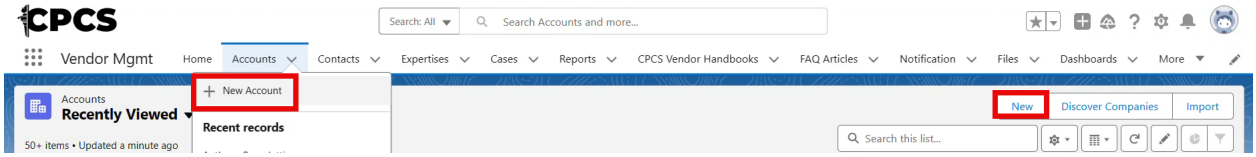
The account screen is divided into sections showing different categories of information.

- The top section shows the account name and Record Type.
- The **Related Objects** section shows the object associated with the account and offers the ability to review and/or add contacts.
- The **Details** section lists the account name and email address.
- The **Activity Panel** on the right side of the account screen displays emails sent related to the account record and allows a system user to send an email associated with the account.

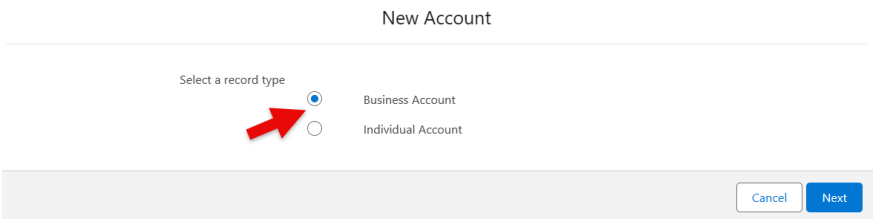


Create an Account

1. Click the action arrow by the **Account** tab and select **New Account** or, when viewing the **Account** tab, click the **New** button in the upper right corner. The **New Account** screen will display.

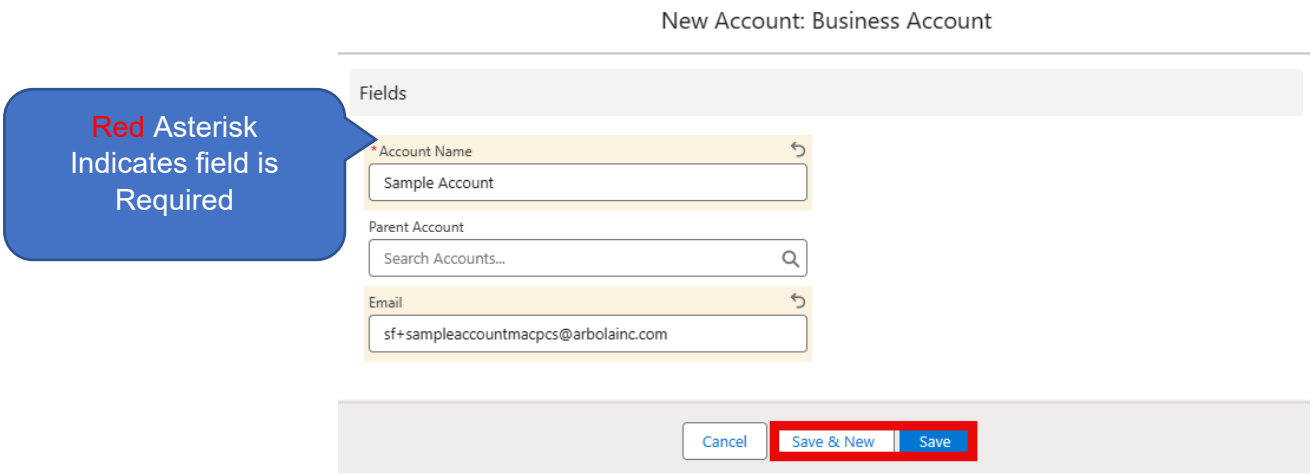


2. Click the **radio button** beside the desired account record type and then click the **Next** button.



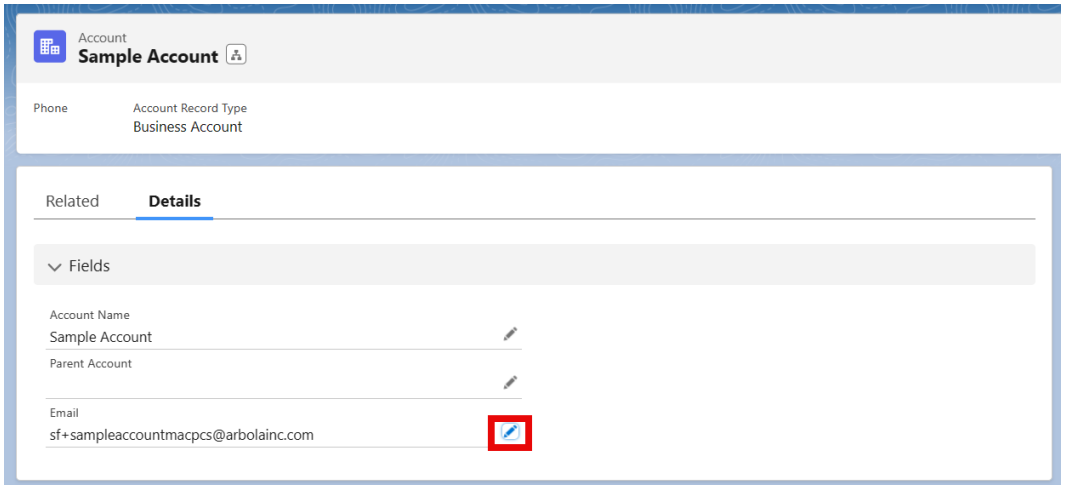
3. Fill in the **New Account** record form fields with the information known about the account. Click the **Save** button or the **Save & New** button to continue creating accounts.

   NOTE: The **Account Name** field is required as indicated by the **red** asterisk. Other information can be added later if desired.

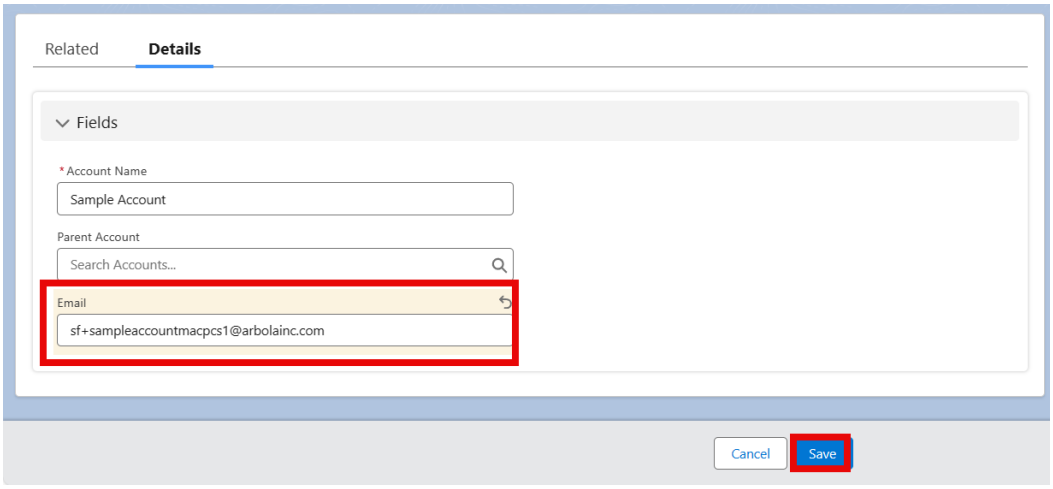


Edit an Account

1. Click a **pencil icon** on the account detail screen.



2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



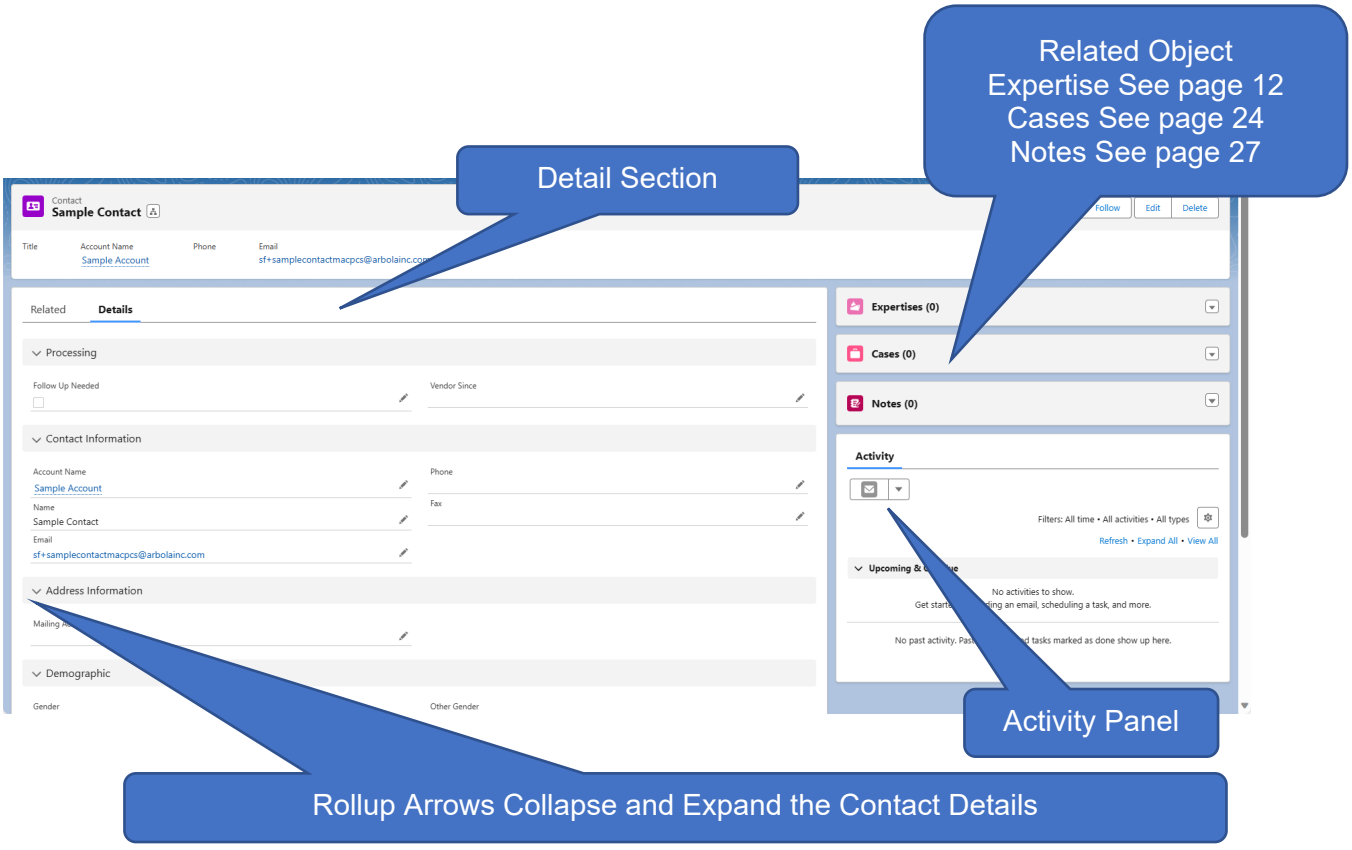
Contacts

Applicants will submit the application via the portal. An account, contact, and expertise record will automatically be created for each application. Contacts can be manually created. They are the individuals associated with accounts and expertise.

Contact Screen Layout

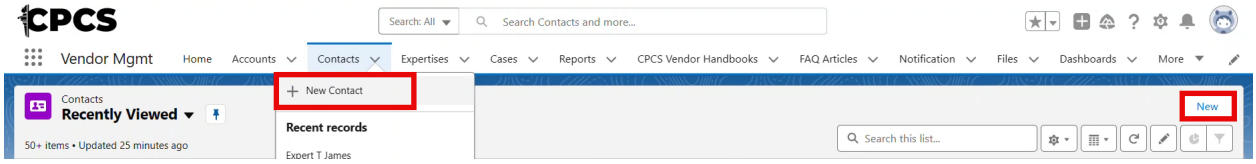
The contact screen is divided into sections showing different categories of information.

- The top section shows the account name, contact phone number, and contact email address.
- The **Related Objects** section shows objects associated with the contact and offer the ability to review and add records.
- The **Details** section is divided into sections with the Processing section displaying at the top. Each details section has a gray rollup divider to expand or collapse any of the sections.
- The **Activity Panel** on the right side of the contact screen displays emails sent related to the contact record and allows a system user to send an email associated with the contact.

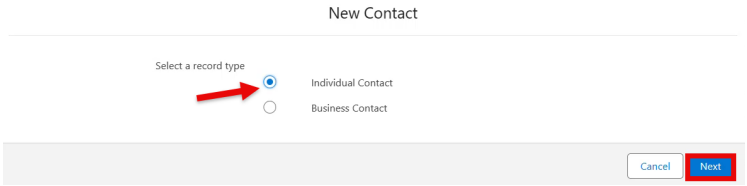


Create a Contact

1. Click the action arrow by the **Contacts** tab and select **New Contact** or, when viewing the Contacts tab, click the **New** button in the upper right corner. The **New Contacts** screen will display.

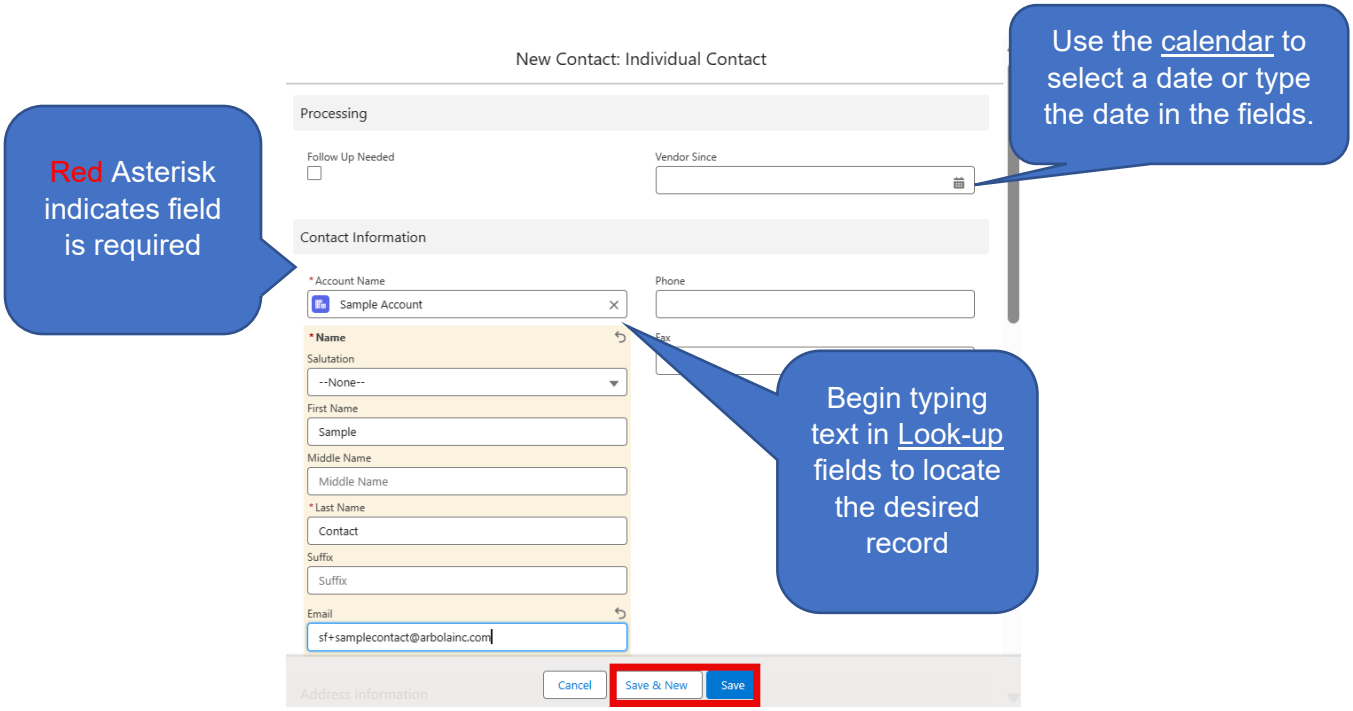


2. Click the **radio button** beside the desired account record type and then click the **Next** button.



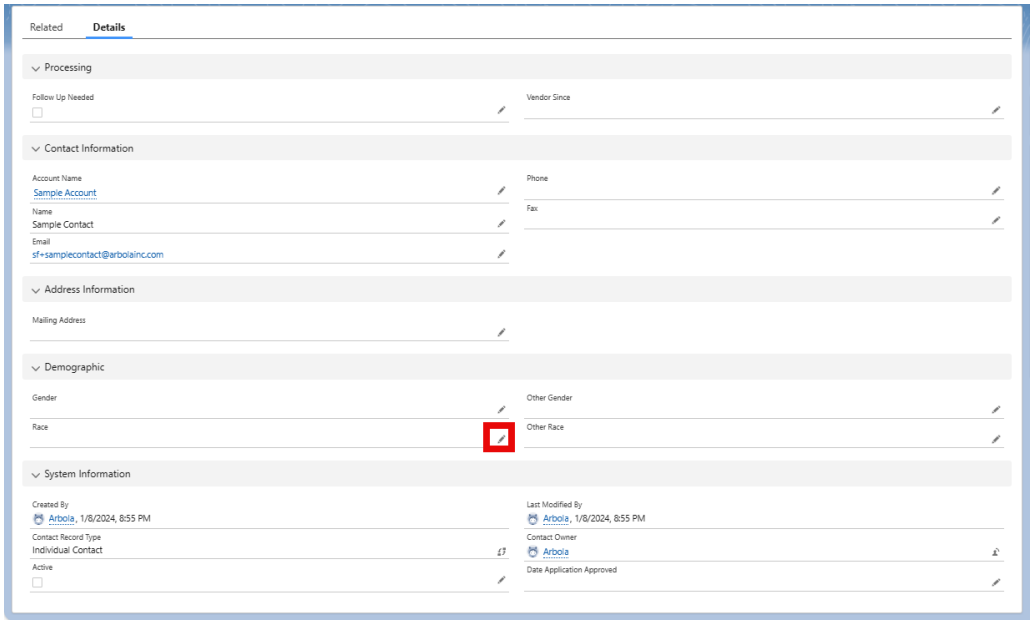
3. Fill in the **New Contact** record form fields with the information known about the contact. When the form is completed, click the **Save** button or the **Save & New** button to continue creating contacts.

   NOTE: The required fields are **Last Name and Account Name** as indicated by the **red** asterisk. Other information can be added later if desired.

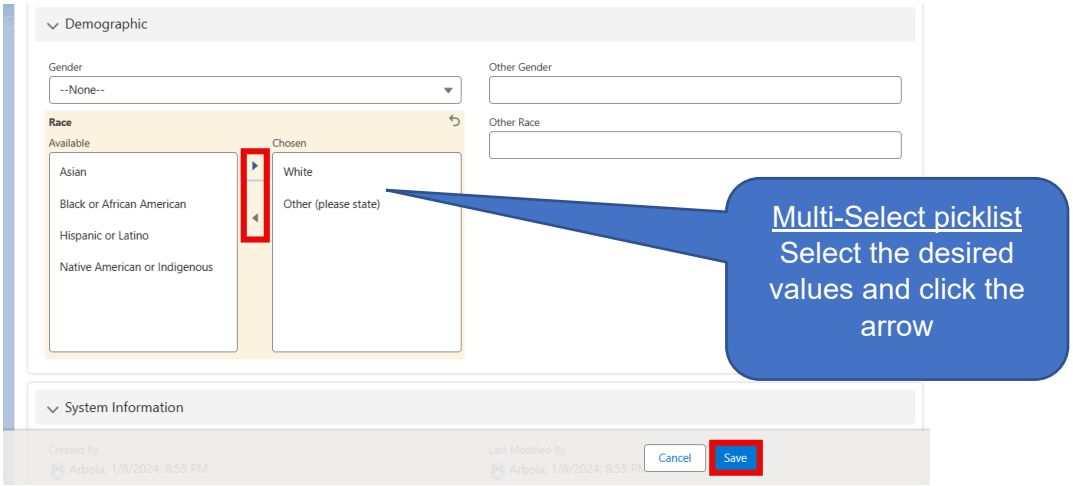


Edit a Contact

1. Click a **pencil icon** on the contact detail screen.



2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



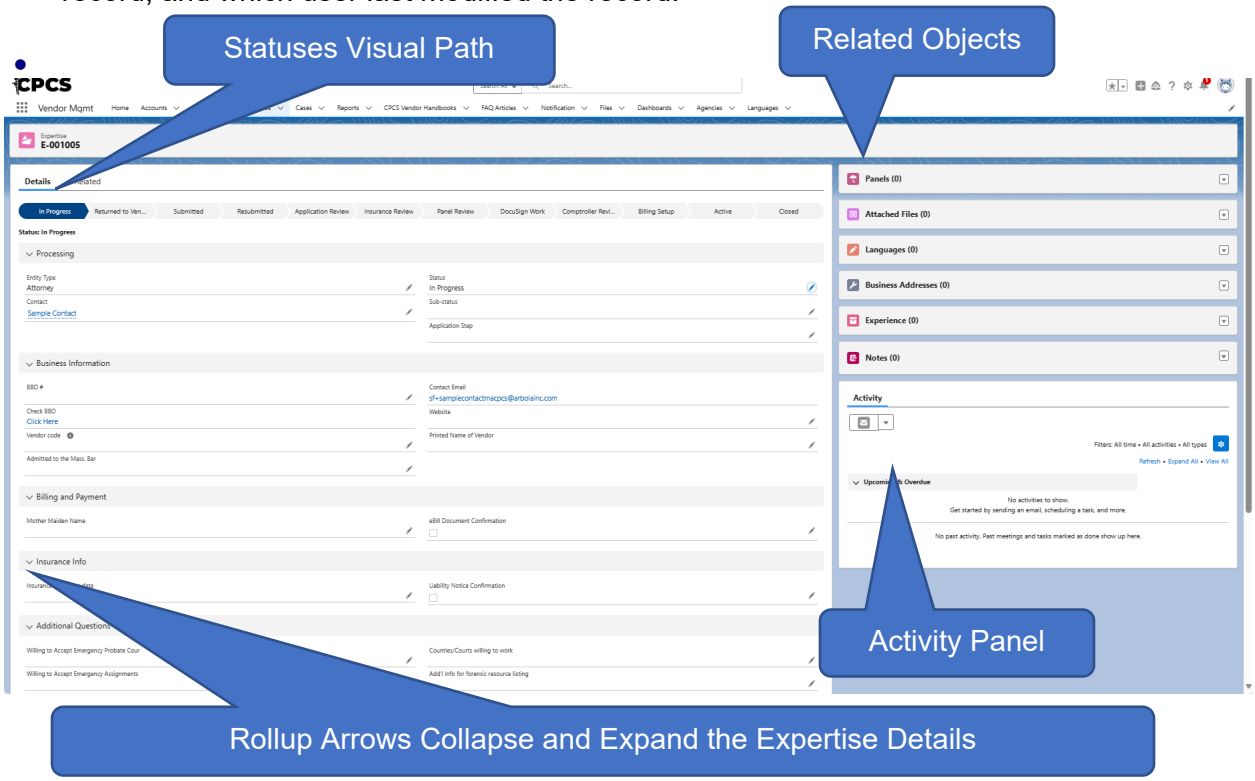
Expertise

Applicants will submit the application via the portal and automatically create an account, contact, and expertise record. An expertise can be manually created for Attorney, Agency Direct Service Vendor, Expert, Other Services, and Private Investigators with unique fields and related objects. See the next section for information on each specific group.

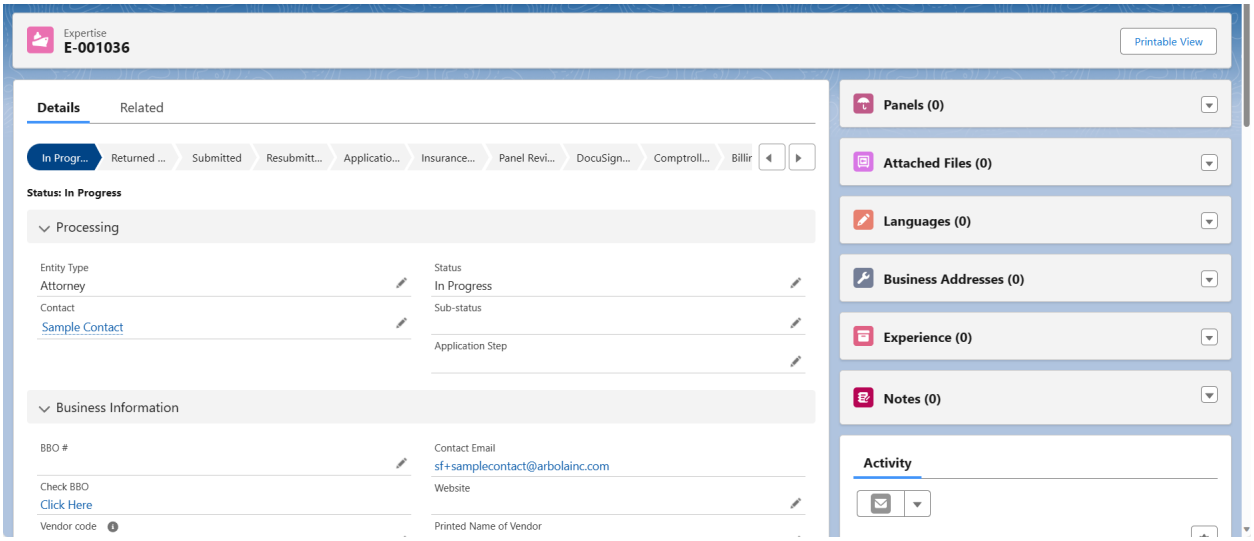
Expertise Screen Layout

The expertise screen is divided into sections showing different categories of information.

- The visual path of Statuses displays at the top of the Detail section.
- The **Related Objects** section shows objects associated with the expertise and offer the ability to review and add records.
- The **Details** section is divided into segments. Each details section has a gray rollup divider to expand or collapse any of the sections.
- The **Activity Panel** on the right side of the expertise screen displays emails sent related to the expertise record and allows a system user to send an email associated with the expertise.
- The **System Information** section lists the record type, which user created the record, and which user last modified the record.



Attorney Screen Layout



Vendor Code format is VC followed by 10 digits. This field is required prior to a user being active.

Related Objects on Attorney Record:

Panels - See page 30

Attached Files - See page 34

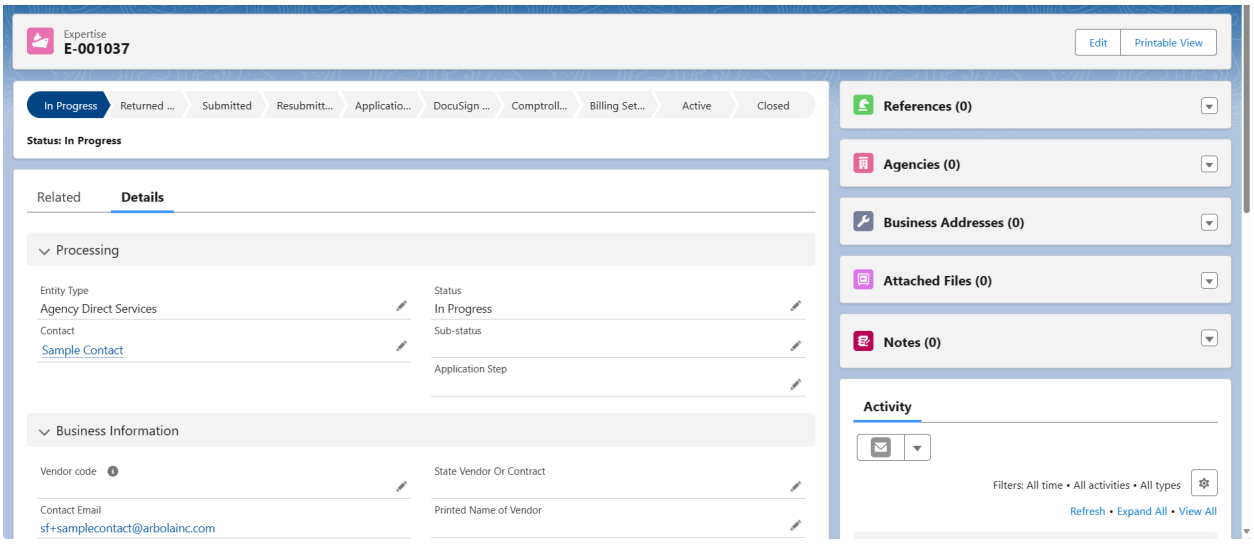
Languages - See page 40

Business Addresses - See page 43

Experiences - See page 46

Notes – See page 27

Agency Direct Services Screen Layout



Related Objects on Agency Direct Services Record:

References - See page 52

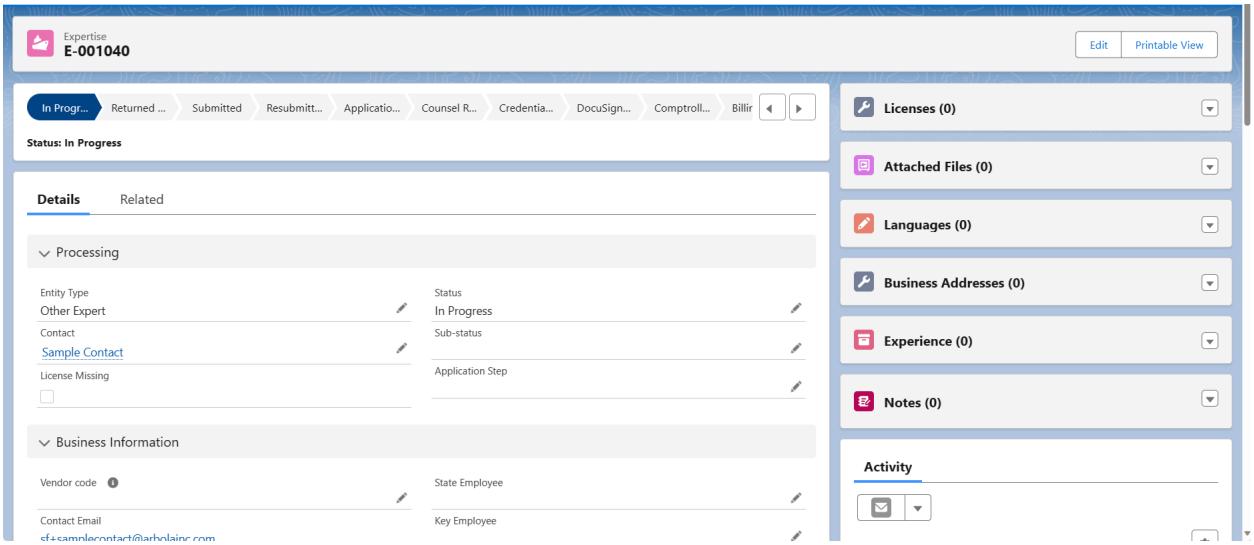
Agencies - See page 55

Business Addresses - See page 43

Attached Files - See page 34

Notes - See page 27

Expert Screen Layout



Related Objects on Expert Screen Record:

Licenses - See page 49

Attached Files – See page 34

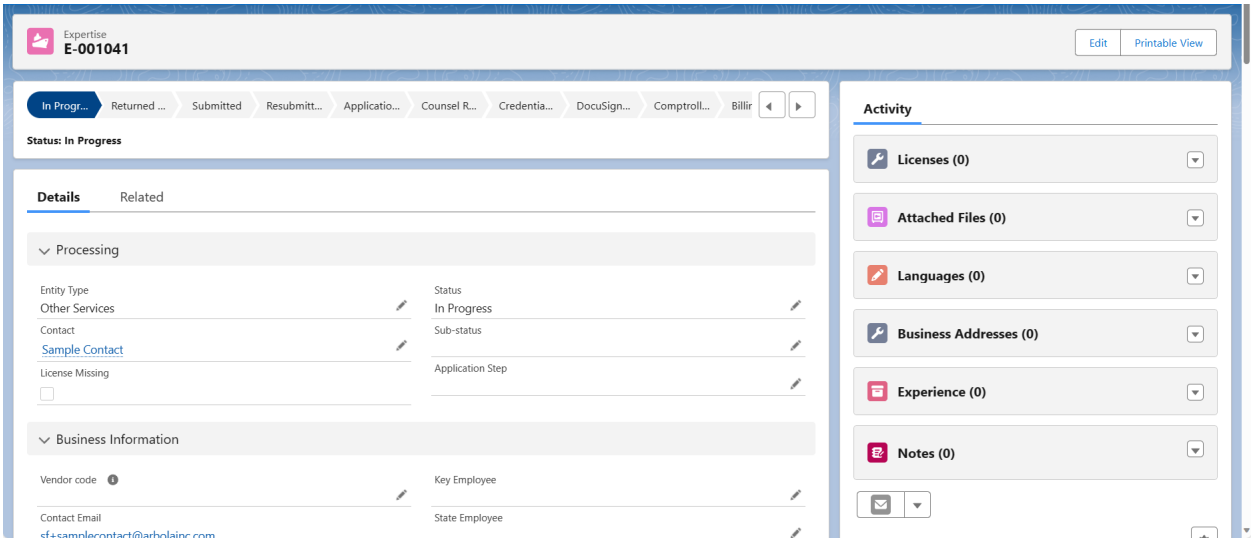
Languages - See page 40

Business Addresses – See page 43

Experience – See page 46

Notes – See page 27

Other Services Screen Layout



Related Objects on Other Services Record:

Licenses - See page 49

Attached Files – See page 34

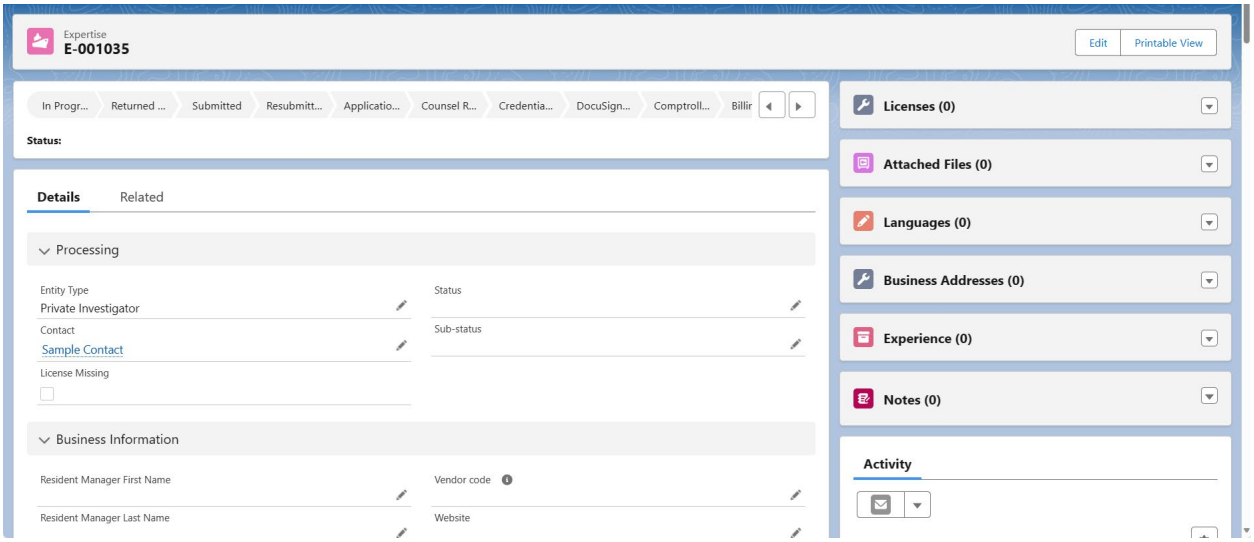
Languages - See page 40

Business Addresses – See page 43

Experience – See page 46

Notes – See page 27

Private Investigator Screen Layout



Related Objects on Private Investigator Record:

Licenses - See page 49

Attached Files – See page 34

Languages - See page 40

Business Addresses – See page 43

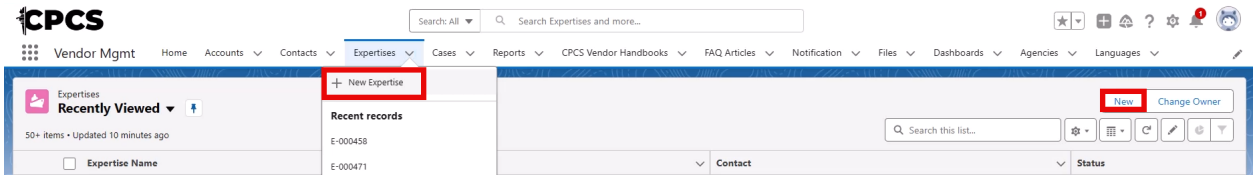
Experience – See page 46

Notes – See page 27

Create an Expertise

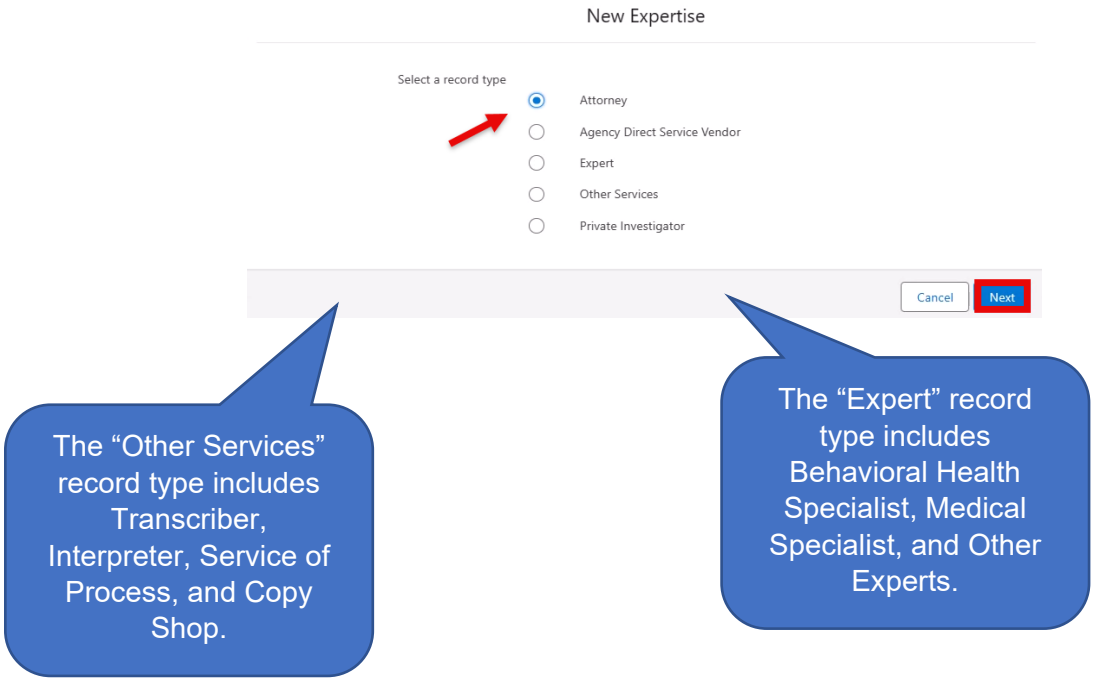
An Expertise is created when an application is submitted online or can be manually created.

1. Click the action arrow by the **Expertise** tab and select **New Expertise** or, when viewing the **Expertise** tab, click the **New** button in the upper right corner. The **New Expertise – record type** screen will display.



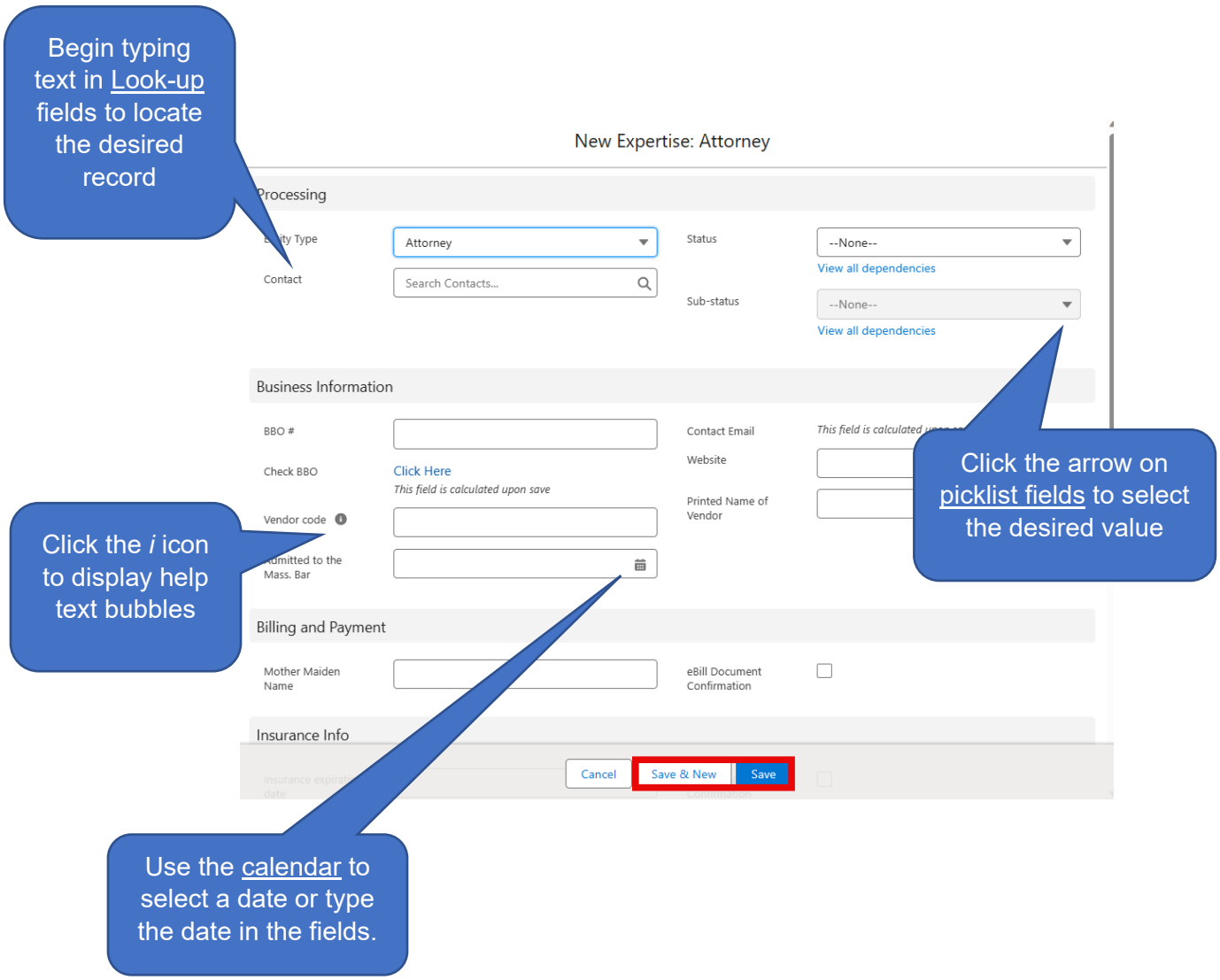
2. Click the **radio button** beside the desired expertise record type and then click the next button.

   NOTE: There may be different fields and related lists depending on the record type selected.



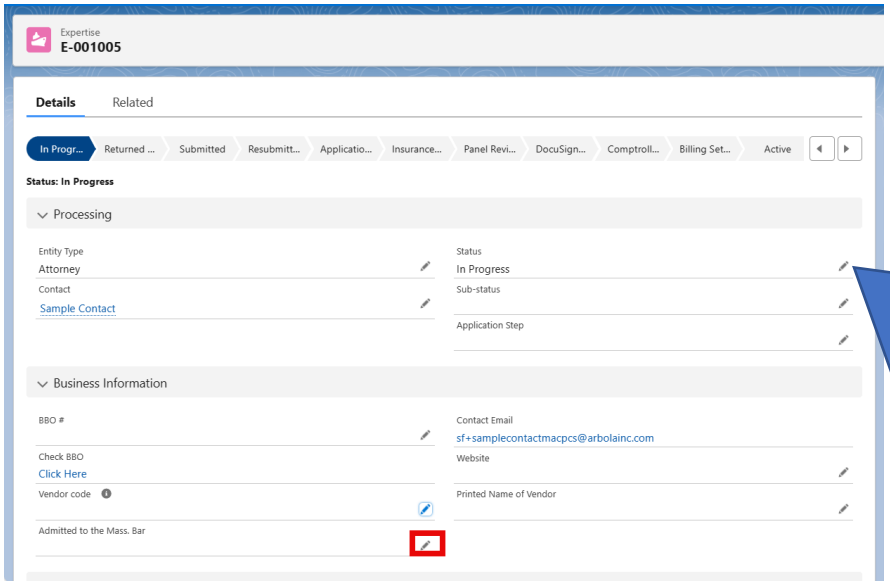
3. Fill in the **New Expertise** record form fields with the information known about the expertise. When the form is completed, click the **Save** button or the **Save & New** button to continue creating additional Expertise records. Other information can be added later if desired.

   NOTE: To check the **BBO number**, select **Click here**. The system will open a new tab for the Massachusetts Board of Bar Overseers website. **Admitted to the Bar** must have a value in order to send the application to the Insurance Review status.



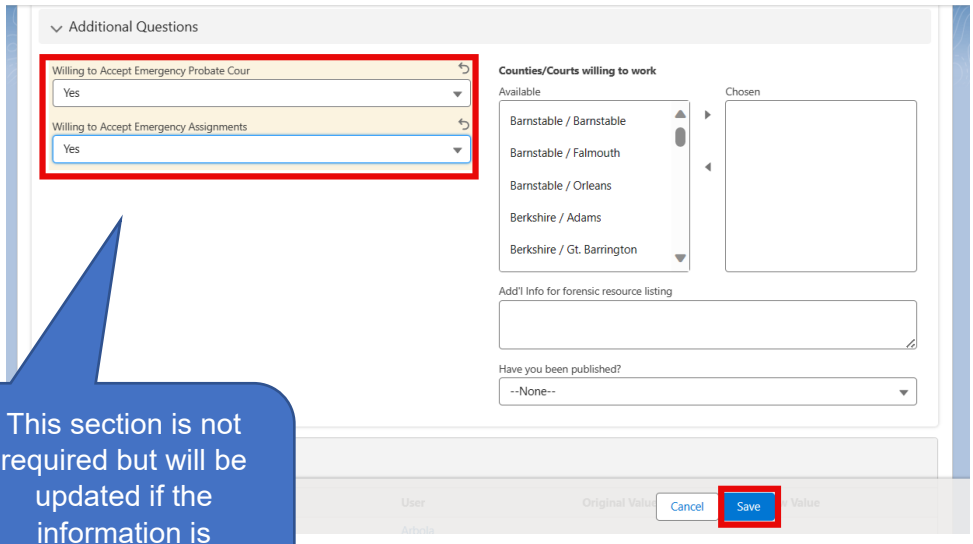
Edit an Expertise

1. Click a **pencil icon** on the expertise detail screen.



There is validation in place to check if there is "License" File before allowing the status to be changed from Application Review status.

2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



This section is not required but will be updated if the information is entered.

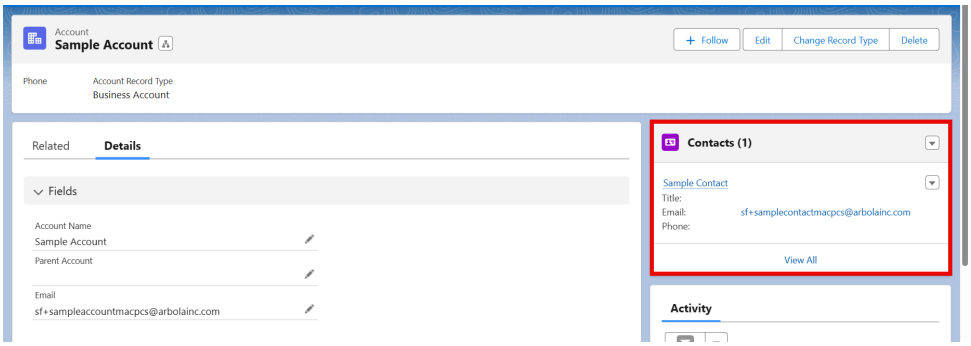
Related Lists

Related Lists show objects associated with the Account, Contact, or Expertise record and offer the ability to review and add records. Based on the object and record type, different related lists will be available. The following related lists are available on the object noted in the parenthesis.

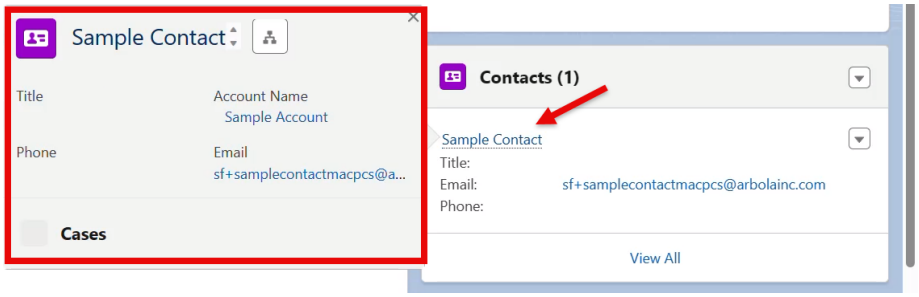
Contact (Account)

A Contact can be viewed or created from the account.

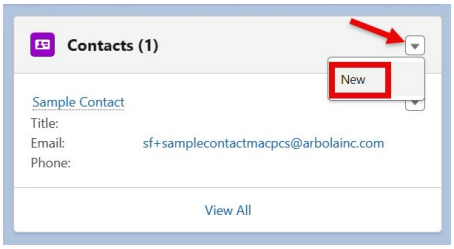
1. With the account displaying, view the current contacts on the **Contacts related list**.



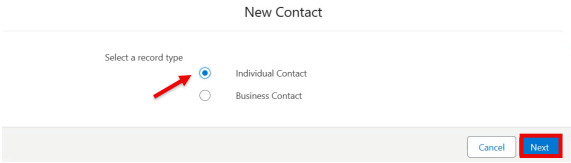
2. Hover over the **contact name** to view details or Click the **link** to open the contact records.



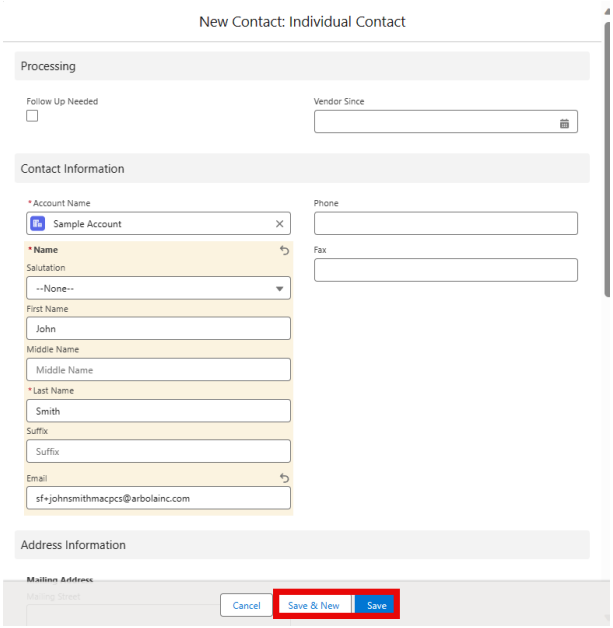
3. To create a new contact, click the down arrow on the right side of the contacts related list and then select the **New** button.



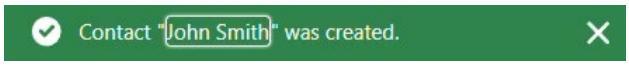
4. Click the **radio button** beside the desired contact record type and then click the **Next** button.



5. The **New Contact** record form (based on the record type selected) will display. Fill in the **New Contact** record form fields with the information known. When the form is completed, click the **Save** button or the **Save & New** button to continue creating contacts.

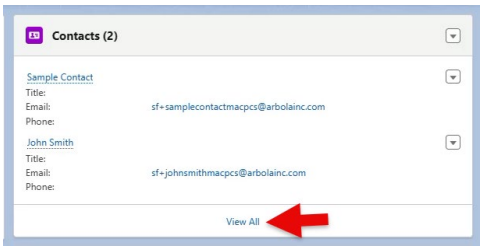


6. A **green bar** will display to indicate that the **Contact** has been created.



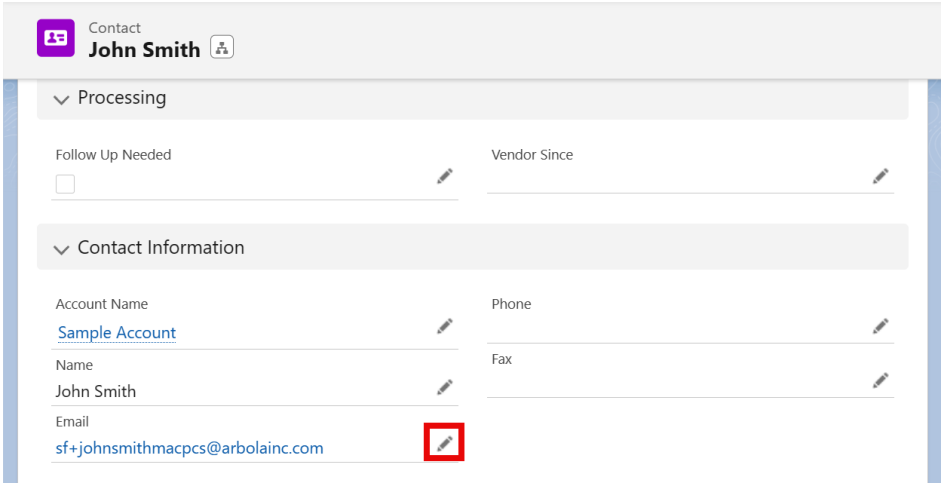
7. The new contact will display on the **Contacts related list**.

   NOTE: Select **View All** to see all the contacts displayed in a **list view**.

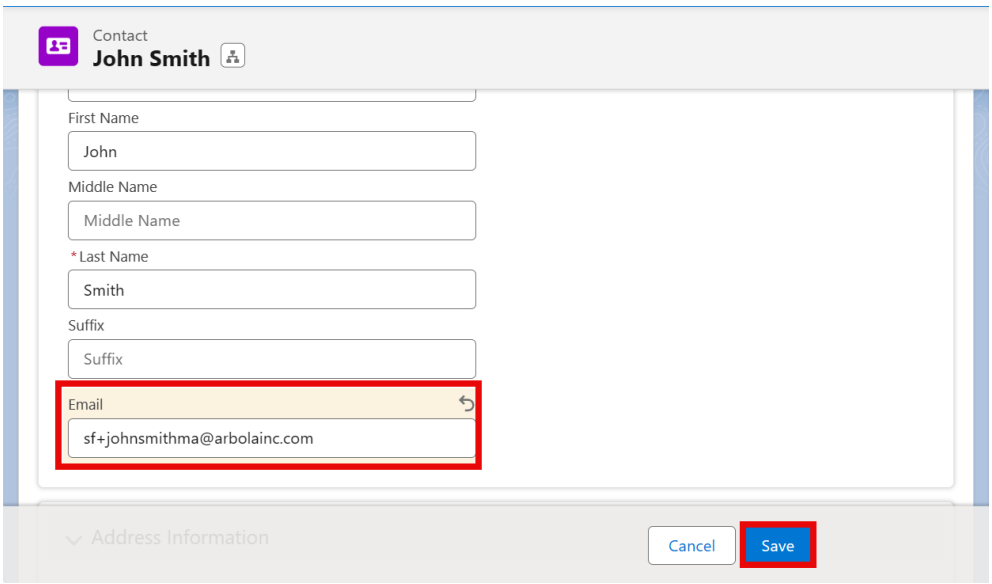


Edit a Contact

1. Click a **pencil icon** on the contact detail screen.



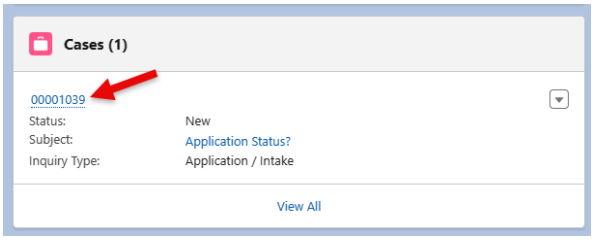
2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



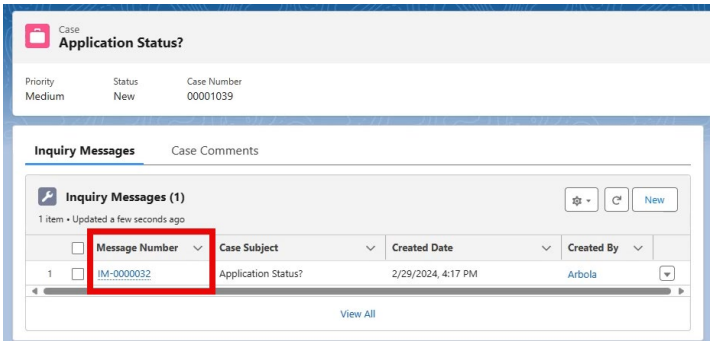
Cases (Contacts)

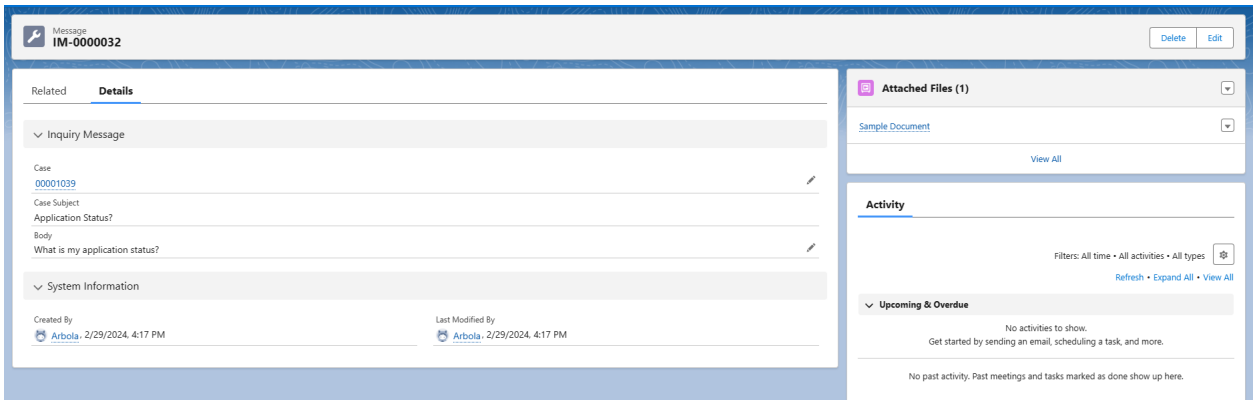
Cases are created to send secure messages to the portal. Incoming cases are sent from the vendors on the portal.

1. To view the details of the **Case,** click the **Case link** in the related list. The detail screen will display.

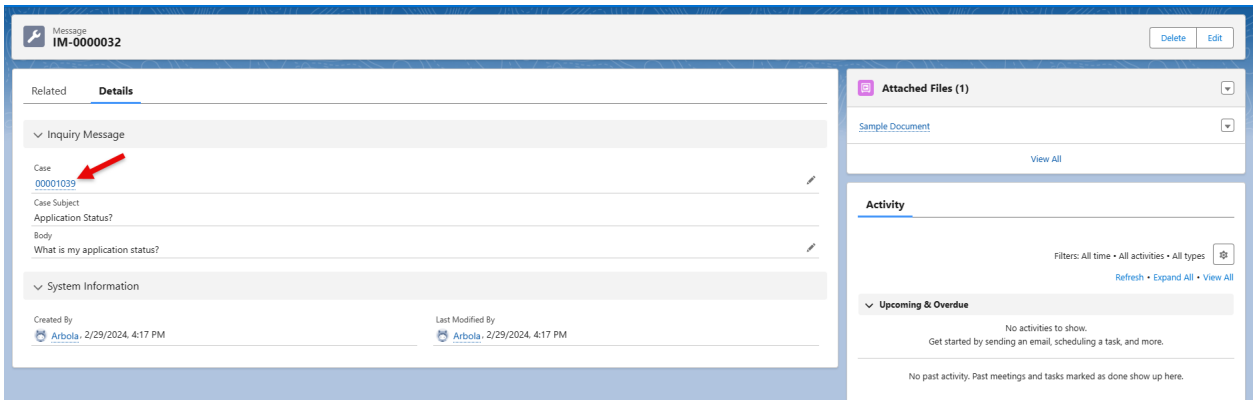


2. The **case details** will display. Click on the **Message Number** to open the message sent from the vendor**.**

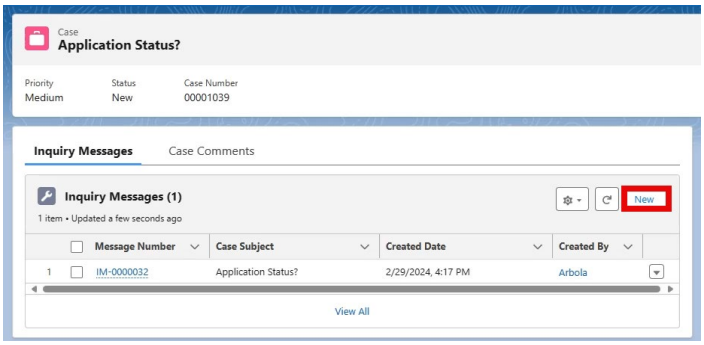




3. To return to the **Case** record, click the **Case link**.

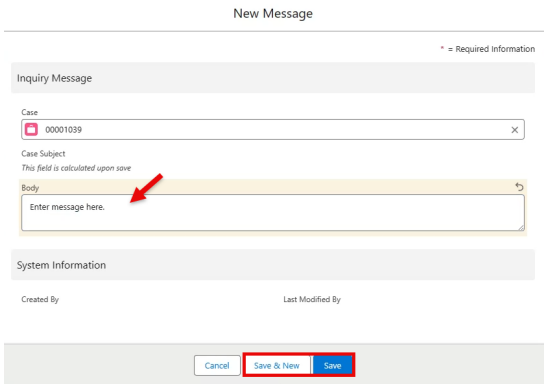


4. To respond to the message, click on the **New** button. The **New Message** screen will display.



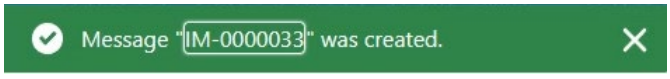
5. The **New Message** form will display. Enter a message in the Body field, click the **Save** button or the **Save & New** button to continue creating messages.

NOTE: The case subject will automatically populate based on the initial message.

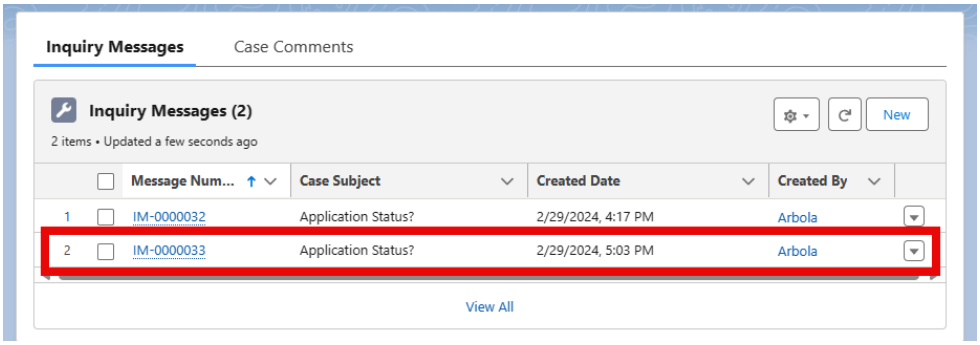


Case Subject will be calculated upon save

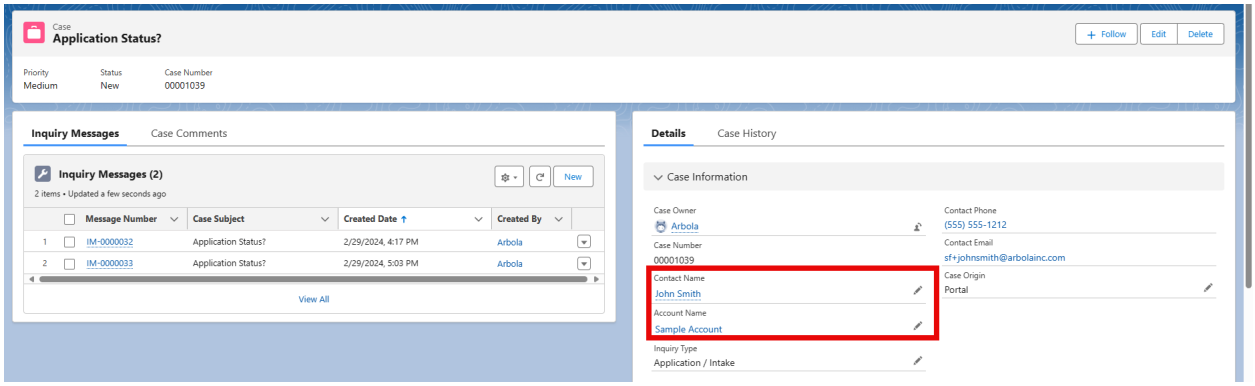
ar will display to indicate that the **Contact** has been created.



7. The response will display for the internal CPCS team on the **case record** and will sent to the vendor via the **portal.**



8. To return to the **Contact or Account** records, click the **Account** or **Contact link**.



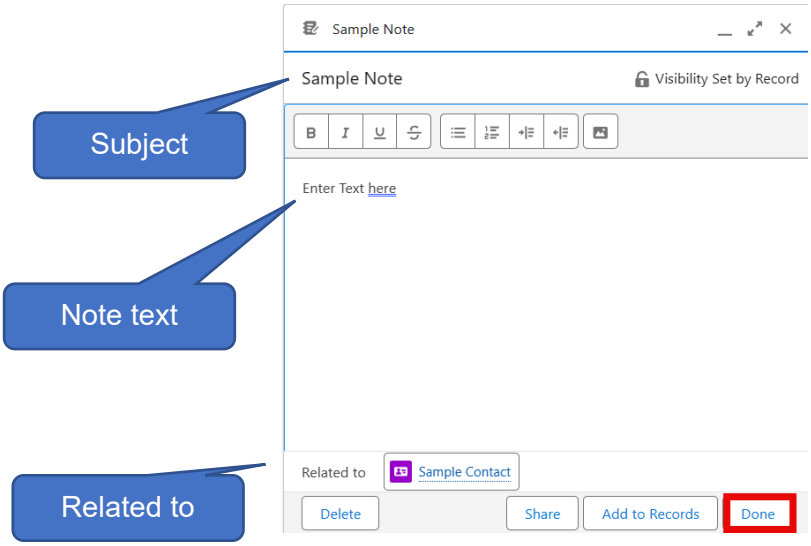
Notes (Contacts and Expertise)

Notes are used by the CPCS staff to record internal notes and are not visible to vendors. Notes can be attached to the Contact or Expertise record.

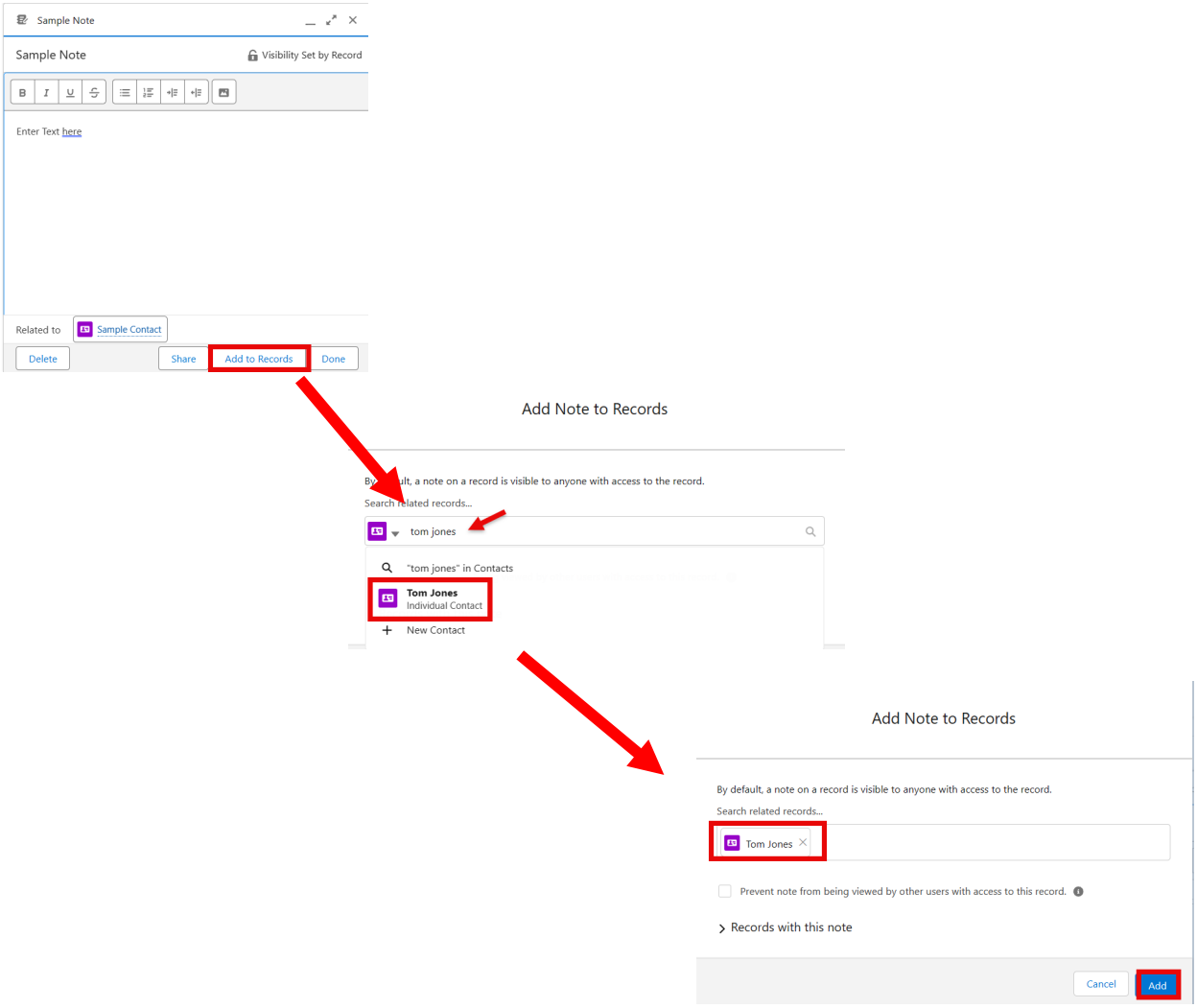
1. On the Notes related object, select the down arrow and the **NEW** button. The new note form will display on the bottom right of the screen.

2. On the **New Note** screen, type a **Subject**. Enter a **Note text** applying the formatting as desired. The **Related To** will automatically populate with the Expertise/Contact name. To save the note on the record, click the **Done** button.

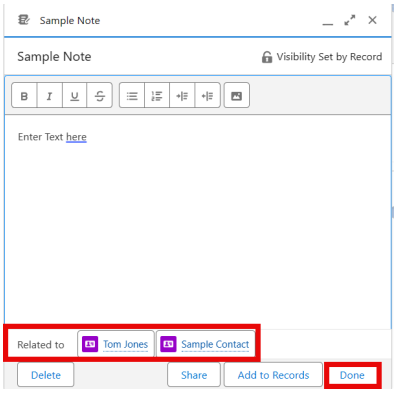
   Note: If the same note needs to be added to another record, please see the next step listed.



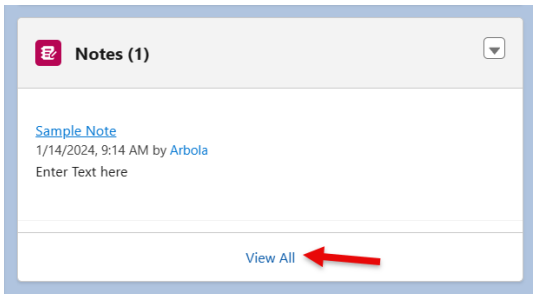
3. To save the same note on another record, click the **Add to Records** button. Begin typing the Expertise/Contact name in the lookup field and select. Click **Add** to return to the note.



4. Both Records will be noted in the **Related to** section. Click the **Done** button to save the note on the record.



5. The new note will now appear on the **Notes related list.** Select the **View All** to see all the notes in a **list view**.



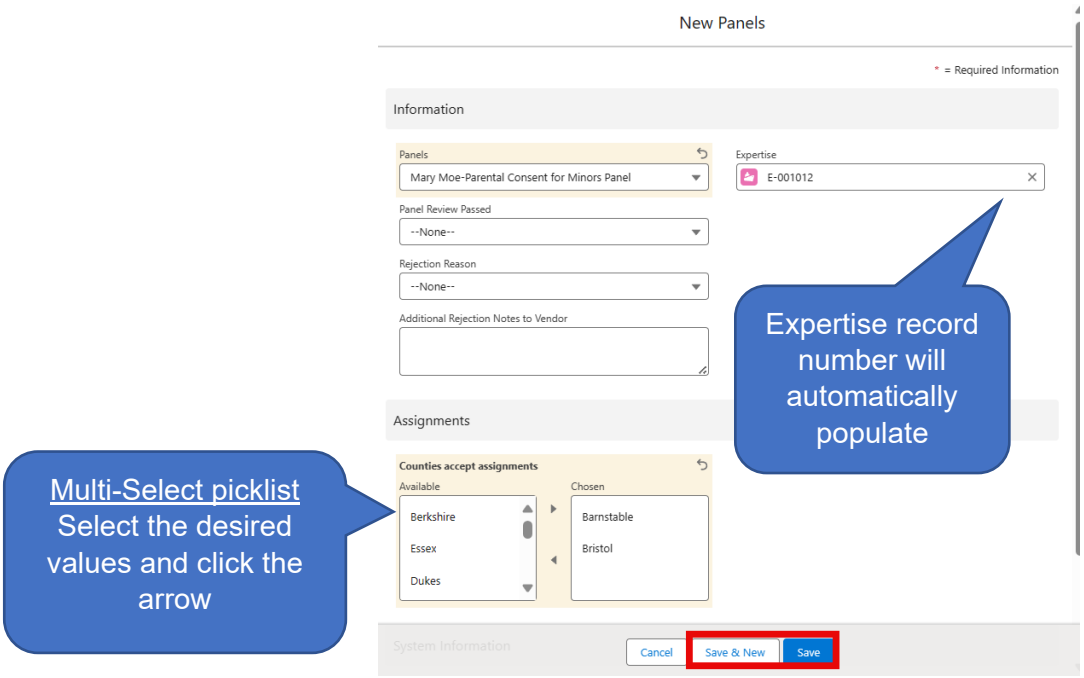
Panels (Expertise)

Panels are connected to an expertise record (Attorneys Only) and is created from the application. Panels can be manually entered. First the Panel must be created and after the panel is created, any additional Panel Details can be filled in.

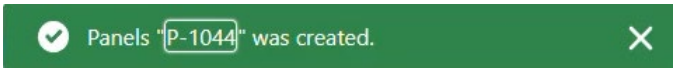
1. With the **Expertise** displaying, click the **down arrow** on the right side of the panels related list and then select the **New** button.

2. Fill in the **New Panels** record form fields with the information known about the panel. When the form is completed, click the **Save** button or the **Save & New** button to continue creating panels.

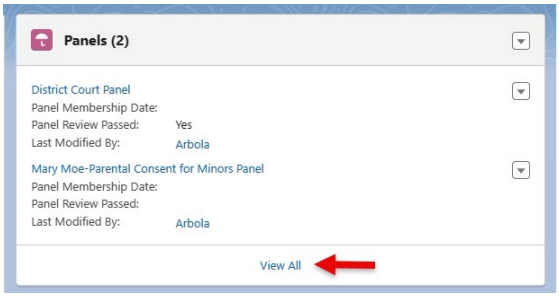
   NOTE: Based on the panel option selected, additional fields will display after the record is created.



3. A **green bar** will display to indicate that the **Panel** has been created.

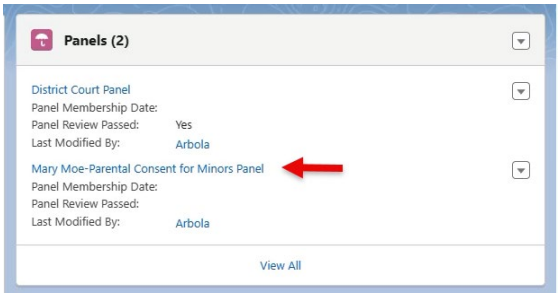


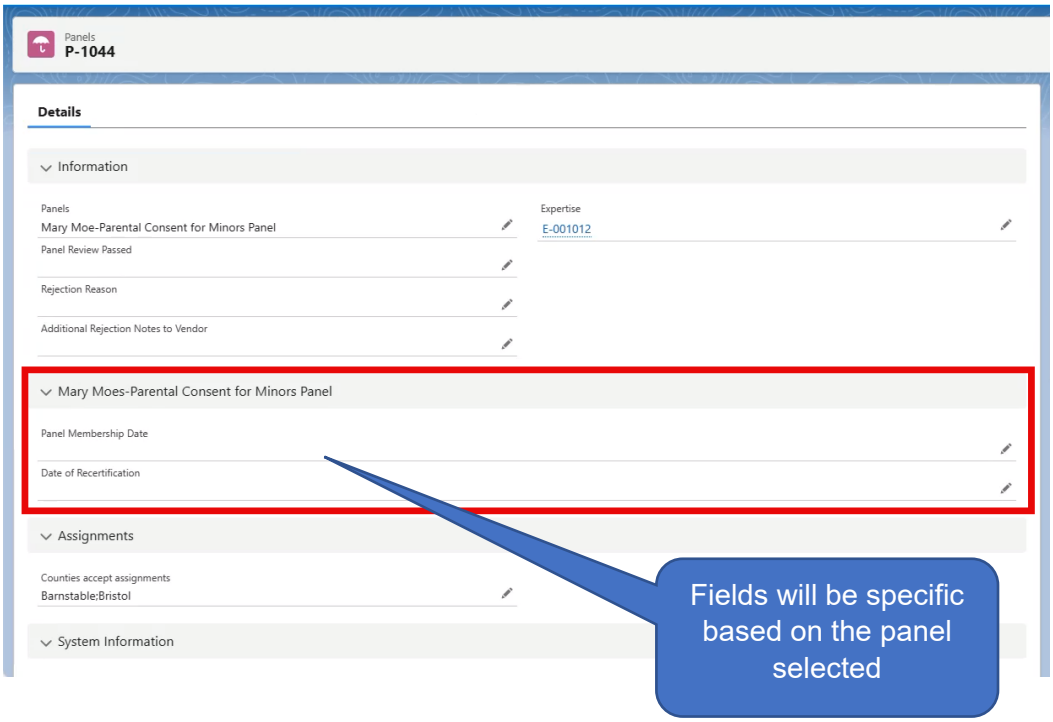
4. The new panel will now appear on the **panels related list.** Select the **View All** to see all the panels in a **list view**.



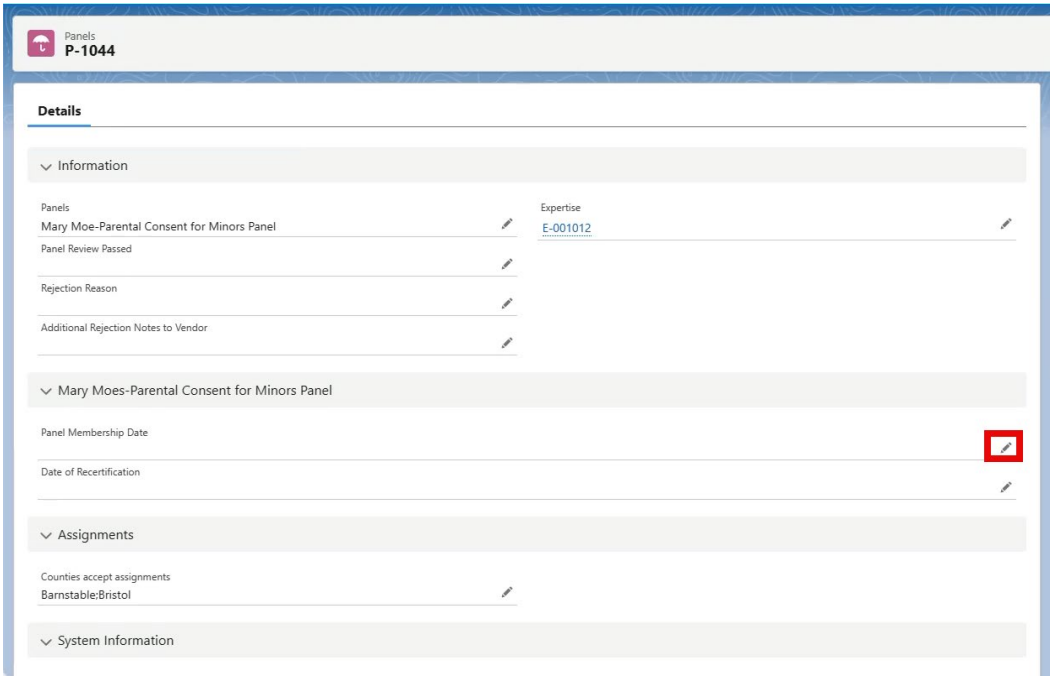
5. To view the details of the **Panel,** click the **Panel Name link** in the related list. The detail screen will display.

   NOTE: The record can be edited and the additional fields will display based on the panel selected.

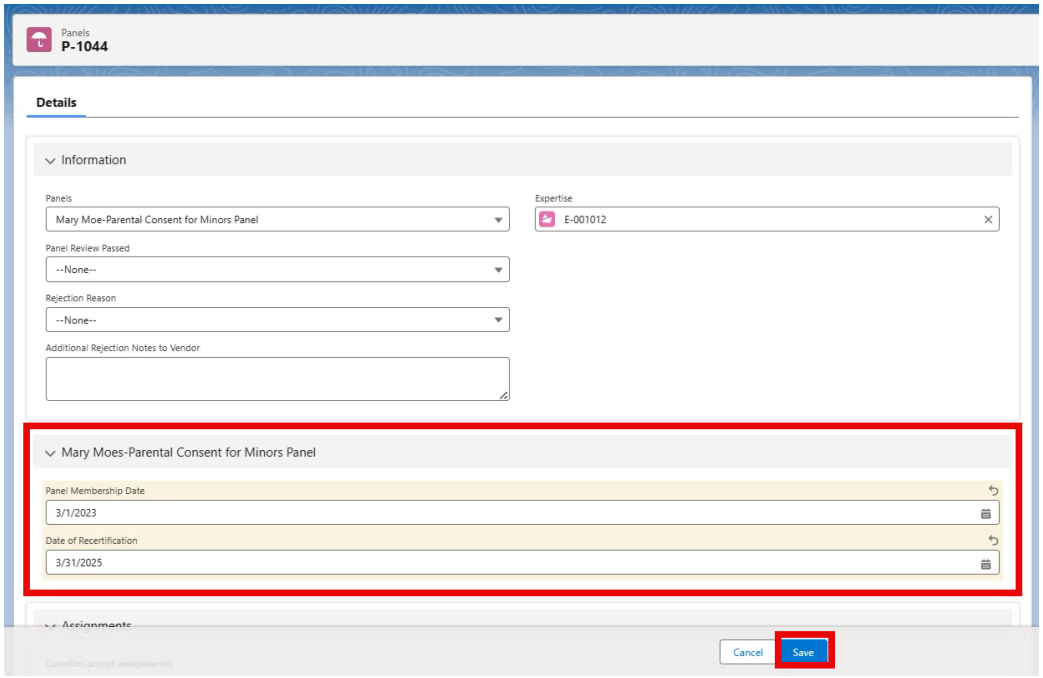




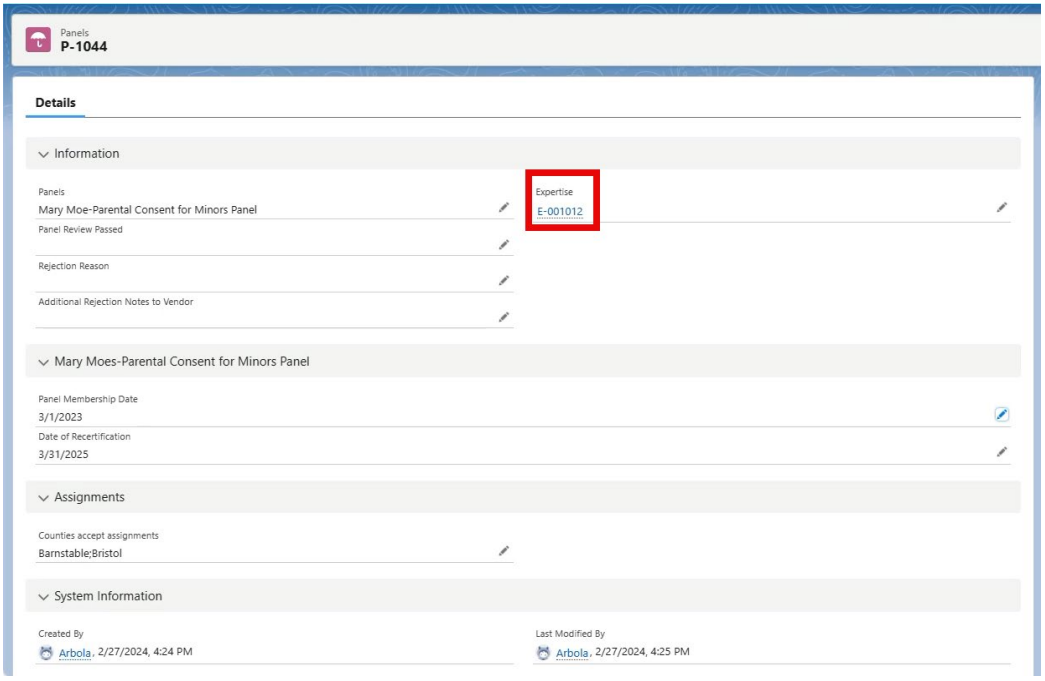
6. Click a **pencil icon** on the panel detail screen to enter additional information on the Panel or edit a field.



7. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



8. To return to the **Expertise** record, click the **Expertise number link**.



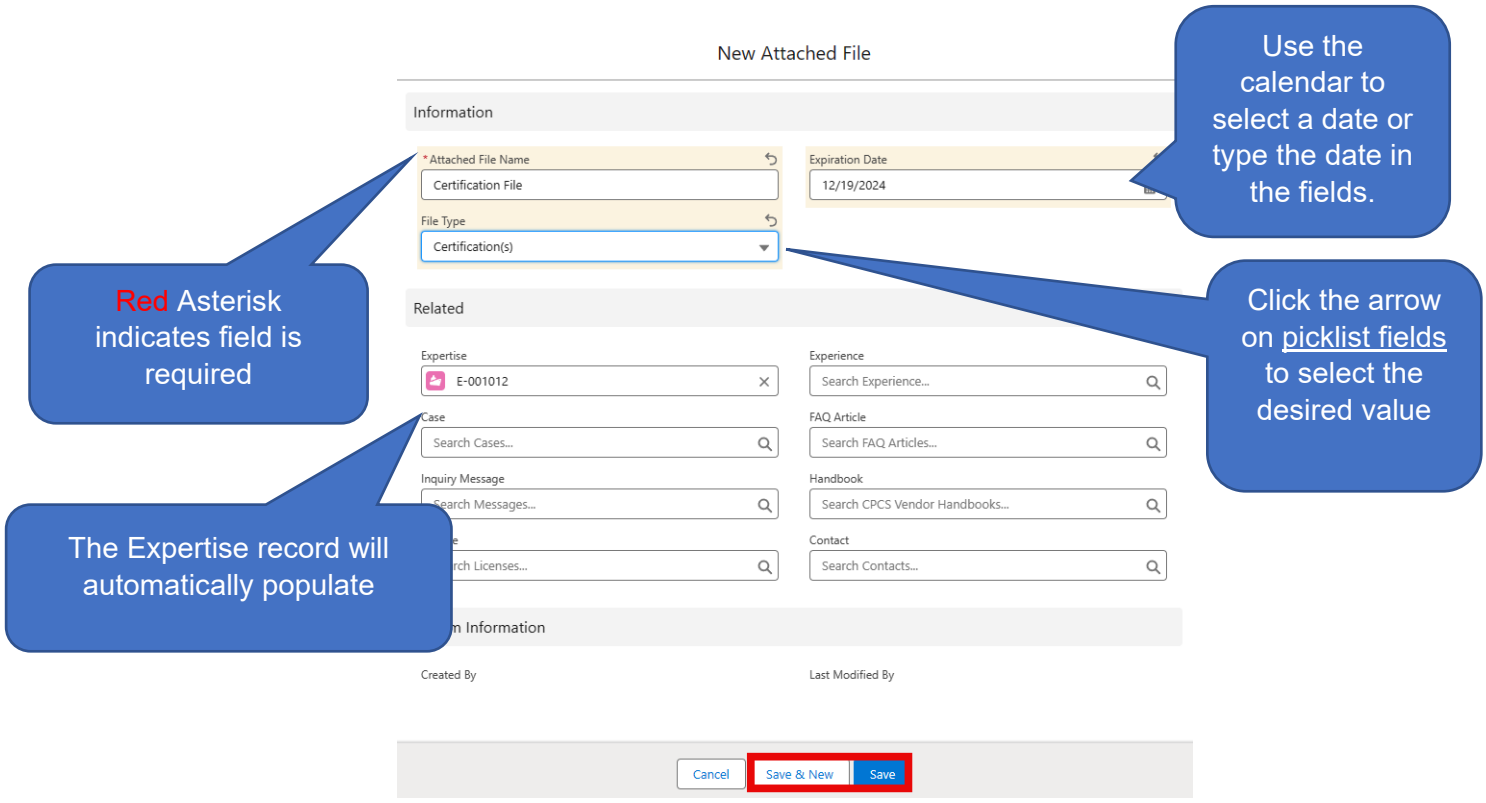
Attached Files (Expertise)

Files are uploaded with the application wizard or can be added to an Expertise record in Salesforce.

Create an Attached File

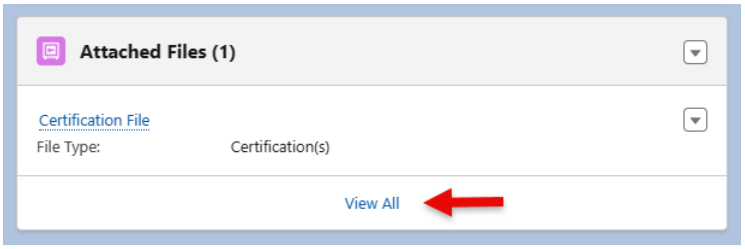
1. With the **Expertise** displaying, click the **down arrow** on the right side of the Attached Files related list and then select the **New** button.

2. Fill in the **New Attached File** record form fields with the information known about the Business Address. When the form is completed, click the **Save** button or the **Save & New** button to continue creating Business Addresses.



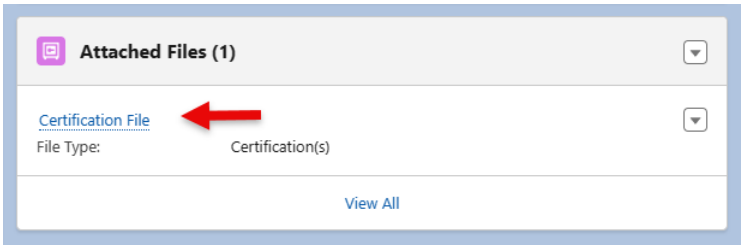
3. A **green bar** will display to indicate that the **Attached File** record has been created.

4. The new experience will now appear on the **Attached Files related list.** Select the **View All** to see all the attached files records in a **list view**.

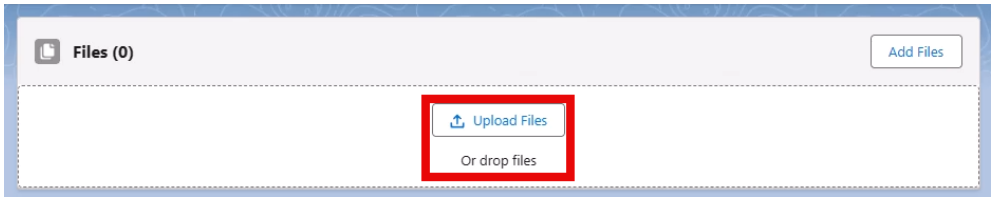


Attach a File

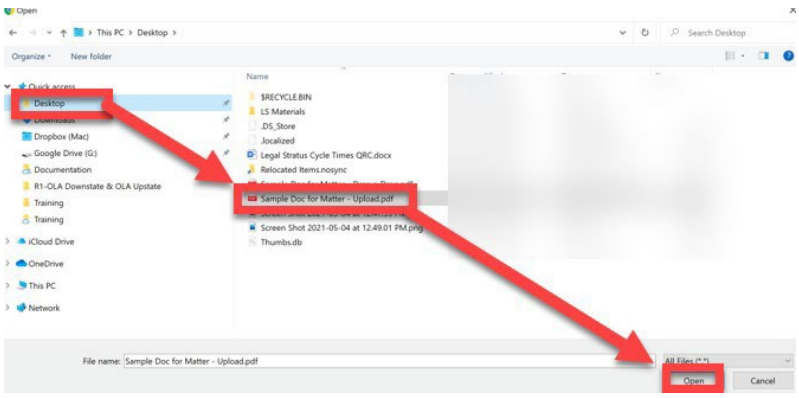
1. To view the details of the **Attached File,** click the **link** in the related list. The detail screen will display and the file can be attached.



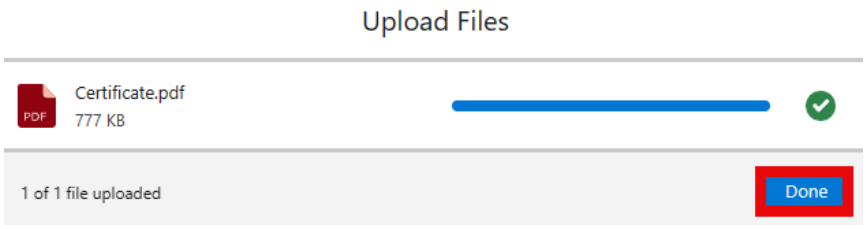
2. The **attached file** record will display. On the right side of the screen, the **files** related list will display. Click the **Upload Files** button to select a document or **drop** the file in the related list.



3. Navigate to the file's location, **Select the file**, and then click the **Open** button.

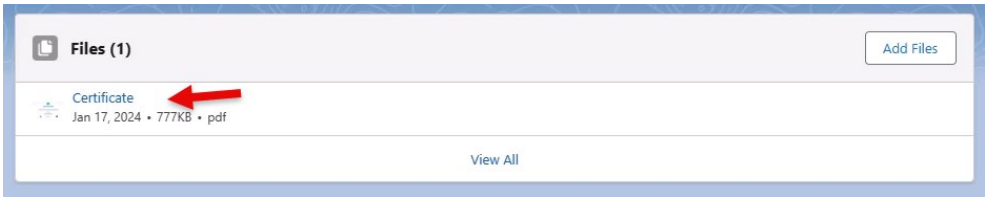


4. Click the **Done** button on the **Upload Files** dialogue box.

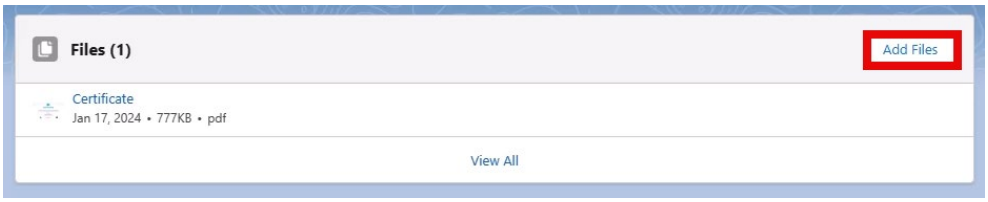


5. A **green bar** will display to indicate that the **File** was added to the **Attached File** record has been created.

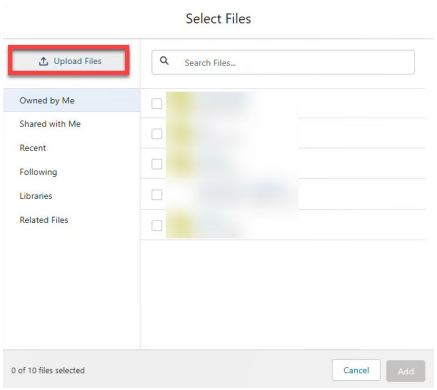
6. The uploaded file will now display on the **Files** related list.



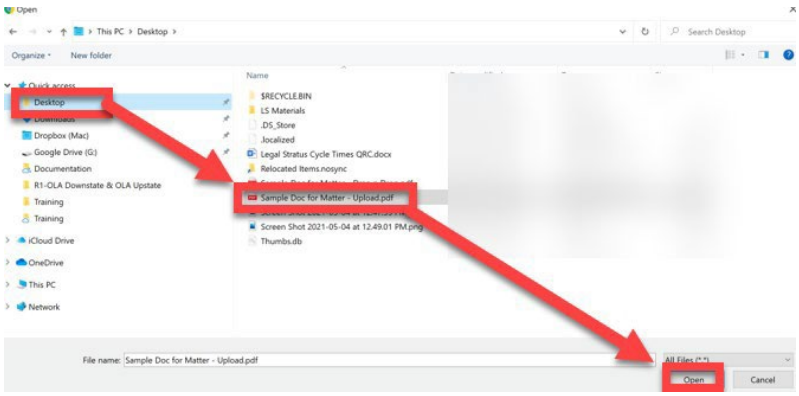
7. To add additional files, click the **Add files** button.



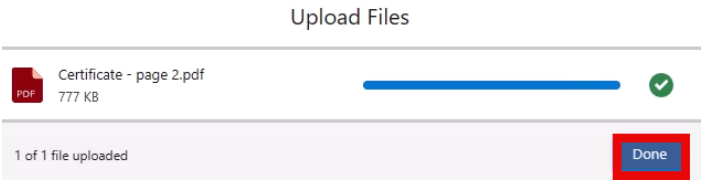
8. To upload a document from your computer, click the **Upload Files** button on the Select Files dialogue box.



9. Navigate to the file's location, **Select the file**, and then click the **Open** button.

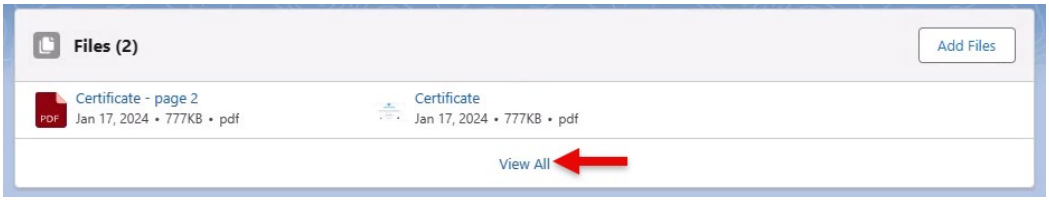


10. Click the **Done** button on the **Upload Files** dialogue box.

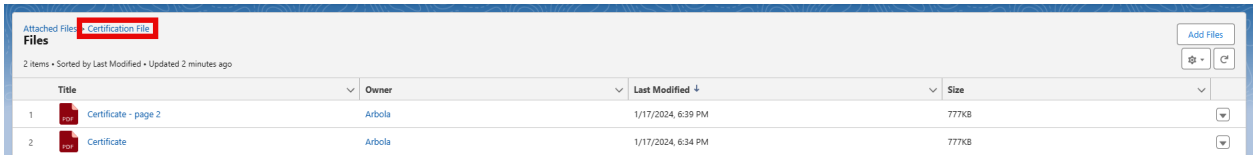


11. A **green bar** will display to indicate that the **File** was added to the **Attached File** record has been created.

12. All of the uploaded files will now display on the **Files** related list. Select the **View All** to see all the files in a **list view**.



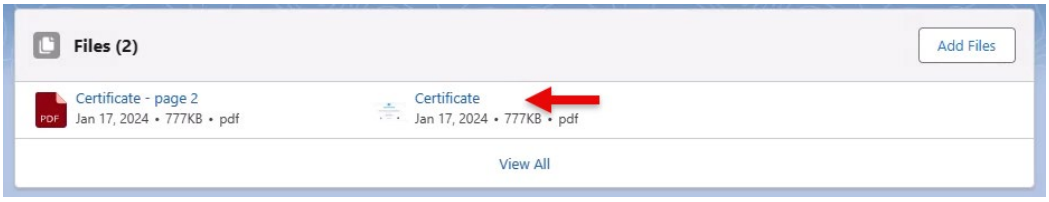
13. To return to the **Attached Files** record, click the Attached Files **link**.

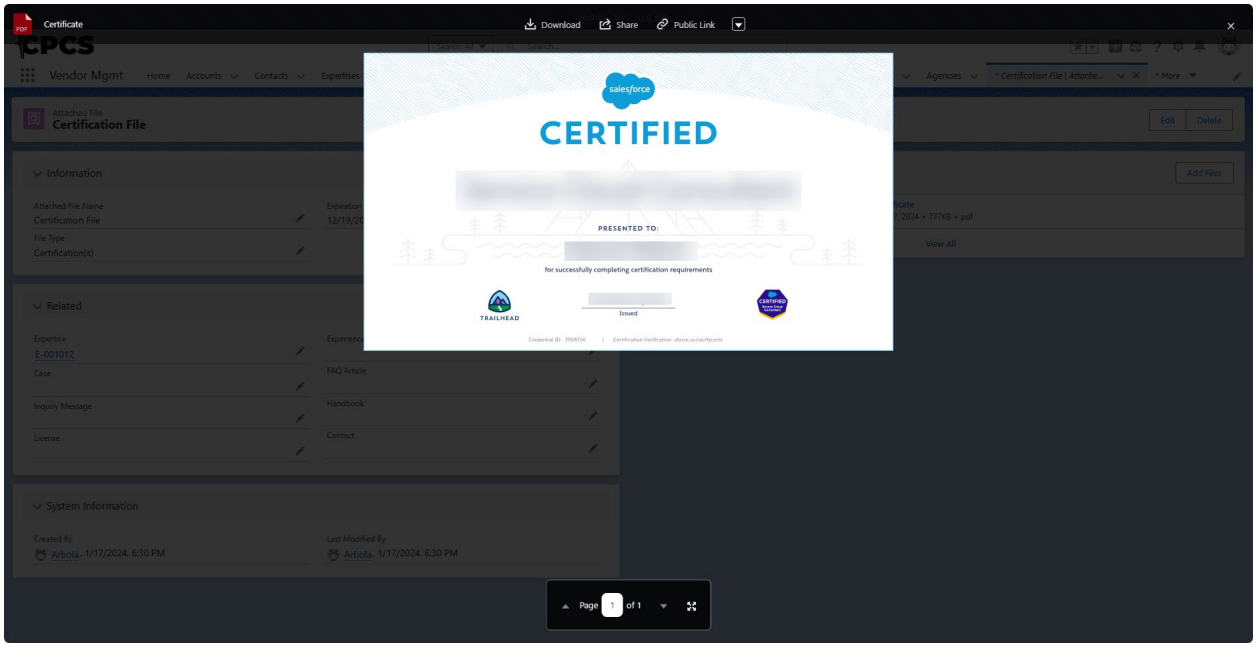


View a File

To view a file preview, click the **File Name link**. The document will display a preview.

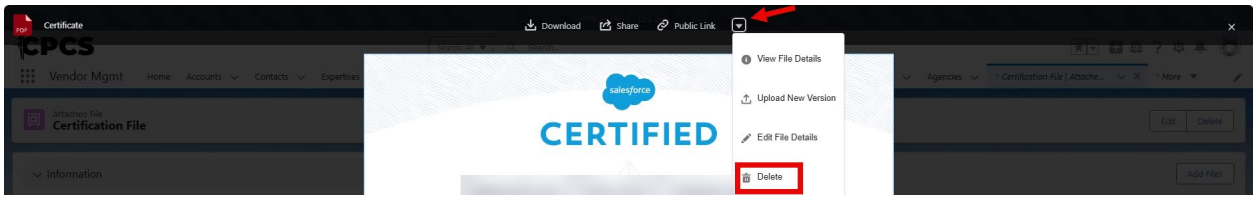
NOTE: A file can be downloaded to your computer if needed. Select the Download button on top center of your screen.





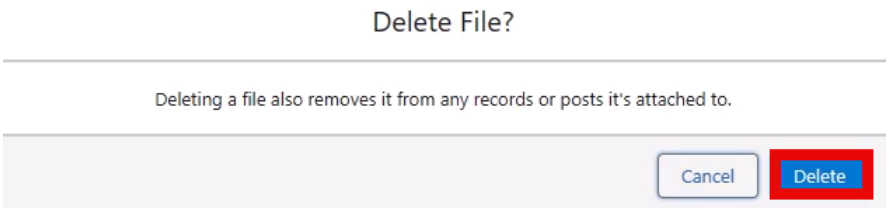
Delete a File

1. With the file preview displaying, click the **down arrow** on the top center of the screen and then select the **Delete** button.



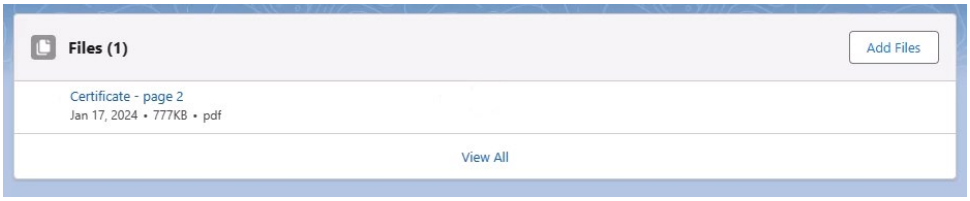
2. The system will confirm the file should be deleted, click **Delete** to proceed.

   NOTE: Deleting a file also removes it from any records or posts it's attached to.



3. A **green bar** will display to indicate that the **File** has been deleted.

4. The **File** will be removed from the **Files** related list.

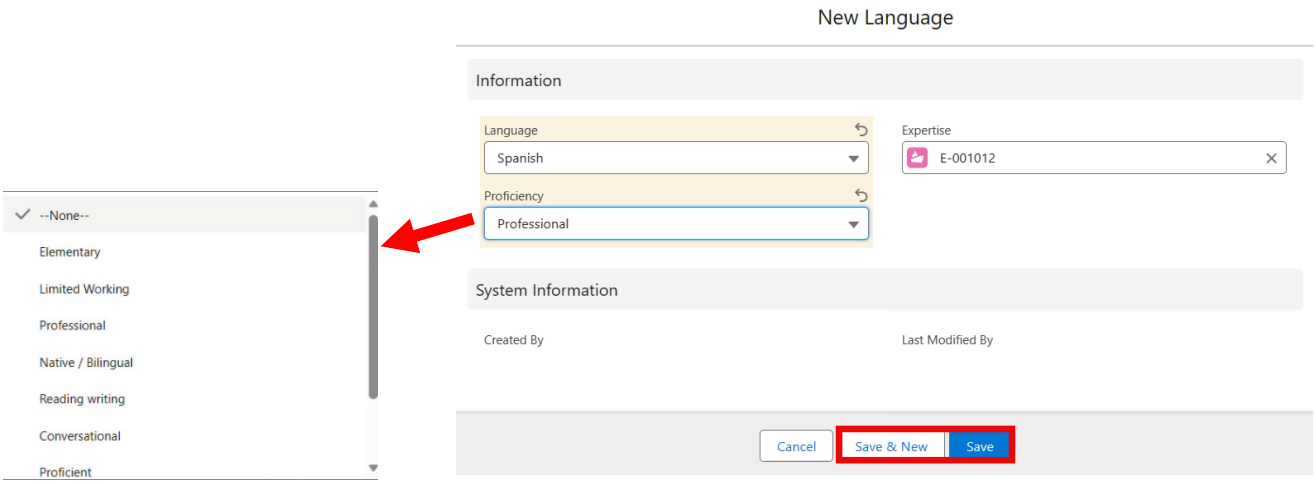


Languages (Expertise)

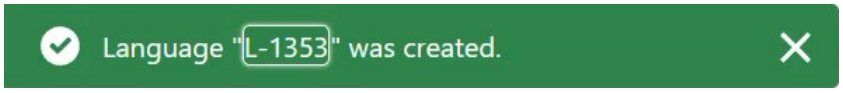
Language records are created/updated from the online application or can be manually entered.

1. With the **Expertise** displaying, click the **down arrow** on the right side of the languages related list and then select the **New** button.

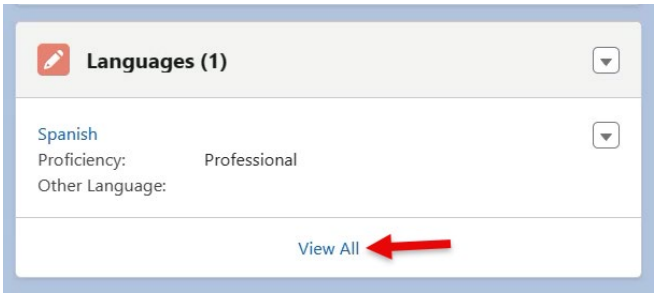
2. Fill in the **New Language** record form fields with the information known about the language. When the form is completed, click the **Save** button or the **Save & New** button to continue creating languages.



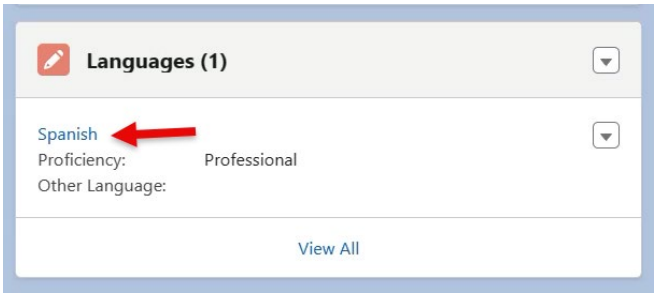
3. A **green bar** will display to indicate that the **Language** has been created.



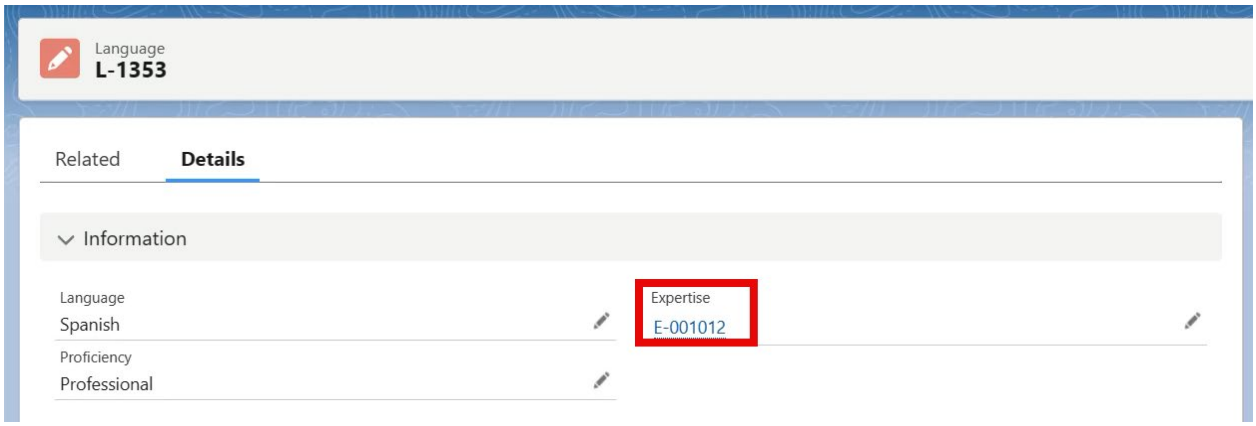
4. The new language will now appear on the **Language related list.** Select the **View All** to see all the panels in a **list view**.



5. To view the details of the **Language,** click the **Language link** in the related list. The detail screen will display and the fields can be edited.

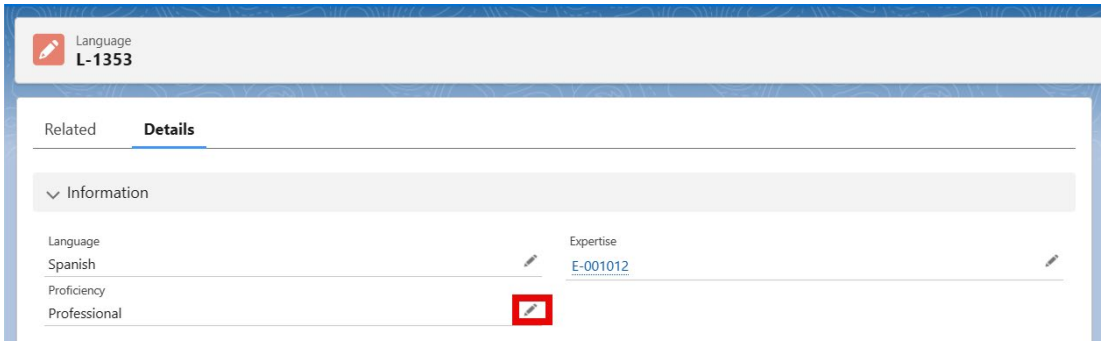


6. To return to the **Expertise** record, click the **Expertise number link**.

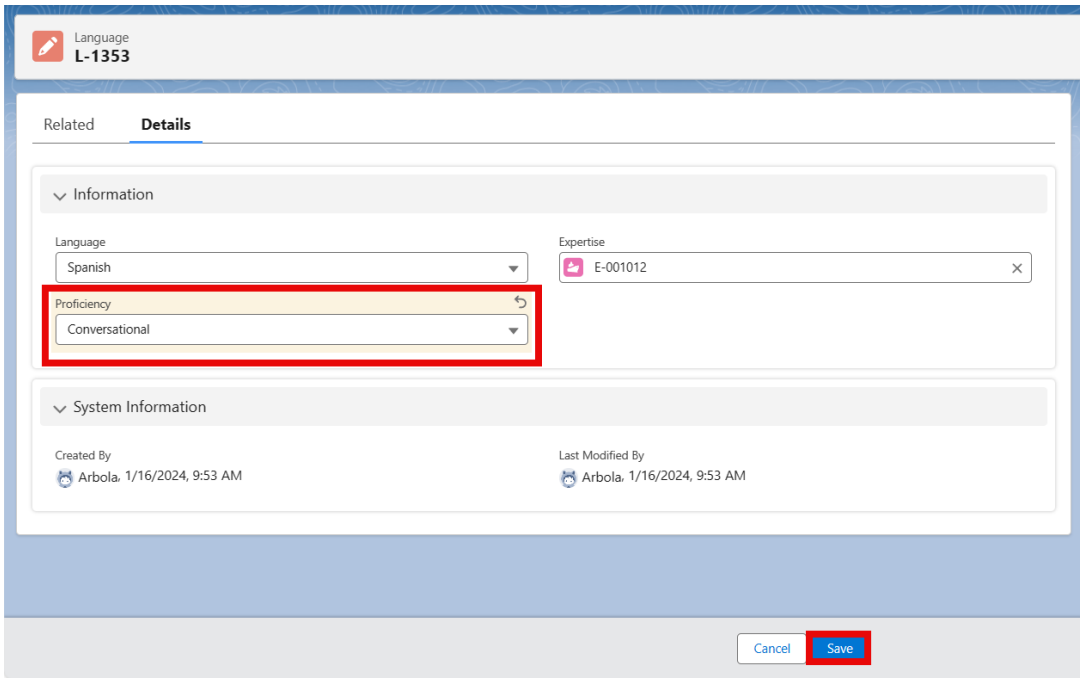


Edit a Language

1. Click a **pencil icon** on the language detail screen.



9. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.

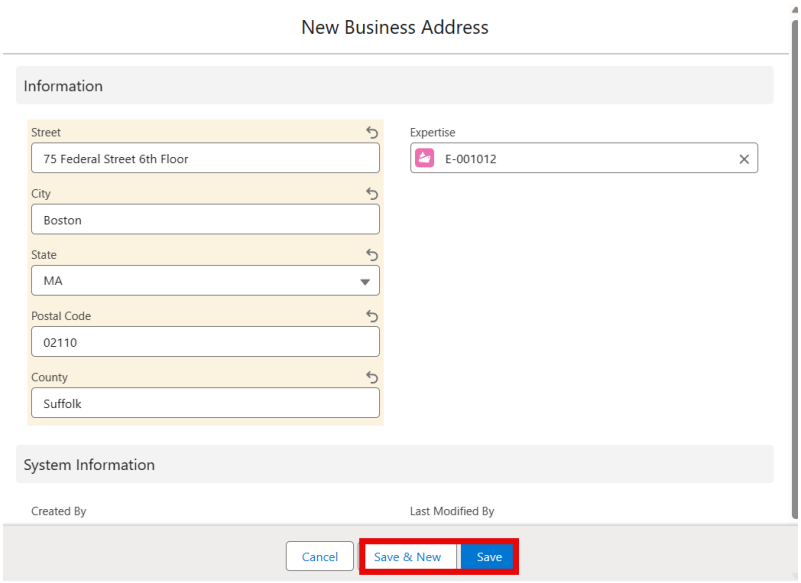


Business Addresses (Expertise)

Business Address records are created from the online application or can be manually entered.

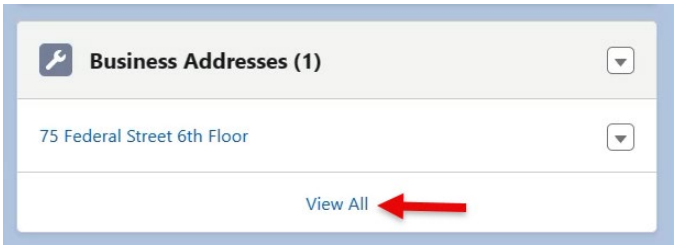
1. With the **Expertise** displaying, click the **down arrow** on the right side of the Business Addresses related list and then select the **New** button.

2. Fill in the **New Business Address** record form fields with the information known about the Business Address. When the form is completed, click the **Save** button or the **Save & New** button to continue creating Business Addresses.

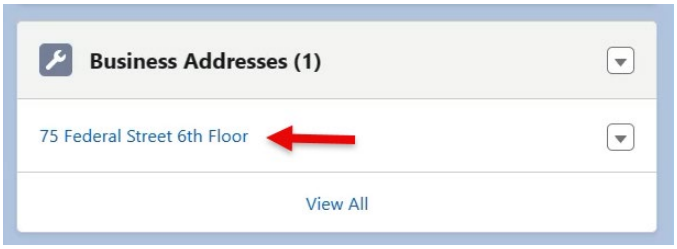


3. A **green bar** will display to indicate that the **Business Address** has been created.

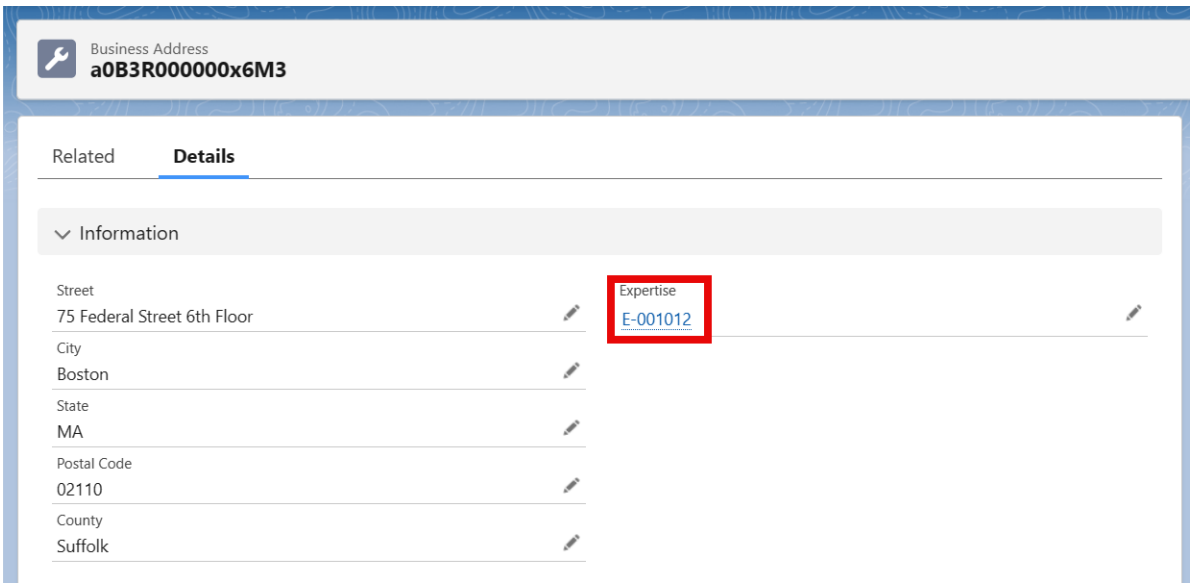
4. The new language will now appear on the **Business Address related list.** Select the **View All** to see all the business addresses in a **list view**.



5. To view the details of the **Business Addresses,** click the **Address link** in the related list. The detail screen will display and the fields can be edited.

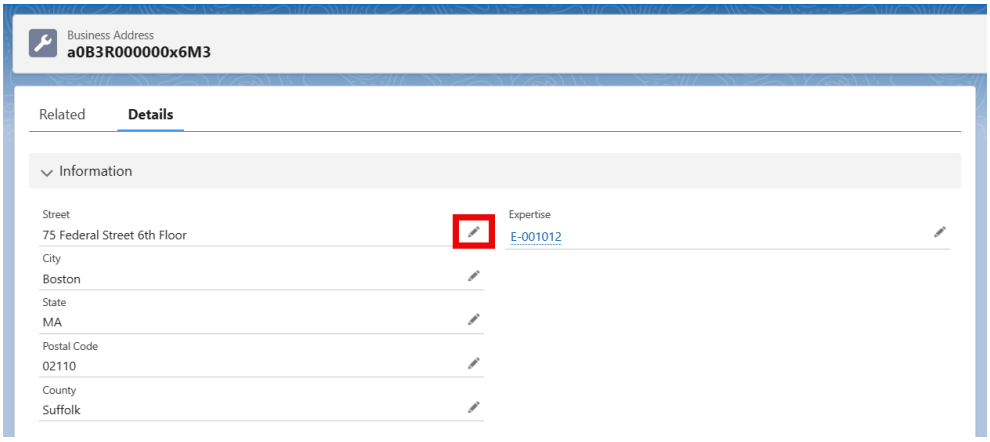


6. To return to the **Expertise** record, click the **Expertise number link**.

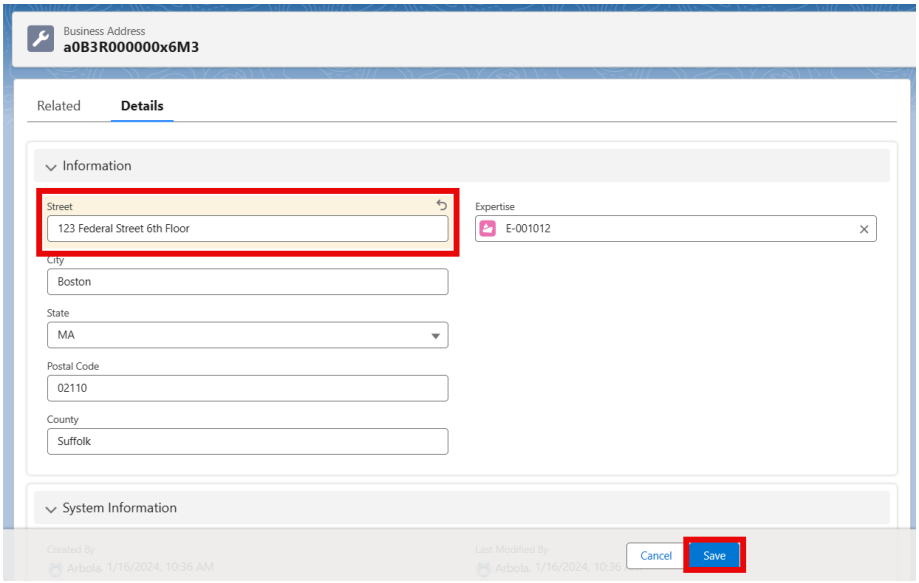


Edit a Business Addresses

1. Click a **pencil icon** on the Business Address detail screen.



10. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.

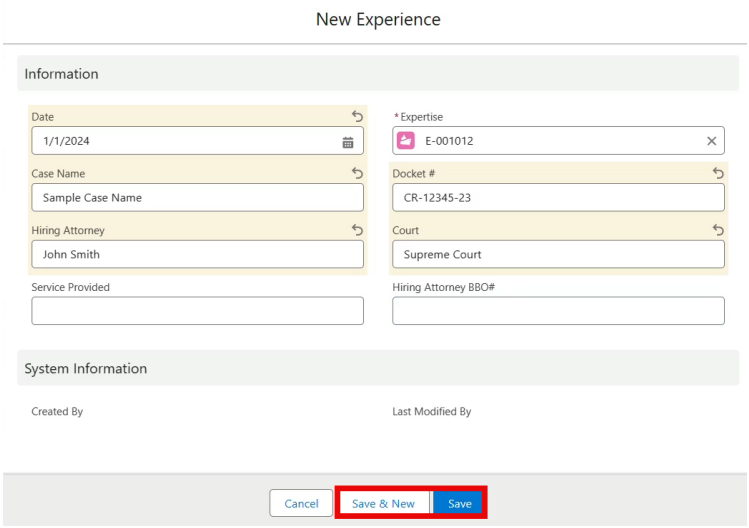


Experience (Expertise)

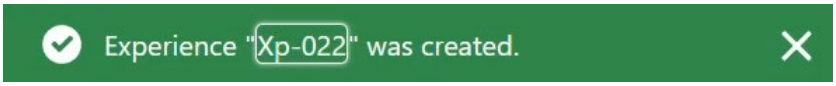
Experience information is additional information requested after they are approved. The information can be entered on the Vendor Portal or manually entered in Salesforce by CPCS.

1. With the **Expertise** displaying, click the **down arrow** on the right side of the Experience related list and then select the **New** button.

2. Fill in the **New Experience** record form fields with the information known about the Business Address. When the form is completed, click the **Save** button or the **Save & New** button to continue creating Experiences.



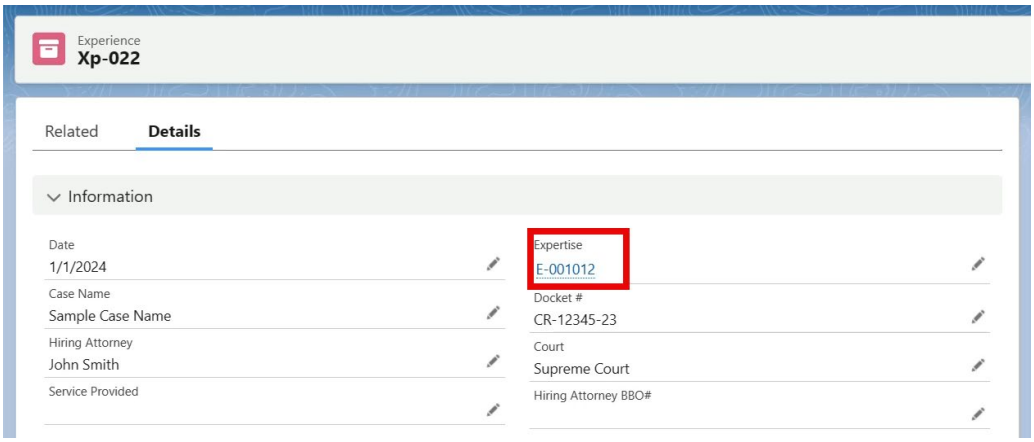
3. A **green bar** will display to indicate that the **Experience** has been created.



4. The new experience will now appear on the **Experiences related list.** Select the **View All** to see all the experience in a **list view**.

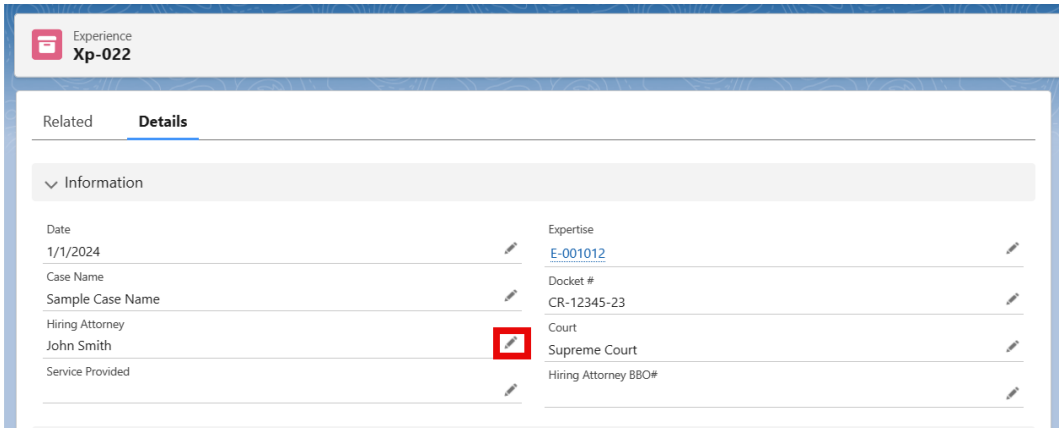
5. To view the details of the **Experience,** click the **link** in the related list. The detail screen will display and the fields can be edited.

6. To return to the **Expertise** record, click the **Expertise number link**.

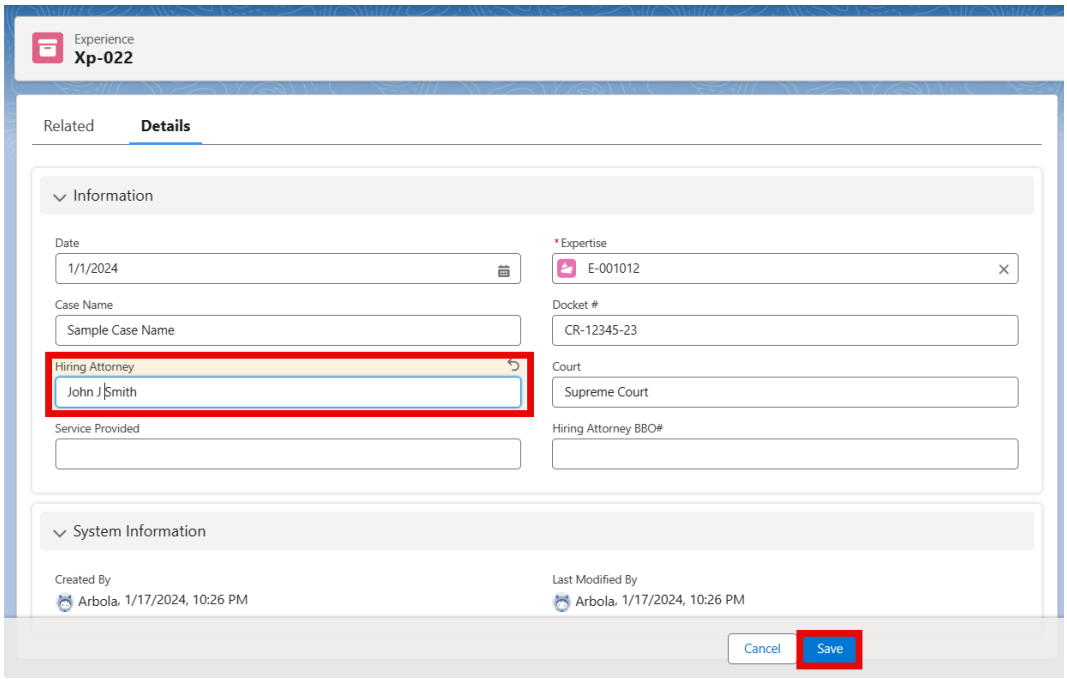


Edit an Experience

1. Click a **pencil icon** on the experience detail screen.



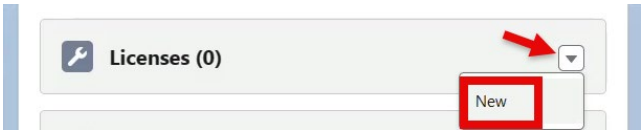
2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



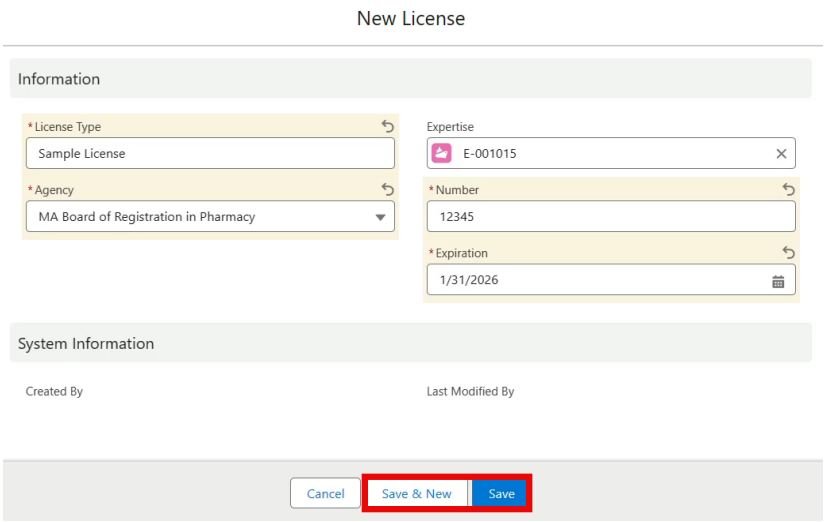
Licenses (Expertise - Other Record)

License information is additional information requested after they are approved. The information can be entered on the Vendor Portal or manually entered in Salesforce by CPCS.

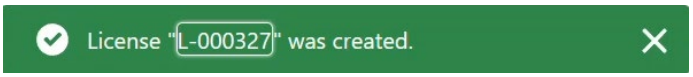
1. With the **Expertise** displaying, click the **down arrow** on the right side of the licenses related list and then select the **New** button.



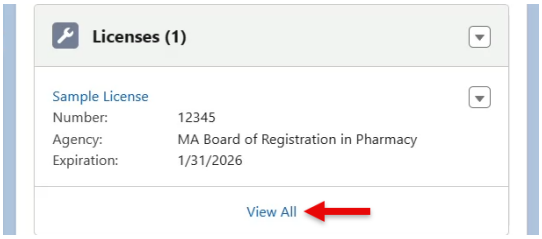
2. Fill in the **New License** record form fields with the information known about the License. When the form is completed, click the **Save** button or the **Save & New** button to continue creating License.



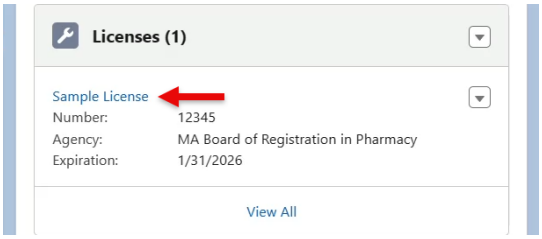
3. A **green bar** will display to indicate that the **License** has been created.



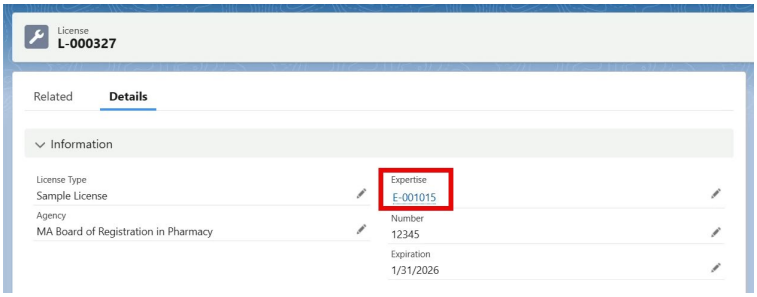
4. The new license will now appear on the **License related list.** Select the **View All** to see all the licenses in a **list view**.



5. To view the details of the **License,** click the **link** in the related list. The detail screen will display and the fields can be edited.

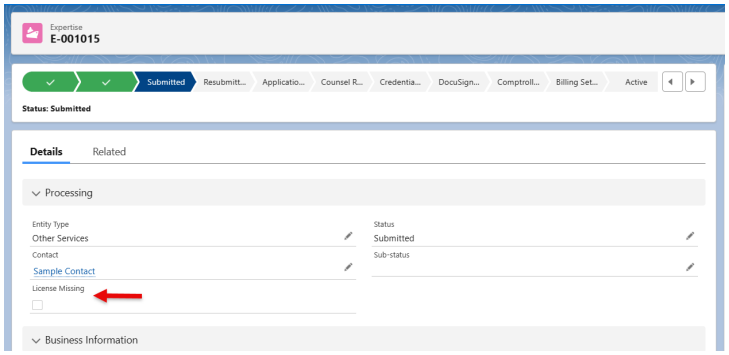


6. To return to the **Expertise** record, click the **Expertise number link**.



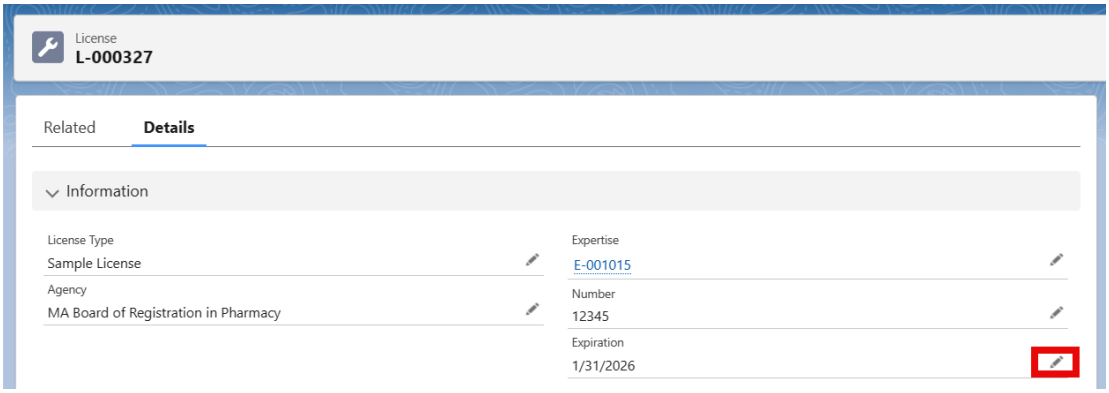
7. When an Expert is required to submit a license and hasn't attached a license, the **License Missing** checkbox on the Expertise record will be populated.

   NOTE: The system is **NOT** requiring any experts to submit licenses during the vendor application wizard.

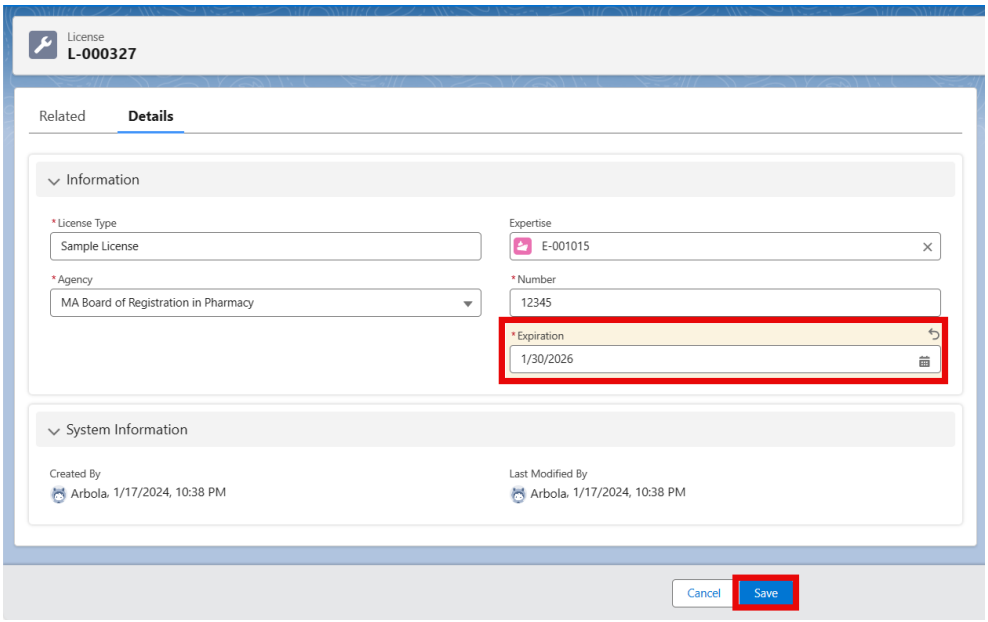


Edit a License

1. Click a **pencil icon** on the license detail screen.



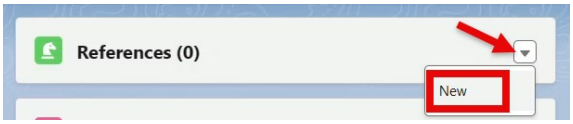
2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



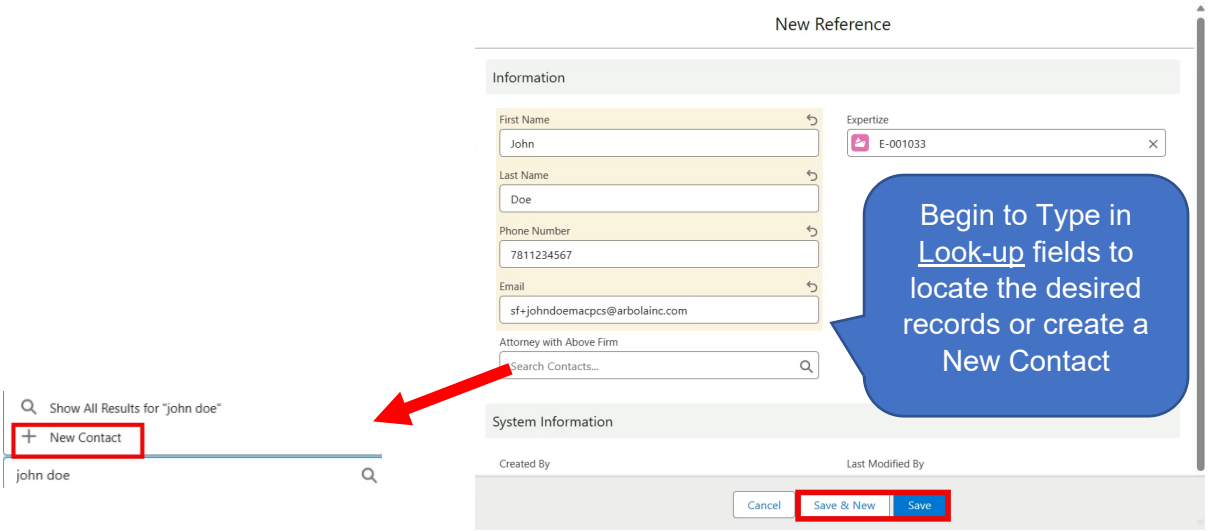
References (Expertise - Agency Direct Services)

Reference records are created from the online application or can be manually entered. Files can be attached to Reference records (See Attach Files on page 33)

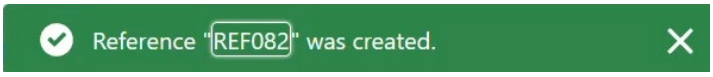
1. With the **Expertise** displaying, click the **down arrow** on the right side of the references related list and then select the **New** button.



2. Fill in the **New Reference** record form fields with the information known about the Reference. When the form is completed, click the **Save** button or the **Save & New** button to continue creating References.



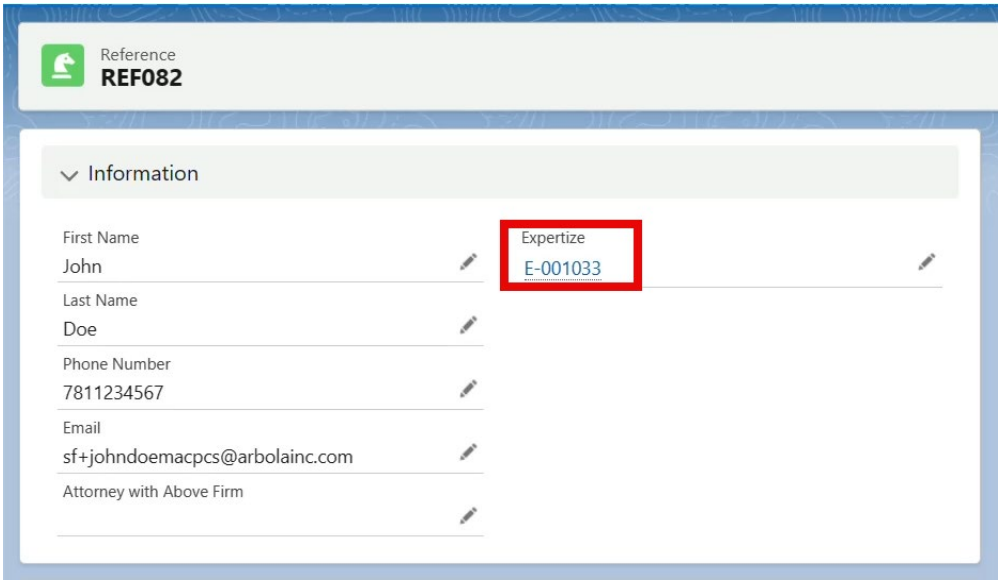
3. A **green bar** will display to indicate that the **Reference** has been created.



4. The new reference will now appear on the **Reference related list.** Select the **View All** to see all the references in a **list view**.

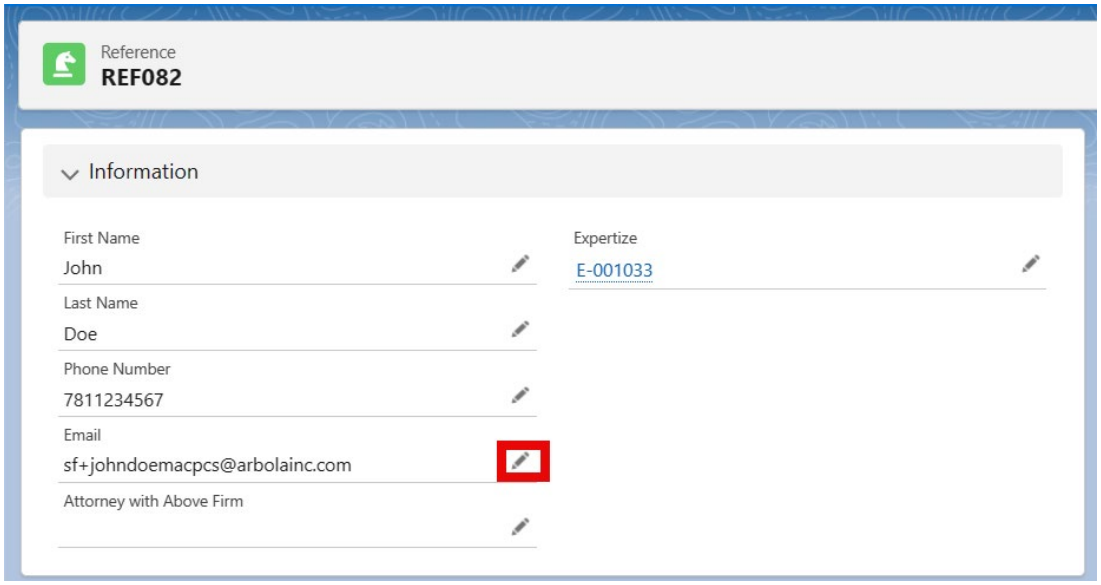
5. To view the details of the **Reference,** click the **link** in the related list. The detail screen will display and the fields can be edited.

6. To return to the **Expertise** record, click the **Expertise number link**.

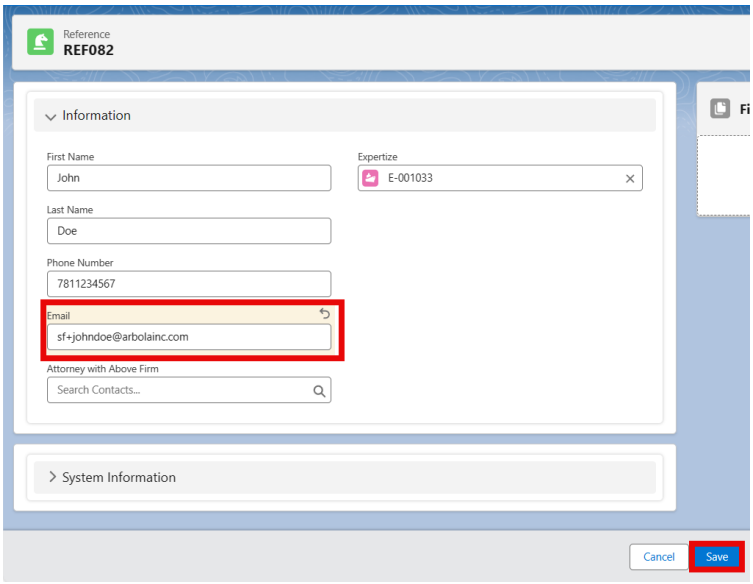


Edit a Reference

1. Click a **pencil icon** on the reference detail screen.



2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.

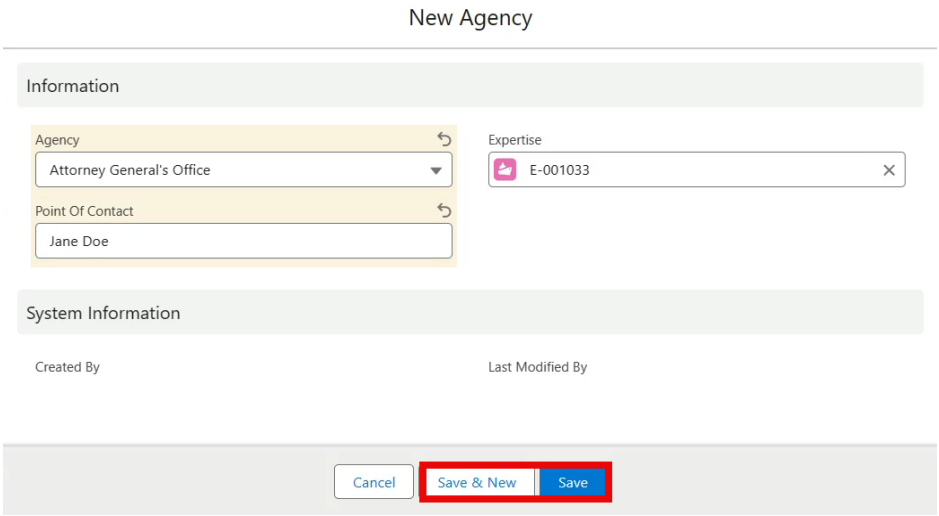


Agencies (Expertise - Agency Direct Services)

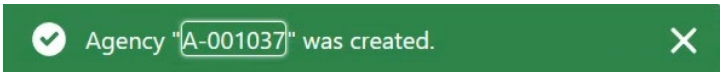
Agency records are created from the online application or can be manually entered by CPCS.

1. With the **Expertise** displaying, click the **down arrow** on the right side of the agencies related list and then select the **New** button.

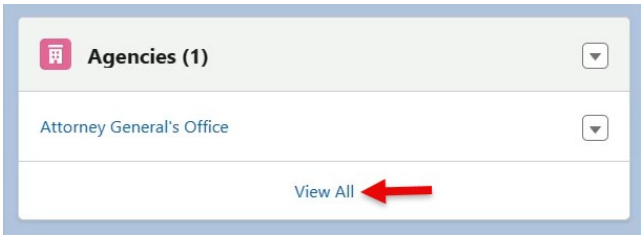
2. Fill in the **New Agency** record form fields with the information known about the Reference. When the form is completed, click the **Save** button or the **Save & New** button to continue creating References.



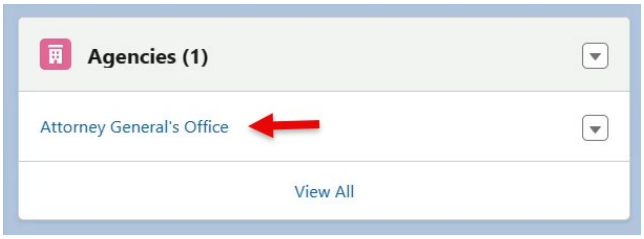
3. A **green bar** will display to indicate that the **Agency** has been created.



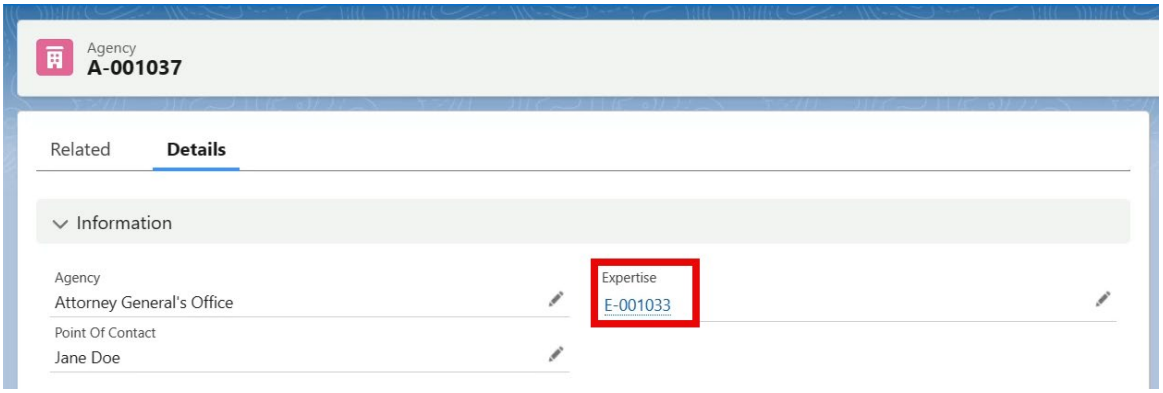
4. The new agency will now appear on the **Reference related list.** Select the **View All** to see all the references in a **list view**.



5. To view the details of the **Reference,** click the **link** in the related list. The detail screen will display and the fields can be edited.

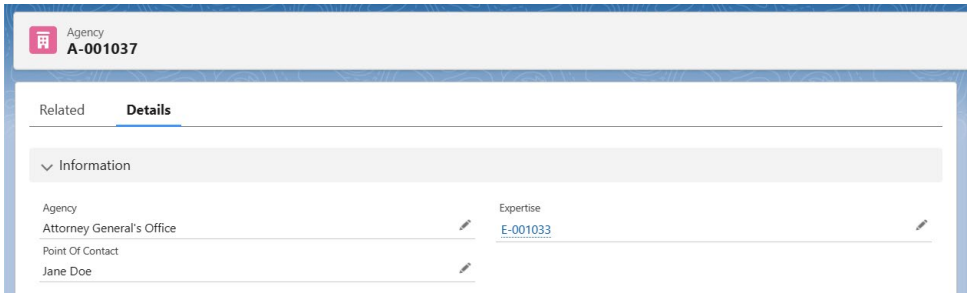


6. To return to the **Expertise** record, click the **Expertise number link**.

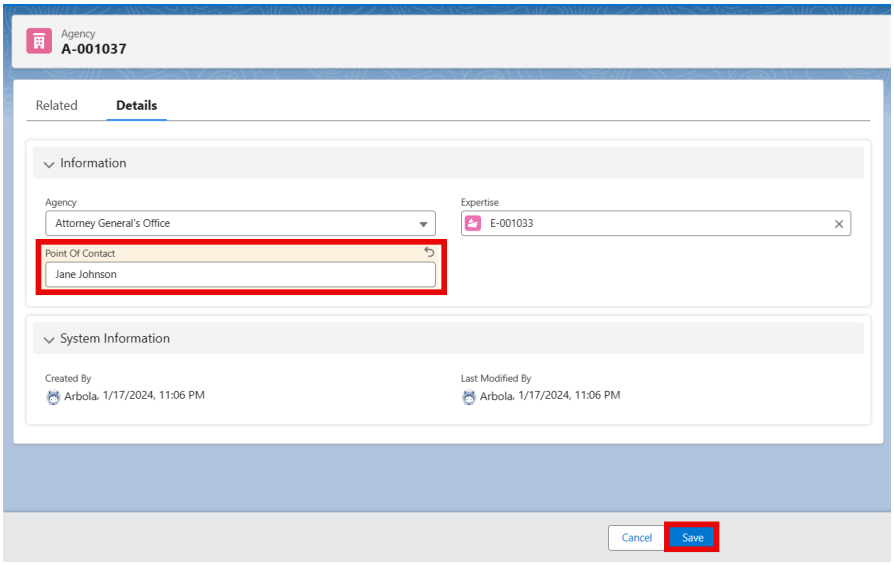


Edit an Agency

1. Click a **pencil icon** on the agency detail screen.



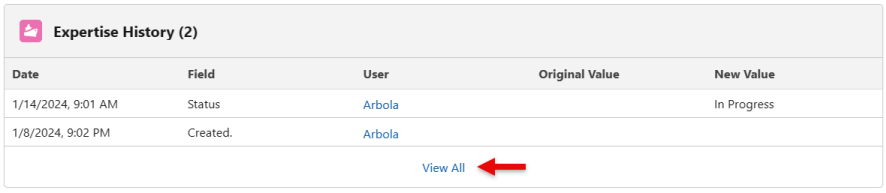
2. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



Expertise History (Expertise)

Expertise History is located below the **Additional Questions** section and above the **System Information** Section. The system tracks certain fields for any changes and displays **Date/Time, Field, User, Original Value,** and **New Value** will be listed. Select the **View All** to see all line items. This is the audit trail for many of the changes that occur in the Expertise record.

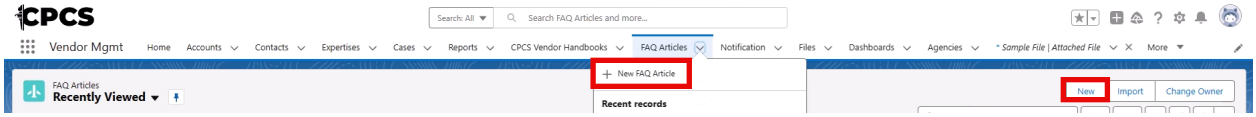
NOTE: Only specific fields selected are tracked.



FAQ Articles

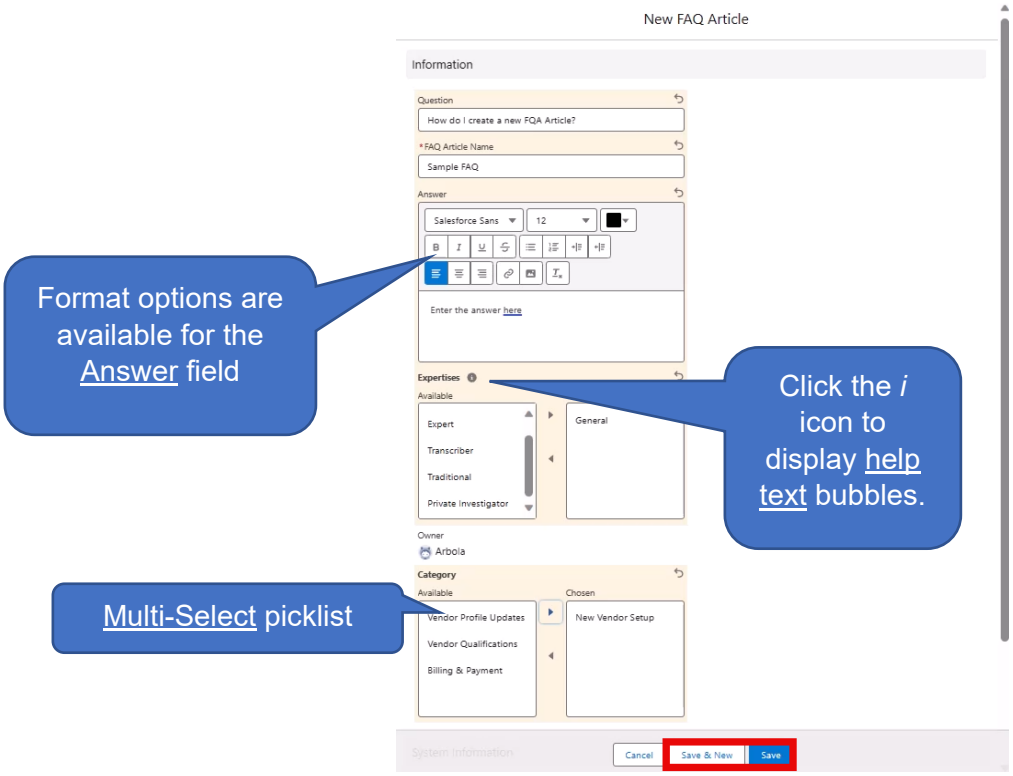
FAQ Articles display on the portal. Articles are organized by Expertise and Category.

1. Click the action arrow by the **FAQ Articles** tab and select **New FAQ Article** or, when viewing the **FAQ Articles** tab, click the **New** button in the upper right corner. The **New FAQ Article** screen will display.

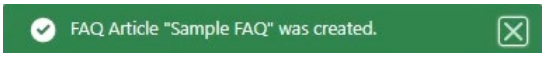


2. Fill in the **New FAQ Article** record form fields with the information known about the FAQ Article. When the form is completed, click the **Save** button or the **Save & New** button to continue creating FAQ Articles.

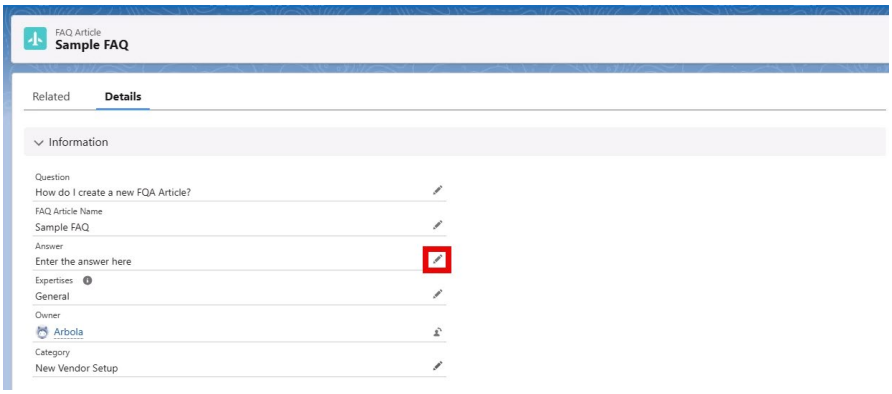
NOTE: The **FAQ Article Name** field is required as indicated by the **red** asterisk. Other information can be added later if desired.



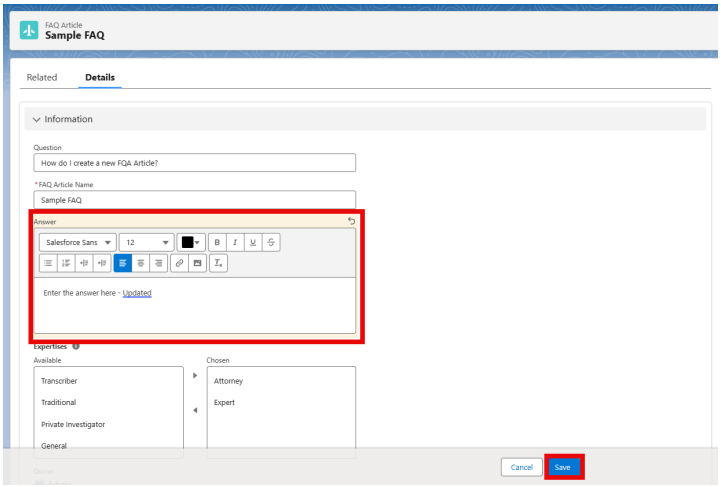
3. A **green bar** will display to indicate that the **FAQ Article** has been created.



4. To edit a field, click a **pencil icon** on the **FAQ Article** detail screen.



5. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.

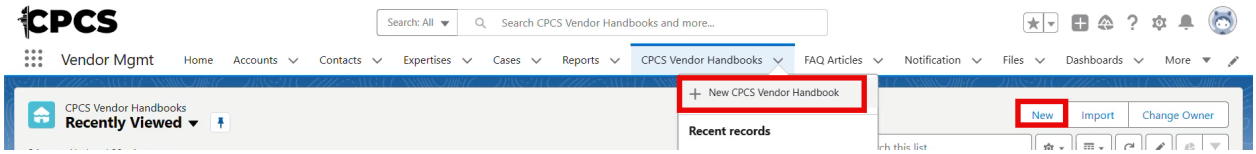


CPCS Vendor Handbooks

CPCS can upload handbooks for the portal users.

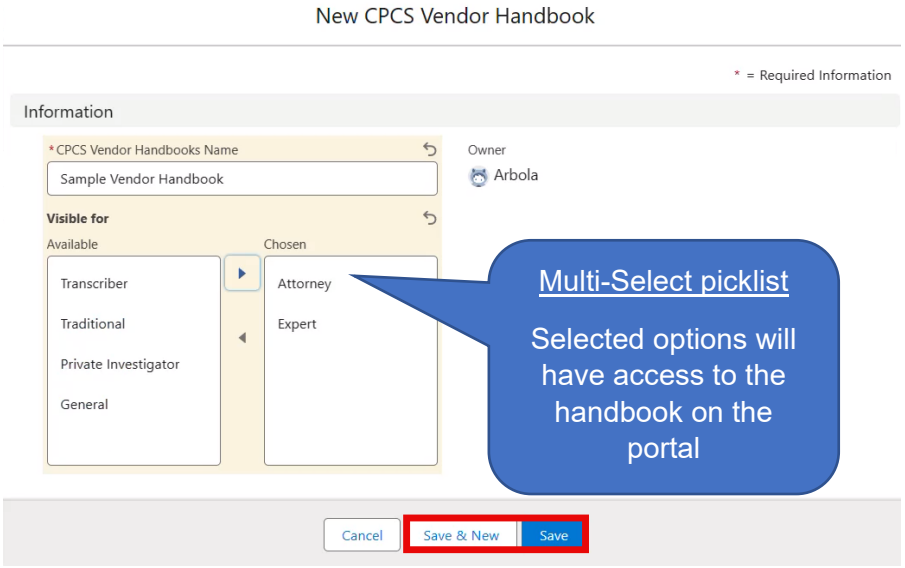
Create a CPCS Vendor Handbooks Record

1. Click the action arrow by the **CPCS Vendor Handbook** tab and select **New CPCS Vendor Handbook** or, when viewing the **CPCS Vendor Handbook** tab, click the **New** button in the upper right corner. The **New CPCS Vendor Handbook** screen will display.



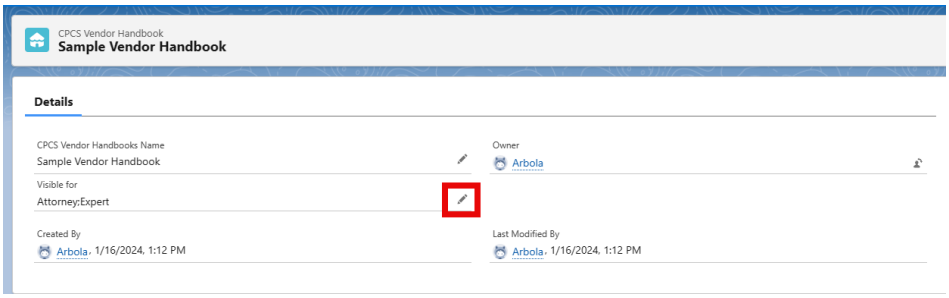
2. Fill in the **New CPCS Vendor Handbook** record form fields with the information known about the CPCS Vendor handbook. When the form is completed, click the **Save** button or the **Save & New** button to continue creating CPCS Vendor Handbooks.

NOTE: The **CPCS Vendor Handbook Name** and **Visible For** fields are required as indicated by the **red** asterisk. Other information can be added later if desired.



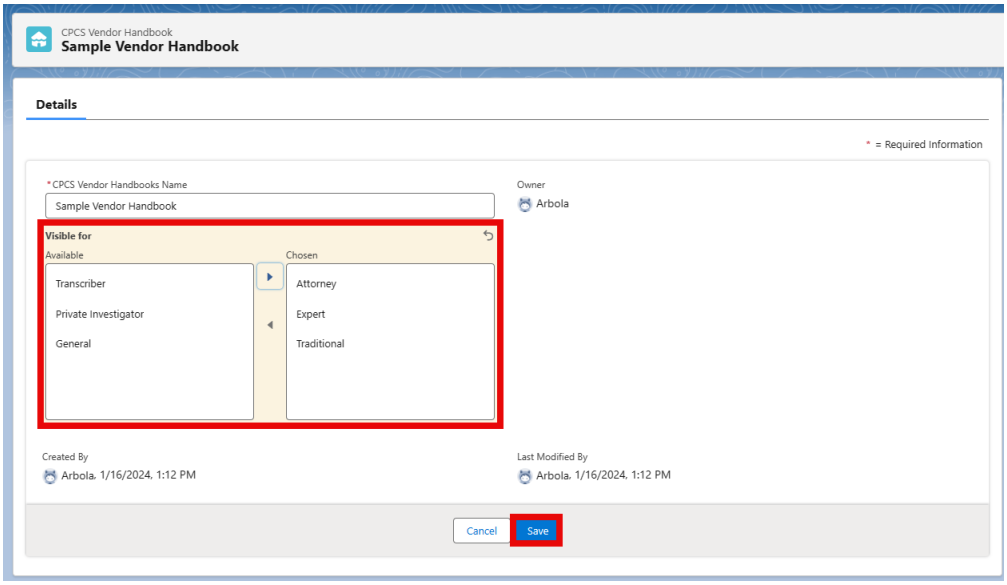
3. A **green bar** will display to indicate that the **CPCS Vendor Handbook** has been created.

4. To edit a field, click a **pencil icon** on the **CPCS Vendor Handbooks** detail screen.



5. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.

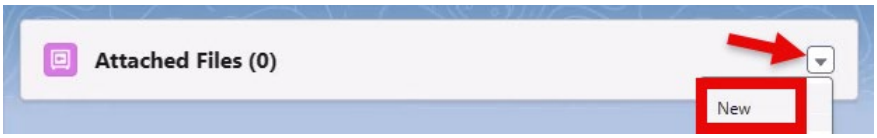
   NOTE: Any Vendors listed in the Chosen column will have access to the CPCS Vendor Handbook via the portal.



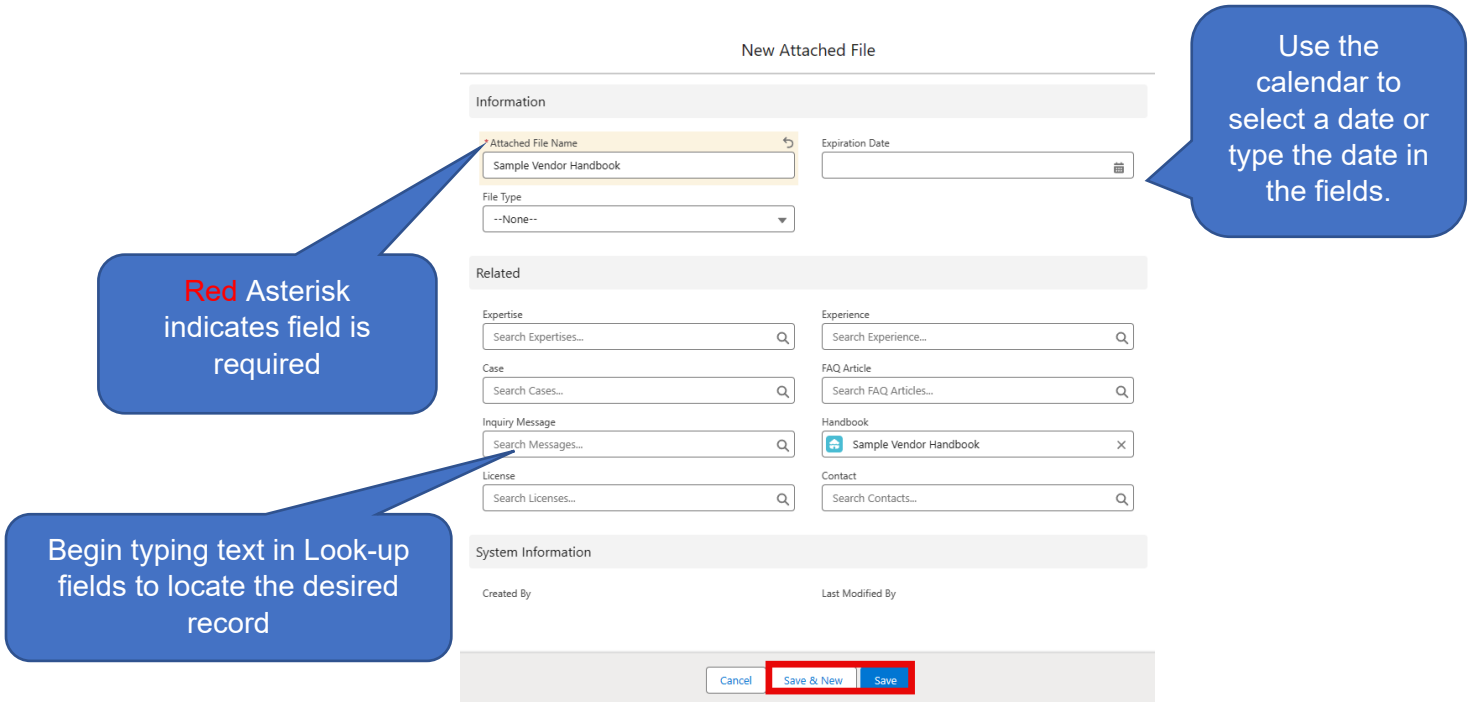
Attached Files (Related List)

Create an Attached File

1. With the **CPCS Vendor Handbook** record displaying, click the **down arrow** on the right side of the Attached Files related list and then select the **New** button.

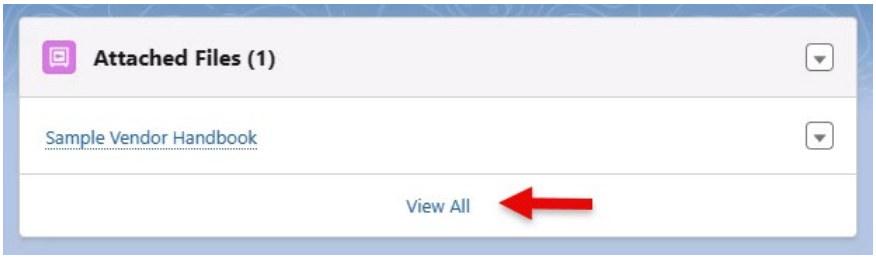


2. Fill in the **New Attached File** record form fields with the information known about the Business Address. When the form is completed, click the **Save** button or the **Save & New** button to continue creating Business Addresses.



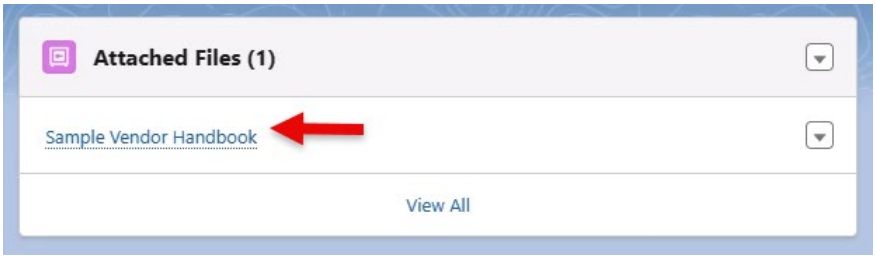
3. A **green bar** will display to indicate that the **Attached File** record has been created.

4. The new experience will now appear on the **Attached Files related list.** Select the **View All** to see all the attached files records in a **list view**.

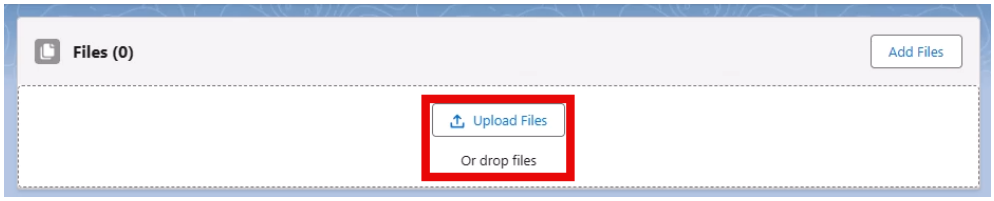


Attach a File

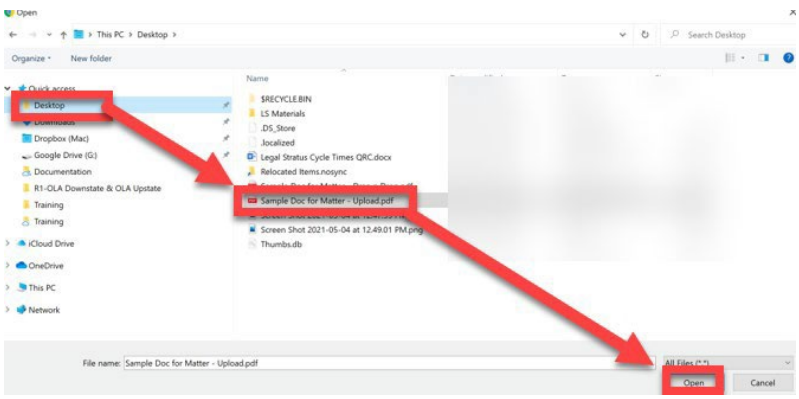
1. To view the details of the **Attached File,** click the **link** in the related list. The detail screen will display and the file can be attached.



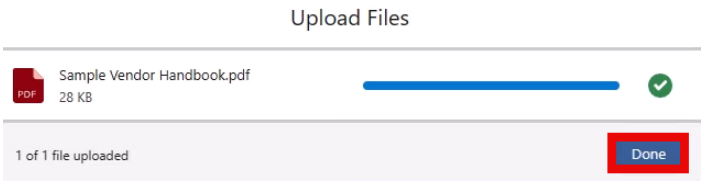
2. The **attached file** record will display. On the right side of the screen, the **files** related list will display. Click the **Upload Files** button to select a document or **drop** the file in the related list.



3. Navigate to the file's location, **Select the file**, and then click the **Open** button.

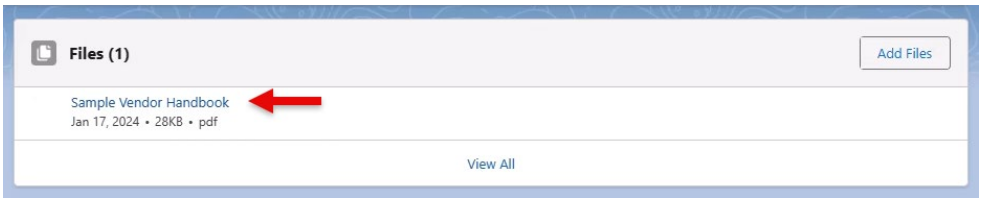


4. Click the **Done** button on the **Upload Files** dialogue box.

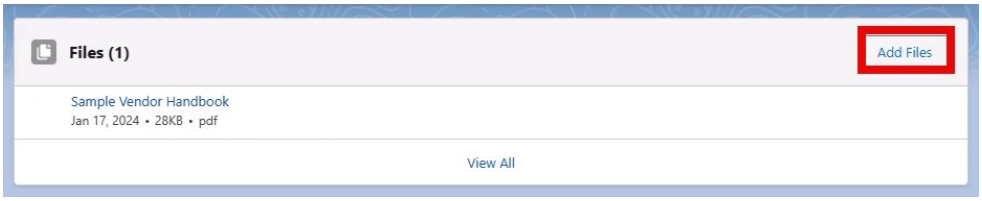


5. A **green bar** will display to indicate that the **File** was added to the **Attached File** record has been created.

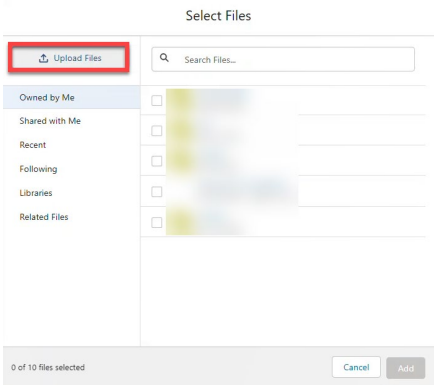
6. The uploaded file will now display on the **Files** related list.



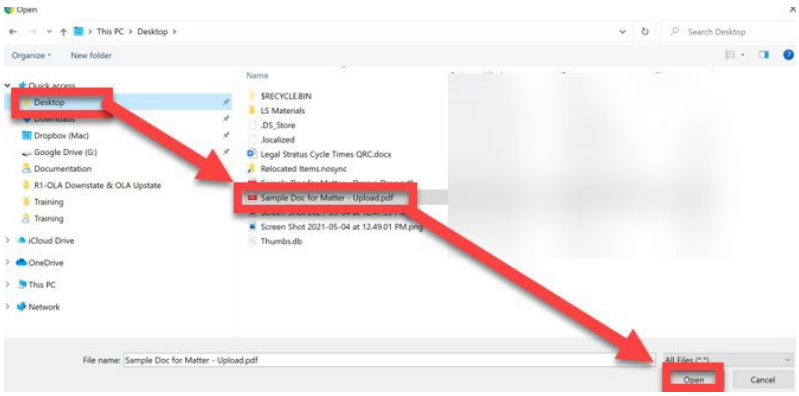
7. To add additional files, click the **Add files** button.



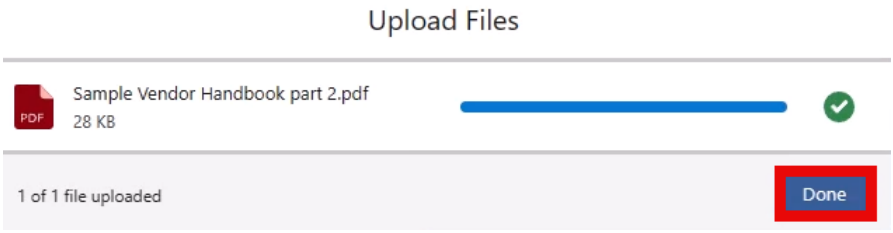
8. To upload a document from your computer, click the **Upload Files** button on the Select Files dialogue box.



9. Navigate to the file's location, **Select the file**, and then click the **Open** button.

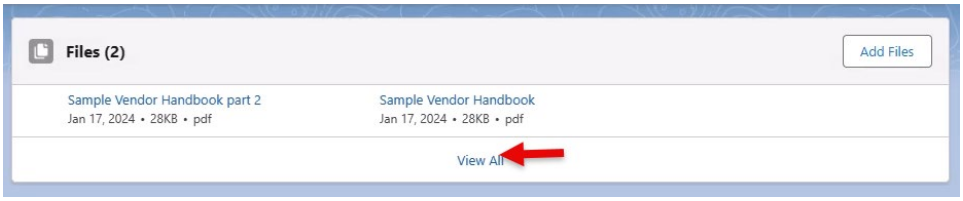


10. Click the **Done** button on the **Upload Files** dialogue box.

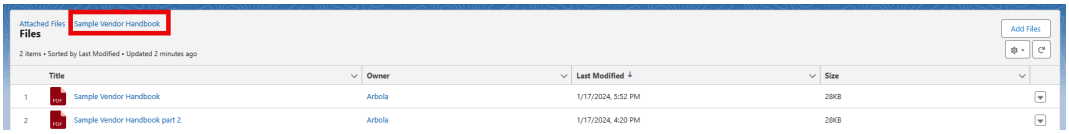


11. A **green bar** will display to indicate that the **File** was added to the **Attached File** record has been created.

12. All of the uploaded files will now display on the **Files** related list. Select the **View All** to see all the files in a **list view**.



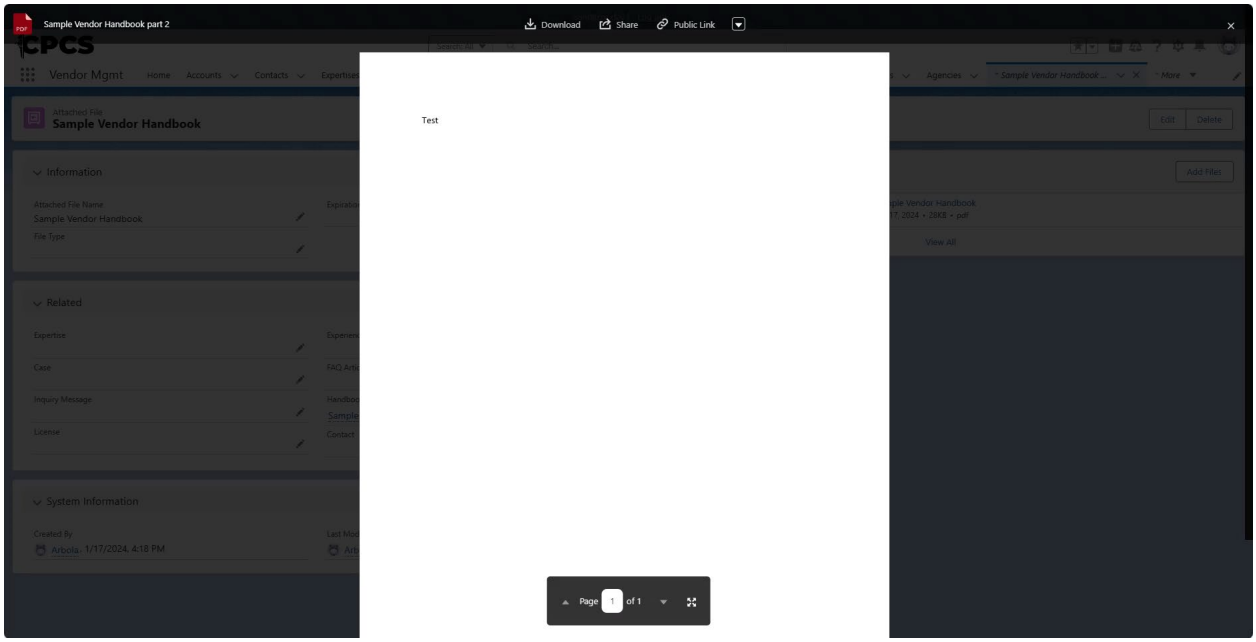
13. To return to the **Attached Files** record, click the Attached Files **link**.



View a File

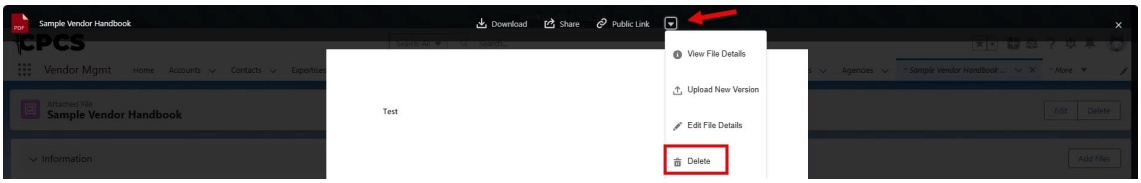
To view a file preview, click the **File Name link**. The document will display a preview.

NOTE: A file can be downloaded to your computer if needed. Select the Download button on top center of your screen.



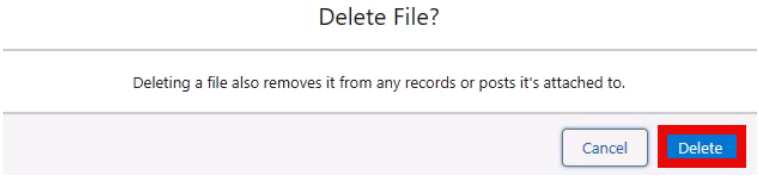
Delete a File

1. With the file preview displaying, click the **down arrow** on the top center of the screen and then select the **Delete** button.

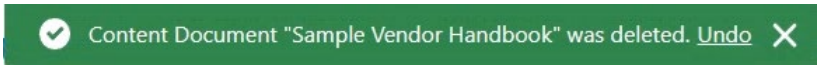


2. The system will confirm the file should be deleted, click **Delete** to proceed.

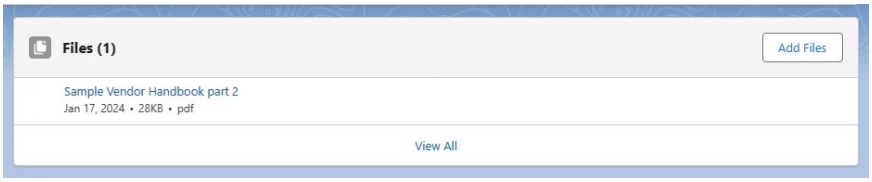
   NOTE: Deleting a file also removes it from any records or posts it's attached to.



3. A **green bar** will display to indicate that the **File** has been deleted.

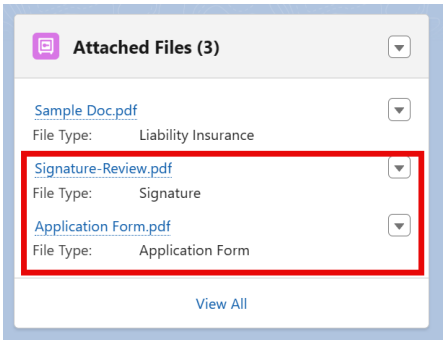


4. The **File** will be removed from the **Files** related list.



Files Attached to an Expertise

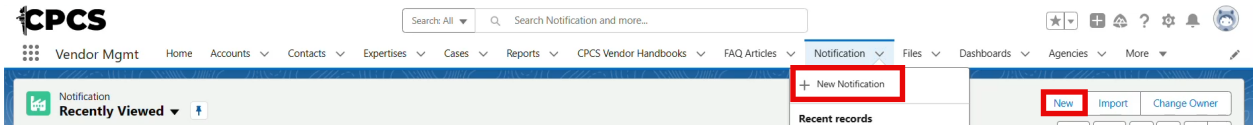
After an application is submitted via the portal, the system will automatically generate the following two documents: **Signature-Review.pdf and Application-Form.pdf**



Notifications

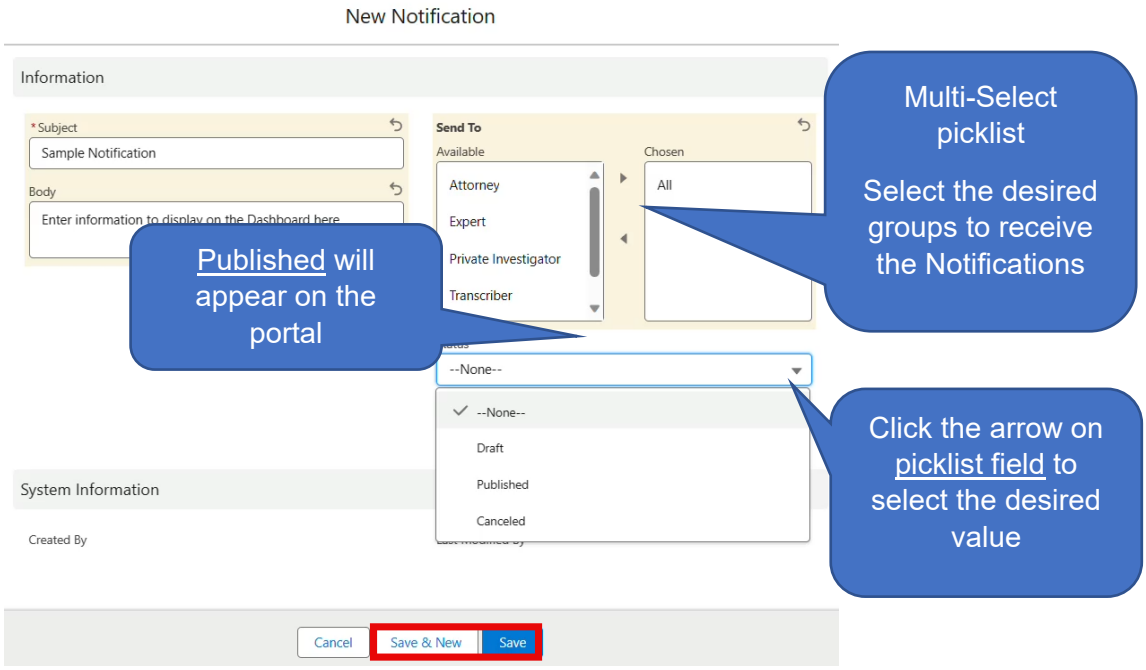
Notifications are a way to broadcast a message to a group of users that display on the portal.

1. Click the action arrow by the **Notifications** tab and select **New notifications** or, when viewing the **Notifications** tab, click the **New** button in the upper right corner. The **New Notification** screen will display.



2. Fill in the **New Notification** record form fields with the information known about the Notifications. When the form is completed, click the **Save** button or the **Save & New** button to continue creating Notifications.

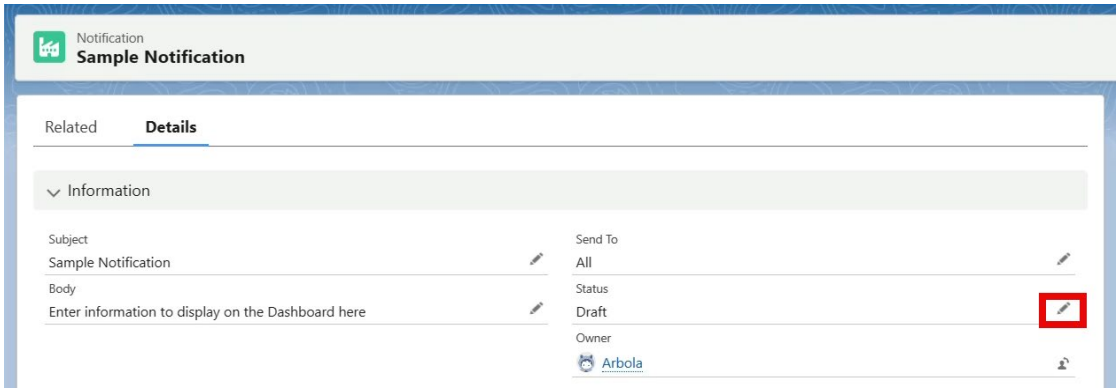
NOTE: The **Subject** field is required as indicated by the **red** asterisk. Other information can be added later if desired.



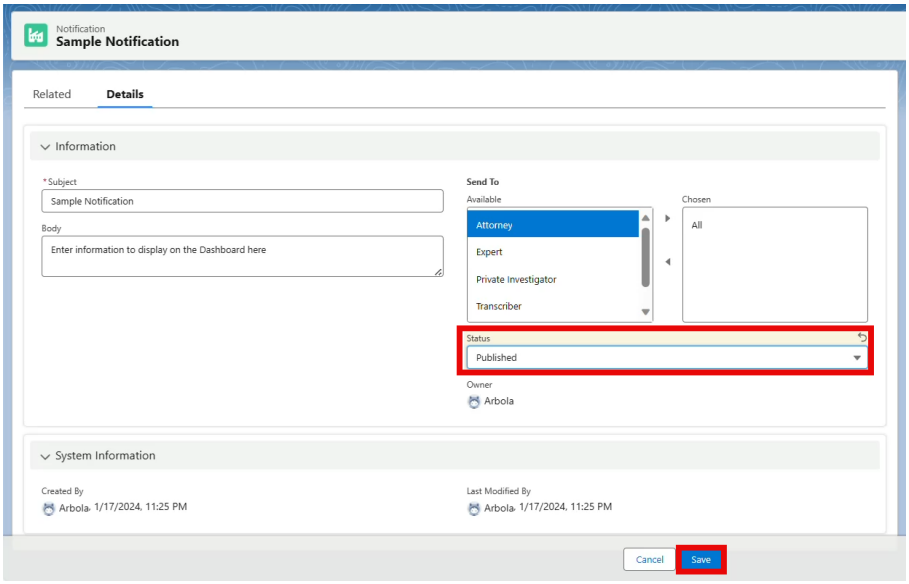
3. A **green bar** will display to indicate that the **Notification** has been created.

4. To edit a field, click a **pencil icon** on the **Notification** detail screen.

   NOTE: The Status field options: Draft, Published, and Cancelled. Published will appear on the portal.



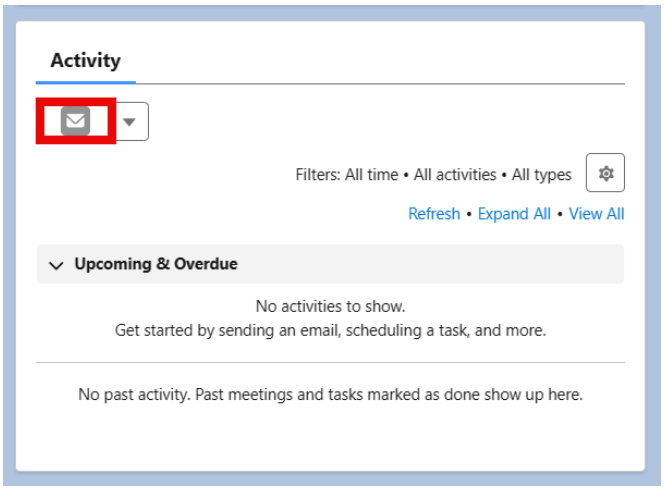
5. Enter the necessary data change **and** click the **Save** button on the bottom of your screen.



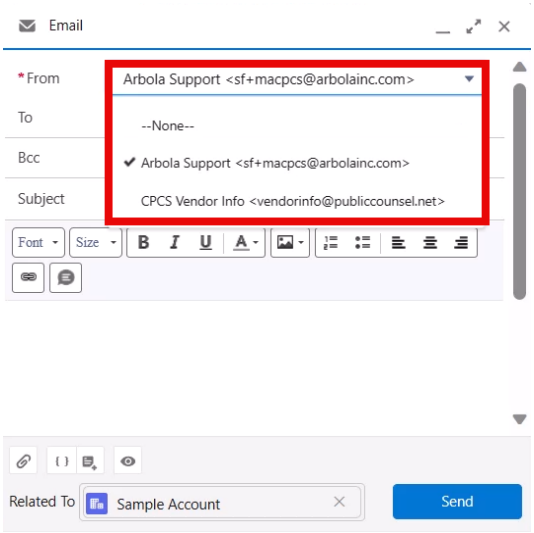
Activity

An email can be sent and logged in the activity timeline. Automated emails sent from the application will display on the Expertise record. Emails will be logged on the record they are sent from.

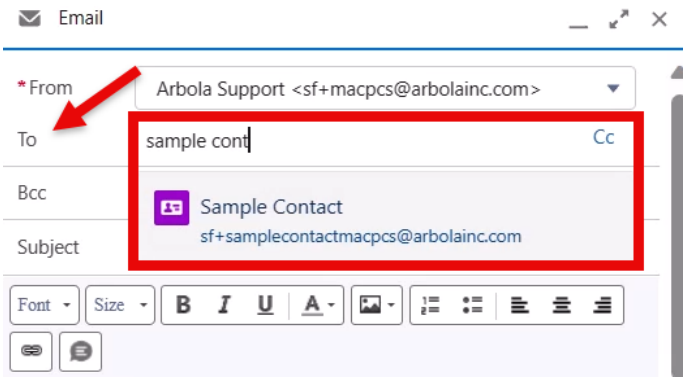
1. Select the **Envelope** icon on the activity tab to display the new email screen.



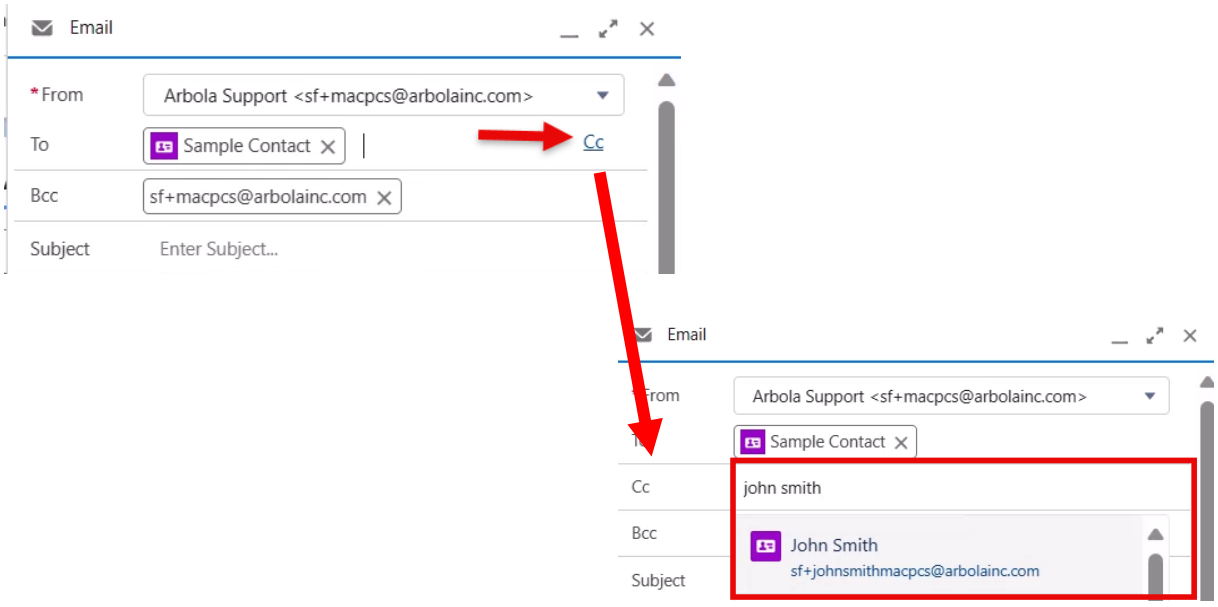
2. Click the drop-down next to **from** and select the correct email address.



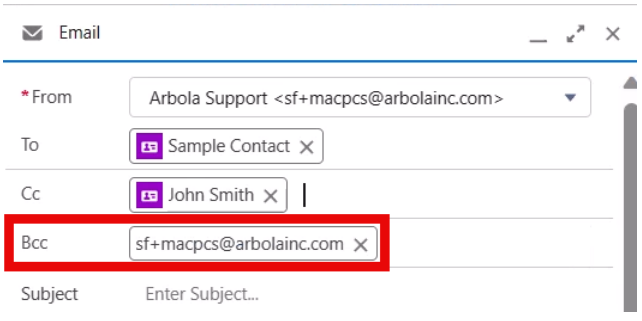
3. Begin typing the **contact name** in the **To** field and select the desired **contact.**



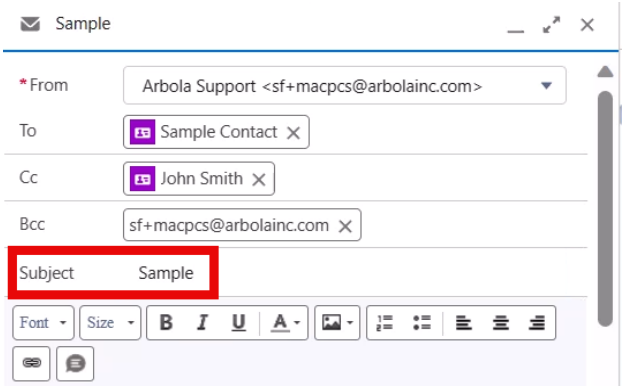
4. To add an email address in the **CC field**, click **Cc**. Begin typing the **contact name** in the **CC** field and select the desired **contact**



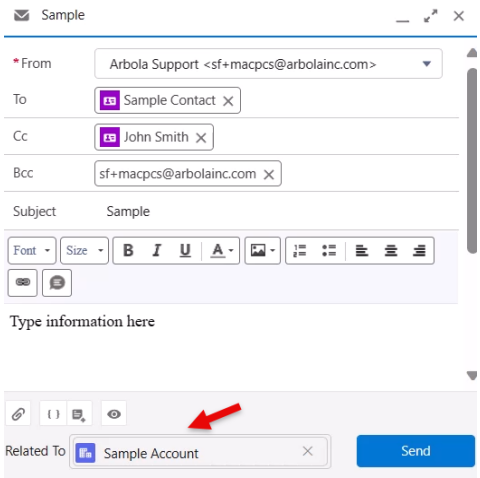
5. Confirm **your email address** is in the **BCC field**.



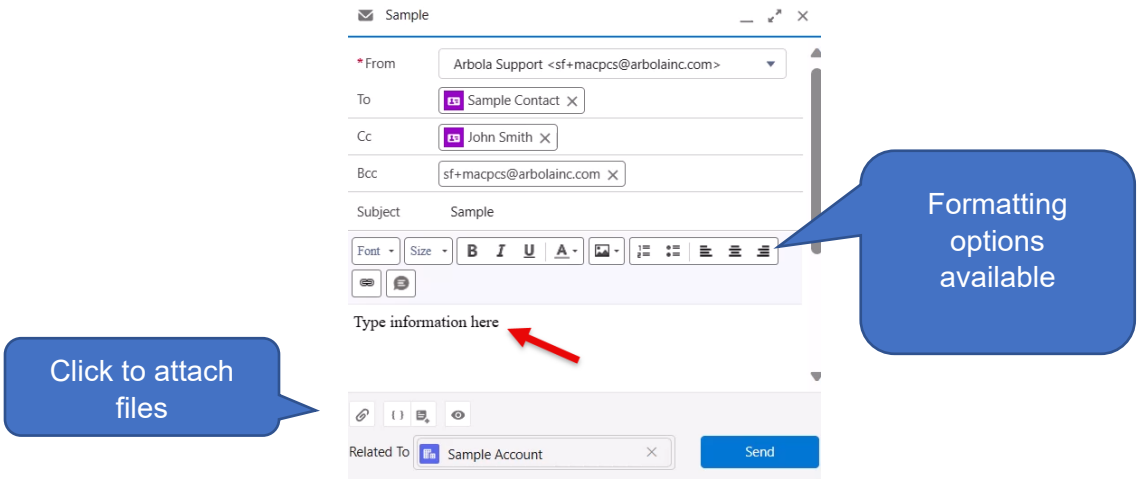
6. Click in the **Subject box** and type the desired text.



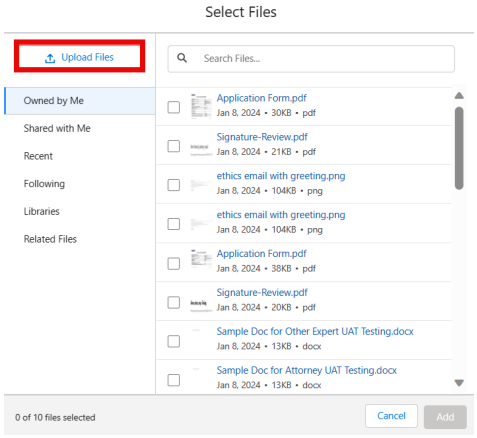
7. Confirm the **Related to** field is populated with the record displayed. The message will be logged on the activity panel of this record.



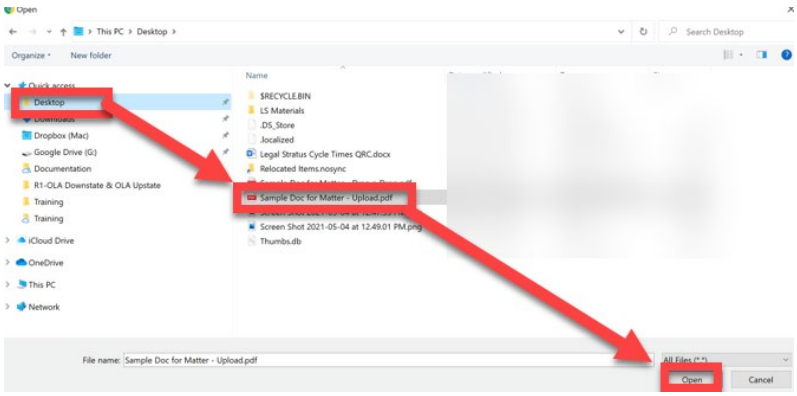
8. Type in the body of the email and apply the format as desired. To **attach files,** click the paperclip icon.



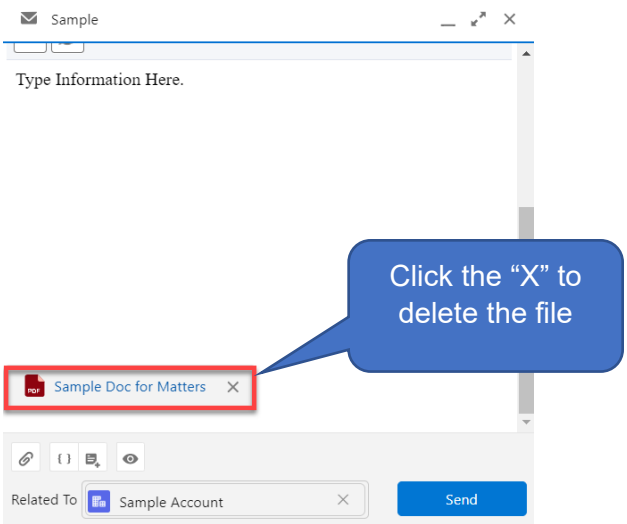
9. the **Upload files** button to select a document from your computer.



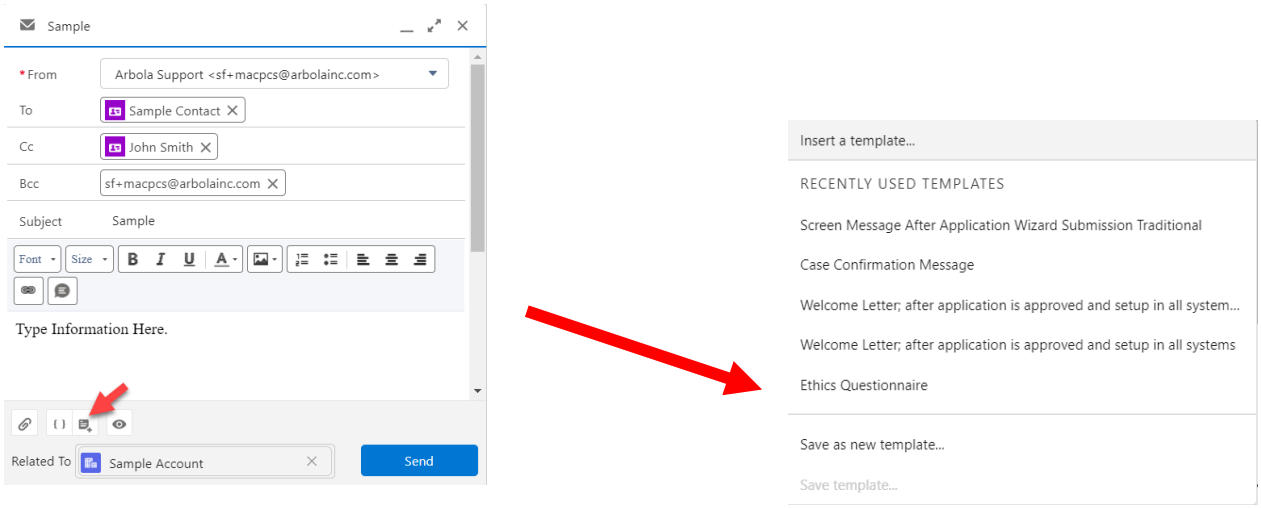
10. Navigate to the file's location, **Select the file**, and then click the **Open** button.



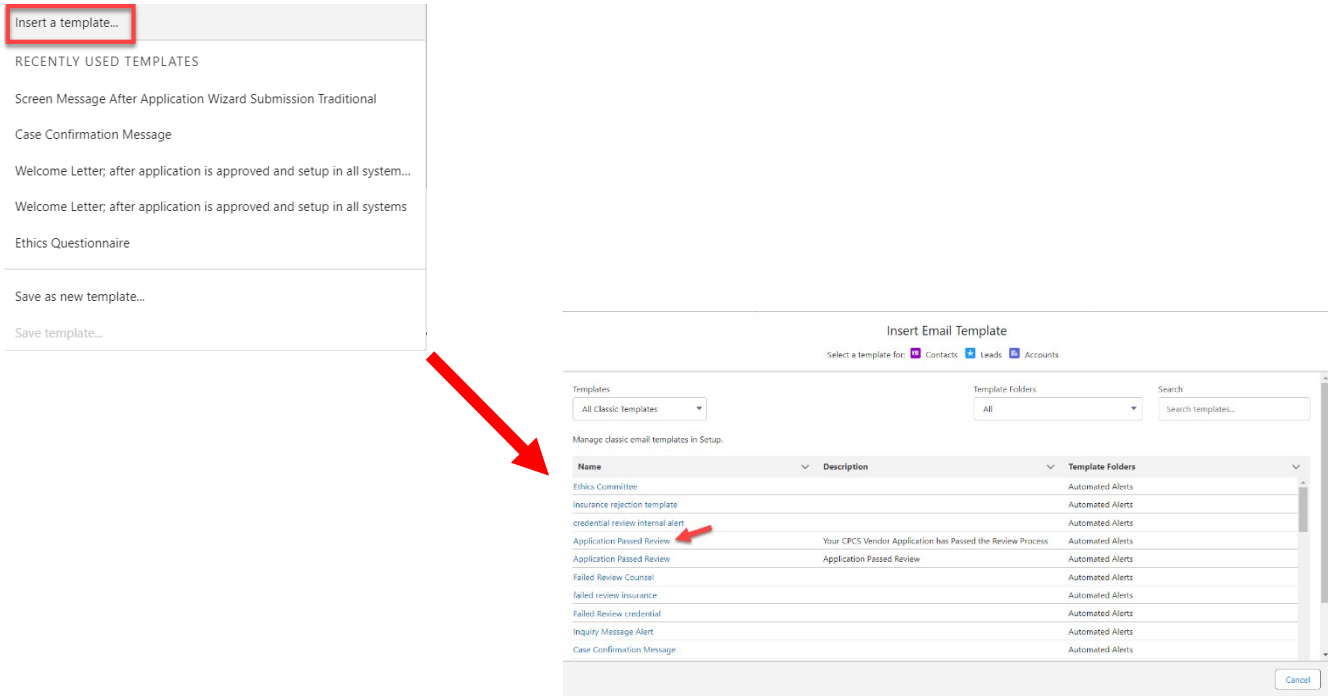
11. The attached file will display below the text box.



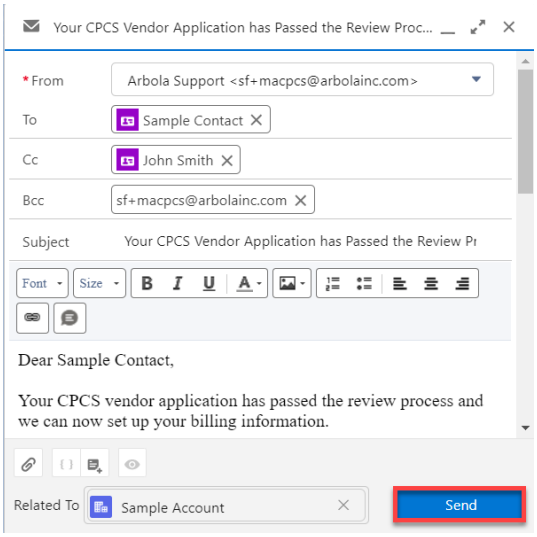
12. To insert a template to the email, click on the **add template** button. Select from a recently used template, insert a new template, or save the current email as a template.



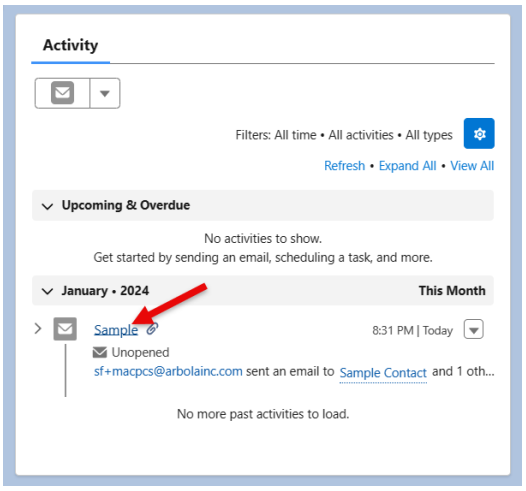
13. To use an existing template, select **Insert Template** and then select from the list of available templates. Click on the template name to insert it in the email.



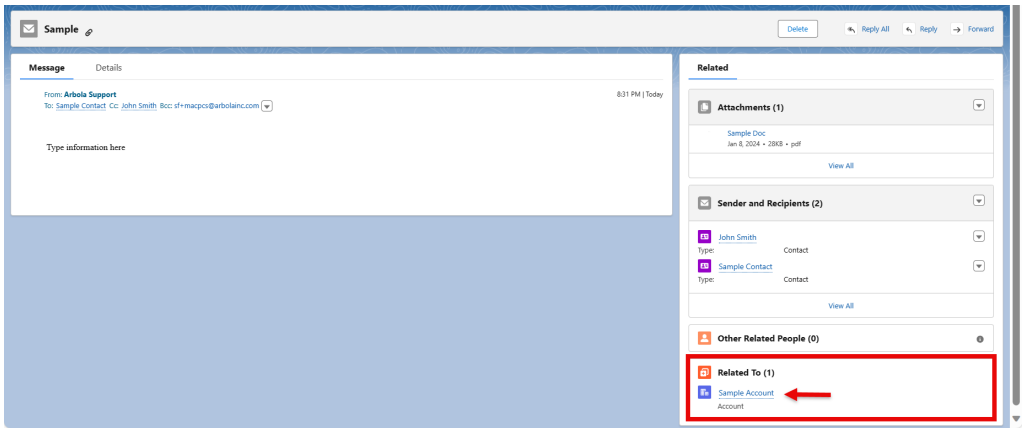
14. When the email is completed, click the **SEND** button.



15. The email will be displayed in the **Activity Panel**. Click the **link** to access the details screen of the email.



16. To return to the **Activity Panel**, click the **Related to** link.



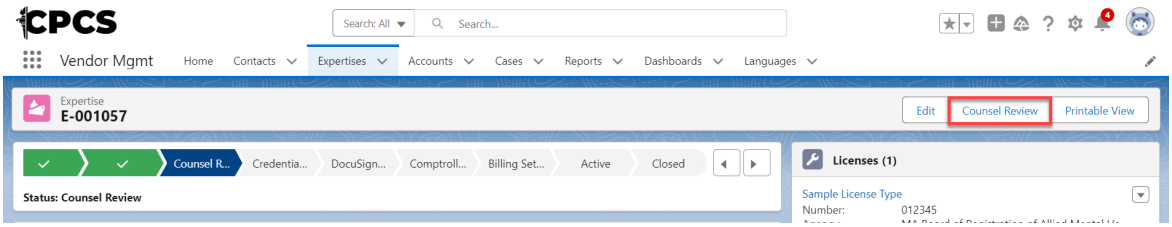
Review Buttons

Buttons are available for certain users to complete their part in the process and change the status of an application after review.

Counsel Review

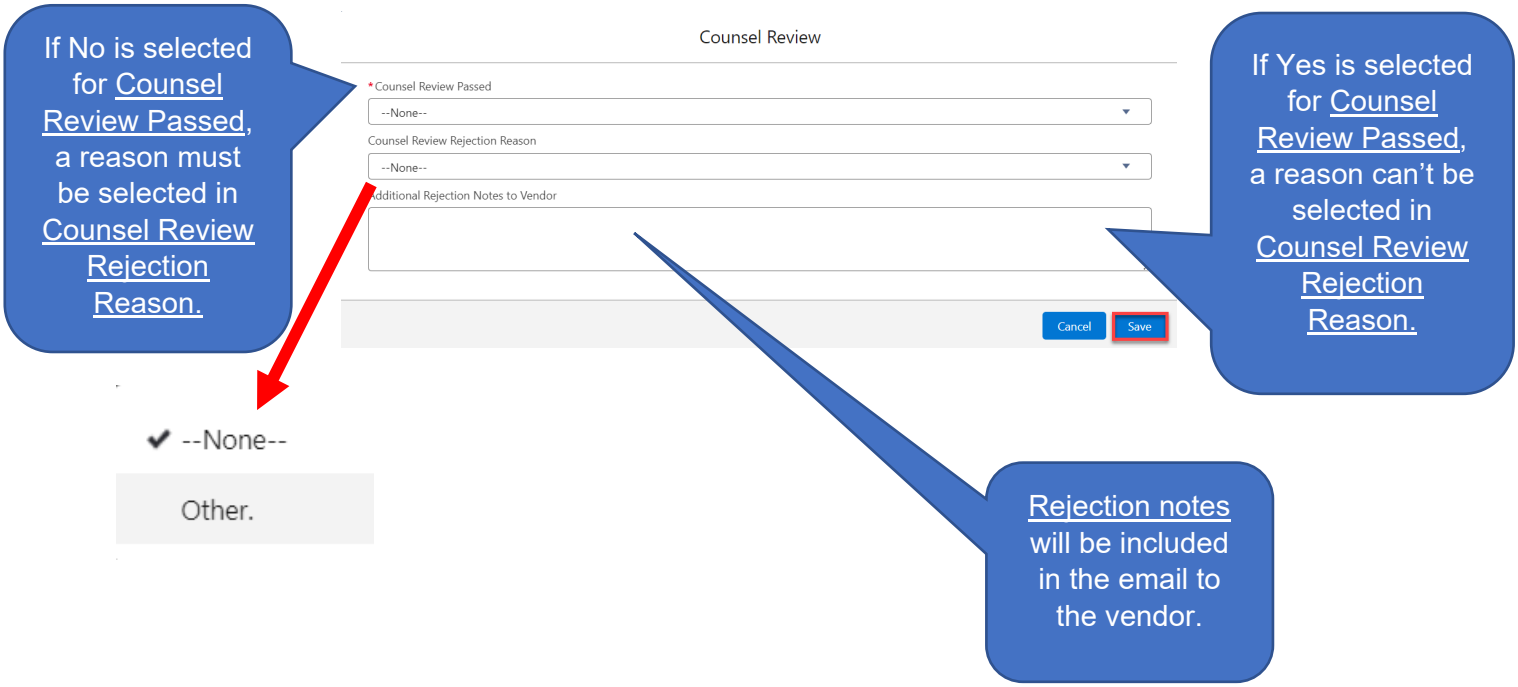
This button is available on the expertise object. The user record role and profile must be Counsel Reviewer to have this available.

1. With the **Expertise** displaying, click the **Counsel Review** button.



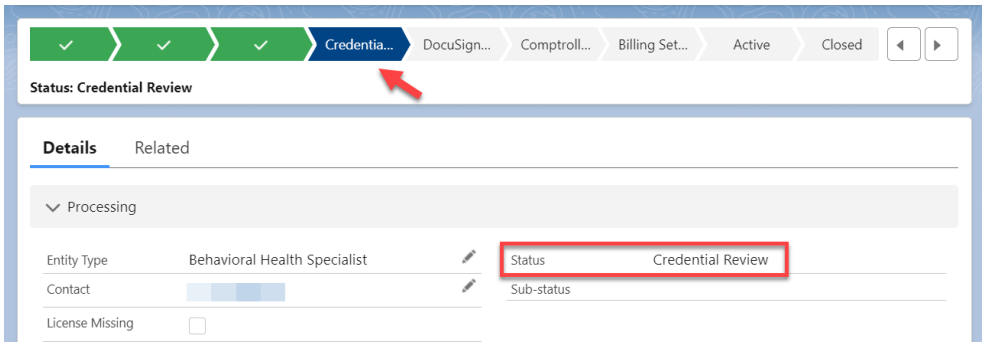
2. The **Counsel Review** form will be displayed.

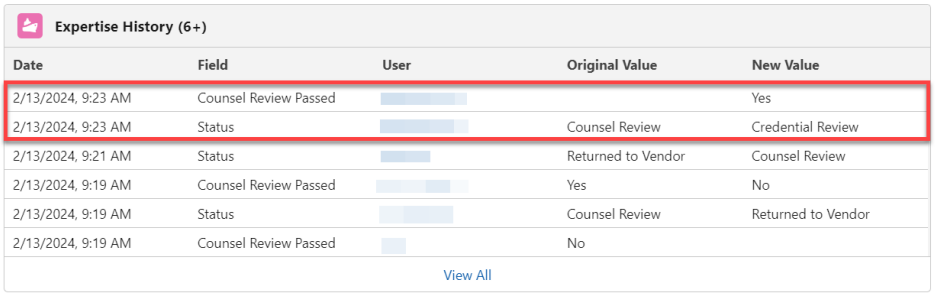
NOTE: The **Counsel Review Passed** field is required as indicated by the **red** asterisk.



3. A **green bar** will display to indicate that the Counsel Review has been updated.

4. The Status will update to "**Credential Review**" and the answer will display in the **Expertise History**.

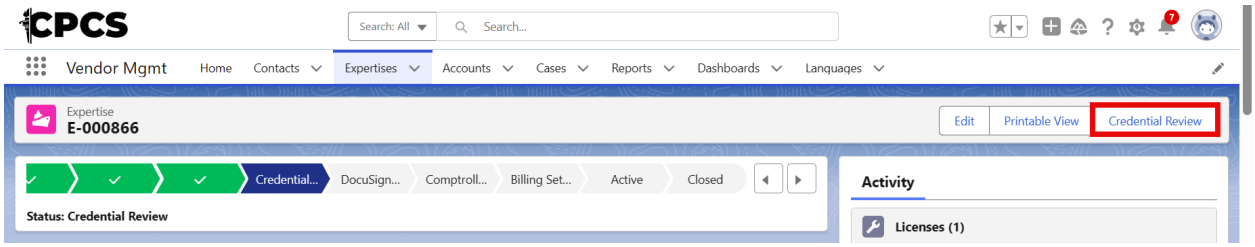




Credential Review

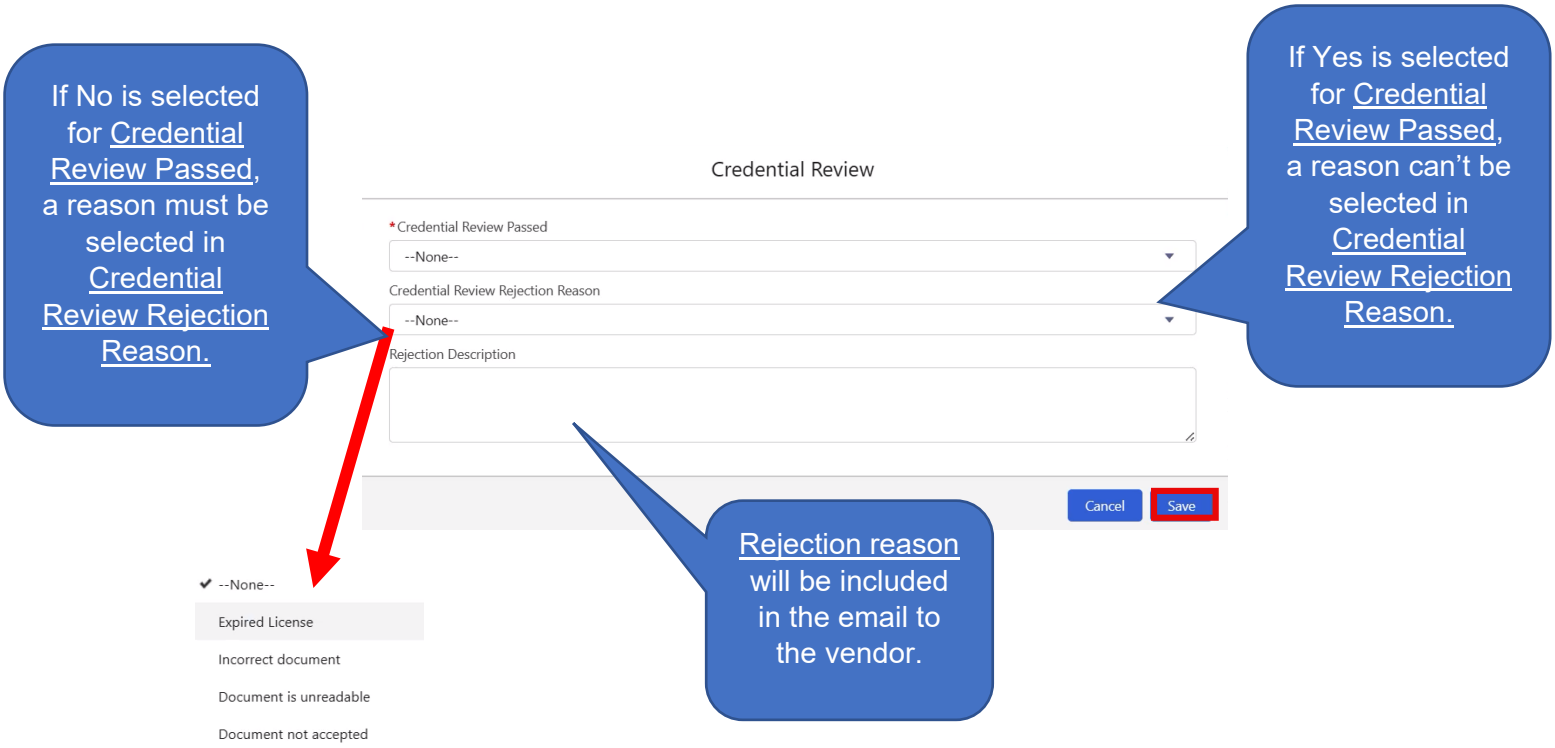
This button is available on the expertise object. The user record role and profile must be Credential Reviewer to have this available.

1. With the **Expertise** displaying, click the **Credential Review** button.



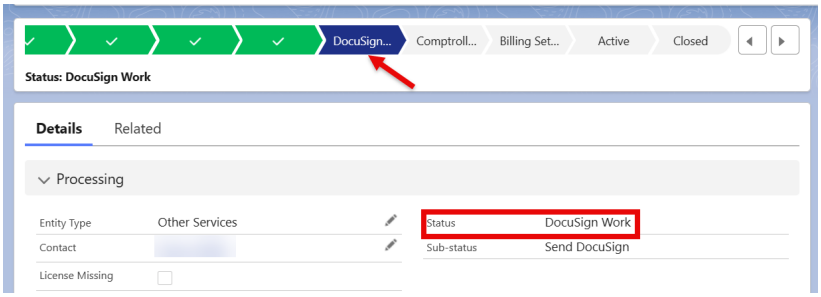
2. The **Credential Review** form will display.

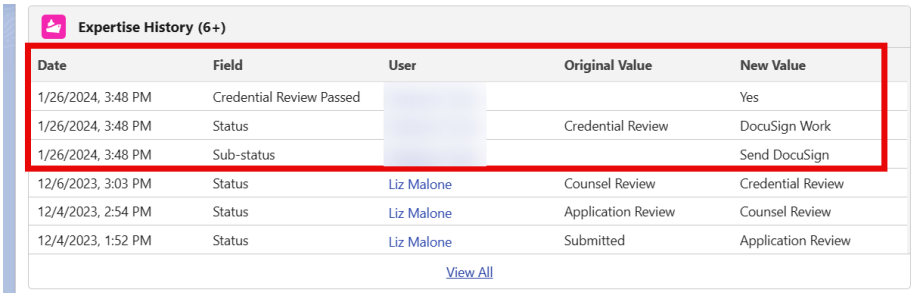
NOTE: The **Credential Review Passed** field is required as indicated by the **red** asterisk.



3. A **green bar** will display to indicate that the Credential Review has been updated.

4. The Status will update to "**Docusign Work**" and the answer will display in the **Expertise History**.

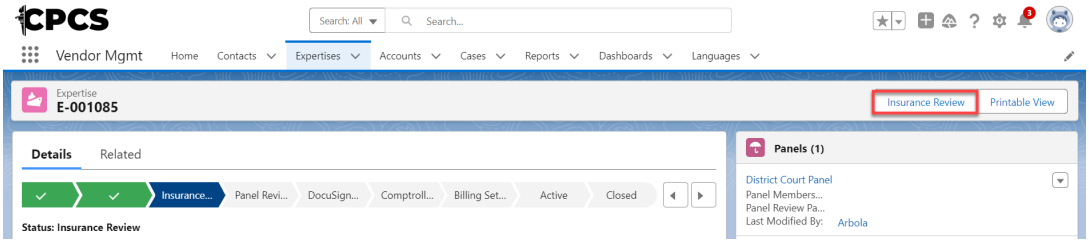




Insurance Review

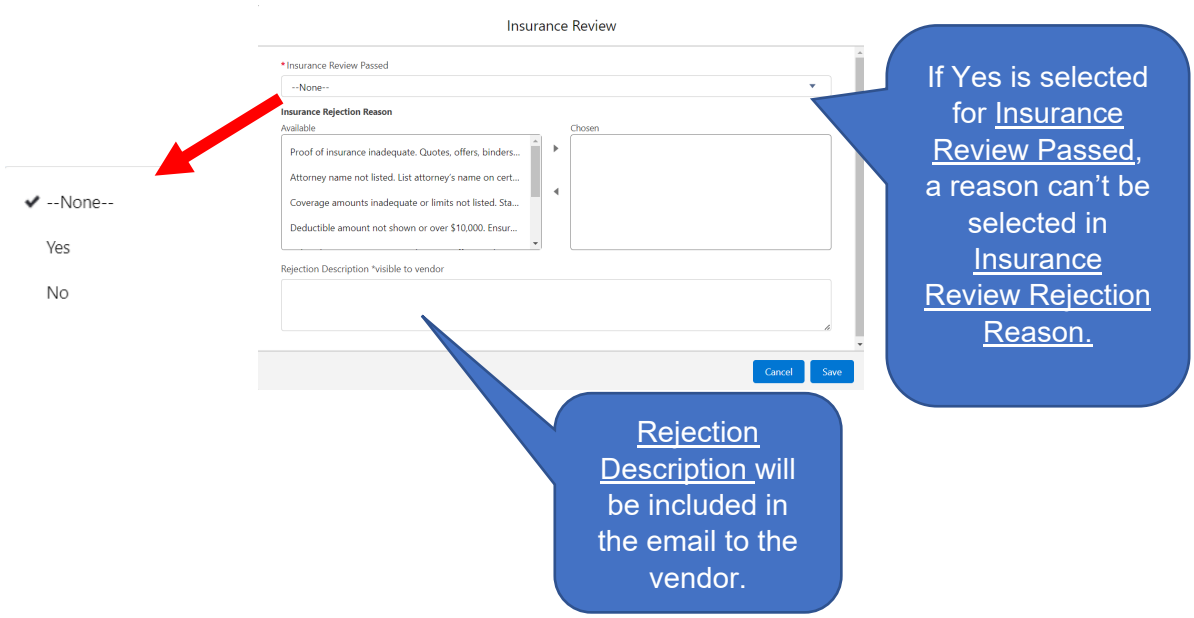
This button is available on the expertise object. The user record role and profile must be **Insurance Review** to have this available.

1. With the **Expertise** displaying, click the **Insurance Review** button.



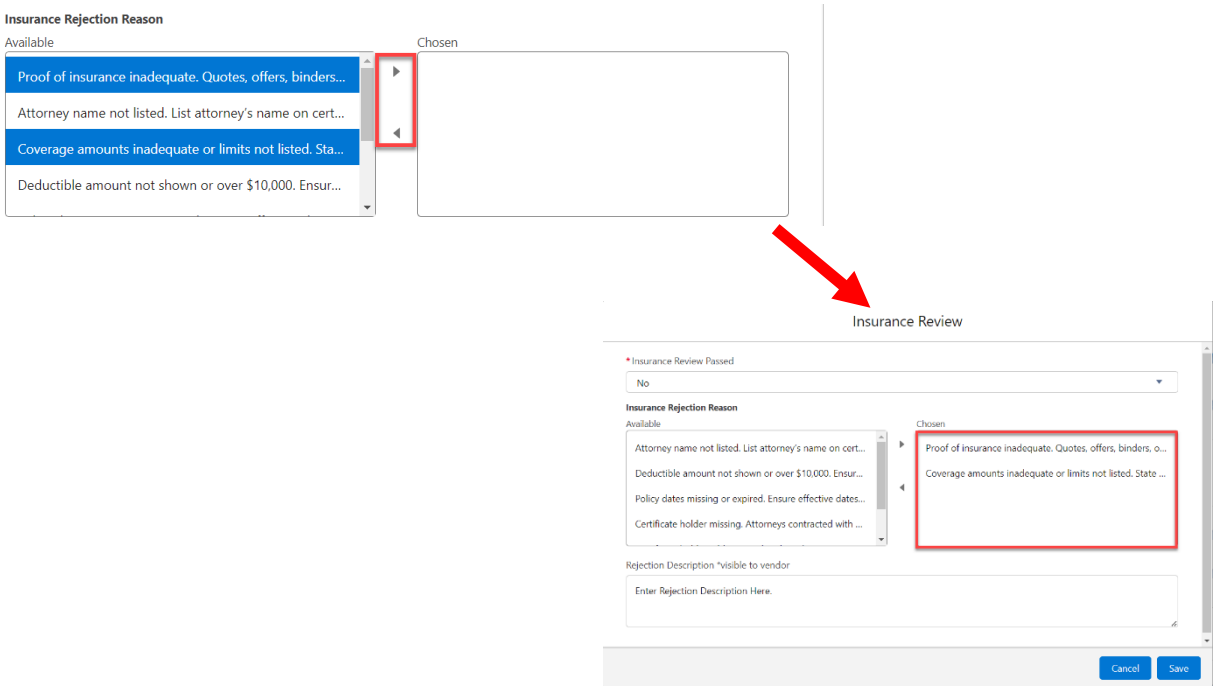
2. The **Insurance Review** form will display.

NOTE: The **Insurance Review Passed** field is required as indicated by the **red** asterisk.

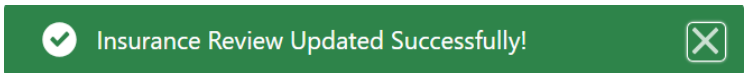


3. If the **Insurance Review Passed** field selected is “No”, an **Insurance Rejection Reason** must be selected from the multi-select picklist.

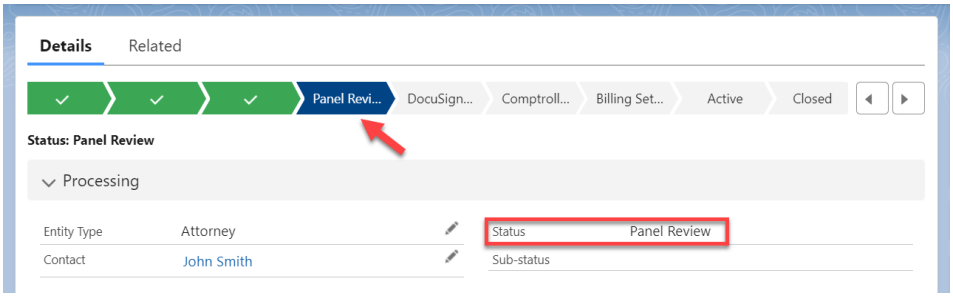
   NOTE: Both the Rejection Reason and Rejection Description are visible to the vendor.

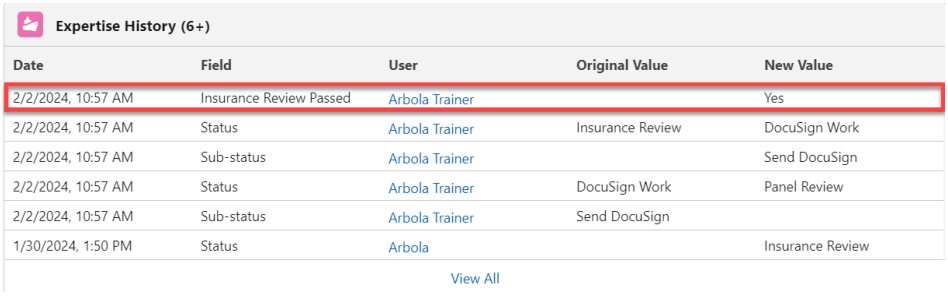


4. A **green bar** will display to indicate that the Insurance Review has been updated.



5. The Status will update to "**Panel Review**" and the answer will display in the **Expertise History**.

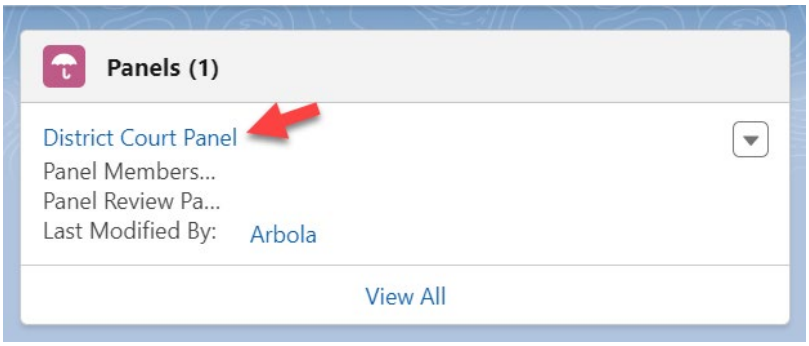




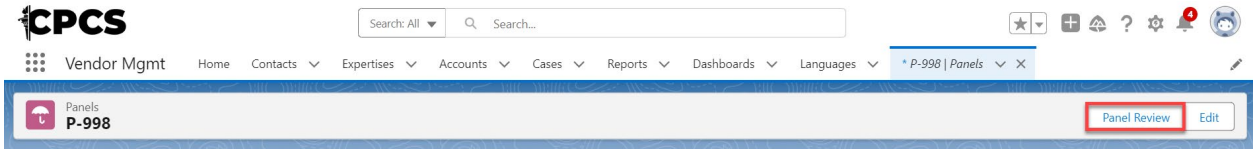
Panel Review

This button is available on the expertise object. The user record role and profile must be **Panel Reviewer** to have this available.

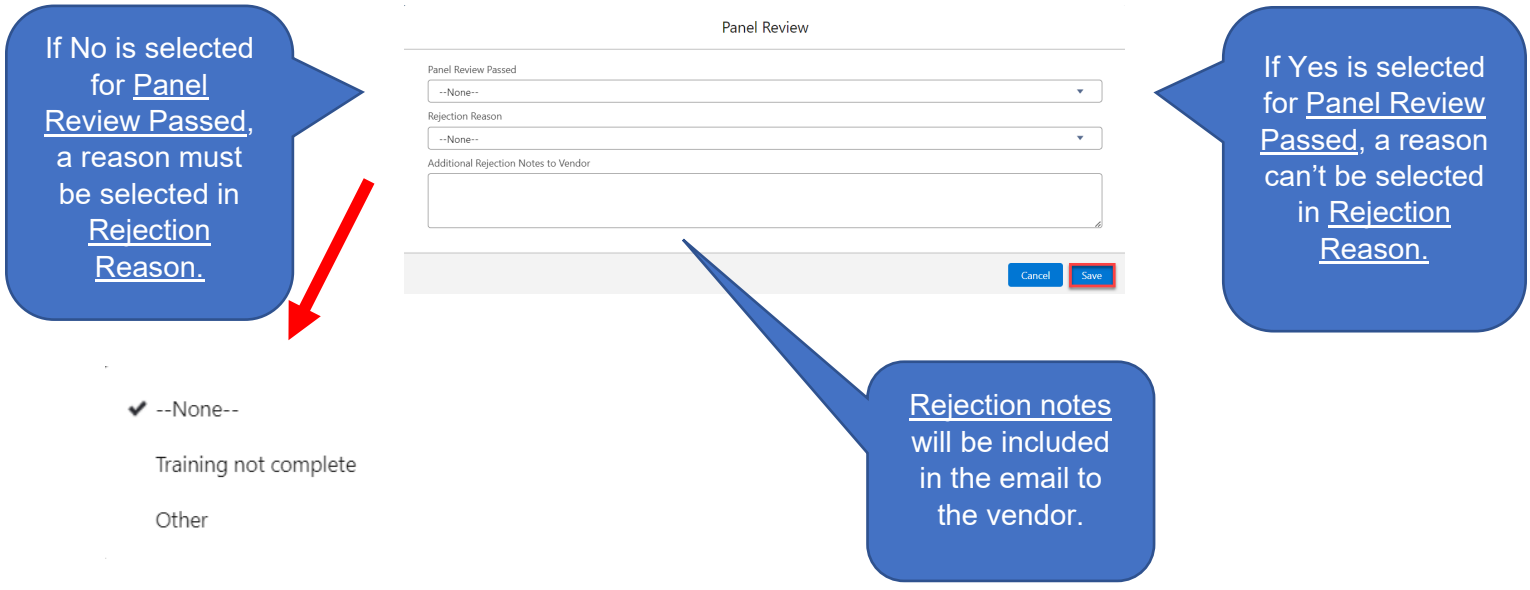
1. With the **Expertise** displaying, click on the **Panel** in the **Panel Related List**.



2. After Reviewing the Panel, click on the **Panel Review** button.

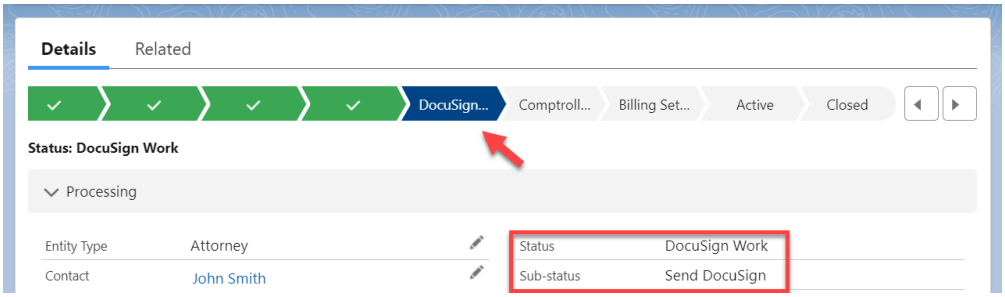


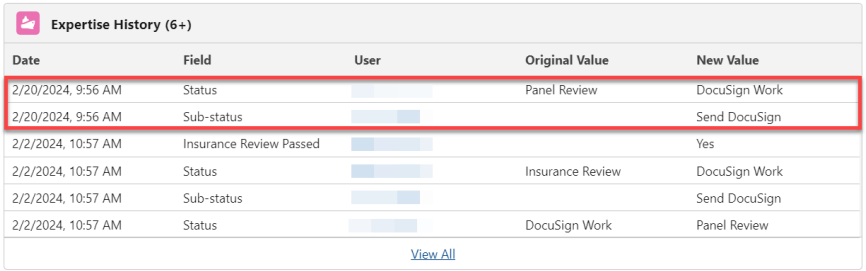
3. The Panel Review form will be displayed.



4. A **green bar** will display to indicate that the Counsel Review has been updated.

5. The Status will update to “DocuSign Work” and the answer will display in the **Expertise History**.





Email Notifications

Application Submitted

From: noreply@salesforce.com <noreply@salesforce.com> **On Behalf Of** CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:05 PM
To: Liz Malone-O'Hara <mmalone-ohara@publiccounsel.net>
Subject: Sandbox: Application Submitted: CPCS NewAttorney

Hello Vendor Maintenance Team,

A vendor application has been submitted/resubmitted to CPCS and is ready for review. Please move this application to Application Review status. The application for CPCS NewAttorney can be accessed by clicking on the link below:

https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000r3FbUAI

Thank you.

Sandbox: CPCS Vendor Application Received! Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via okcrj4ny8lrdotz1.axyebadjoyzbwfvs.66f2a.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com Thu, Jan 18, 1:02 PM (1 day ago)
to agile.steve.smith+cpcsnewattorney@gmail.com

Dear CPCS NewAttorney,

Thanks for completing the initial part of the CPCS vendor application process. We have successfully received your application and will begin our review process.

The application review process typically takes 4 weeks. Members of our team will review your application information and supporting documents. If we identify any issues, we will ask you to update your application so that we may continue our review.

Once your application is approved, we will proceed with setting up your billing information via DocuSign. We will send you more information about DocuSign later in the review process.

You may use the Vendor Portal to submit any questions to us, and to check the status of your application.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/)

Thank you for applying to be a vendor for the Commonwealth of Massachusetts.

CPCS Vendor Maintenance Team

Insurance Review Request

From: noreply@salesforce.com <noreply@salesforce.com> On Behalf Of CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:10 PM
To: Jorge Aviles <javiles@publiccounsel.net>; Bill Shay <wshay@publiccounsel.net>; Denise Torraco <dtorraco@publiccounsel.net>; George Earley <gearley@publiccounsel.net>
Subject: Sandbox: Insurance Review Request: CPCS NewAttorney

Hello Insurance Review,

There is an attorney liability insurance pending your approval. Please review the information submitted by following the link below:

https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000r3FbUAI

- Attorney: CPCS NewAttorney

- BBO #: 599715

- Insurance Exp Date: January 31, 2024

- Panel(s): [District Court Panel]

Please let us know if you have any questions or if you need any additional information.

Thank you,

CPCS Vendor Maintenance Team

Counsel Review Rejection

Sandbox: There is an Issue with your CPCS Vendor Application Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via czqfddasyy5coqhd.oguasvut25bcg3gl.okbyz.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com
to agile.steve.smith+cpcsnewattorney@gmail.com

Dear CPCS NewAttorney,

We have encountered an issue with your CPCS vendor application. Your application did not pass our insurance review process for the following reason(s):

• Coverage amounts inadequate or limits not listed. State coverage amounts and list limits (per claim and aggregate).

• Please re-submit with adequate insurance coverage.

Please visit the Vendor Portal to upload corrected or additional insurance information so that we may continue to process your application.

You may check the status of your application or contact us using the Vendor Portal. If the CPCS Vendor Team has any questions, they will reach out to you directly.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/)

Thank you for applying to be a vendor for the Commonwealth of Massachusetts.

CPCS Vendor Maintenance Team

One attachment • Scanned by Gmail ⓘ

Insurance Review Complete

From: noreply@salesforce.com <noreply@salesforce.com> on behalf of CPCS Vendor Info <vendorinfo@publiccounsel.net>
Date: Tuesday, January 16, 2024 at 10:47 AM
To: james.sharpe@arbolainc.com <james.sharpe@arbolainc.com>
Subject: Sandbox: Insurance Review Completed: Steve AttorneyDocusignEmail

Dear Rita,

The insurance review for Steve AttorneyDocusignEmail was successfully completed by Jorge Aviles on 1/16/2024, 10:47 AM.

- Attorney Name: Steve AttorneyDocusignEmail
- BBO: 599715
- Panels: [District Court Panel]

Thank You,

Audit & Oversight Team

Panel Review Request

From: noreply@salesforce.com <noreply@salesforce.com> On Behalf Of CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:08 PM
To: Denise Torraco <dtorraco@publiccounsel.net>
Subject: Sandbox: Insurance Approved, Panel Review Required: CPCS NewAttorney

Dear Panel Head,

CPCS has successfully completed its review of insurance information for the attorney applicant CPCS NewAttorney.

* Attorney Name: CPCS NewAttorney
* BBO: 599715
* Insurance Exp Date: January 31, 2024
* Panels: [District Court Panel]

You may view and complete the panel approval of this application by clicking on the link below:

https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000r3FbUAI

Thank you,

CPCS Vendor Maintenance Team

Panel Review Complete

From: noreply@salesforce.com <noreply@salesforce.com> **On Behalf Of** CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:11 PM
To: Liz Malone-O'Hara <mmalone-ohara@publiccounsel.net>
Subject: Sandbox: Panel Review Completed: CPCS NewAttorney

The Panel Review for CPCS NewAttorney was successfully completed by Donny Jee on 1/18/2024, 1:10 PM. This application is ready for DocuSign work.
https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000r3FbUAI

Ready for DocuSign Work

From: noreply@salesforce.com <noreply@salesforce.com> **On Behalf Of** CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:09 PM
To: Liz Malone-O'Hara <mmalone-ohara@publiccounsel.net>; sf+macpcs@arbolainc.com
Subject: Sandbox: Ready for DocuSign Work:

Dear Vendor Maintenance,

The panel review for was successfully completed by Donny Jee on 1/18/2024, 1:08 PM. This application is ready for DocuSign work.

https://cpcs--dev.sandbox.my.salesforce.com/a073R000001XzGAQA0

Agency Head Request

Sandbox: State/Key Vendor Applying for CPCS Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via 34vxa2d3ysxvuhk8.k603zx5xvr8ccgl6.nq39nog.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com Thu, Jan 18, 1:19 PM (1 day ago)
to agile.steve.smith+cpcsnewexpert@gmail.com

Hello Test Title,

- The following employee, CPCS NewExpert, who is the Test Title at Executive Office for Administration and Finance has applied to become a Court Cost Vendor for the Committee for Public Counsel Services (CPCS) where they will be able to provide expert services to cases on a part-time basis.Here is the info disclosed by your employee:I am a state employee. The Committee for Public Counsel Services ("CPCS") provides representation and services to persons with regard to various matters in the state courts and assigns attorneys and personnel to work on the matters. In connection with these matters, I expect to provide representation or services to, or on behalf of, such persons, attorneys or personnel. I respectfully request written approval of the arrangement from CPCS and (if I am not an elected state employee) from my appointing authority in my state position.
- Office Email: agile.steve.smith+cpcsnewexpert@gmail.com
- Nature of services: Description of the nature of the representation.
- The following entity will pay for the services:
- Financial Interest: 1000

Please reply to this email indicating that you have reviewed the facts that the state employee has disclosed above and approve the arrangement proposed by the state employee.
Thanks for your prompt response,CPCS Vendor Maintenance Team
https://www.publiccounsel.net/

Ethics Questionnaire

Sandbox: Ethics Questionnaire Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via obt2zq30ixpylrry.yrr4aameagye9624.fdaelw4.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com Thu, Jan 18, 1:19 PM (1 day ago)
to agile.steve.smith+cpcsnewexpert@gmail.com

Dear CPCS NewExpert,

Thanks for completing the initial part of the CPCS vendor application process. Since you have indicated on your application that either you are a state employee, a key employee on state contract, or currently provide services to the Commonwealth, the State Ethics Commissions requires some additional information be completed as part of your application.

Please reply to this email and provide responses to the two questions below:

1. Are there any conflicts with your current job and the CPCS client and if not, what will you do to prevent any conflict going forward?
2. Describe your current state work in terms of hours worked per day, and how you plan on providing forensic expert services for CPCS while being employed by another state agency?

In addition to the two questions, please complete the attached disclosure form and attach it to your email response.

Once your application is approved, we will proceed with setting up your billing information via DocuSign. We will send you more information about DocuSign later in the review process.

You may use the Vendor Portal to submit any questions to us, and to check the status of your application.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/)

Thank you for applying to be a vendor for the Commonwealth of Massachusetts.

CPCS Vendor Maintenance Team

One attachment • Scanned by Gmail

Ins. Review Rejection

Sandbox: There is an Issue with your CPCS Vendor Application Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via czqfddasyy5coqhd.oguasvut25bcg3gl.okbyz.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com
to agile.steve.smith+cpcsnewattorney@gmail.com

Dear CPCS NewAttorney,

We have encountered an issue with your CPCS vendor application. Your application did not pass our insurance review process for the following reason(s):

• Coverage amounts inadequate or limits not listed. State coverage amounts and list limits (per claim and aggregate).

• Please re-submit with adequate insurance coverage.

Please visit the Vendor Portal to upload corrected or additional insurance information so that we may continue to process your application.

You may check the status of your application or contact us using the Vendor Portal. If the CPCS Vendor Team has any questions, they will reach out to you directly.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/)

Thank you for applying to be a vendor for the Commonwealth of Massachusetts.

CPCS Vendor Maintenance Team

One attachment • Scanned by Gmail

Credential Review Request

From: noreply@salesforce.com <noreply@salesforce.com> on behalf of CPCS Vendor Info <vendorinfo@publiccounsel.net>
Date: Friday, January 26, 2024 at 4:17 PM
To: ntamulis@publiccounsel.net <ntamulis@publiccounsel.net>, cdunne@publiccounsel.net <cdunne@publiccounsel.net>, igant@publiccounsel.net <igant@publiccounsel.net>, jterrasi@publiccounsel.net <jterrasi@publiccounsel.net>, mgrant@publiccounsel.net <mgrant@publiccounsel.net>, odubois@publiccounsel.net <odubois@publiccounsel.net>, kdame@publiccounsel.net <kdame@publiccounsel.net>
Cc: [redacted]
Subject: Sandbox: Credential Review Request for State Employee: Jamie Steward

Dear Expert Review Team,

Please click on the hyperlink below to view the vendor application and supporting documents of vendor Jamie Steward:

https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000rP67

Please review at your convenience and let us know once everything has been approved for vendor set up. If you need anything else, please don't hesitate to reach out. Thank you!

Thank you,
CPCS Vendor Maintenance Team

Credential Review Rejection

From: noreply@salesforce.com <noreply@salesforce.com> on behalf of CPCS Vendor Info <vendorinfo@publiccounsel.net>
Date: Friday, January 26, 2024 at 4:25 PM
To: [redacted]
Subject: Sandbox: There is an Issue with your CPCS Vendor Application

Dear Jamie Steward,

We have encountered an issue with your CPCS vendor application. Your application did not pass our insurance review process for the following reason:

Document is unreadable. Please upload your document using a darker text setting; the text is too light, we cannot read the dates.

Please visit the Vendor Portal to upload corrected or additional insurance information so that we may continue to process your application.

You may check the status of your application or contact us using the Vendor Portal. If the CPCS Vendor Team has any questions, they will reach out to you directly.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/login)

Thank you for applying to be a vendor for the Commonwealth of Massachusetts.

CPCS Vendor Maintenance Team

Credential Review Complete

From: noreply@salesforce.com <noreply@salesforce.com> **On Behalf Of** CPCS Vendor Info
Sent: Thursday, January 18, 2024 1:30 PM
To: Liz Malone-O'Hara <mmalone-ohara@publiccounsel.net>
Subject: Sandbox: Panel Review Completed: CPCS NewExpert

The Credential Review for CPCS NewExpert was successfully completed by Arbola on 1/18/2024, 1:29 PM. This application is ready for DocuSign work.
https://cpcs--dev.sandbox.my.salesforce.com/a0F3R000000r3H3UAI

Vendor Account Closed

Sandbox: Your CPCS Vendor Account has been Closed Inbox ×

CPCS Vendor Info vendorinfo@publiccounsel.net via c2rrat2aatzb7ewl.awf4pr4ykt1ei33v.u7xjdio.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com
to agile.steve.smith+cpcsnewattorney@gmail.com

Dear CPCS NewAttorney,

CPCS has closed your vendor account. Thank you being a vendor with us.

If you would like to re-apply as a vendor, please create an account and complete the vendor application on the vendor portal.

Vendor Portal (https://uat-vendorportal.publiccounsel.net/login)<

Sincerely,

CPCS Vendor Maintenance Team

Secure Message Received

Sandbox: Case Confirmation Inbox ×

Arbola sf+macpcs@arbolainc.com via roc31zg53rnzg171.gszt.3r-8f0huaa.cs132.bnc.sandbox.salesforce.com
to agile.steve.smith+cpcsnewexpert@gmail.com

Hello,

MA CPCS has received your received your message. The reference number is below.

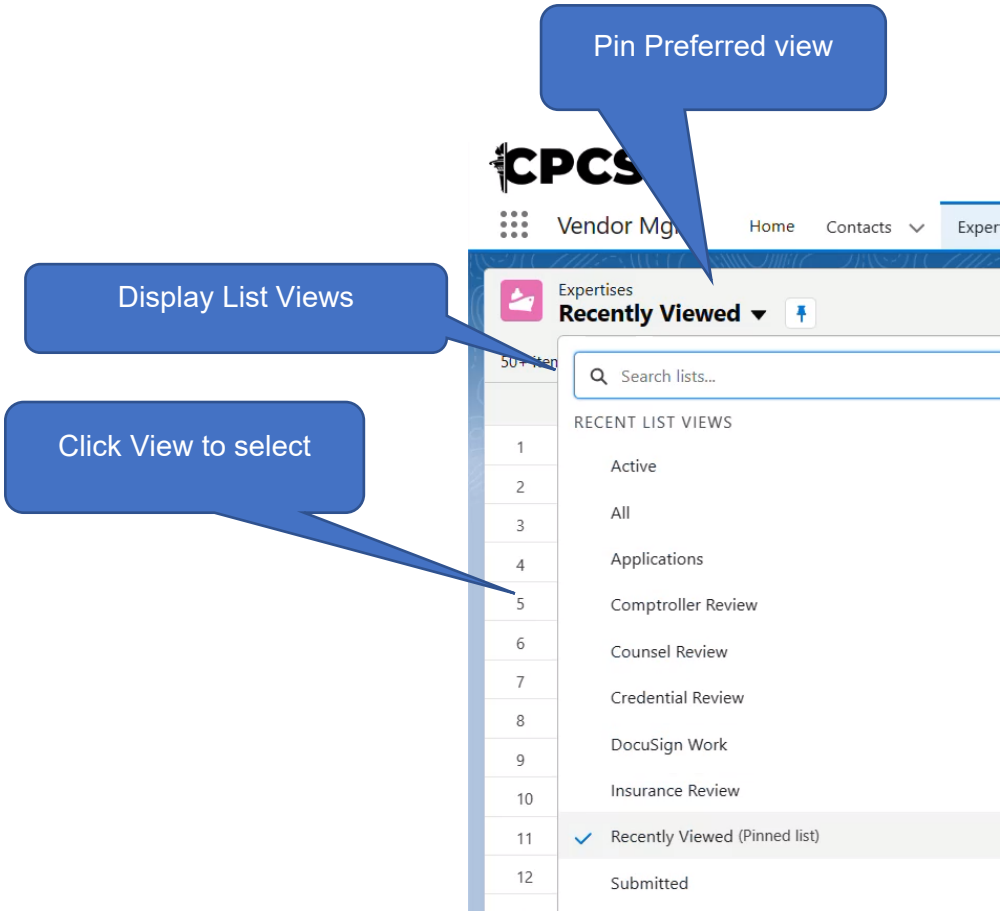
00016779

Thank you!

View and Locate Records

List Views

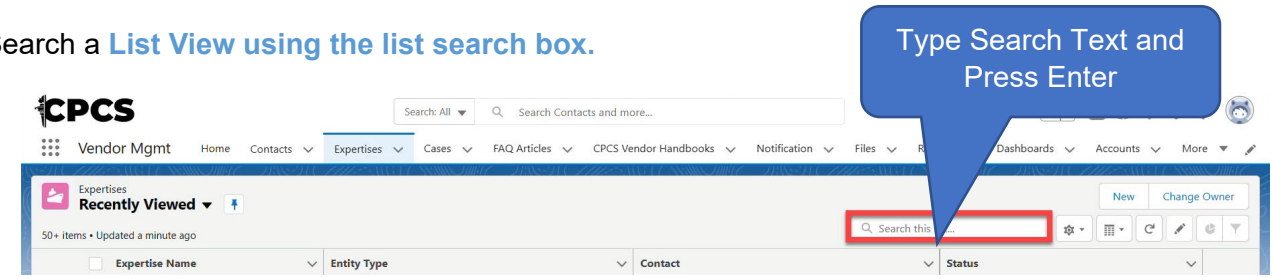
Objects display using **List Views**. The actual list view options will be based on your department role. The different list views allow you to group by categories to locate specific records more easily. The default **List View** is **Recently Viewed.**



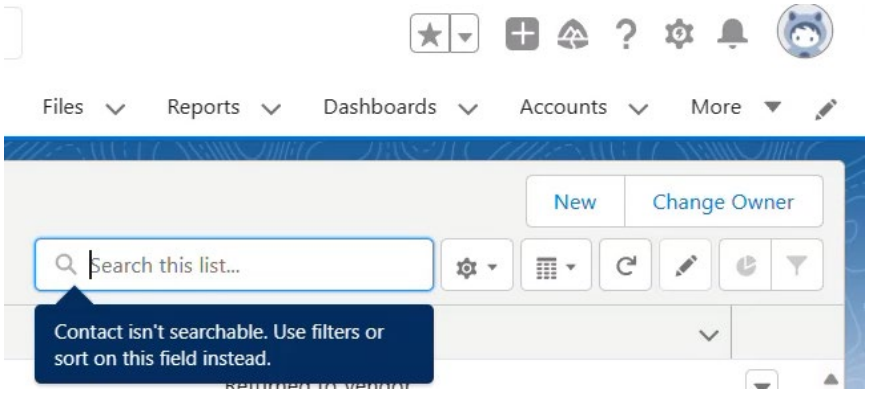
Using List Views

Search a List View

Search a **List View using the list search box.**

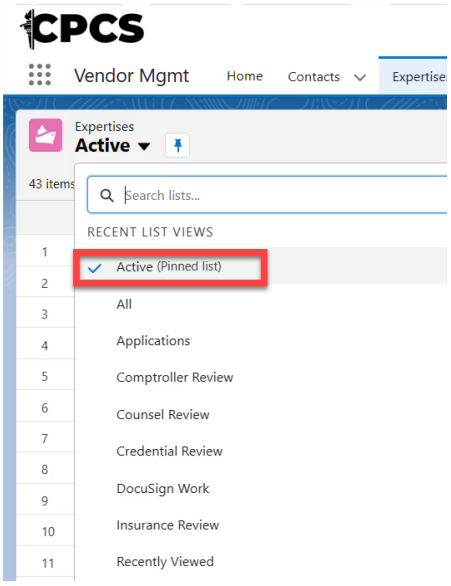


NOTE: Salesforce limits this search



Pin a List View

The **List View** that is **pinned** will be the default view. To select a different **List View,** select the list name from the dropdown and click the **pin**.



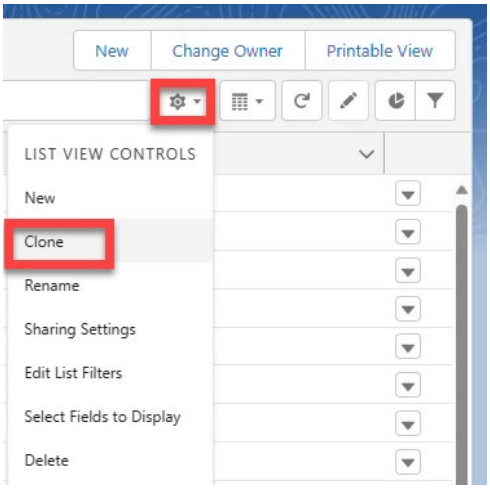
Creating Custom List Views

You can create your personal list view quickly and easily by **Cloning** (i.e., copying) an existing list view, and tailoring your new view to your specific needs by following these steps:

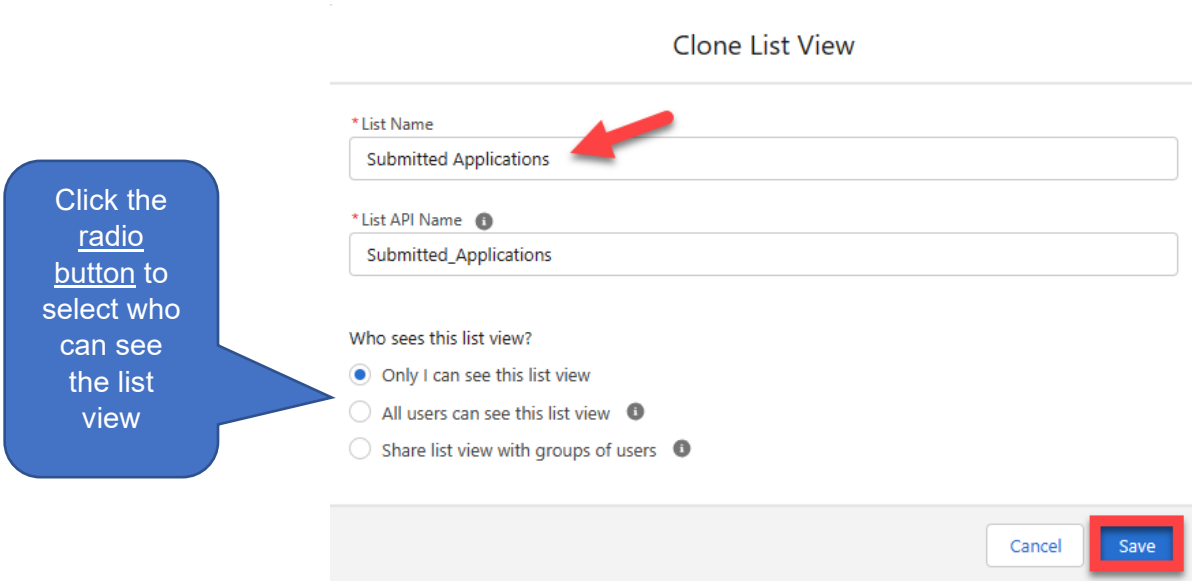
NOTE: A **List View** can be for private or public view.

Clone and Filter a List View

1. With the list view to be copied displaying on the screen, click the **gear icon** in the upper right corner of the screen and select **Clone** from the **LIST VIEW CONTROLS** list.

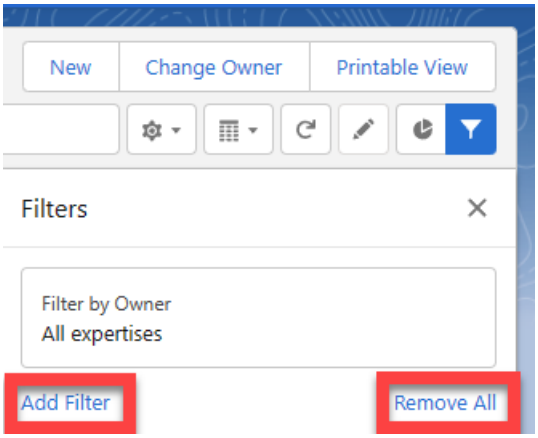


2. Click in the **List Name** field, type the name for your view, and click the **Save** button
NOTE: The **List API Name** field will auto-populate.

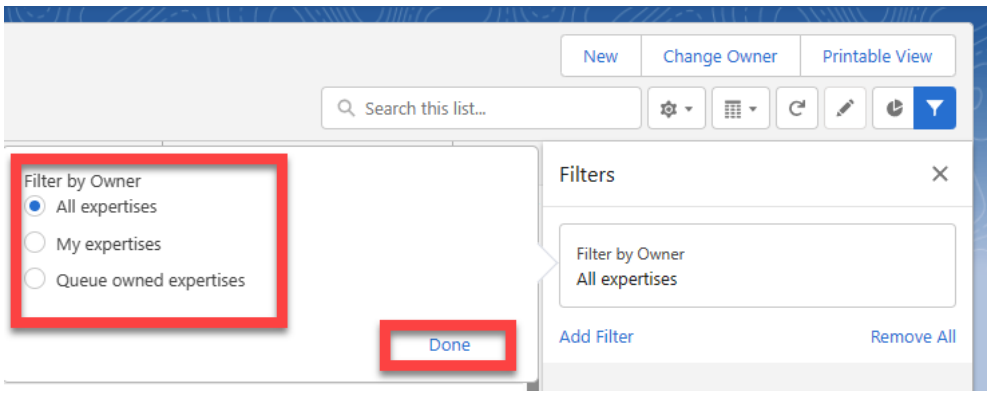


3. The new list view will display, the **Filters** panel will display on the right side of the screen displaying the **existing filters**, and the filters button will display in **blue and white.**

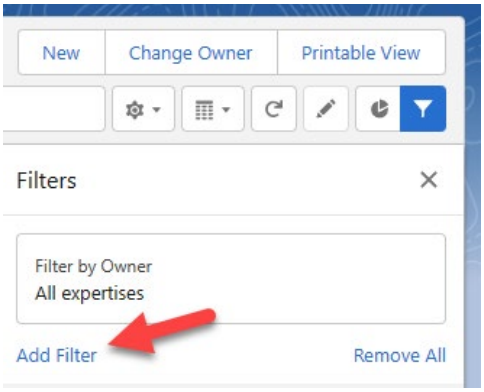
   There are links below the existing filters to **Add Filters** and **Remove All**.



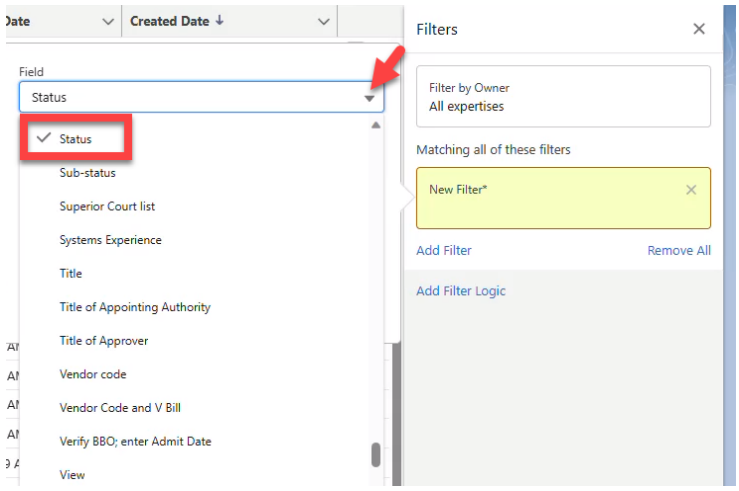
4. Click on any **existing filters**, adjust the desired value(s), and then click the **Done** button.



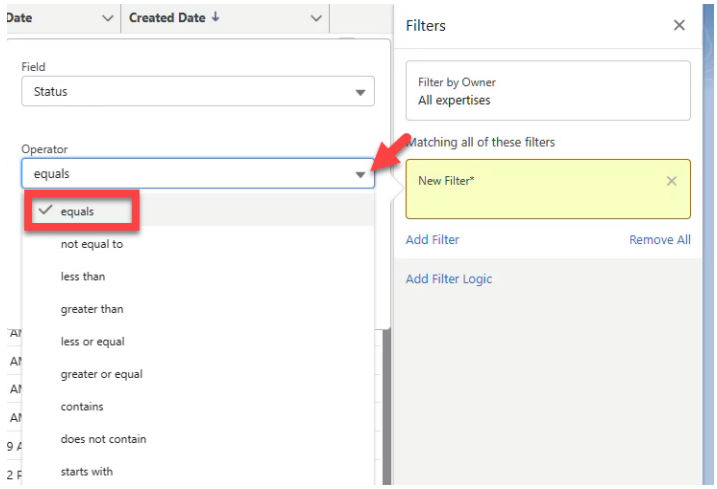
5. Click the link **Add Filter**



6. Select the desired **field** from the picklist.

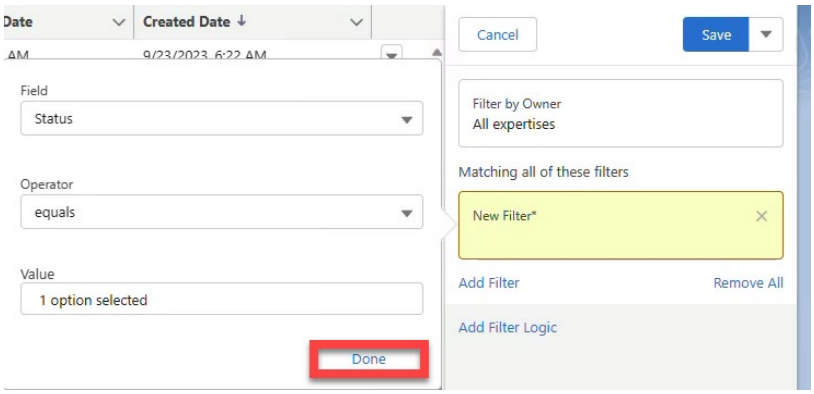


7. Select the **filter Operator** from the picklist.

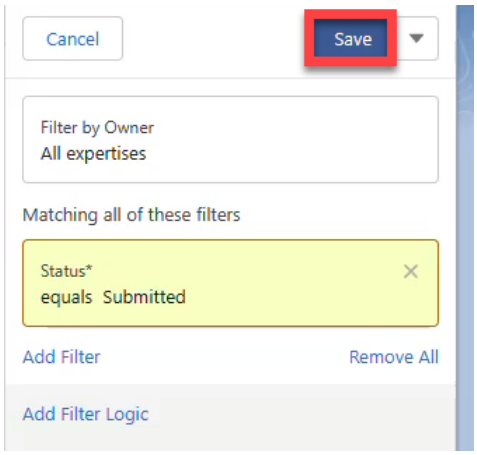


8. Enter the desired **field Value** from the picklist and click the **Done** button.

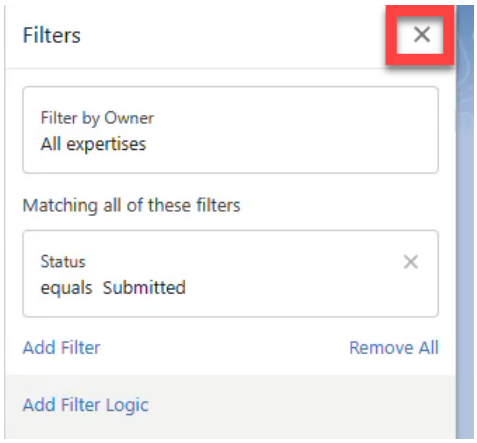
NOTE: Picklist fields will require the user to select the value from the available options.



9. Add as many additional filters as needed and then click the **Save** button.



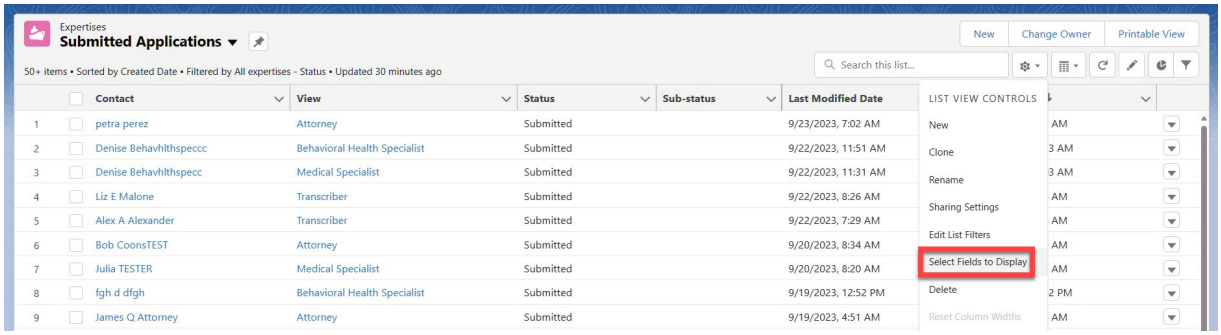
10. Close the **Filters** panel by clicking the "**X**" in the upper right corner.



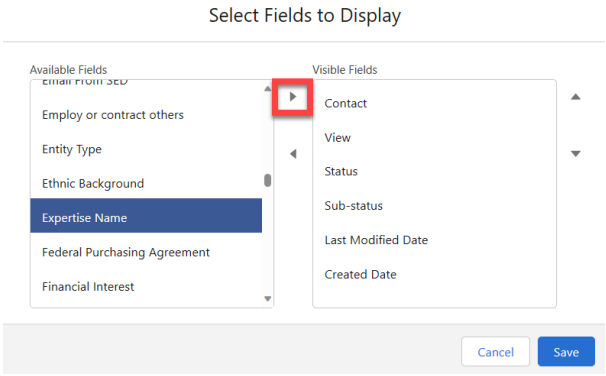
Selecting Fields (Columns) to Display

You can **add/adjust/remove columns** in your custom list view as desired by following these steps:

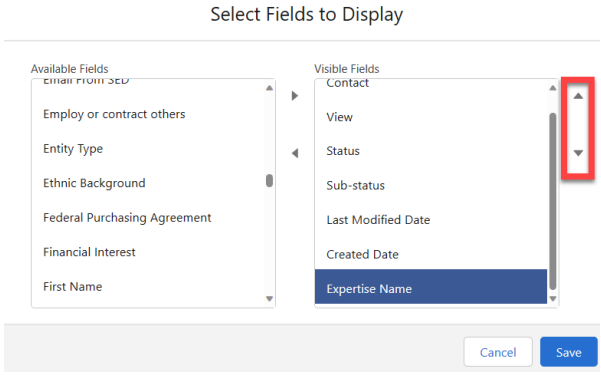
1. Click the **gear icon** in the upper right corner and click **Select Fields to Display**.



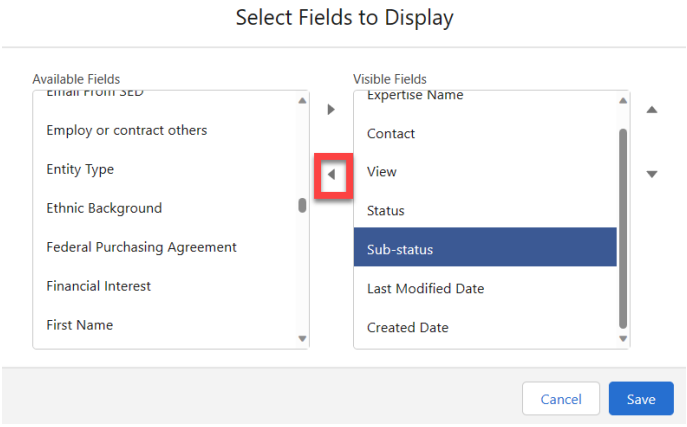
2. **Click on one or more fields** in the **Available Fields** column and click the right-pointing arrow to add it to the **Visible Fields** column.



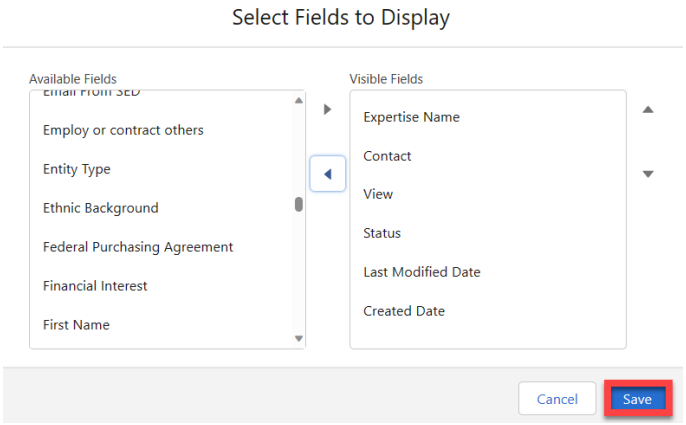
3. **Reorder** the fields using the up/down arrows.



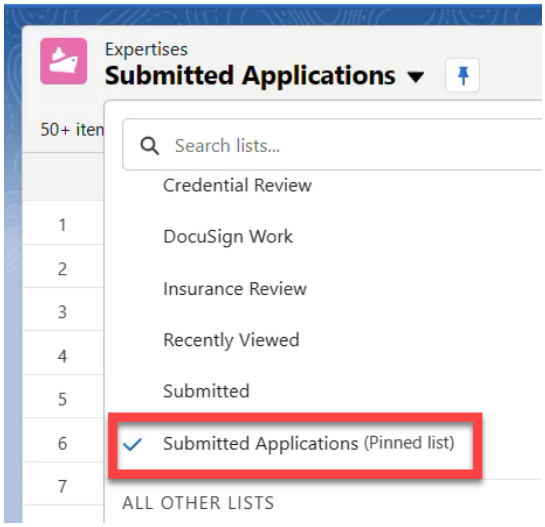
4. **Remove** unwanted fields from the Visible Fields column by clicking the left-pointing arrow.



5. When completed, click the **Save** button.



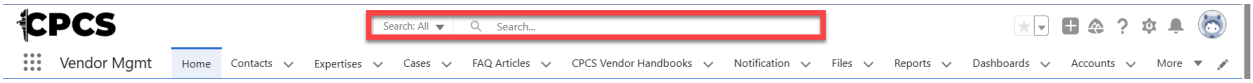
6. The new list view will appear on the **list view picklist** and can be **Pinned** so that it becomes your **default view**.



Global Search Box

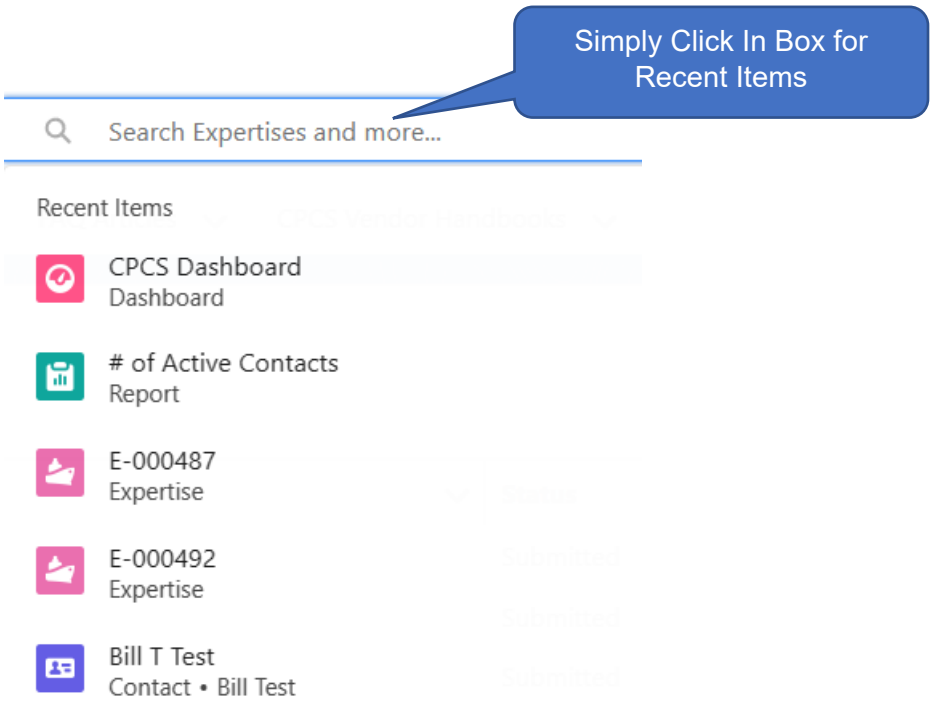
Search for all items using the **Global Search Box**, which appears on all Salesforce screens.

Pressing enter after search text enables advanced searching options.

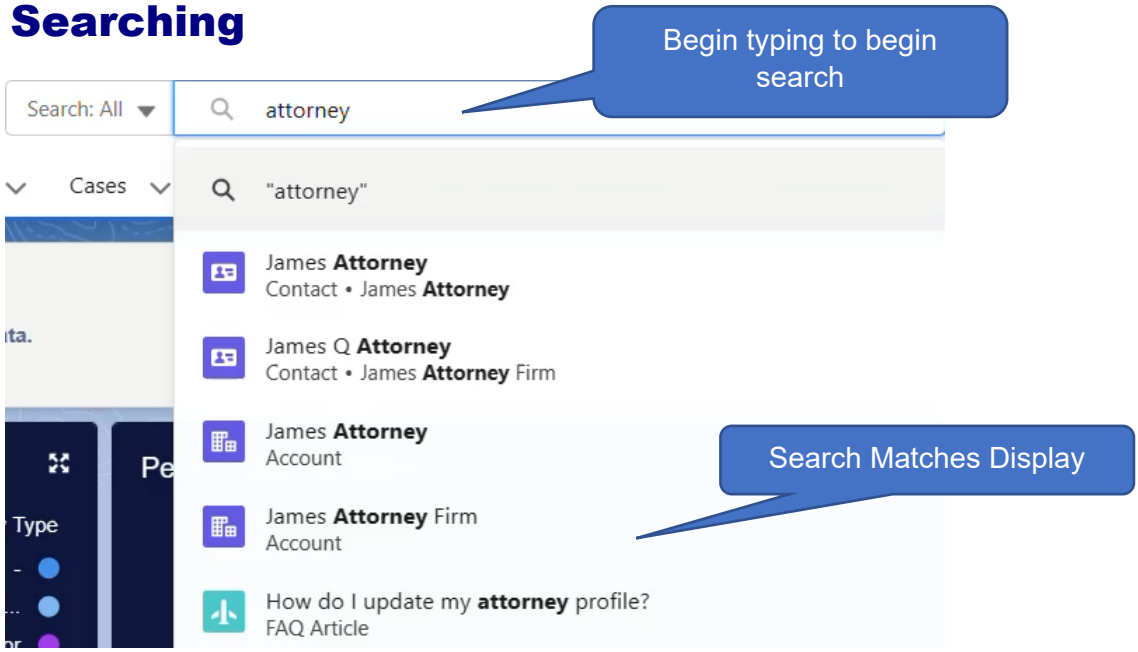


Recent Items

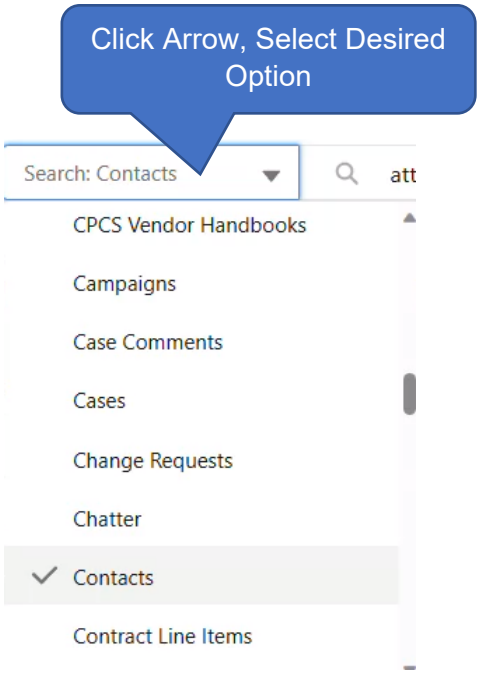
The search box also allows quick access to recently viewed items.

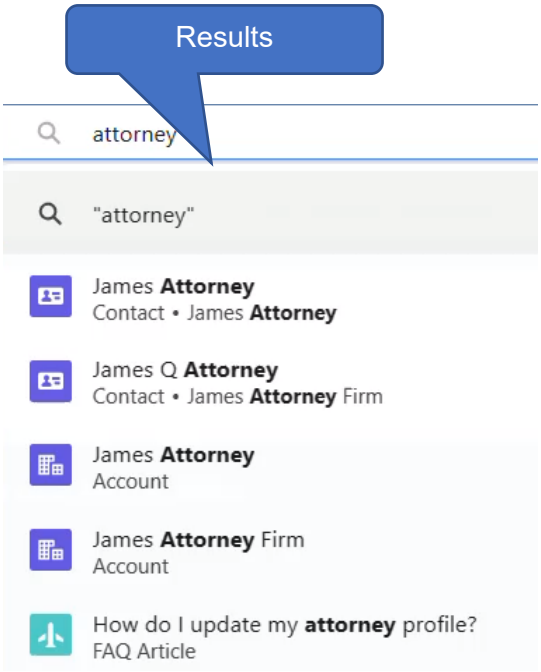


Global Searching



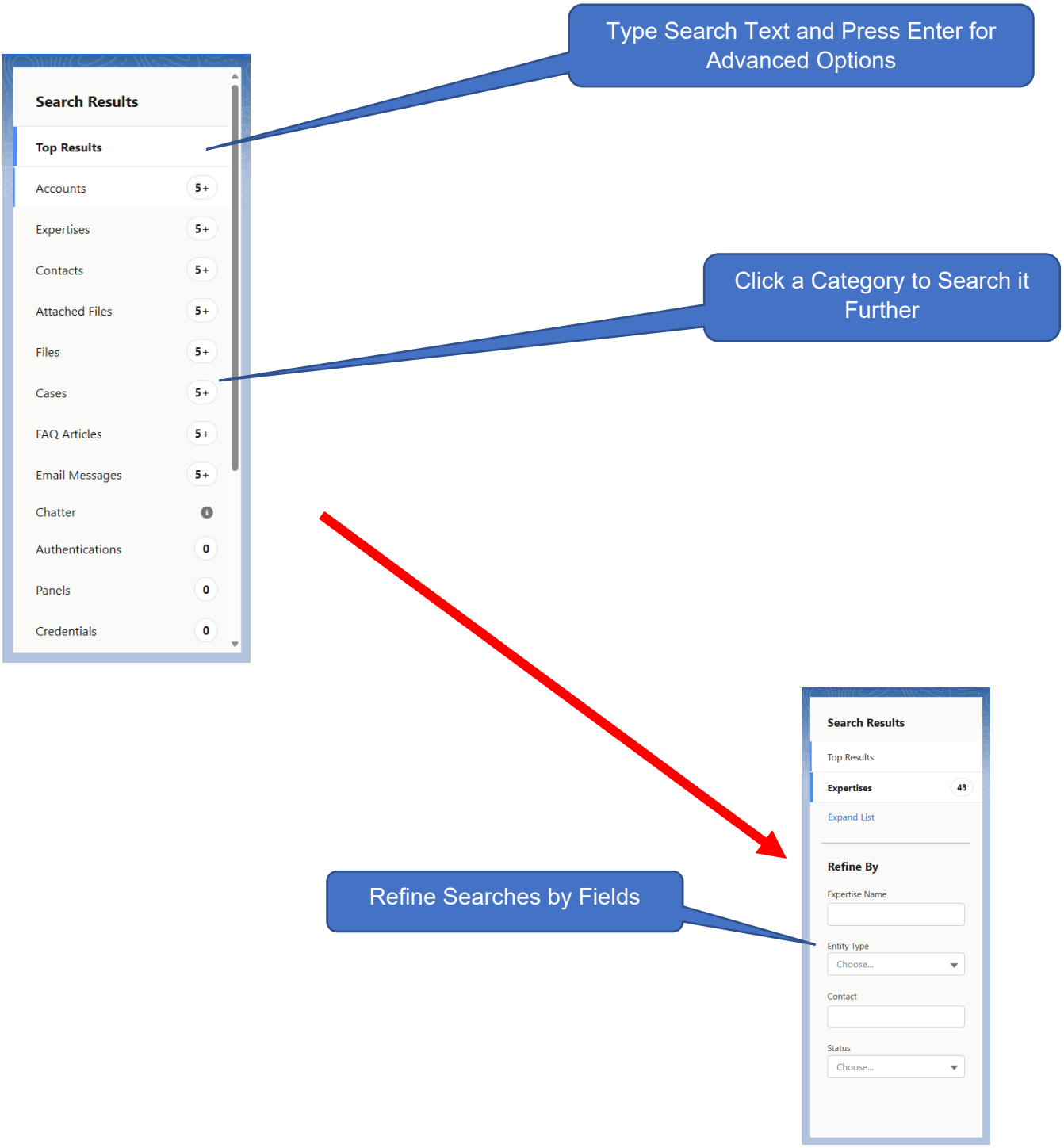
Specific Searches for Expertise, Contacts, Etc.





Advanced Searching

Invoke advanced search options by typing search text in the search box and then pressing **Enter**.

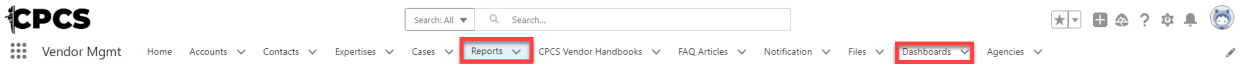


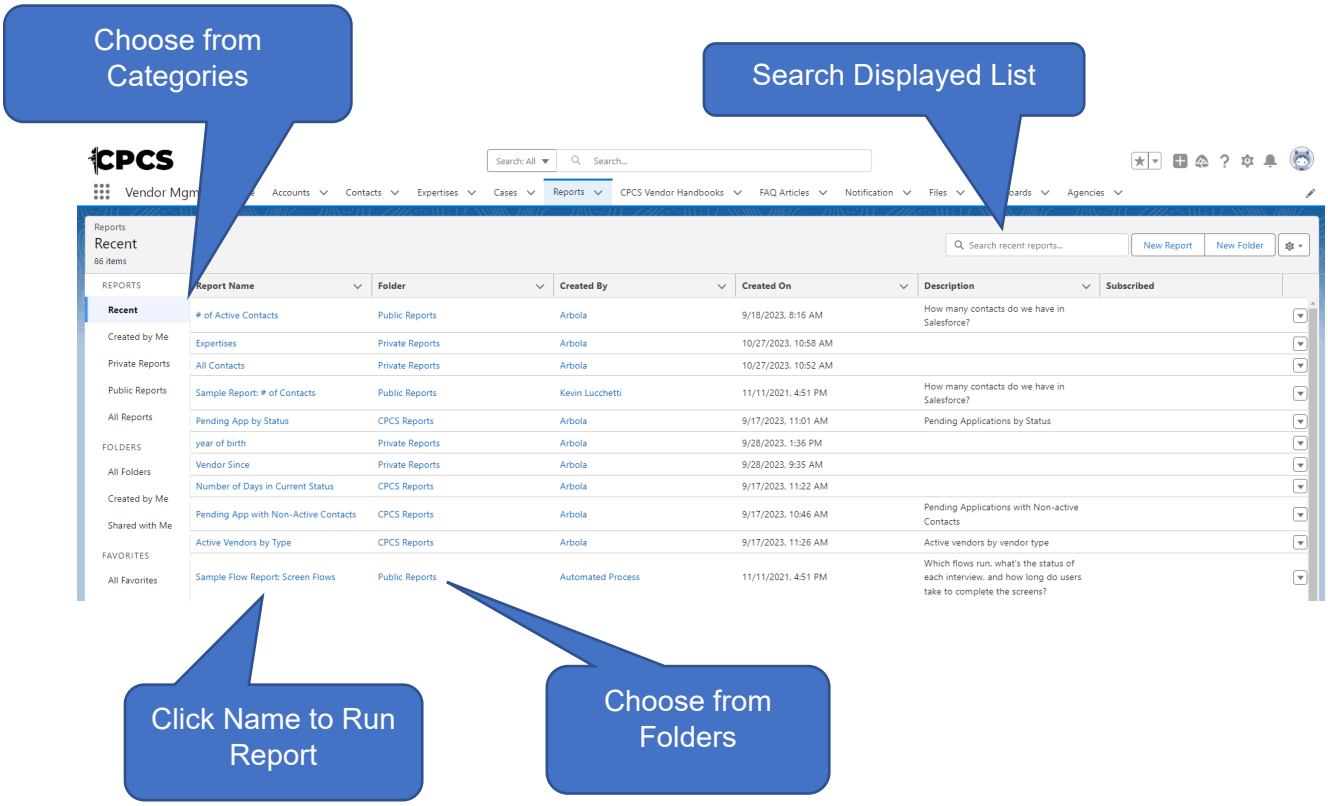
Reports

There are numerous **Reports** that Salesforce provides that can be configured to output the information you need.

Dashboards that comprise data from several different reports displayed as charts are also available.

Access **Reports and Dashboards** by clicking on their respective tabs.

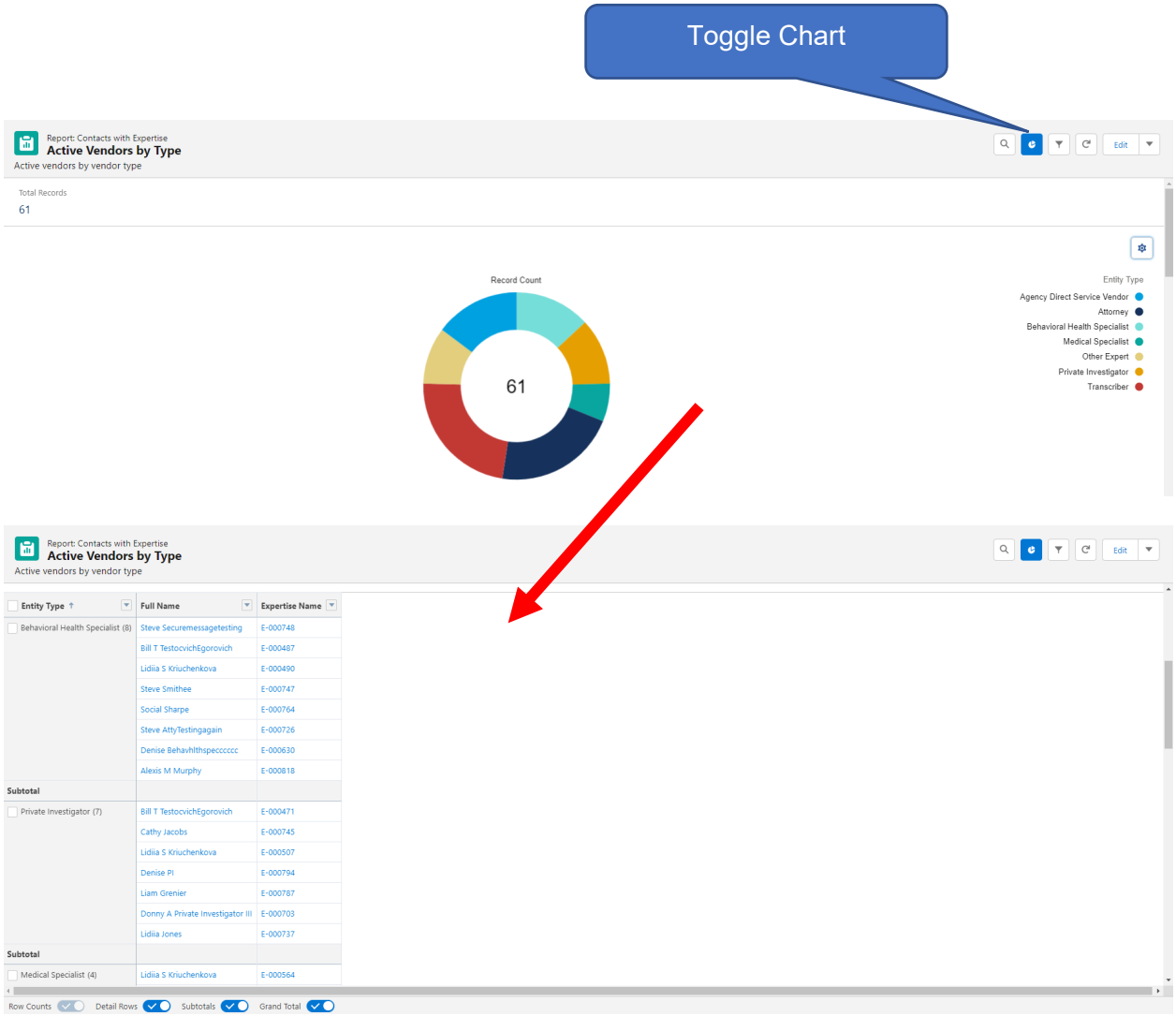




Viewing Reports

Reports typically display with a chart at the top while Dashboards show a collection of charts.

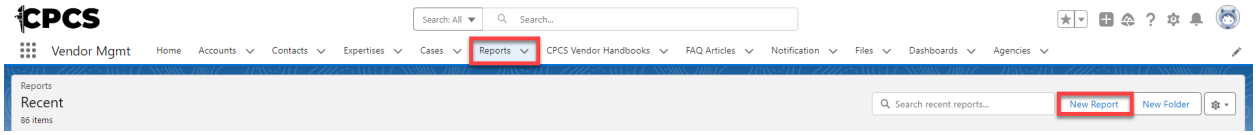
Click the **Toggle Chart button** to hide and display the chart that displays in a report.



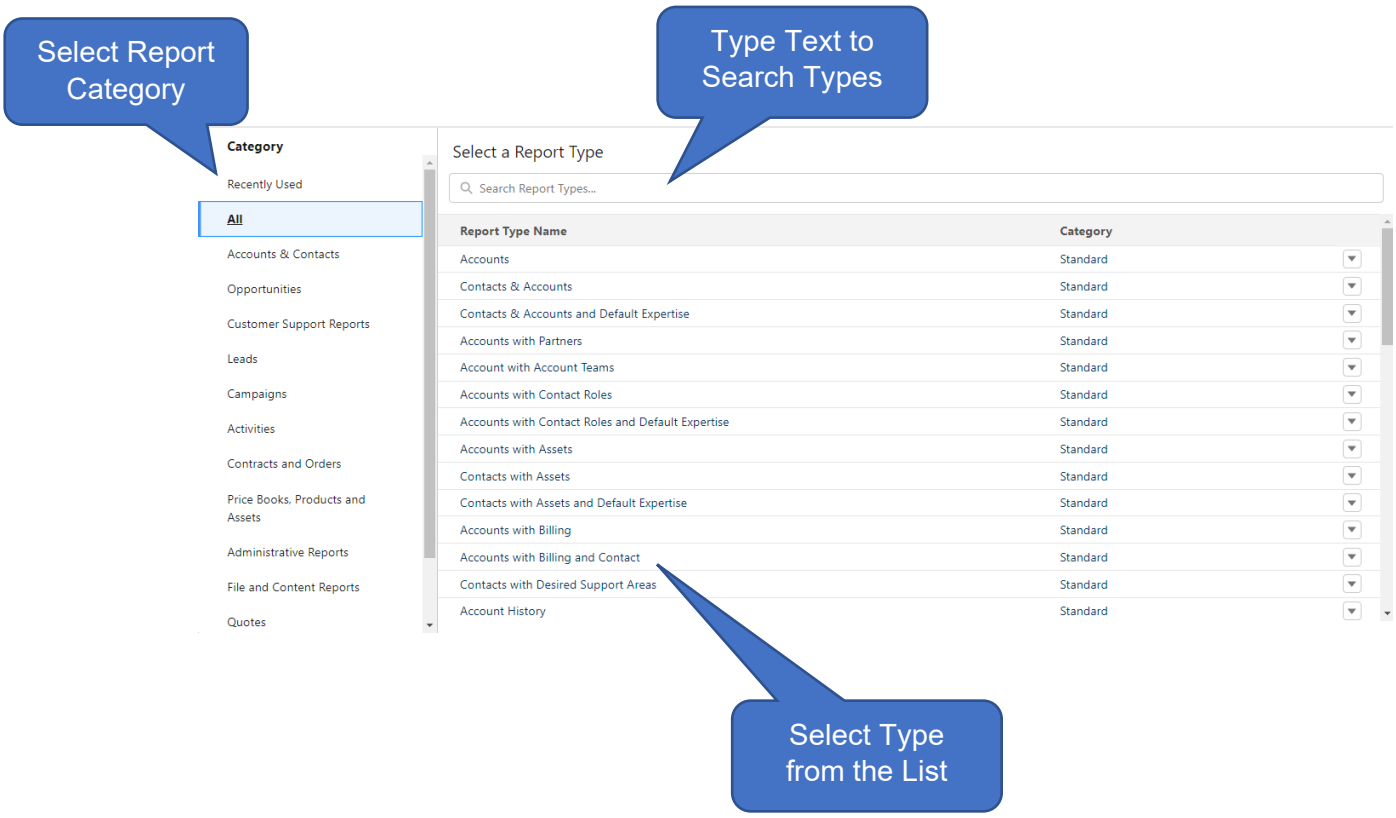
Creating Reports

Choose a Report Type

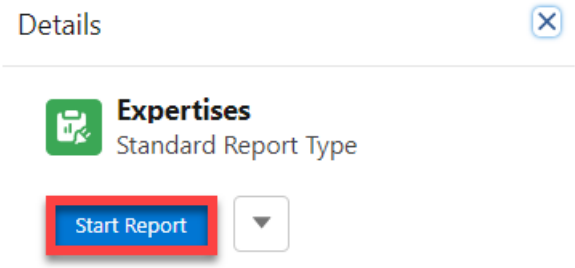
1. From the Reports tab, click the **New Report** button.



2. All **Report Types** will display. Filter the list by choosing one of the displayed **Categories** on the left and/or type matching text in the search field to further refine the list. Select the desired objects for your report.

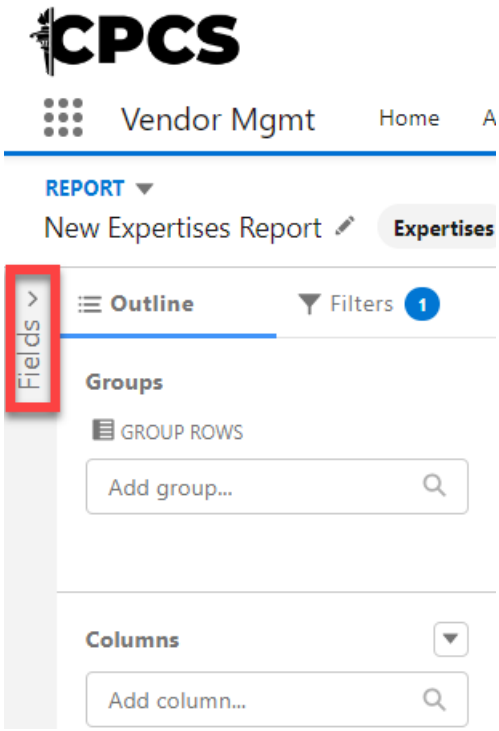


3. Click the **Start Report** button.

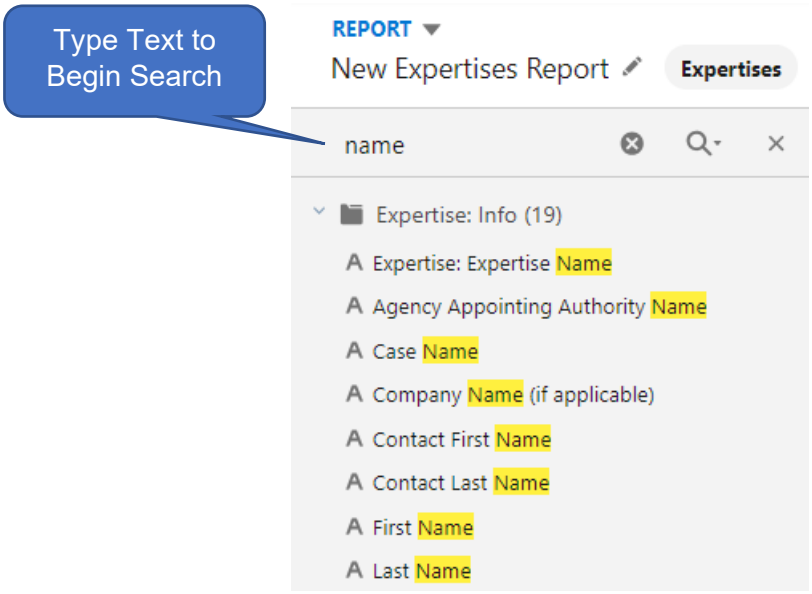


Select Fields

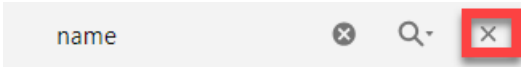
1. Select the Fields (columns) for the report by clicking the arrow button on the **Fields** panel.



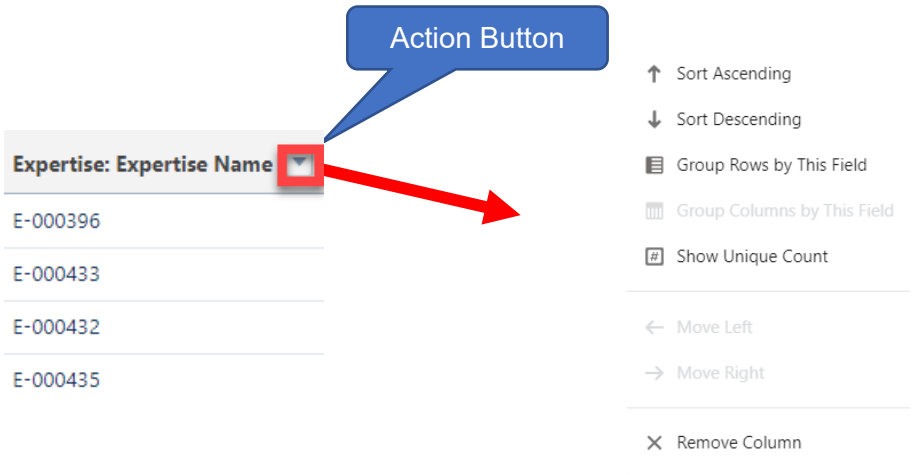
2. Use the **search box** to type part of the **field name** to refine the list. Double-click the desired **field** to add it to the report. The **field** selected will be added to the report.



3. Close the panel by clicking the **"X"** to the right of the search box.

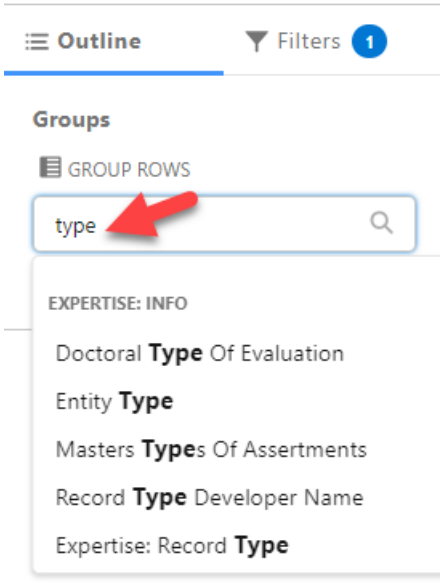


4. Use the Action Button to Sort, Group rows or columns by this field, Show unique Count, Move Left or Right, or Remove this Column.

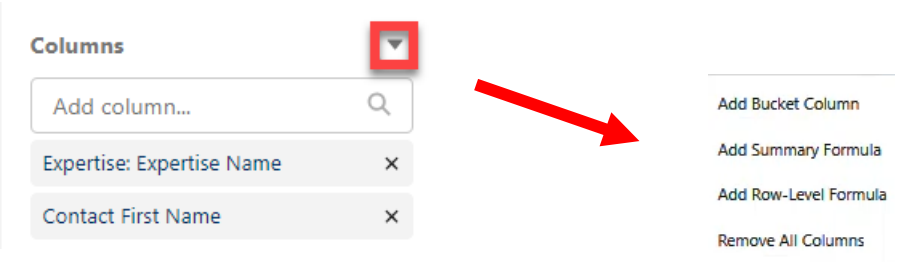


Use the Outline Panel to Group and Add Columns

1. Type in the **Groups** search box to find a column to group the report.

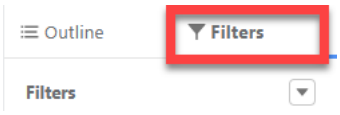


2. Add additional columns by searching and selecting them using the **Columns** search box. Click the action button for additional options.

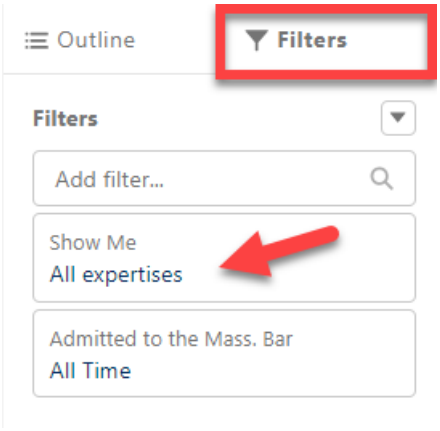


Adjust and Add Filters

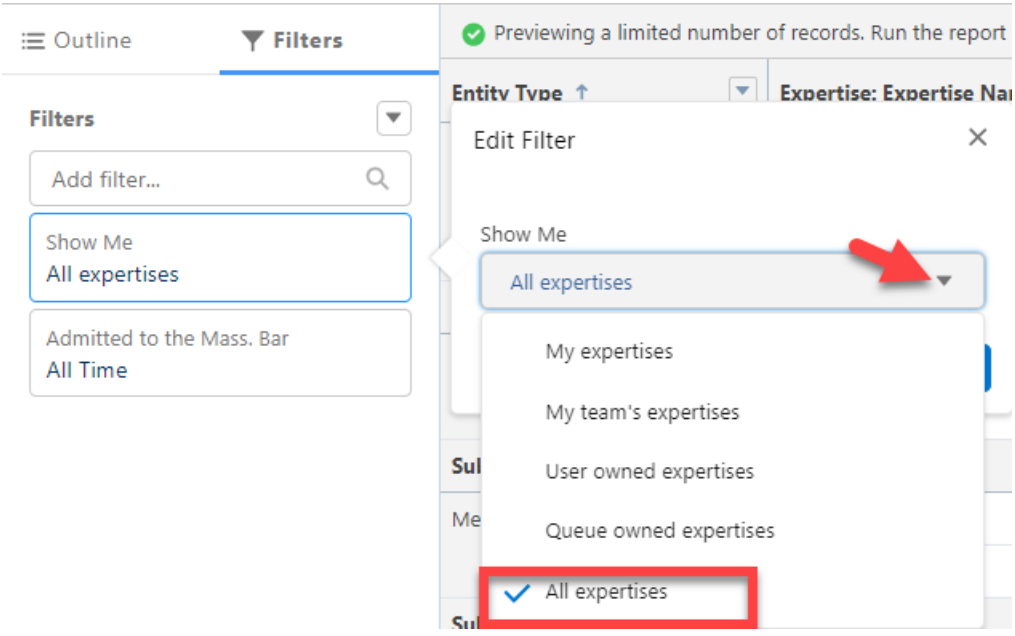
1. Click the **Filters** tab.



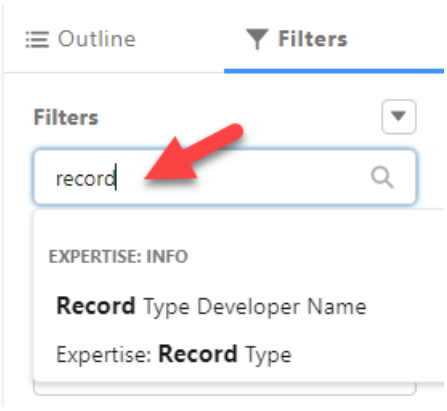
2. To show additional opportunities matching the report criteria, click the **Show Me** filter.



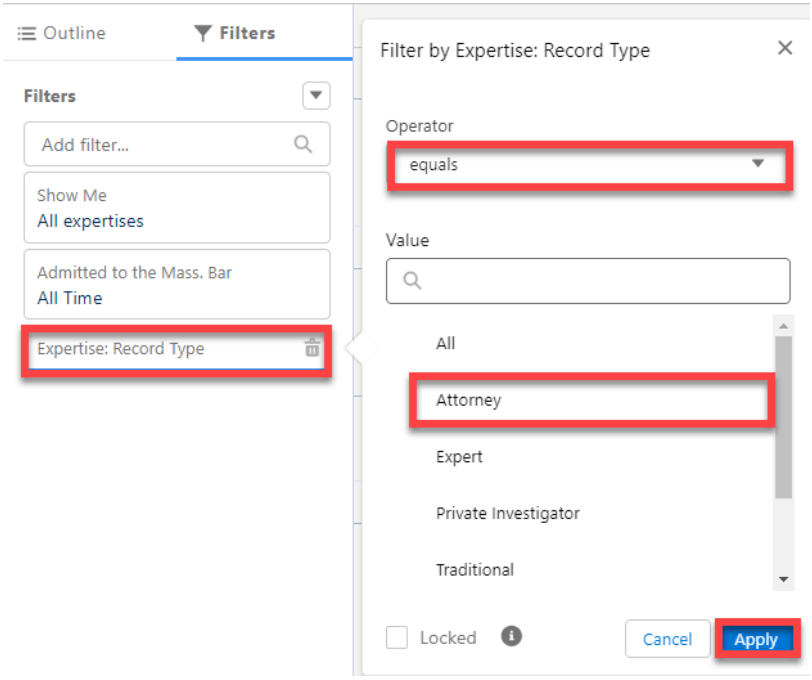
3. Select an option to filter by from the picklist.



4. To add a filter, begin typing the desired field in the **Filter search box**.



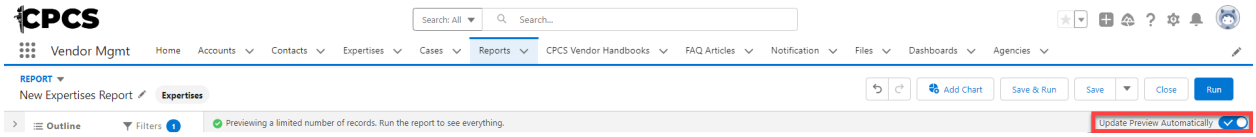
5. After selecting the filter, select the **Operator** of your choice and select the status from the picklist **values.** Click the **Apply** button to continue creating the report.



Preview and Run the Report

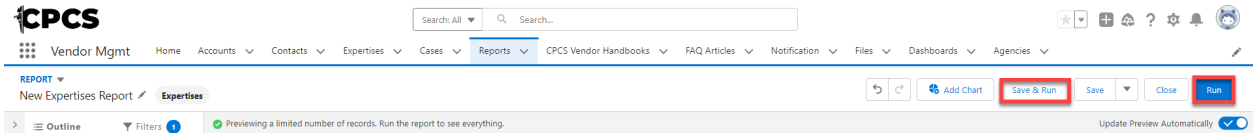
1. To preview the changes you are making in the fields and filters, enable **Update Preview Automatically** (upper-right of the Report Builder).

   NOTE: The report will show a limited number of records while previewing the report.

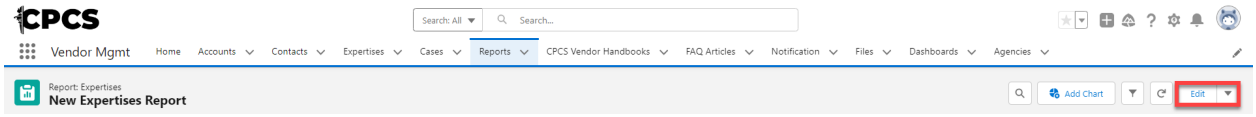


2. Click the **Run or Save & Run** button to preview the report with full data. The report will display.

   NOTE: If you select **Save & Run**, please refer to the next section for saving a report

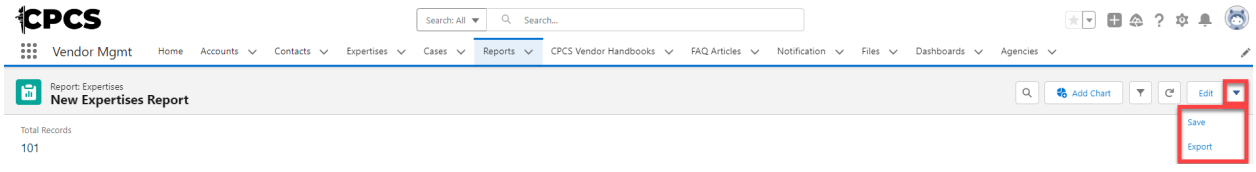


3. To make changes to the report, click the **Edit** button to return to the report building screen.



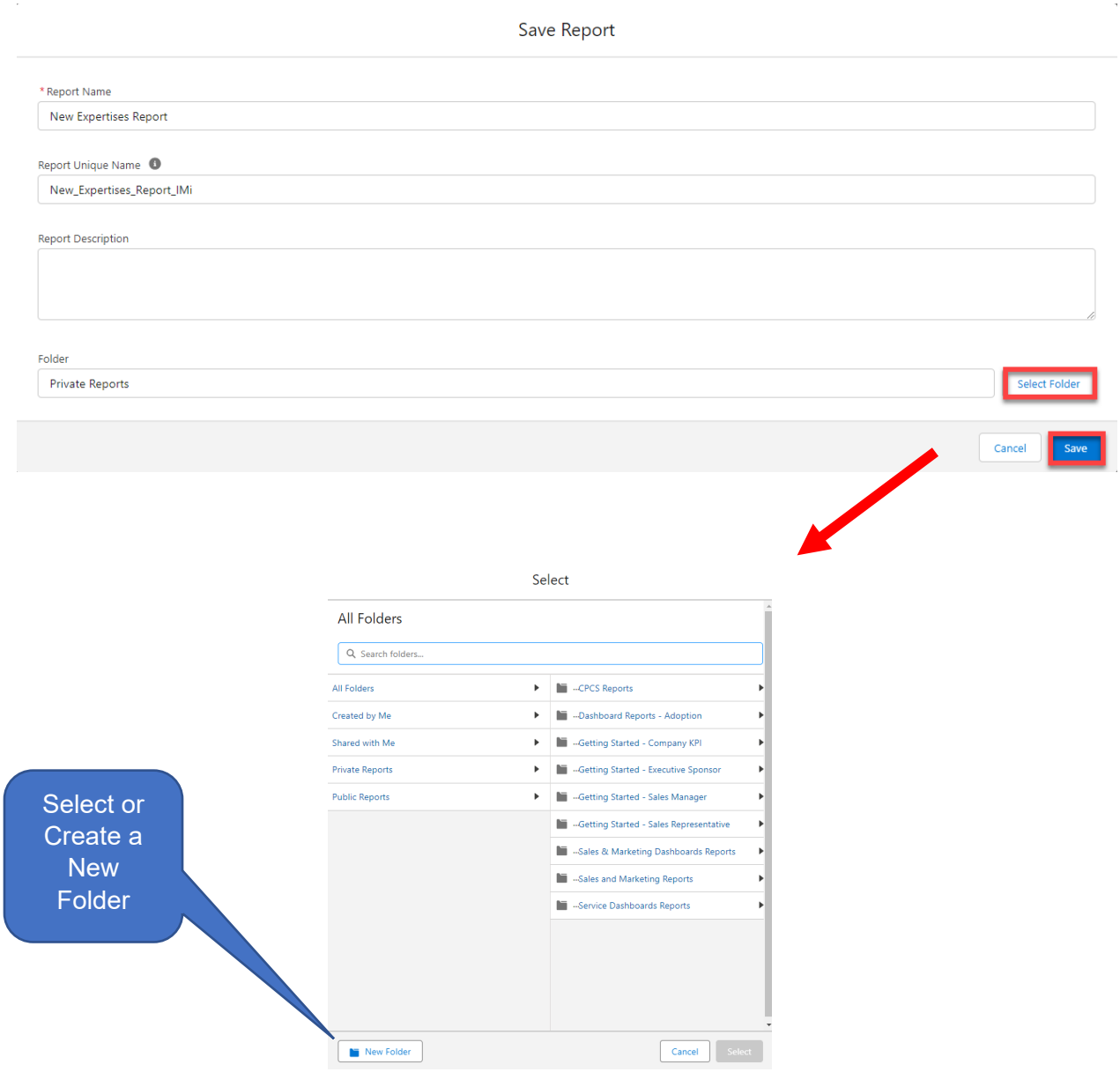
Save the Report

1. To save the report, click the **Edit action button** to select **Save**.



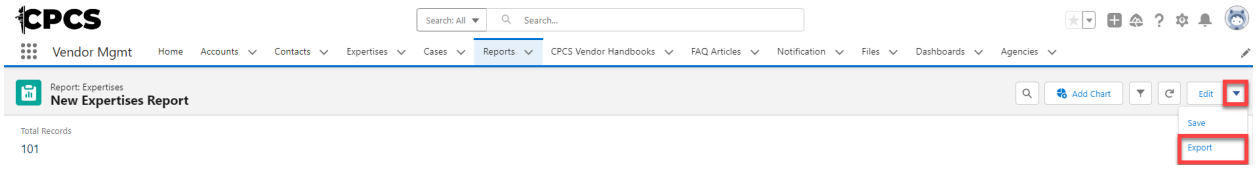
2. **Name** the report. Optionally, add a **Report Description**, and/or **select Folder**; and press the **Save** button.

NOTE: The Report Unique Name will automatically populate after the Report Name is entered.

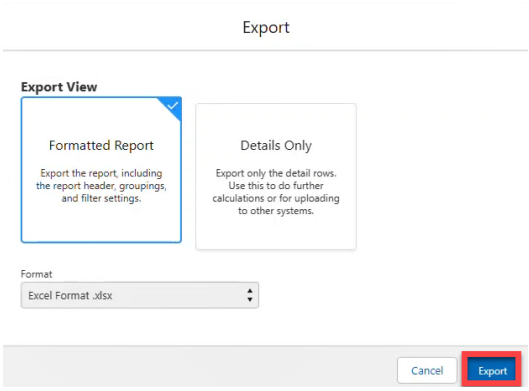


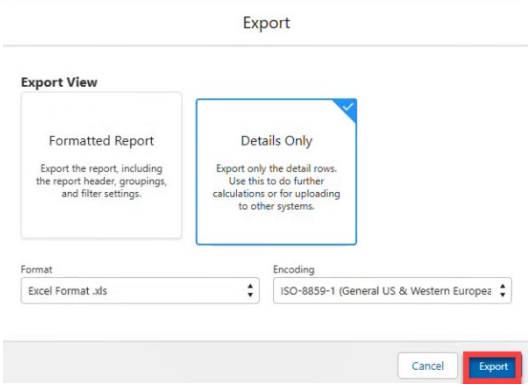
Exporting and Printing the Report

1. Click the dropdown arrow next to the Edit button and select **Export**.



2. The **Export** screen will display. Select either **Formatted Report** or **Details Only** and click the **Export** button. The report will download in MS Excel format.



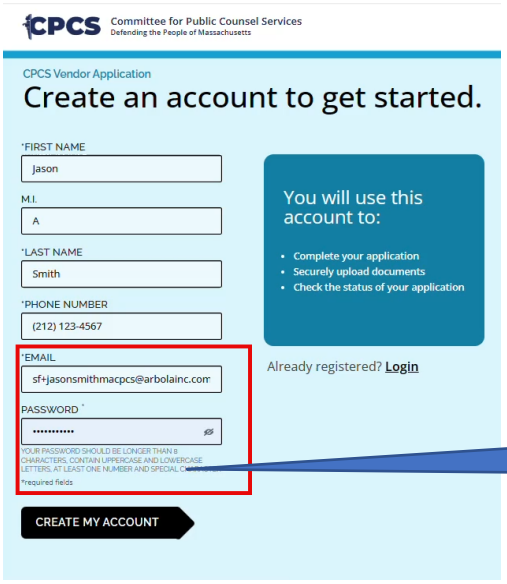


Vendor Applications – Portal

Applications are submitted via the portal. There are seven paths with specific information related to each vendor type. The user has the option to Save and Continue the application on each screen.

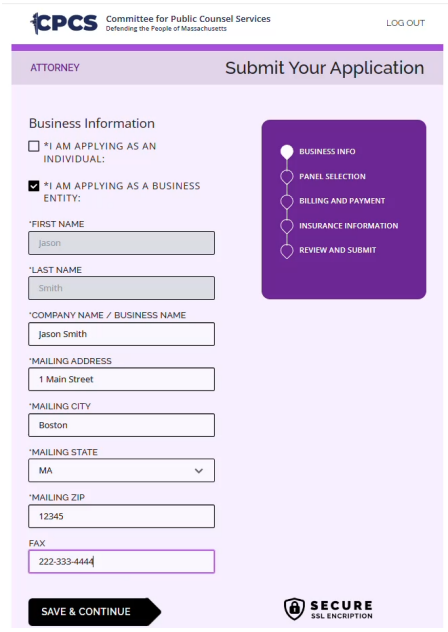
Attorney

Account & Contact



Login username and password

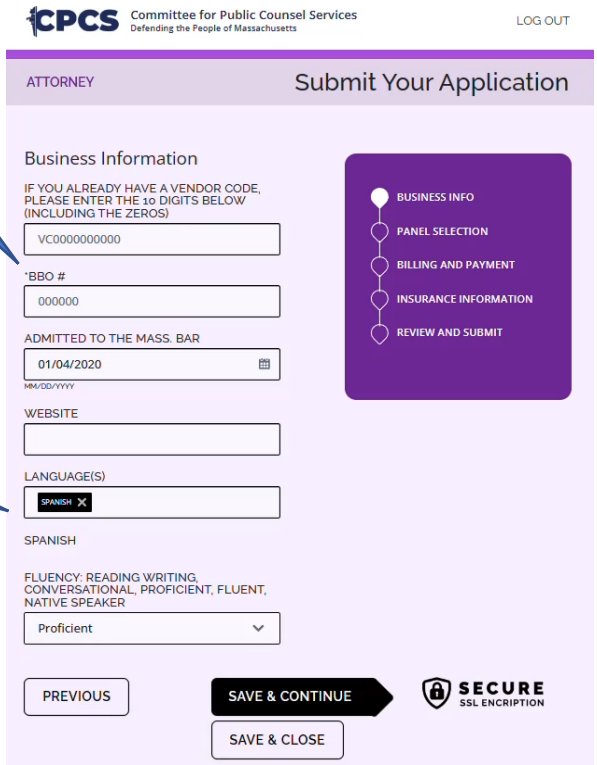
Contact

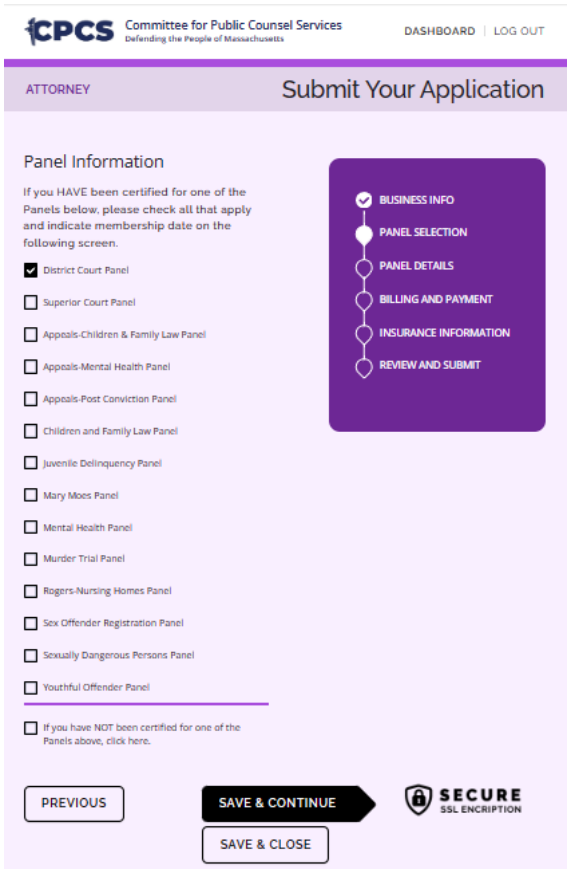


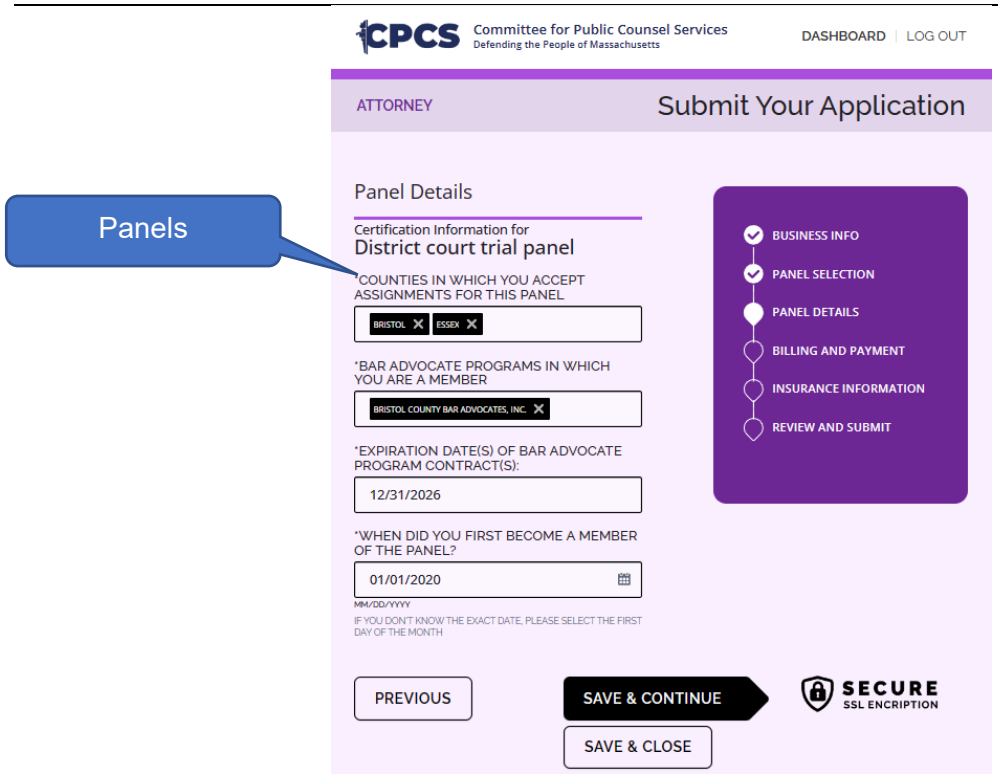
Expertise

Languages

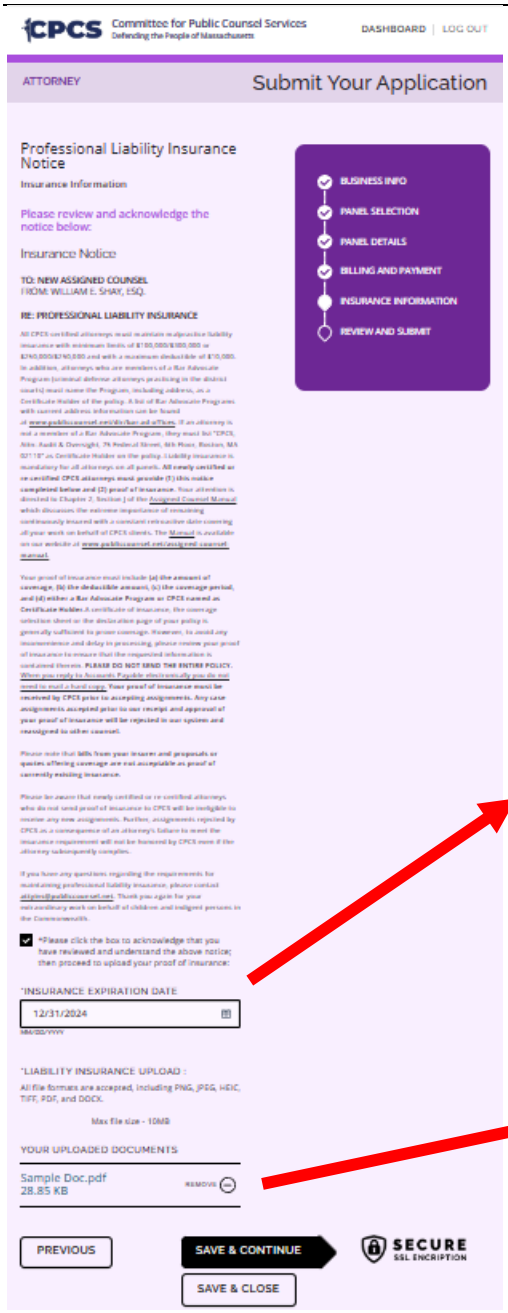
Panels






Panels
CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
DASHBOARD | LOG OUT
ATTORNEY
Submit Your Application
Panel Details
Certification Information for
District court trial panel
*COUNTIES IN WHICH YOU ACCEPT ASSIGNMENTS FOR THIS PANEL
BRISTOL
ESSEX
*BAR ADVOCATE PROGRAMS IN WHICH YOU ARE A MEMBER
BRISTOL COUNTY BAR ADVOCATES, INC.
*EXPIRATION DATE(S) OF BAR ADVOCATE PROGRAM CONTRACT(S):
12/31/2026
*WHEN DID YOU FIRST BECOME A MEMBER OF THE PANEL?
01/01/2020
MM/DD/YYYY
IF YOU DON'T KNOW THE EXACT DATE, PLEASE SELECT THE FIRST DAY OF THE MONTH
BUSINESS INFO
PANEL SELECTION
PANEL DETAILS
BILLING AND PAYMENT
INSURANCE INFORMATION
REVIEW AND SUBMIT
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
DASHBOARD | LOG OUT
ATTORNEY
Submit Your Application
Billing and Payment
Private Attorney Ebill 2.0 Access Agreement
In consideration of the grant of access to the Committee for Public Counsel Services (CPCS) Ebill 2.0 System through my individual password, I hereby agree to abide by the terms and conditions of this agreement, as set forth below:
1. The password assigned to me will be used exclusively by me for billing CPCS for legal services I provide. I may also bill for my employees/contractors and submit vouchers in keeping with CPCS policy. I agree that I have appropriate security systems in place to prevent unauthorized access to the Ebill 2.0 System and shall be solely responsible for safeguarding the confidentiality of my password and for any unauthorized access that results from a failure to do so. I will notify CPCS immediately of any suspected security breach.
2. I have reviewed the CPCS Assigned Counsel Manual, and Ebill 2.0 User Manual, as may be amended from time to time and agree to abide by the policies, terms and conditions contained therein.
3. I agree that by submitting electronic bills to CPCS, I am attesting under the pains and penalties of perjury that the legal services were provided to the client, that all work was performed as billed, and that I maintain contemporaneous time records supporting the hours billed and case files in accordance with CPCS billing and recordkeeping policy and the Assigned Counsel Manual as amended. In addition, I maintain receipts supporting all expenses incurred.
4. I agree to maintain a copy of the signed Ebill voucher, and all attachments, supporting records, contemporaneous time records and all other documentation supporting the services provided for a period of 7 years.
5. I agree to produce any requested documentation to CPCS or billing records to the State Auditor immediately upon request.
I certify under pains and penalties of perjury that for all my bills filed with CPCS through the "Ebill 2.0" system, I have been assigned to each case indicated on my Ebill; I have provided the services described on the dates and for the times listed; I have provided representation consistent with CPCS Performance Guidelines and Standards; and all charges for legal services reflected on the Ebill are based on my contemporaneous time records maintained in accordance with CPCS Assigned Counsel Manual's policies and procedures.
*EBILL DOCUMENT CONFIRMATION
*MOTHER'S MAIDEN NAME
Johnson
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFO
PANEL SELECTION
PANEL DETAILS
BILLING AND PAYMENT
INSURANCE INFORMATION
REVIEW AND SUBMIT
Expertise
*EBILL DOCUMENT CONFIRMATION
*MOTHER'S MAIDEN NAME
Johnson
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION



Expertise

*Please click the box to acknowledge that you have reviewed and understand the above notice; then proceed to upload your proof of insurance:

*INSURANCE EXPIRATION DATE

12/31/2024

MM/DD/YYYY

Attached Files

*LIABILITY INSURANCE UPLOAD :

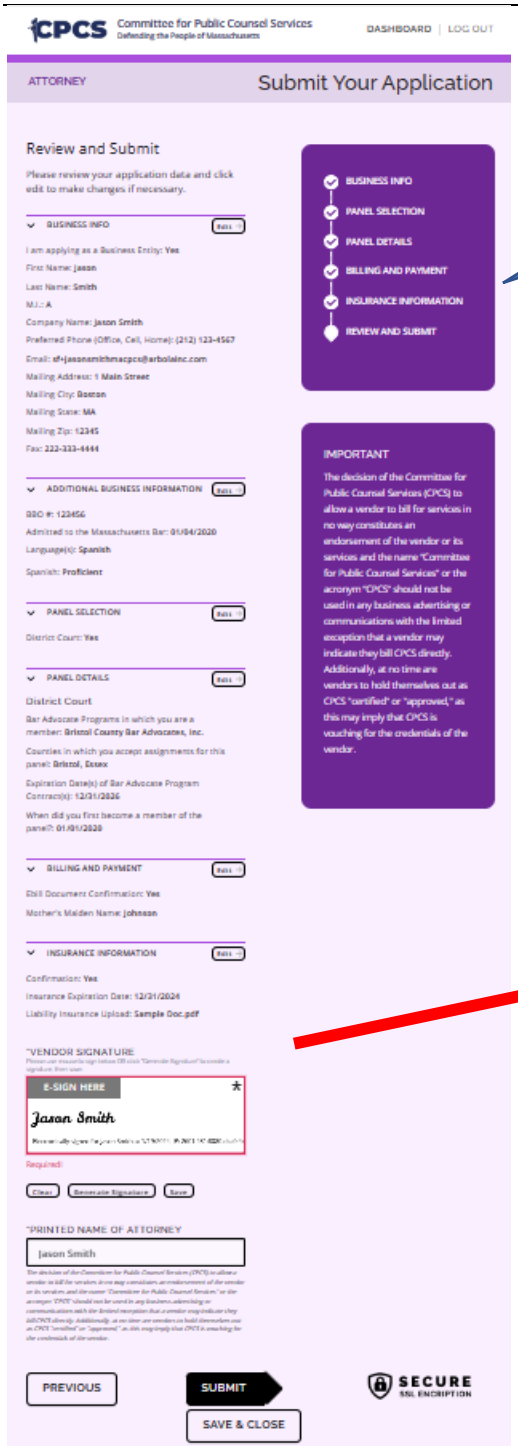
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.

Max file size - 10MB

YOUR UPLOADED DOCUMENTS

Sample Doc.pdf
28.85 KB

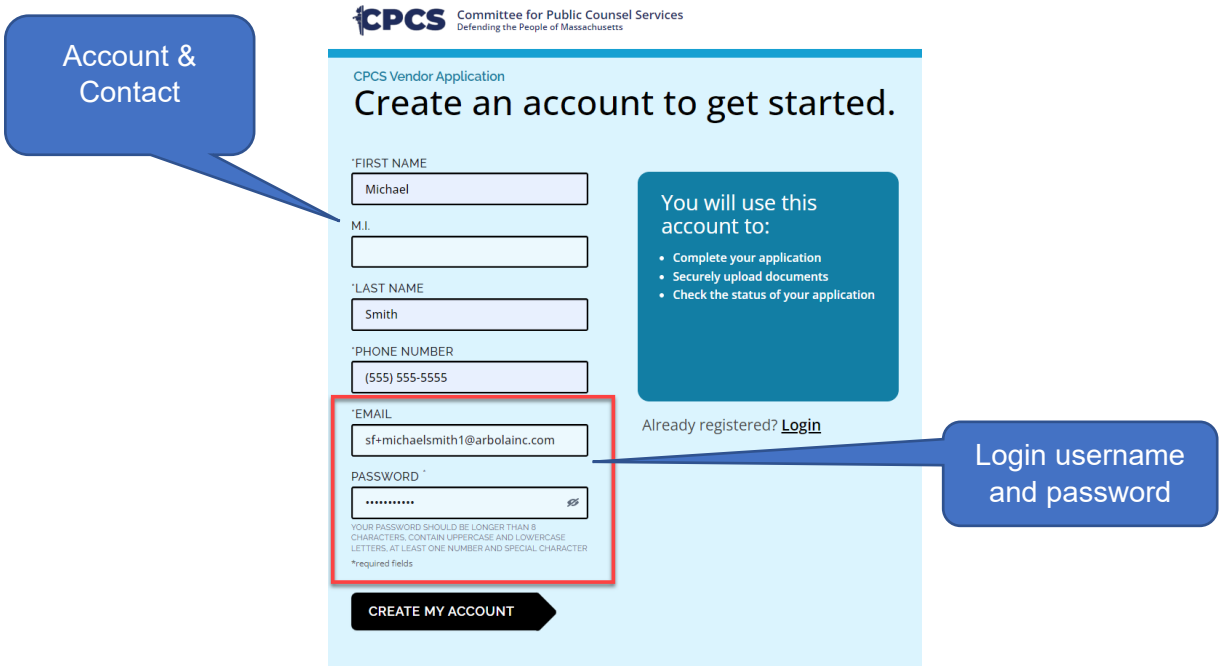
REMOVE

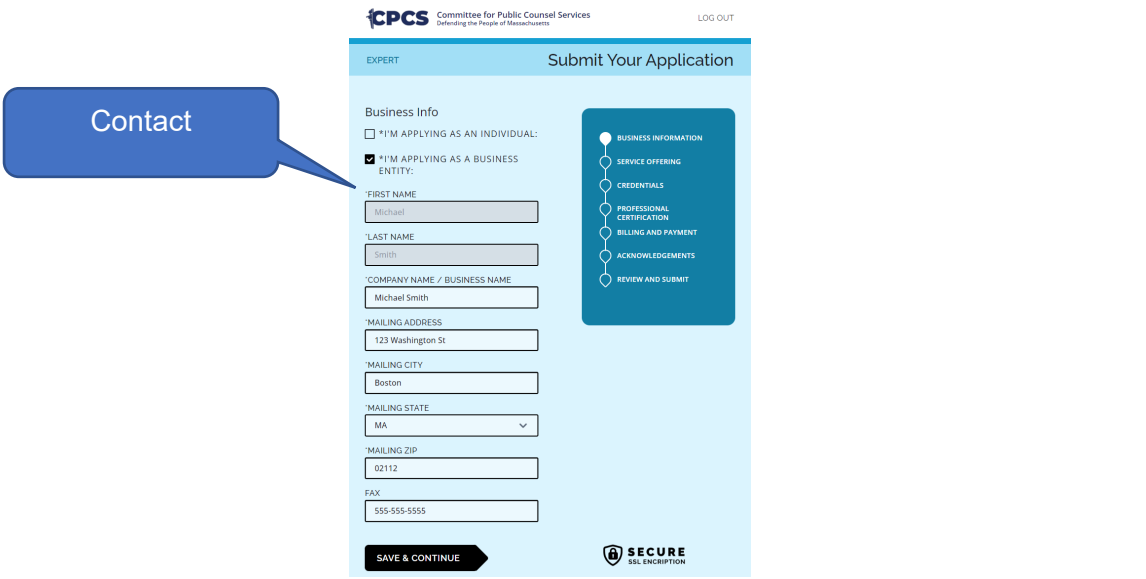


Attached Files
Application-Form
.PDF

Attached Files
Signature- Review
.PDF

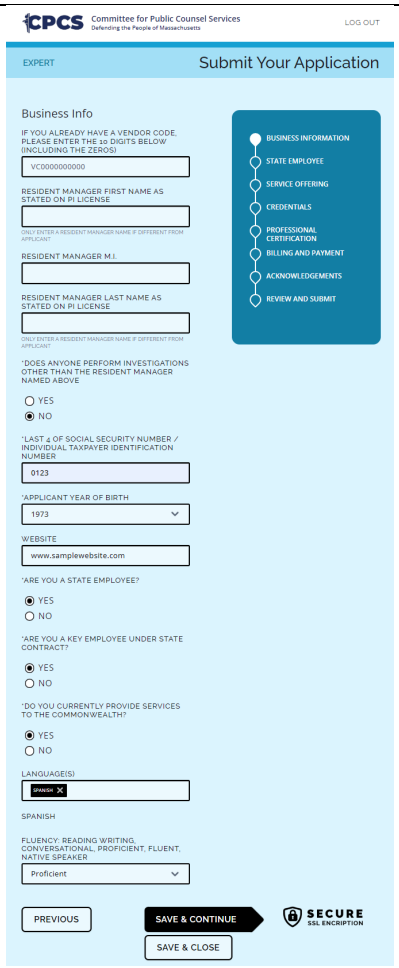
Private Investigator

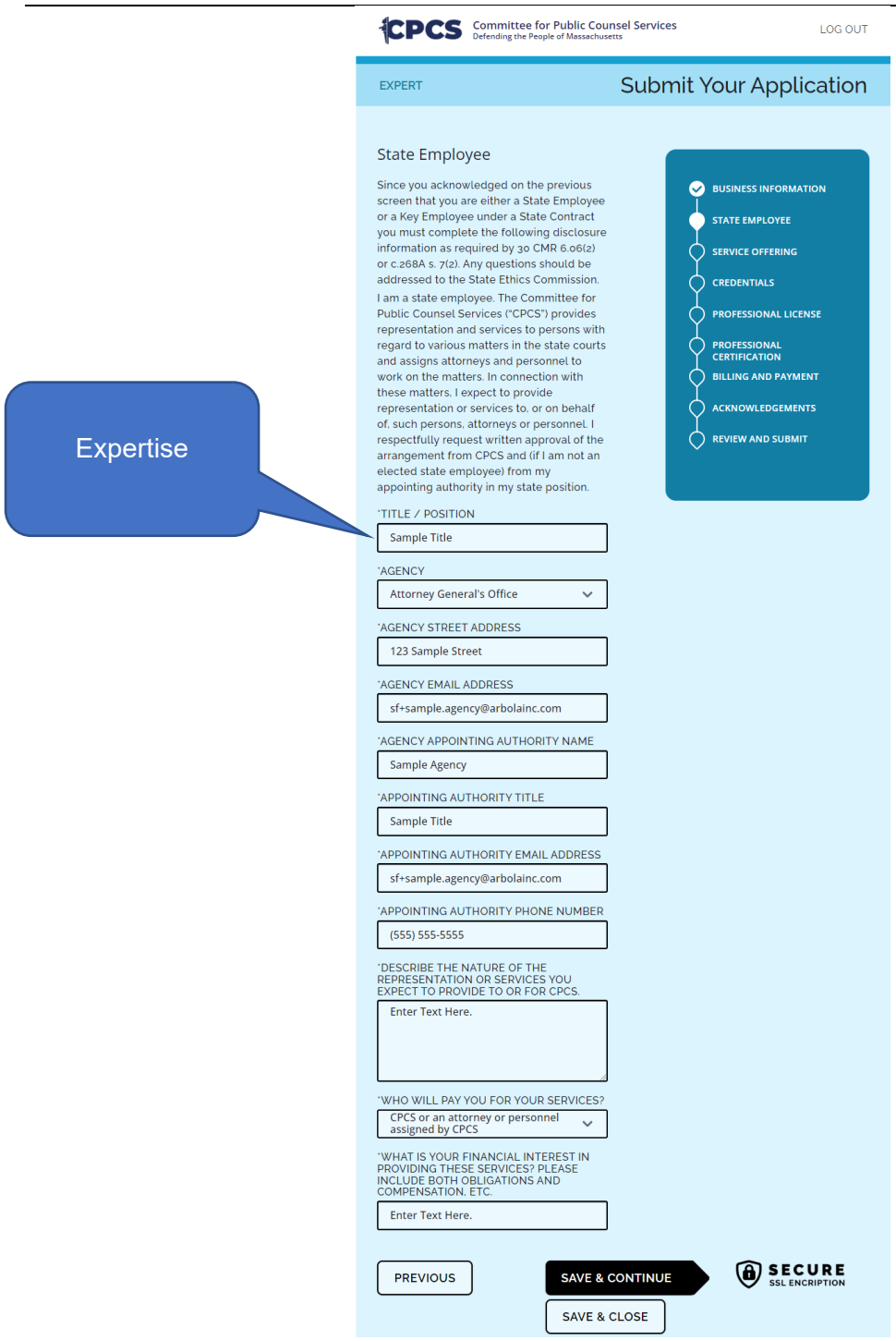


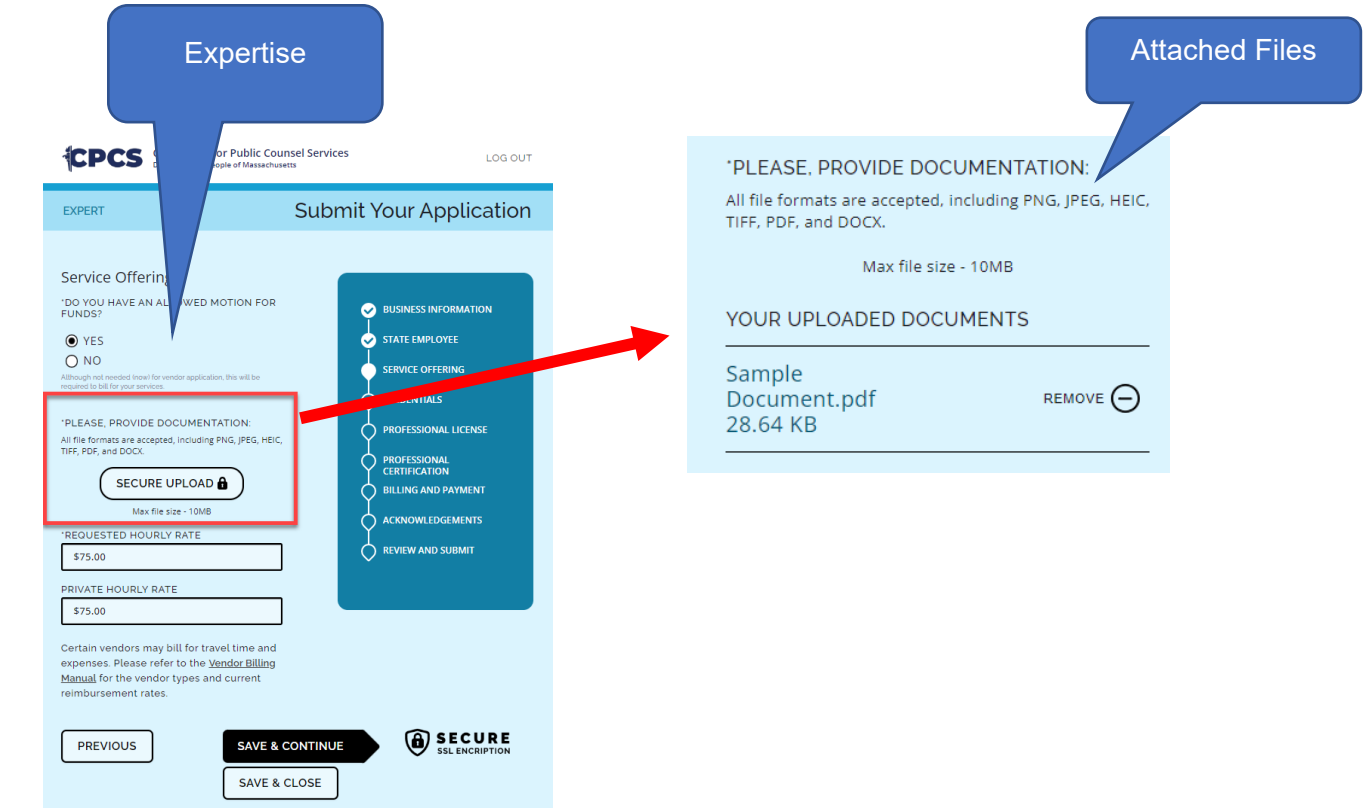


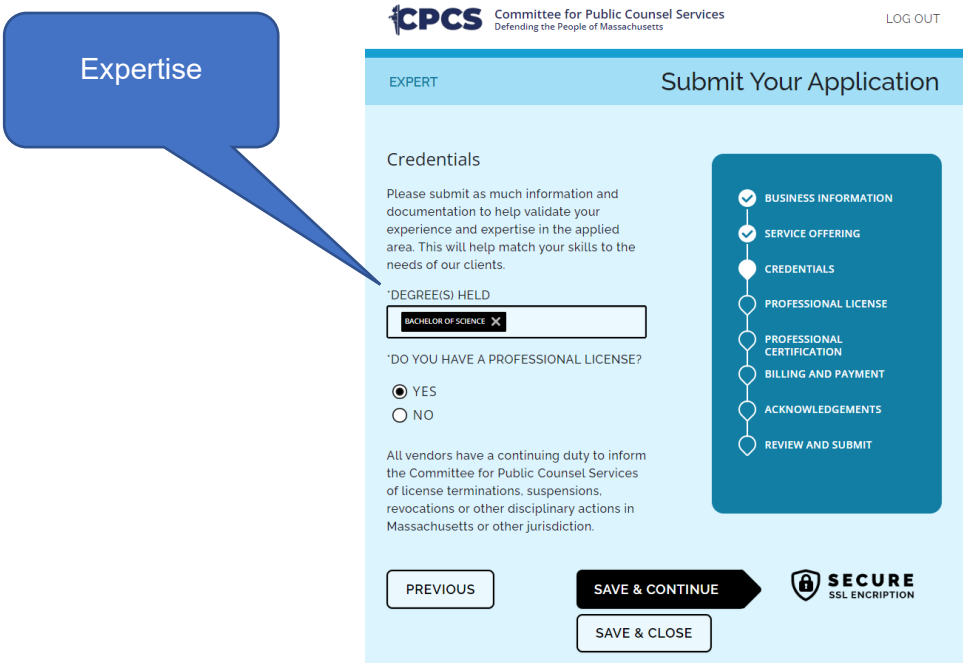
Expertise

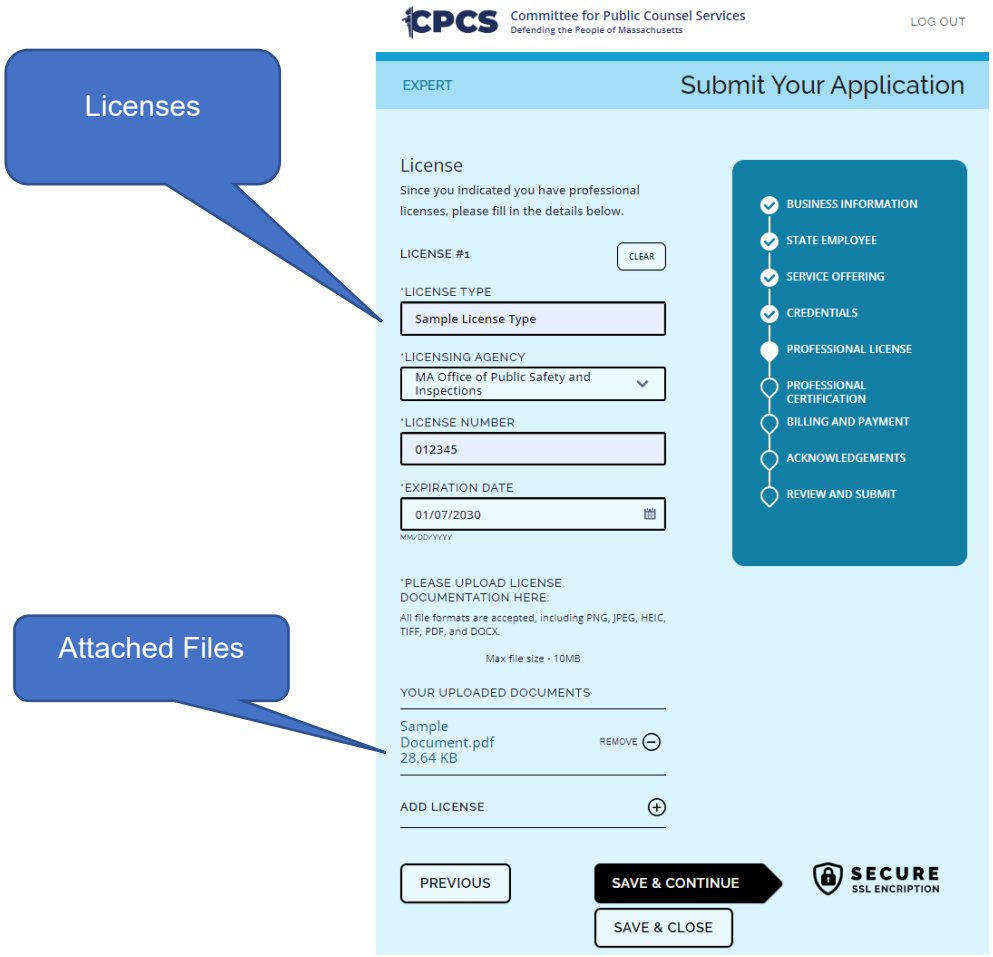
Languages



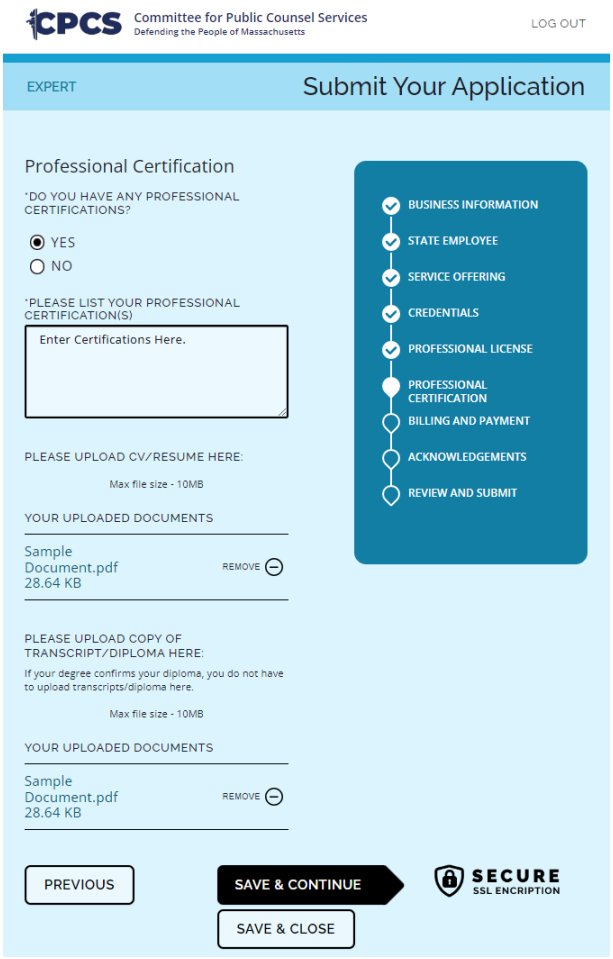

CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
State Employee
Since you acknowledged on the previous screen that you are either a State Employee or a Key Employee under a State Contract you must complete the following disclosure information as required by 30 CMR 6.06(2) or c.268A s. 7(2). Any questions should be addressed to the State Ethics Commission.
I am a state employee. The Committee for Public Counsel Services ("CPCS") provides representation and services to persons with regard to various matters in the state courts and assigns attorneys and personnel to work on the matters. In connection with these matters, I expect to provide representation or services to, or on behalf of, such persons, attorneys or personnel. I respectfully request written approval of the arrangement from CPCS and (if I am not an elected state employee) from my appointing authority in my state position.
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
Expertise
*TITLE / POSITION
Sample Title
*AGENCY
Attorney General's Office
*AGENCY STREET ADDRESS
123 Sample Street
*AGENCY EMAIL ADDRESS
sf+sample.agency@arbolainc.com
*AGENCY APPOINTING AUTHORITY NAME
Sample Agency
*APPOINTING AUTHORITY TITLE
Sample Title
*APPOINTING AUTHORITY EMAIL ADDRESS
sf+sample.agency@arbolainc.com
*APPOINTING AUTHORITY PHONE NUMBER
(555) 555-5555
*DESCRIBE THE NATURE OF THE REPRESENTATION OR SERVICES YOU EXPECT TO PROVIDE TO OR FOR CPCS.
Enter Text Here.
*WHO WILL PAY YOU FOR YOUR SERVICES?
CPCS or an attorney or personnel assigned by CPCS
*WHAT IS YOUR FINANCIAL INTEREST IN PROVIDING THESE SERVICES? PLEASE INCLUDE BOTH OBLIGATIONS AND COMPENSATION, ETC.
Enter Text Here.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION


Expertise
Attached Files
CPCS
LOG OUT
EXPERT
Submit Your Application
Service Offering
*DO YOU HAVE AN ALLOWED MOTION FOR FUNDS?
YES
NO
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
SECURE UPLOAD
Max file size - 10MB
*REQUESTED HOURLY RATE
$75.00
PRIVATE HOURLY RATE
$75.00
Certain vendors may bill for travel time and expenses. Please refer to the Vendor Billing Manual for the vendor types and current reimbursement rates.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE


Expertise
CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Credentials
Please submit as much information and documentation to help validate your experience and expertise in the applied area. This will help match your skills to the needs of our clients.
*DEGREE(S) HELD
BACHELOR OF SCIENCE
*DO YOU HAVE A PROFESSIONAL LICENSE?
YES
NO
All vendors have a continuing duty to inform the Committee for Public Counsel Services of license terminations, suspensions, revocations or other disciplinary actions in Massachusetts or other jurisdiction.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION
BUSINESS INFORMATION
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


Licenses
Attached Files
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
License
Since you indicated you have professional licenses, please fill in the details below.
LICENSE #1
CLEAR
*LICENSE TYPE
Sample License Type
*LICENSING AGENCY
MA Office of Public Safety and Inspections
*LICENSE NUMBER
012345
*EXPIRATION DATE
01/07/2030
MM/DD/YYYY
*PLEASE UPLOAD LICENSE DOCUMENTATION HERE:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE
ADD LICENSE
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT

Expertise


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Professional Certification
*DO YOU HAVE ANY PROFESSIONAL CERTIFICATIONS?
YES
NO
*PLEASE LIST YOUR PROFESSIONAL CERTIFICATION(S)
Enter Certifications Here.
PLEASE UPLOAD CV/RESUME HERE:
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PLEASE UPLOAD COPY OF TRANSCRIPT/DIPLOMA HERE:
If your degree confirms your diploma, you do not have to upload transcripts/diploma here.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
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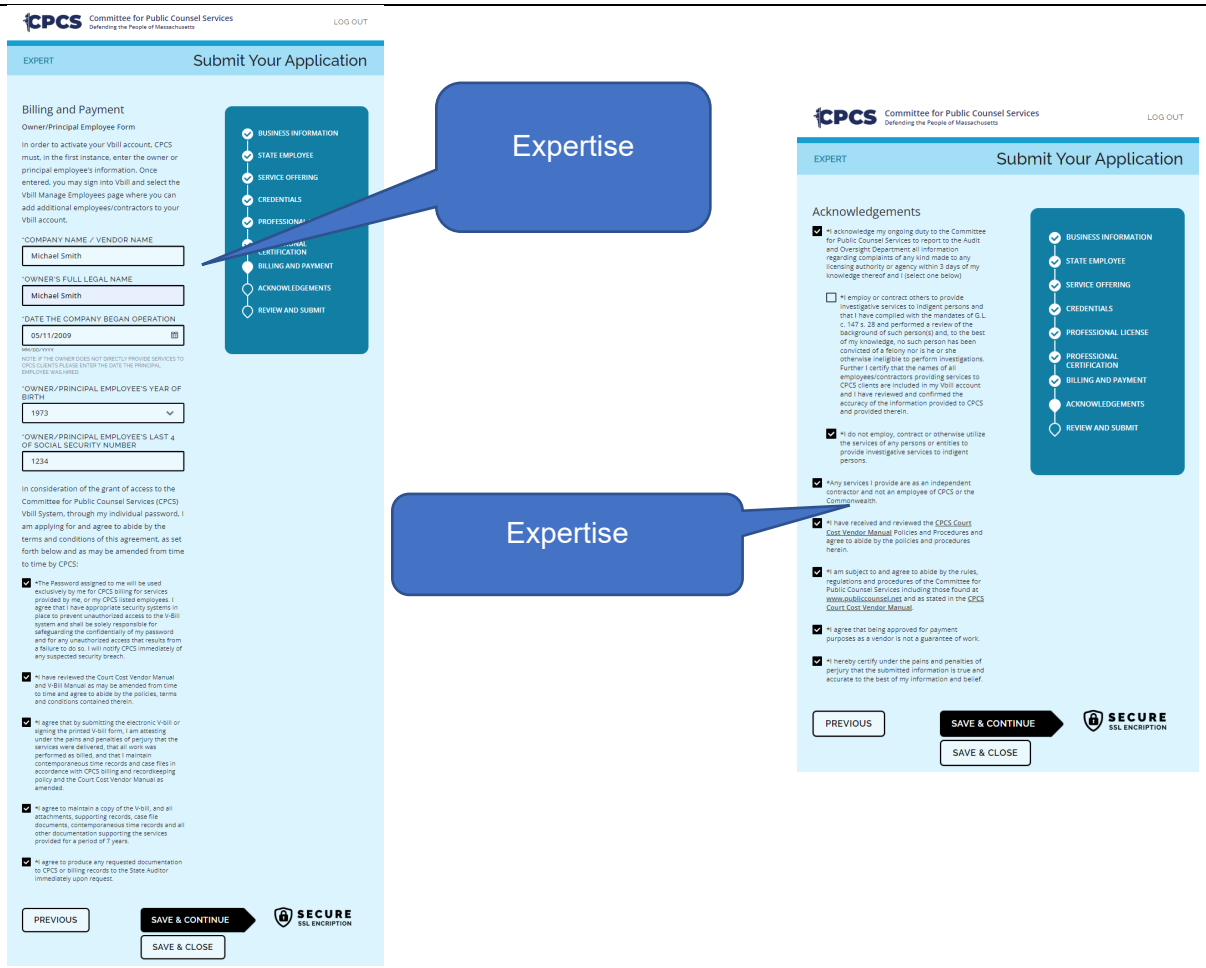
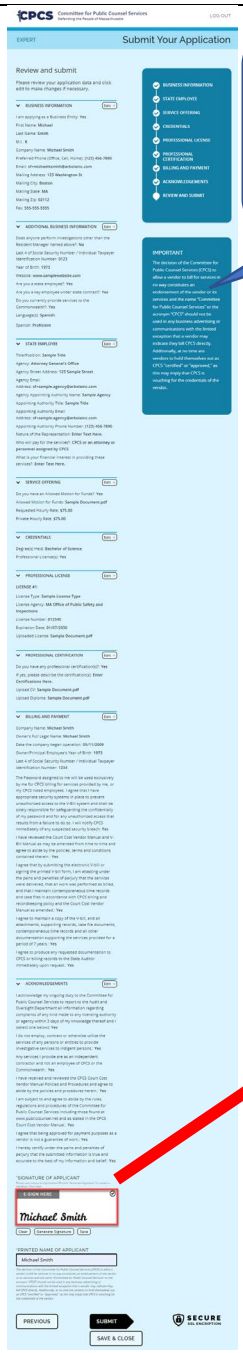
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Billing and Payment
Owner/Principal Employee Form
In order to activate your Vbill account, CPCS must, in the first instance, enter the owner or principal employee's information. Once entered, you may sign into Vbill and select the Vbill Manage Employees page where you can add additional employees/contractors to your Vbill account.
*COMPANY NAME / VENDOR NAME
Michael Smith
*OWNER'S FULL LEGAL NAME
Michael Smith
*DATE THE COMPANY BEGAN OPERATION
05/11/2009
NOTE: IF THE OWNER DOES NOT DIRECTLY PROVIDE SERVICES TO CPCS CLIENTS PLEASE ENTER THE DATE THE PRINCIPAL EMPLOYEE WAS HIRED.
*OWNER/PRINCIPAL EMPLOYEE'S YEAR OF BIRTH
1973
*OWNER/PRINCIPAL EMPLOYEE'S LAST 4 OF SOCIAL SECURITY NUMBER
1234
In consideration of the grant of access to the Committee for Public Counsel Services (CPCS) Vbill System, through my individual password, I am applying for and agree to abide by the terms and conditions of this agreement, as set forth below and as may be amended from time to time by CPCS:
*The Password assigned to me will be used exclusively by me for CPCS billing for services provided by me, or my CPCS listed employees. I agree that I have appropriate security systems in place to prevent unauthorized access to the V-Bill system and shall be solely responsible for safeguarding the confidentiality of my password and for any unauthorized access that results from a failure to do so. I will notify CPCS immediately of any suspected security breach.
*I have reviewed the Court Cost Vendor Manual and V-Bill Manual as may be amended from time to time and agree to abide by the policies, terms and conditions contained therein.
*I agree that by submitting the electronic V-bill or signing the printed V-bill form, I am attesting under the pains and penalties of perjury that the services were delivered, that all work was performed as billed, and that I maintain contemporaneous time records and case files in accordance with CPCS billing and recordkeeping policy and the Court Cost Vendor Manual as amended.
*I agree to maintain a copy of the V-bill, and all attachments, supporting records, case file documents, contemporaneous time records and all other documentation supporting the services provided for a period of 7 years.
*I agree to produce any requested documentation to CPCS or billing records to the State Auditor immediately upon request.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
Expertise
Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Acknowledgements
*I acknowledge my ongoing duty to the Committee for Public Counsel Services to report to the Audit and Oversight Department all information regarding complaints of any kind made to any licensing authority or agency within 3 days of my knowledge thereof and I (select one below)
*I employ or contract others to provide investigative services to indigent persons and that I have complied with the mandates of G.L. c. 147 s. 28 and performed a review of the background of such person(s) and, to the best of my knowledge, no such person has been convicted of a felony nor is he or she otherwise ineligible to perform investigations. Further I certify that the names of all employees/contractors providing services to CPCS clients are included in my Vbill account and I have reviewed and confirmed the accuracy of the information provided to CPCS and provided therein.
*I do not employ, contract or otherwise utilize the services of any persons or entities to provide investigative services to indigent persons.
*Any services I provide are as an independent contractor and not an employee of CPCS or the Commonwealth.
*I have received and reviewed the CPCS Court Cost Vendor Manual Policies and Procedures and agree to abide by the policies and procedures herein.
*I am subject to and agree to abide by the rules, regulations and procedures of the Committee for Public Counsel Services including those found at www.publiccounsel.net and as stated in the CPCS Court Cost Vendor Manual.
*I agree that being approved for payment purposes as a vendor is not a guarantee of work.
*I hereby certify under the pains and penalties of perjury that the submitted information is true and accurate to the best of my information and belief.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT

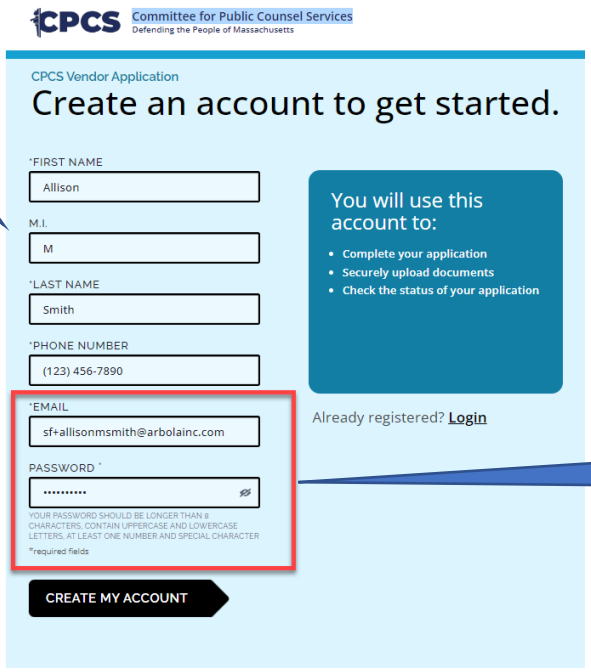


Attached Files
Application-Form
.PDF

Attached Files
Signature- Review
.PDF

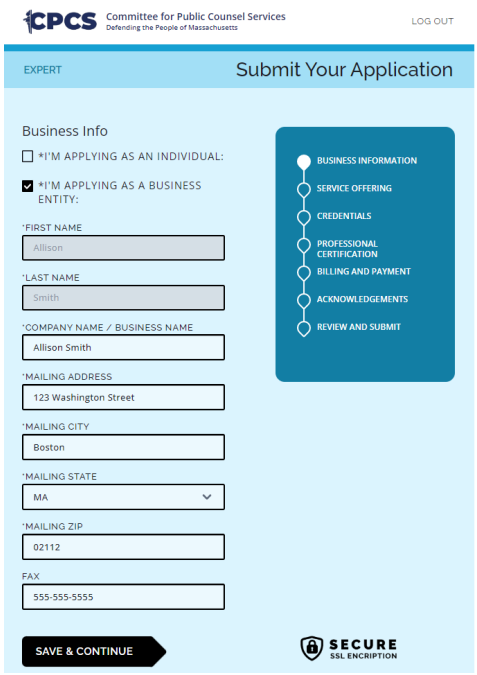
Behavioral Health Specialist

Account & Contact



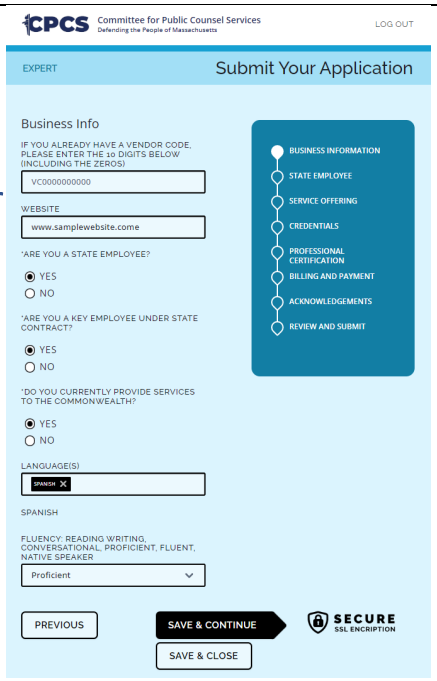
Login username and password

Contact

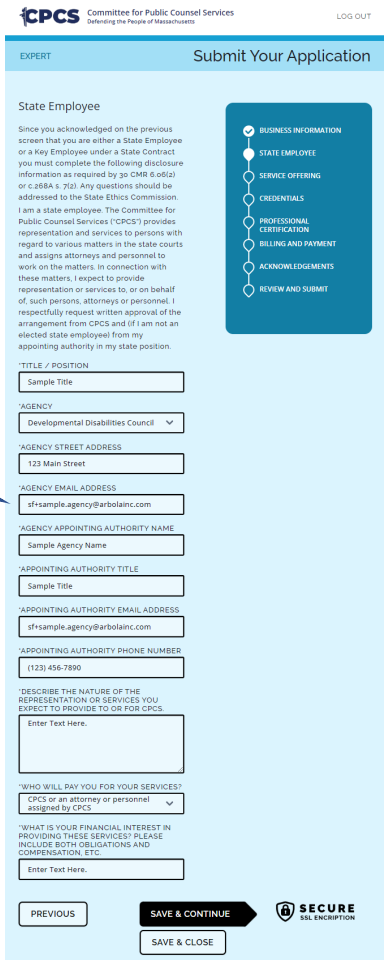


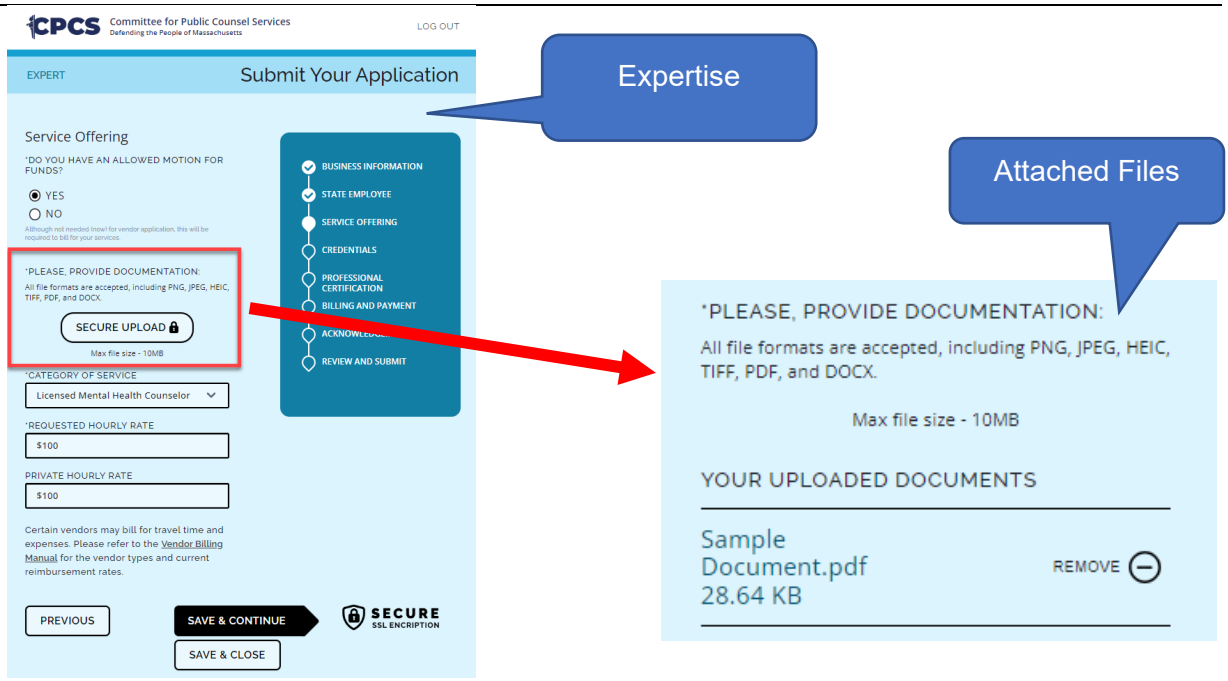
Expertise

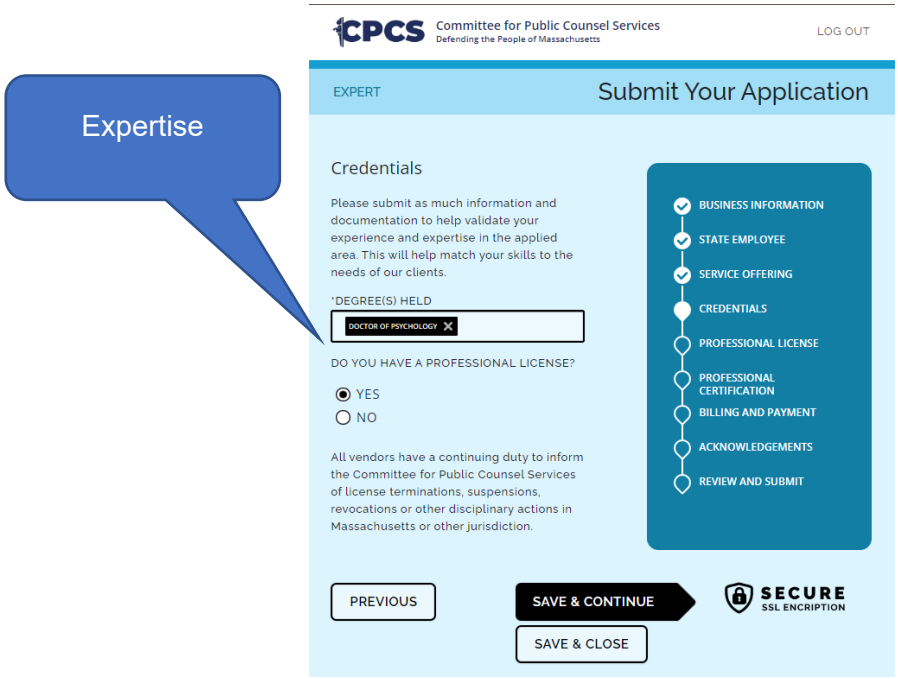
Languages

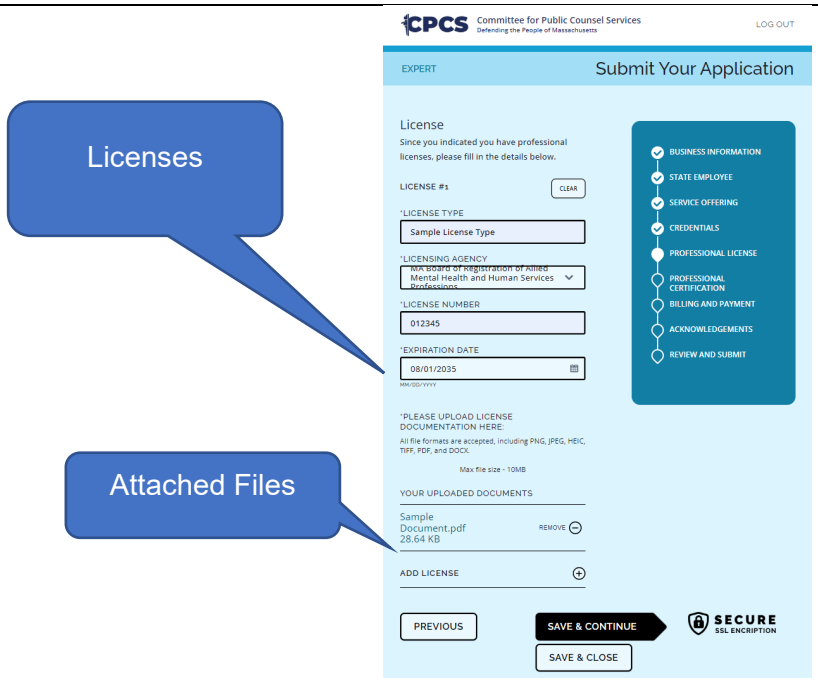


Expertise




CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Expertise
Service Offering
*DO YOU HAVE AN ALLOWED MOTION FOR FUNDS?
YES
NO
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
SECURE UPLOAD
Max file size - 10MB
*CATEGORY OF SERVICE
Licensed Mental Health Counselor
*REQUESTED HOURLY RATE
$100
PRIVATE HOURLY RATE
$100
Certain vendors may bill for travel time and expenses. Please refer to the Vendor Billing Manual for the vendor types and current reimbursement rates.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
REVIEW AND SUBMIT
Attached Files
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE

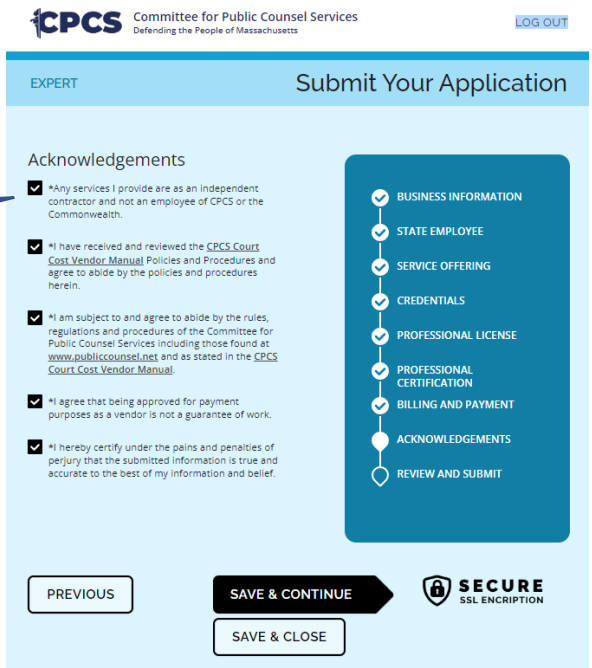

Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Credentials
Please submit as much information and documentation to help validate your experience and expertise in the applied area. This will help match your skills to the needs of our clients.
*DEGREE(S) HELD
DOCTOR OF PSYCHOLOGY
DO YOU HAVE A PROFESSIONAL LICENSE?
YES
NO
All vendors have a continuing duty to inform the Committee for Public Counsel Services of license terminations, suspensions, revocations or other disciplinary actions in Massachusetts or other jurisdiction.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


Licenses
Attached Files
CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
License
Since you indicated you have professional licenses, please fill in the details below.
LICENSE #1
CLEAR
*LICENSE TYPE
Sample License Type
*LICENSING AGENCY
MA Board of Registration of Allied Mental Health and Human Services Professions
*LICENSE NUMBER
012345
*EXPIRATION DATE
08/01/2035
MM/DD/YYYY
*PLEASE UPLOAD LICENSE DOCUMENTATION HERE:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE
ADD LICENSE
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


Expertise
Attached Files
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Professional Certification
*DO YOU HAVE ANY PROFESSIONAL CERTIFICATIONS?
YES
NO
*PLEASE LIST YOUR PROFESSIONAL CERTIFICATION(S)
Enter Certifications Here.
*PLEASE UPLOAD CERTIFICATION DOCUMENTATION HERE:
ADDITIONAL UPLOAD
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PLEASE UPLOAD CV/RESUME HERE:
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PLEASE UPLOAD COPY OF TRANSCRIPT/DIPLOMA HERE:
If your degree confirms your diploma, you do not have to upload transcripts/diploma here.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION

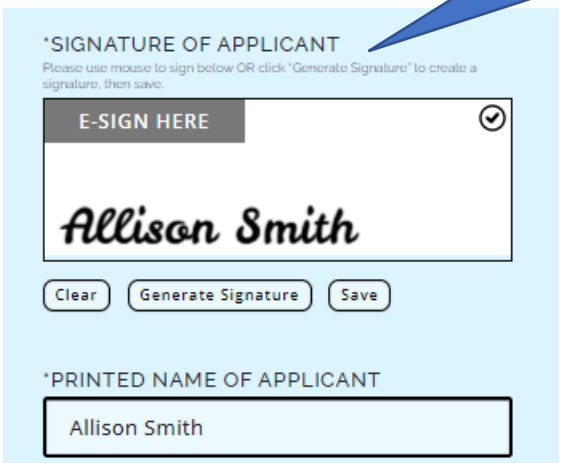
Expertise

Expertise



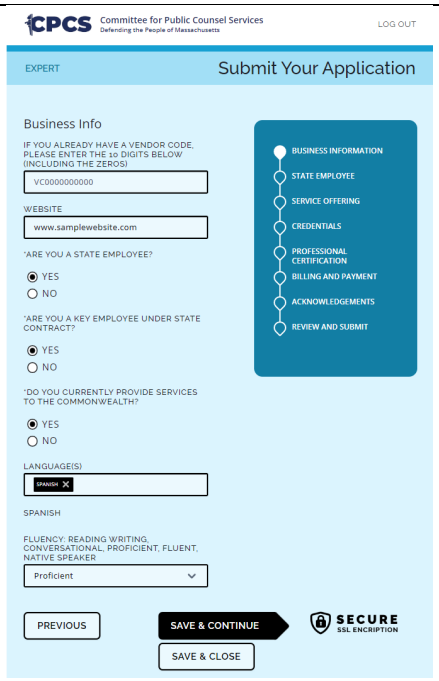
Attached Files
Application-Form
.PDF

Attached Files
Signature- Review
.PDF



Medical Specialist

Expertise


CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Business Info
IF YOU ALREADY HAVE A VENDOR CODE, PLEASE ENTER THE 10 DIGITS BELOW (INCLUDING THE ZEROS)
VC0000000000
WEBSITE
www.samplewebsite.com
*ARE YOU A STATE EMPLOYEE?
YES
NO
*ARE YOU A KEY EMPLOYEE UNDER STATE CONTRACT?
YES
NO
*DO YOU CURRENTLY PROVIDE SERVICES TO THE COMMONWEALTH?
YES
NO
LANGUAGE(S)
SPANISH
SPANISH
FLUENCY: READING WRITING, CONVERSATIONAL, PROFICIENT, FLUENT, NATIVE SPEAKER
Proficient
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
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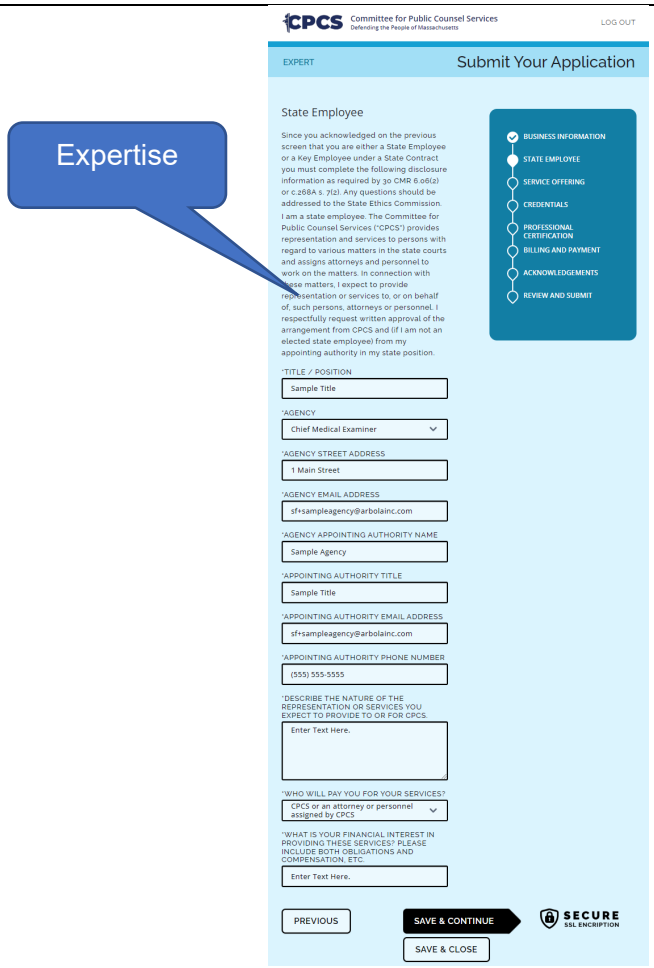
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


Expertise
CPCS Committee for Public Counsel Services
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LOG OUT
EXPERT
Submit Your Application
State Employee
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BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
*TITLE / POSITION
Sample Title
*AGENCY
Chief Medical Examiner
*AGENCY STREET ADDRESS
1 Main Street
*AGENCY EMAIL ADDRESS
sf+sampleagency@arbolainc.com
*AGENCY APPOINTING AUTHORITY NAME
Sample Agency
*APPOINTING AUTHORITY TITLE
Sample Title
*APPOINTING AUTHORITY EMAIL ADDRESS
sf+sampleagency@arbolainc.com
*APPOINTING AUTHORITY PHONE NUMBER
(555) 555-5555
*DESCRIBE THE NATURE OF THE REPRESENTATION OR SERVICES YOU EXPECT TO PROVIDE TO OR FOR CPCS.
Enter Text Here.
*WHO WILL PAY YOU FOR YOUR SERVICES?
CPCS or an attorney or personnel assigned by CPCS
*WHAT IS YOUR FINANCIAL INTEREST IN PROVIDING THESE SERVICES? PLEASE INCLUDE BOTH OBLIGATIONS AND COMPENSATION, ETC.
Enter Text Here.
PREVIOUS
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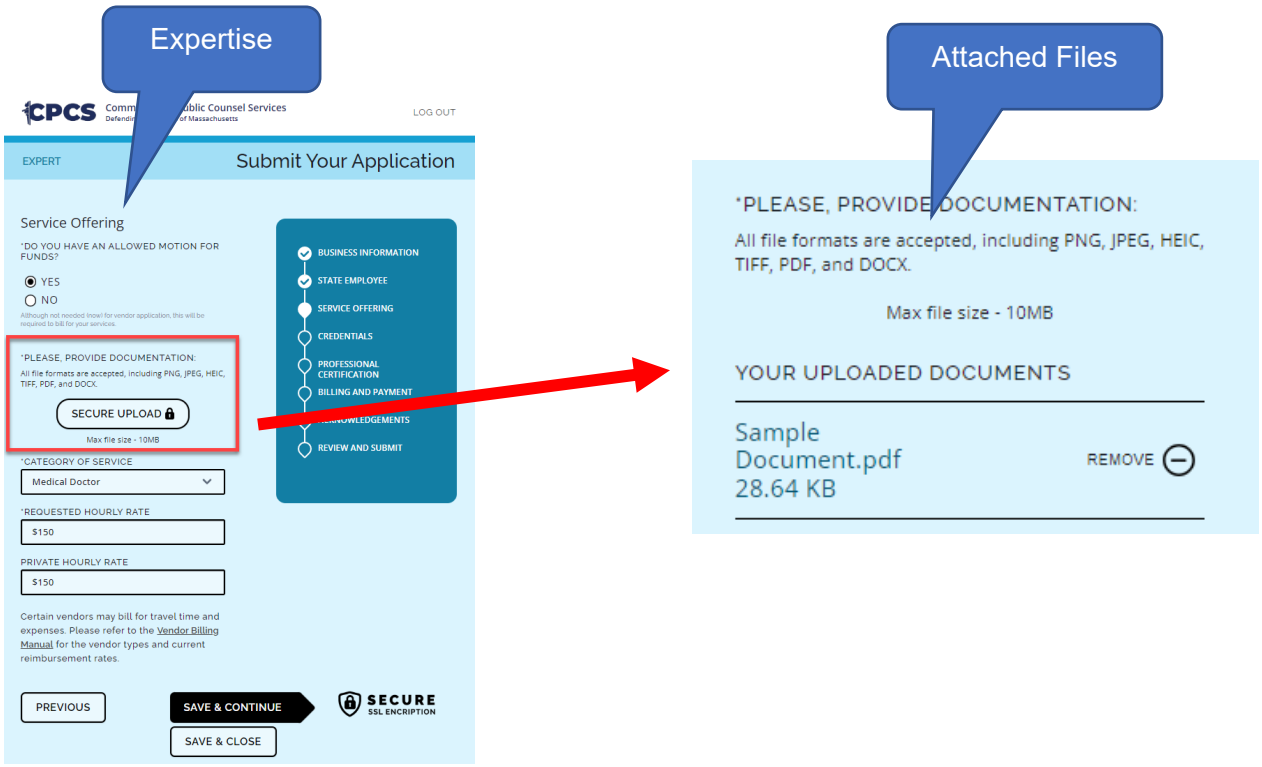
SAVE & CLOSE
SECURE
SSL ENCRIPTION


Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Service Offering
*DO YOU HAVE AN ALLOWED MOTION FOR FUNDS?
YES
NO
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
SECURE UPLOAD
Max file size - 10MB
*CATEGORY OF SERVICE
Medical Doctor
*REQUESTED HOURLY RATE
$150
PRIVATE HOURLY RATE
$150
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BILLING AND PAYMENT
REVIEW AND SUBMIT
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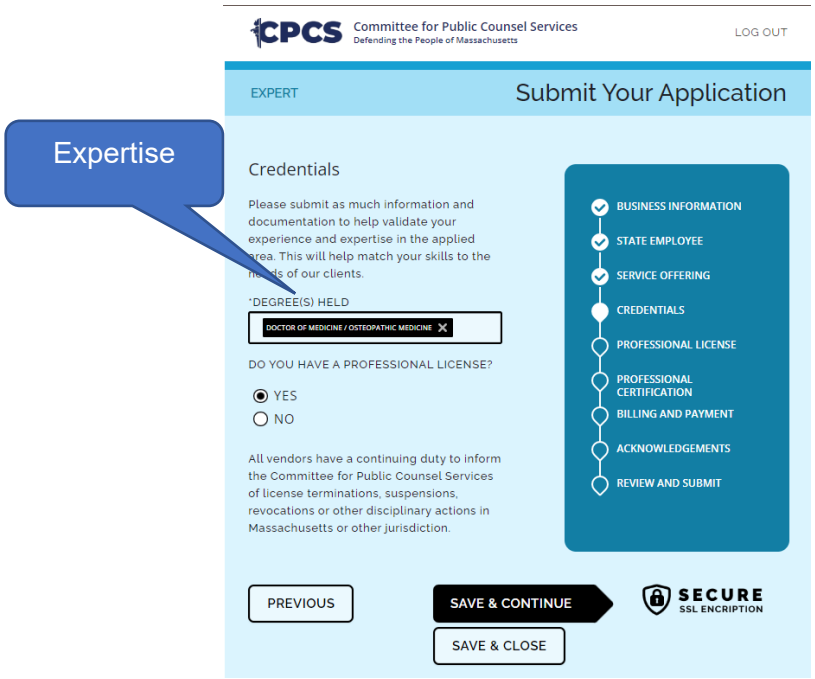
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE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CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
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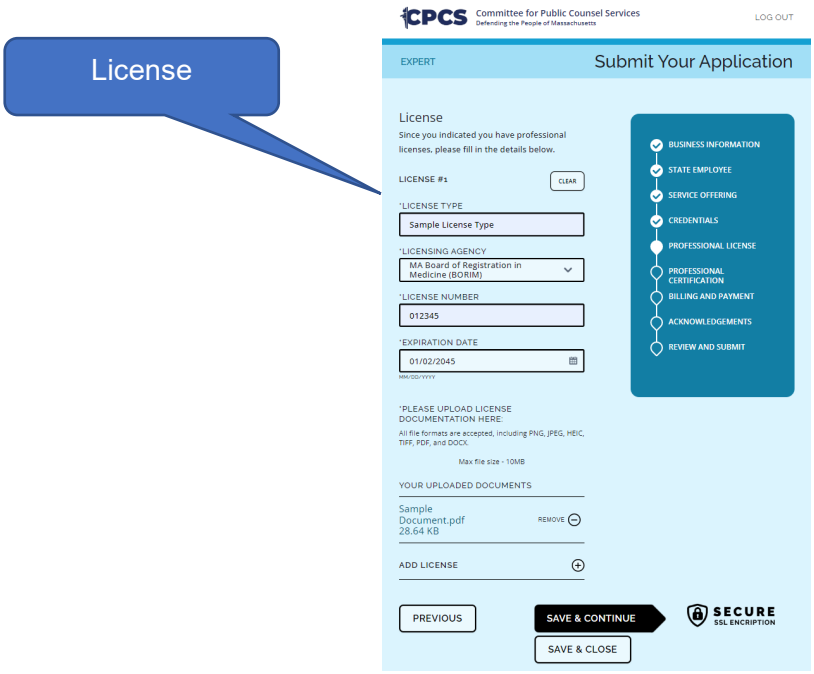
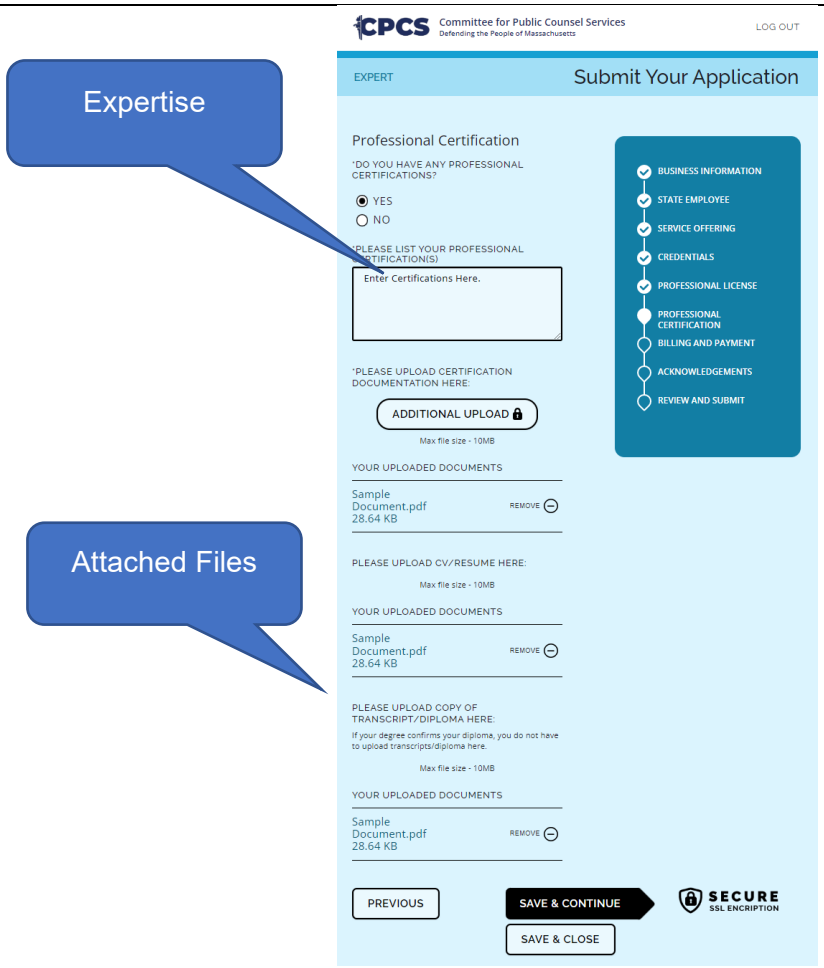
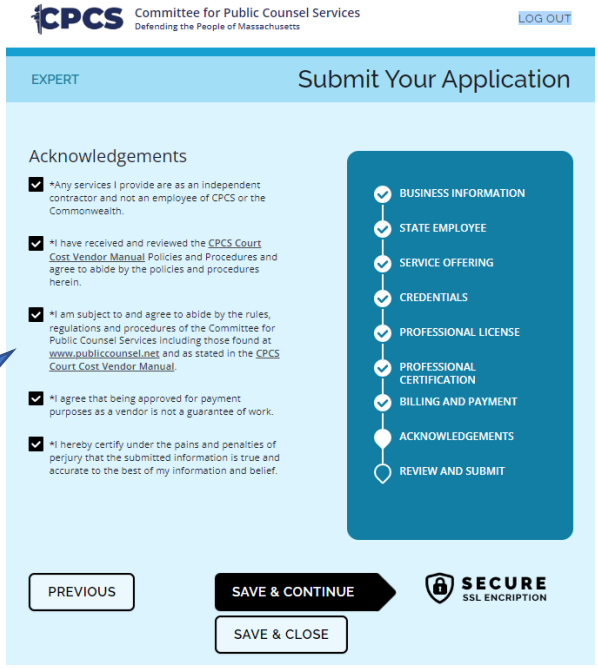
Submit Your Application
Credentials
Please submit as much information and documentation to help validate your experience and expertise in the applied area. This will help match your skills to the needs of our clients.
*DEGREE(S) HELD
DOCTOR OF MEDICINE / OSTEOPATHIC MEDICINE
DO YOU HAVE A PROFESSIONAL LICENSE?
YES
NO
All vendors have a continuing duty to inform the Committee for Public Counsel Services of license terminations, suspensions, revocations or other disciplinary actions in Massachusetts or other jurisdiction.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


License
CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
License
Since you indicated you have professional licenses, please fill in the details below.
LICENSE #1
CLEAR
*LICENSE TYPE
Sample License Type
*LICENSING AGENCY
MA Board of Registration in Medicine (BORIM)
*LICENSE NUMBER
012345
*EXPIRATION DATE
01/02/2045
MM/DD/YYYY
*PLEASE UPLOAD LICENSE DOCUMENTATION HERE
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size = 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
ADD LICENSE
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION


Expertise
Attached Files
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Professional Certification
*DO YOU HAVE ANY PROFESSIONAL CERTIFICATIONS?
YES
NO
*PLEASE LIST YOUR PROFESSIONAL CERTIFICATION(S)
Enter Certifications Here.
*PLEASE UPLOAD CERTIFICATION DOCUMENTATION HERE:
ADDITIONAL UPLOAD
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PLEASE UPLOAD CV/RESUME HERE:
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
PLEASE UPLOAD COPY OF TRANSCRIPT/DIPLOMA HERE:
If your degree confirms your diploma, you do not have to upload transcripts/diploma here.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf 28.64 KB
REMOVE
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION

Expertise

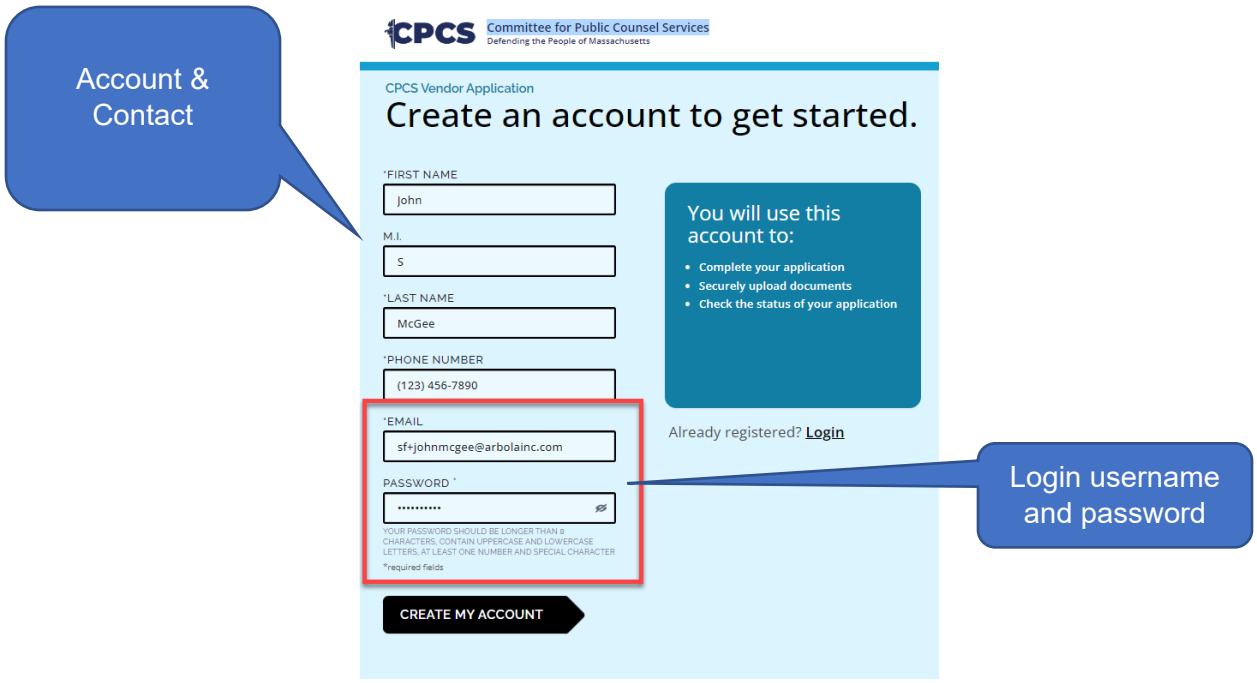
Expertise

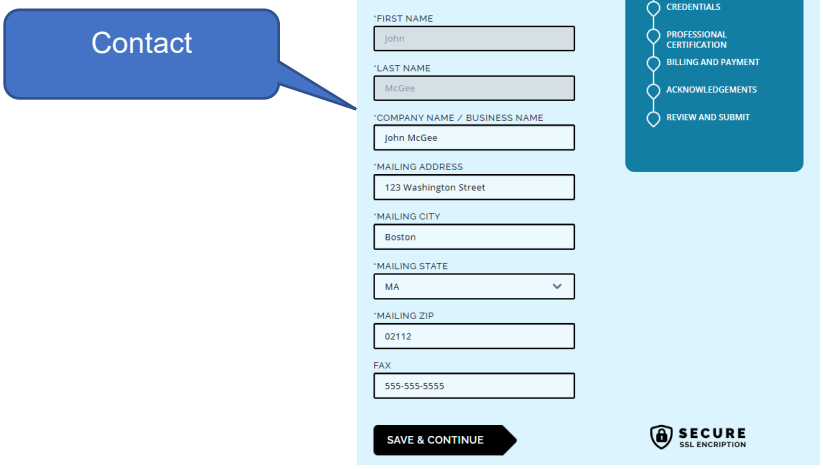


Attached Files
Application-Form
.PDF

Attached Files
Signature- Review
.PDF

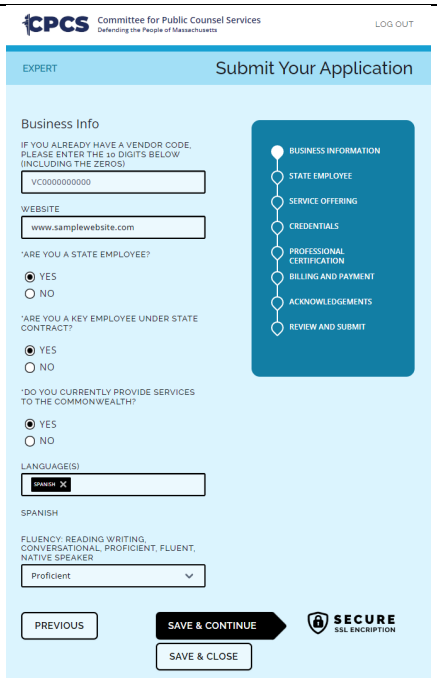
All Other Experts



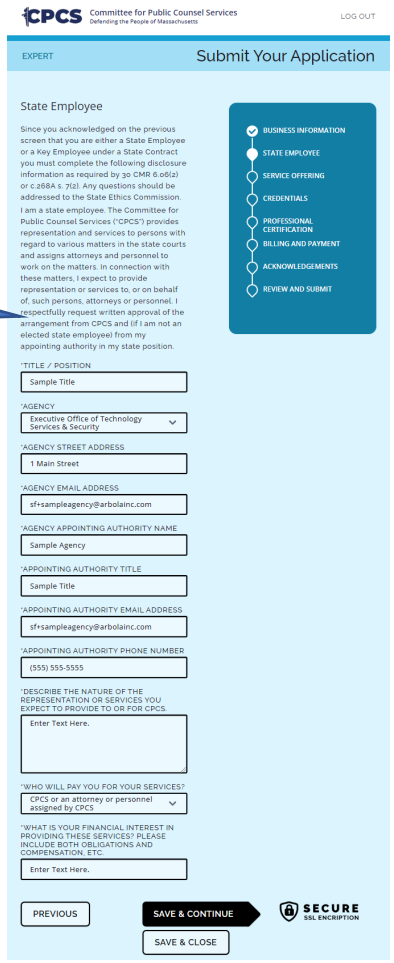


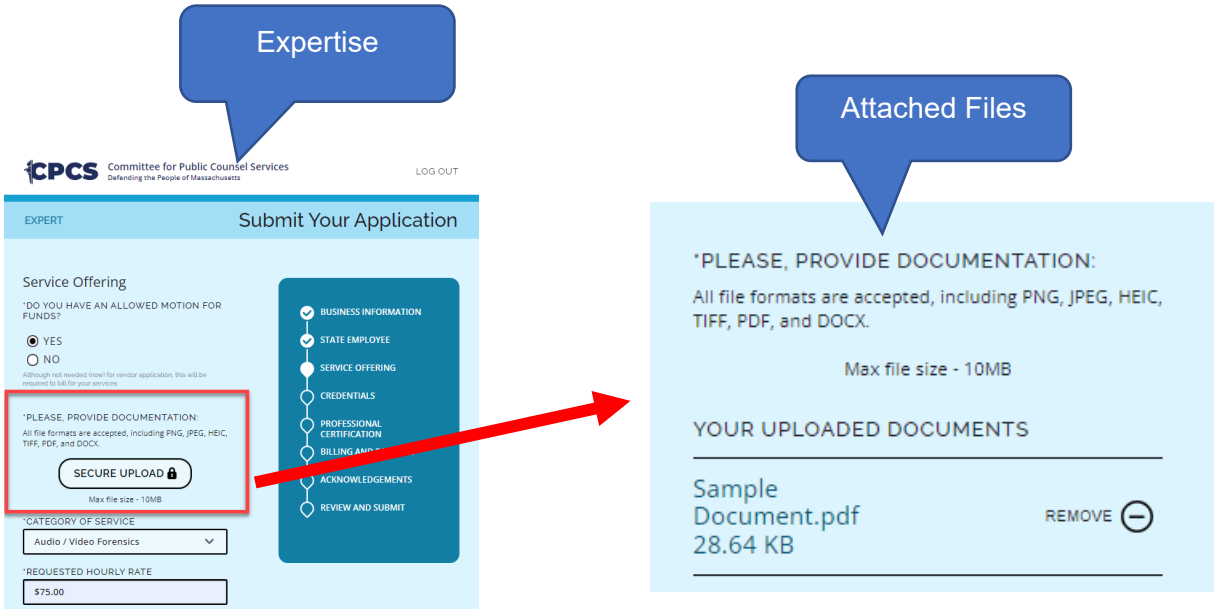
Expertise

Languages

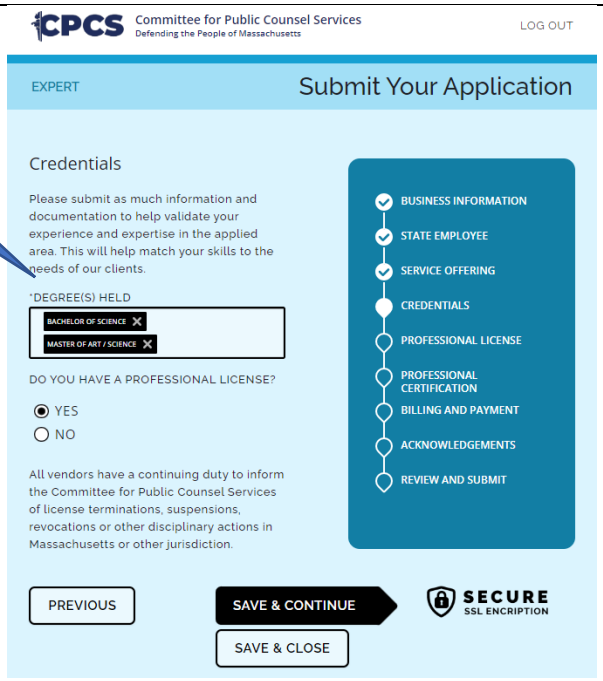


Expertise

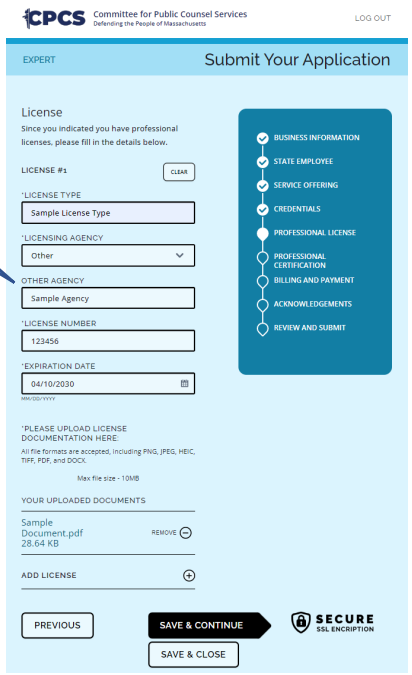


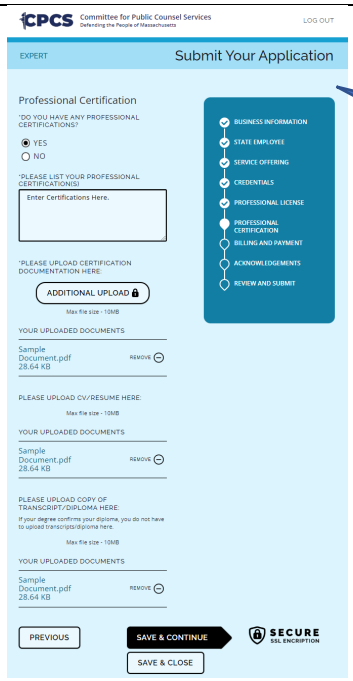

Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
EXPERT
Submit Your Application
Service Offering
*DO YOU HAVE AN ALLOWED MOTION FOR FUNDS?
YES
NO
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
SECURE UPLOAD
Max file size - 10MB
*CATEGORY OF SERVICE
Audio / Video Forensics
*REQUESTED HOURLY RATE
$75.00
PRIVATE HOURLY RATE
$75.00
Certain vendors may bill for travel time and expenses. Please refer to the Vendor Billing Manual for the vendor types and current reimbursement rates.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
Attached Files
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE

Expertise



Licenses

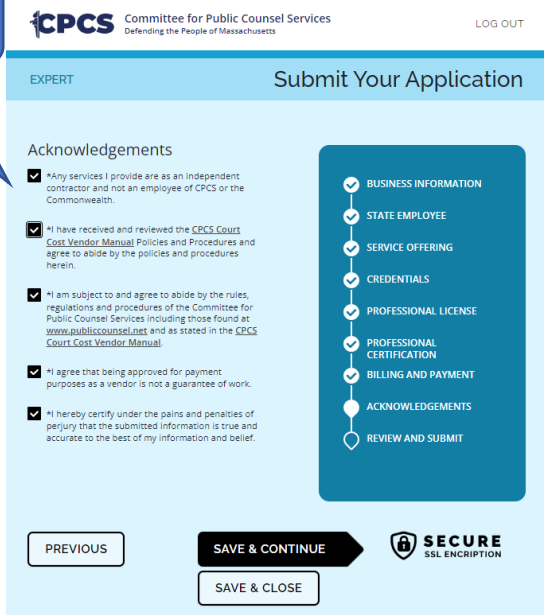


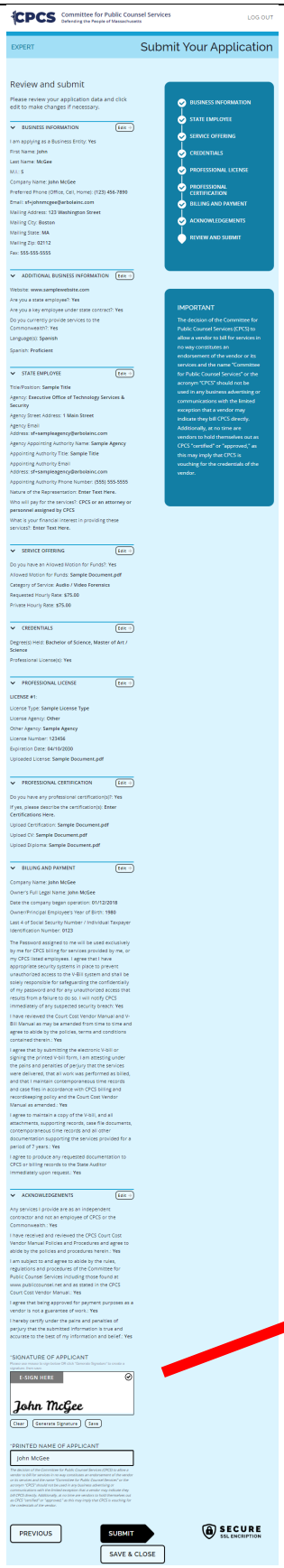


Expertise

Expertise

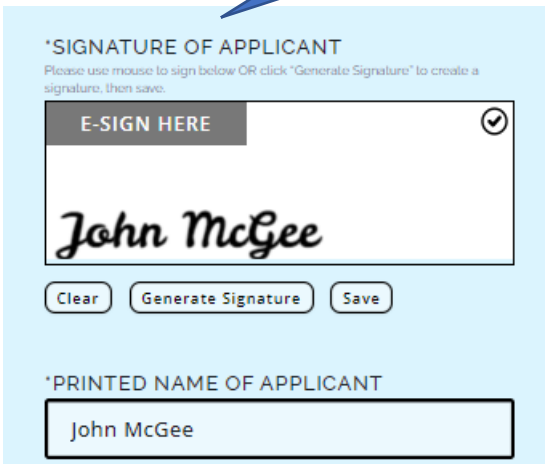
Expertise



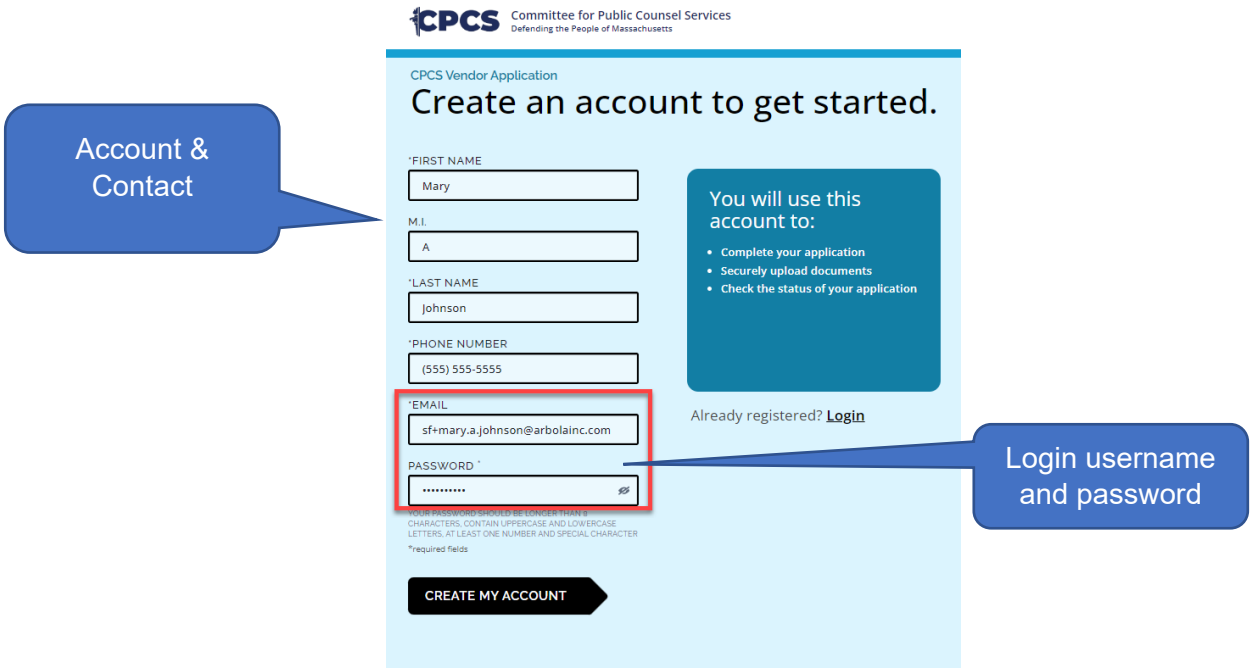


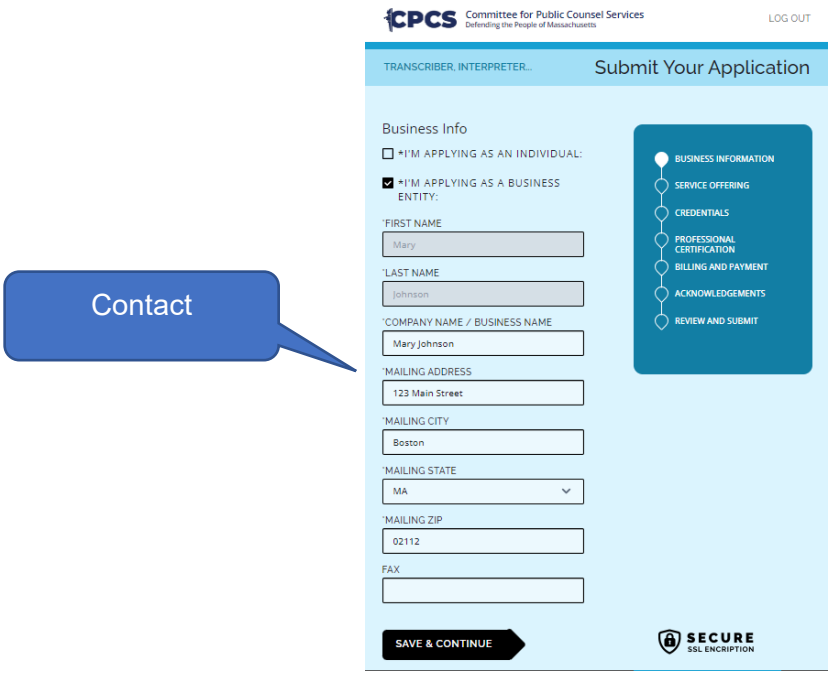
Attached Files
Application-Form
.PDF

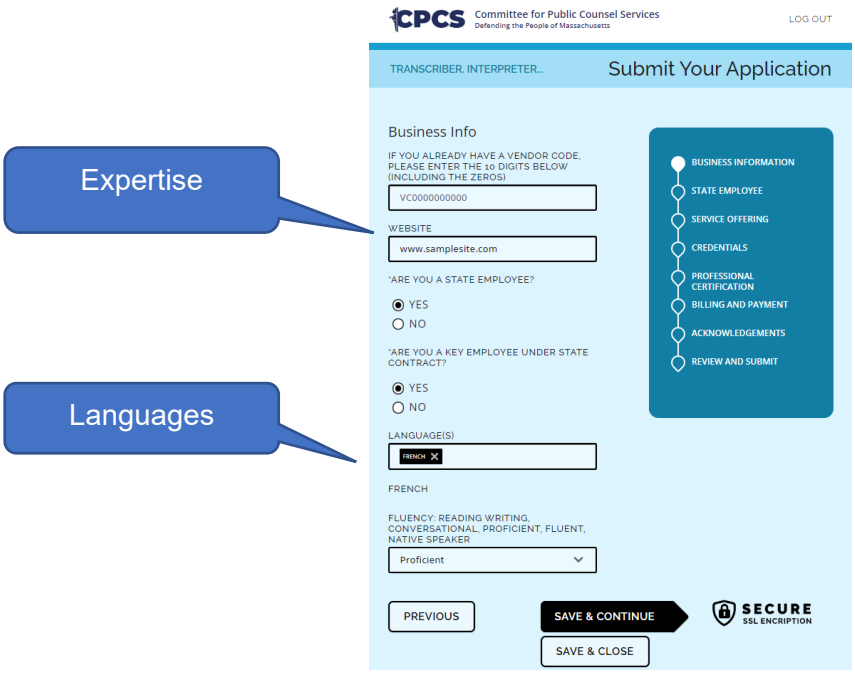
Attached Files
Signature- Review
.PDF



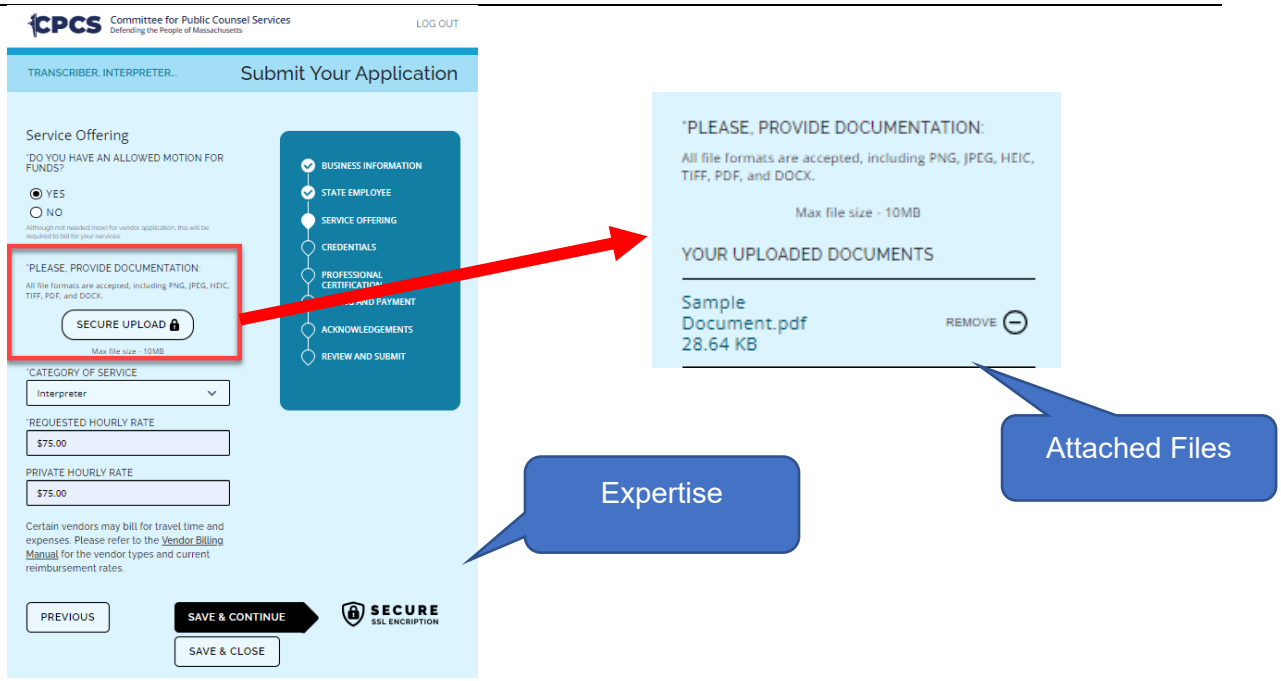
Transcriber, Interpreter, Copy Shop, Service of Process

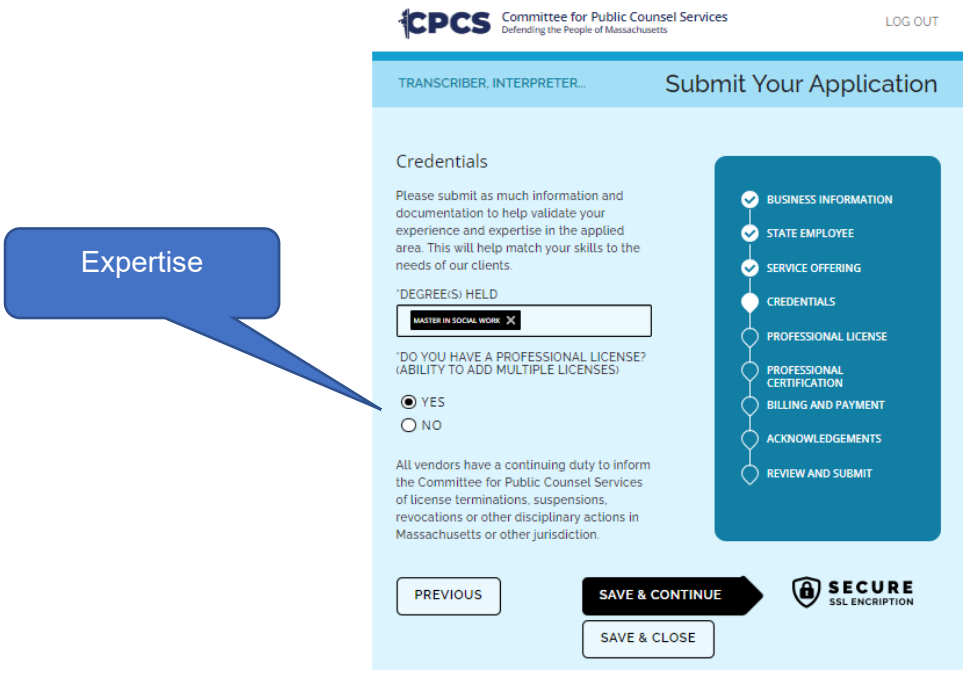


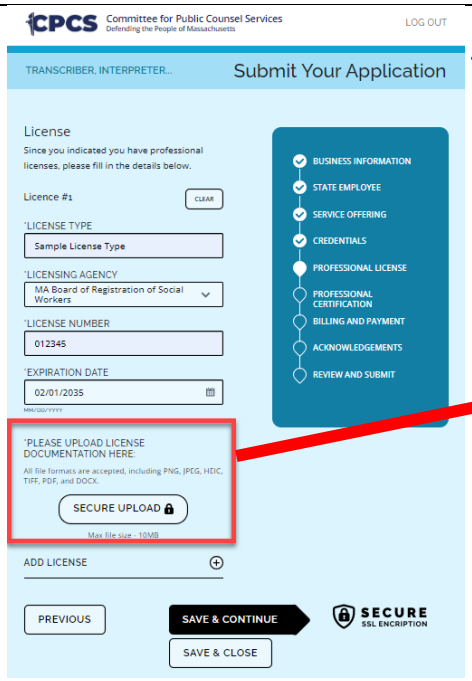



Expertise
Languages
CPCS
Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
Business Info
IF YOU ALREADY HAVE A VENDOR CODE, PLEASE ENTER THE 10 DIGITS BELOW (INCLUDING THE ZEROS)
VC0000000000
WEBSITE
www.samplesite.com
*ARE YOU A STATE EMPLOYEE?
YES
NO
*ARE YOU A KEY EMPLOYEE UNDER STATE CONTRACT?
YES
NO
LANGUAGE(S)
FRENCH
FRENCH
FLUENCY: READING WRITING, CONVERSATIONAL, PROFICIENT, FLUENT, NATIVE SPEAKER
Proficient
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION

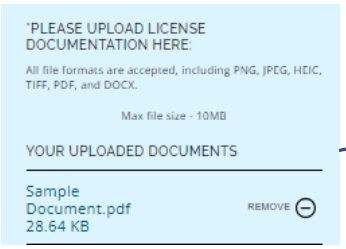

CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
State Employee
Since you acknowledged on the previous screen that you are either a State Employee or a Key Employee under a State Contract you must complete the following disclosure information as required by 30 CMR 6.06(2) or c.268A s. 7(2). Any questions should be addressed to the State Ethics Commission.
I am a state employee. The Committee for Public Counsel Services ("CPCS") provides representation and services to persons with regard to various matters in the state courts and assigns attorneys and personnel to work on the matters. In connection with these matters, I expect to provide representation or services to, or on behalf of, such persons, attorneys or personnel. I respectfully request written approval of the arrangement from CPCS and (if I am not an elected state employee) from my appointing authority in my state position.
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
Expertise
*TITLE / POSITION
Sample Title
*AGENCY
Executive Office for Administration and Finance
*AGENCY STREET ADDRESS
1 Main Street
*AGENCY EMAIL ADDRESS
sf+sampleagency@arbolainc.com
*AGENCY APPOINTING AUTHORITY NAME
Sample Agency
*APPOINTING AUTHORITY TITLE
Sample Title
*APPOINTING AUTHORITY EMAIL ADDRESS
sf+sampleagency@arbolainc.com
*APPOINTING AUTHORITY PHONE NUMBER
(555) 555-5550
*DESCRIBE THE NATURE OF THE REPRESENTATION OR SERVICES YOU EXPECT TO PROVIDE TO OR FOR CPCS.
Enter Text Here.
*WHO WILL PAY YOU FOR YOUR SERVICES?
CPCS or an attorney or personnel assigned by CPCS
*WHAT IS YOUR FINANCIAL INTEREST IN PROVIDING THESE SERVICES? PLEASE INCLUDE BOTH OBLIGATIONS AND COMPENSATION, ETC.
Enter Text Here.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
Service Offering
*DO YOU HAVE AN ALLOWED MOTION FOR FUNDS?
YES
NO
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
SECURE UPLOAD
Max file size - 10MB
*CATEGORY OF SERVICE
Interpreter
*REQUESTED HOURLY RATE
$75.00
PRIVATE HOURLY RATE
$75.00
Certain vendors may bill for travel time and expenses. Please refer to the Vendor Billing Manual for the vendor types and current reimbursement rates.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL CERTIFICATION
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT
*PLEASE, PROVIDE DOCUMENTATION:
All file formats are accepted, including PNG, JPEG, HEIC, TIFF, PDF, and DOCX.
Max file size - 10MB
YOUR UPLOADED DOCUMENTS
Sample Document.pdf
28.64 KB
REMOVE
Attached Files
Expertise


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
Expertise
Credentials
Please submit as much information and documentation to help validate your experience and expertise in the applied area. This will help match your skills to the needs of our clients.
*DEGREE(S) HELD
MASTER IN SOCIAL WORK
*DO YOU HAVE A PROFESSIONAL LICENSE? (ABILITY TO ADD MULTIPLE LICENSES)
YES
NO
All vendors have a continuing duty to inform the Committee for Public Counsel Services of license terminations, suspensions, revocations or other disciplinary actions in Massachusetts or other jurisdiction.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT



Licenses



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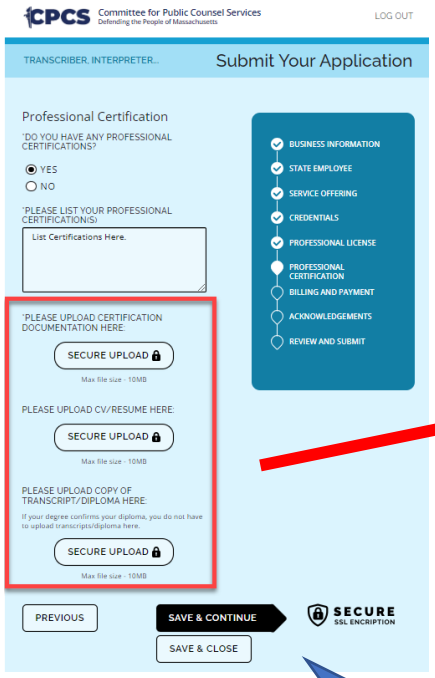

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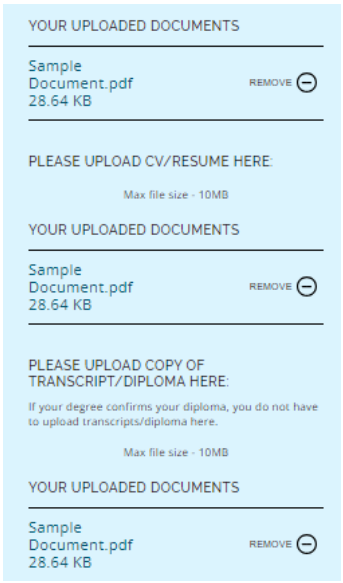
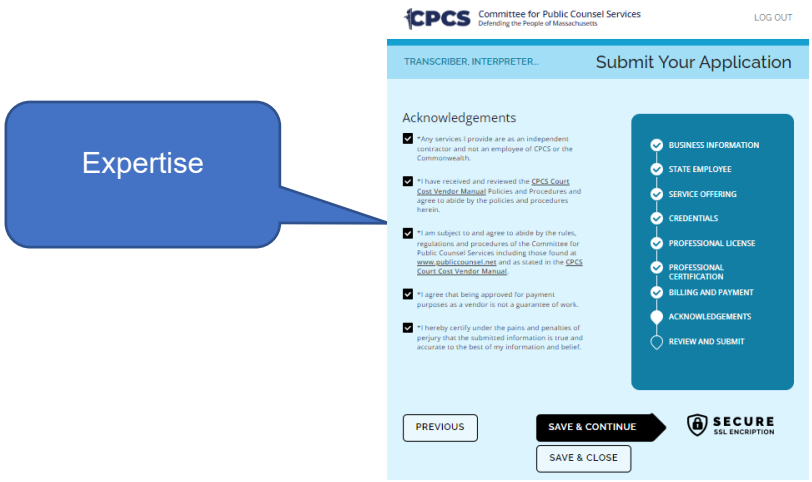
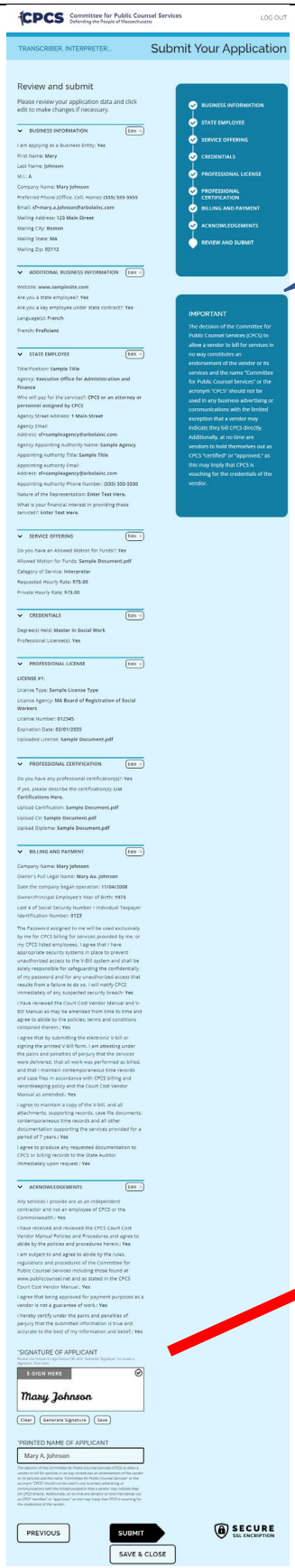


Expertise

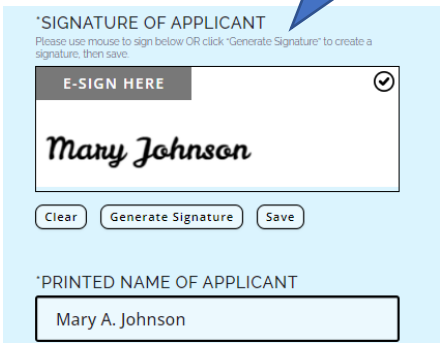

Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
Billing and Payment
Owner/Principal Employee Form
In order to activate your Vbill account, CPCS must, in the first instance, enter the owner or principal employee's information. Once entered, you may sign into Vbill and select the Vbill Manage Employees page where you can add additional employees/contractors to your Vbill account.
*COMPANY NAME / VENDOR NAME
Mary Johnson
*OWNER'S FULL LEGAL NAME
Mary Aa. Johnson
*DATE THE COMPANY BEGAN OPERATION
11/04/2008
*OWNER/PRINCIPAL EMPLOYEE'S YEAR OF BIRTH
1973
*OWNER/PRINCIPAL EMPLOYEE'S LAST 4 OF SOCIAL SECURITY NUMBER
0123
In consideration of the grant of access to the Committee for Public Counsel Services (CPCS) Vbill System, through my individual password, I am applying for and agree to abide by the terms and conditions of this agreement, as set forth below and as may be amended from time to time by CPCS:
*The Password assigned to me will be used exclusively by me for CPCS billing for services provided by me, or my CPCS listed employees. I agree that I have appropriate security systems in place to prevent unauthorized access to the V-Bill system and shall be solely responsible for safeguarding the confidentiality of my password and for any unauthorized access that results from a failure to do so. I will notify CPCS immediately of any suspected security breach.
*I have reviewed the Court Cost Vendor Manual and V-Bill Manual as may be amended from time to time and agree to abide by the policies, terms and conditions contained therein.
*I agree that by submitting the electronic V-bill or signing the printed V-bill form, I am assessing under the pains and penalties of perjury that the services were delivered, that all work was performed as billed, and that I maintain contemporaneous time records and case files in accordance with CPCS billing and recordkeeping policy and the Court Cost Vendor Manual as amended.
*I agree to maintain a copy of the V-bill, and all attachments, supporting records, case file documents, contemporaneous time records and all other documentation supporting the services provided for a period of 7 years.
*I agree to produce any requested documentation to CPCS or billing records to the State Auditor immediately upon request.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT


Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRANSCRIBER, INTERPRETER...
Submit Your Application
Acknowledgements
*Any services I provide are as an independent contractor and not an employee of CPCS or the Commonwealth.
*I have received and reviewed the CPCS Court Cost Vendor Manual Policies and Procedures and agree to abide by the policies and procedures herein.
*I am subject to and agree to abide by the rules, regulations and procedures of the Committee for Public Counsel Services including those found at www.publiccounsel.net and as stated in the CPCS Court Cost Vendor Manual.
*I agree that being approved for payment purposes as a vendor is not a guarantee of work.
*I hereby certify under the pains and penalties of perjury that the submitted information is true and accurate to the best of my information and belief.
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE SSL ENCRIPTION
BUSINESS INFORMATION
STATE EMPLOYEE
SERVICE OFFERING
CREDENTIALS
PROFESSIONAL LICENSE
PROFESSIONAL CERTIFICATION
BILLING AND PAYMENT
ACKNOWLEDGEMENTS
REVIEW AND SUBMIT

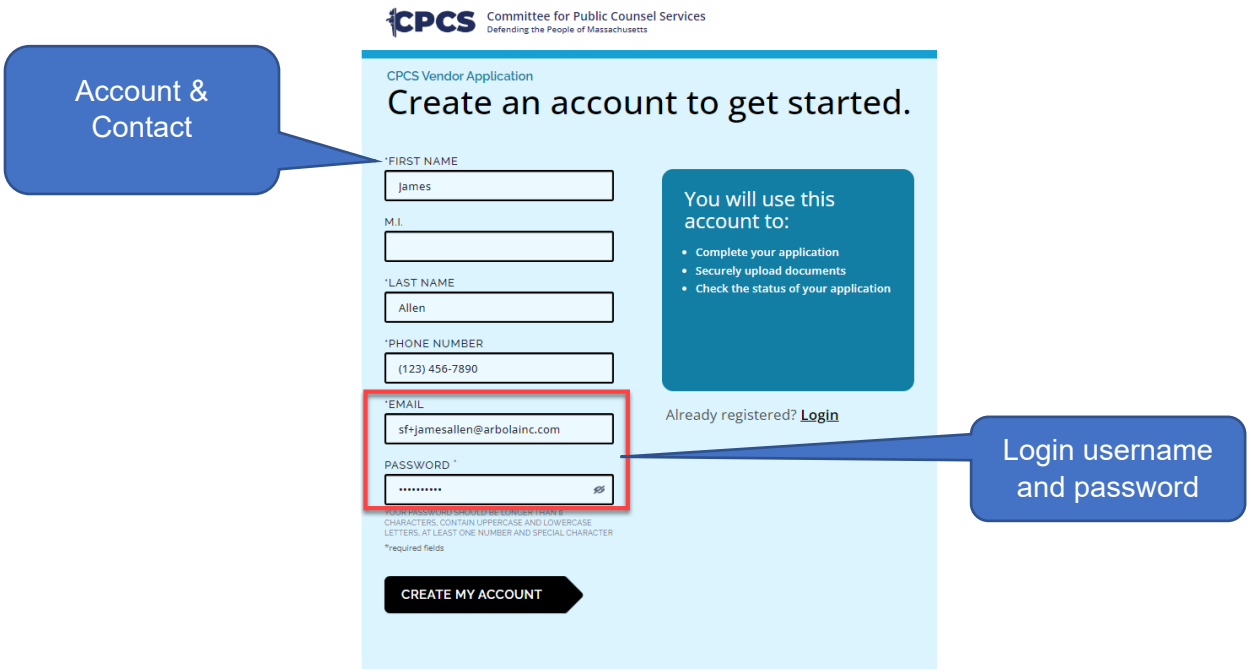


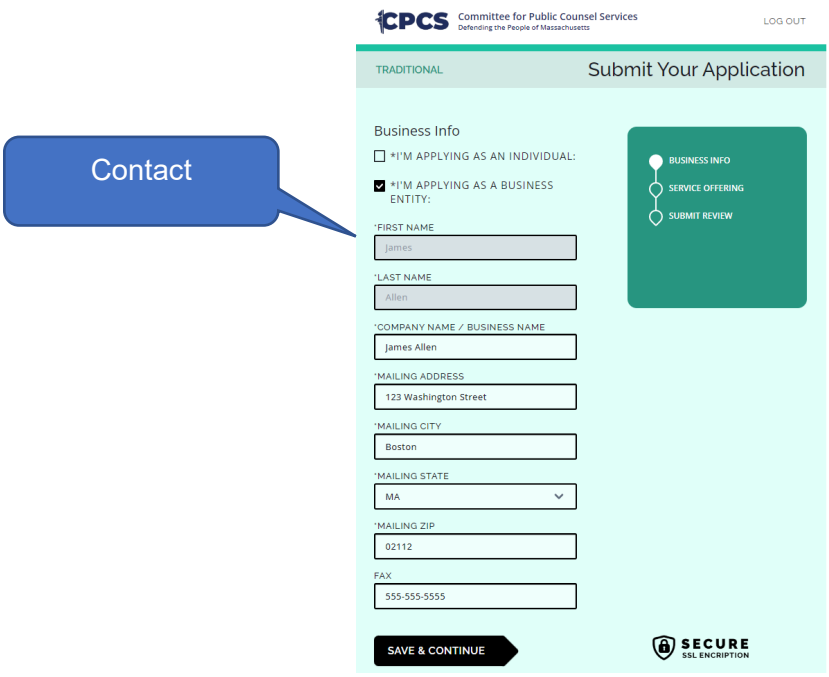
Attached Files
Application-Form
.PDF

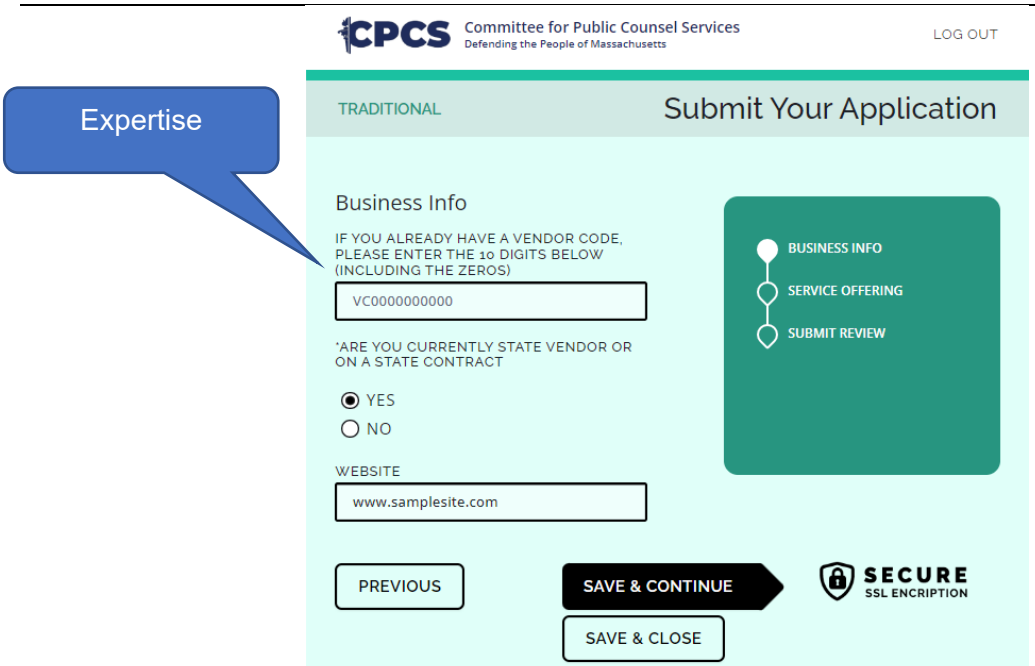
Attached Files
Signature- Review
.PDF

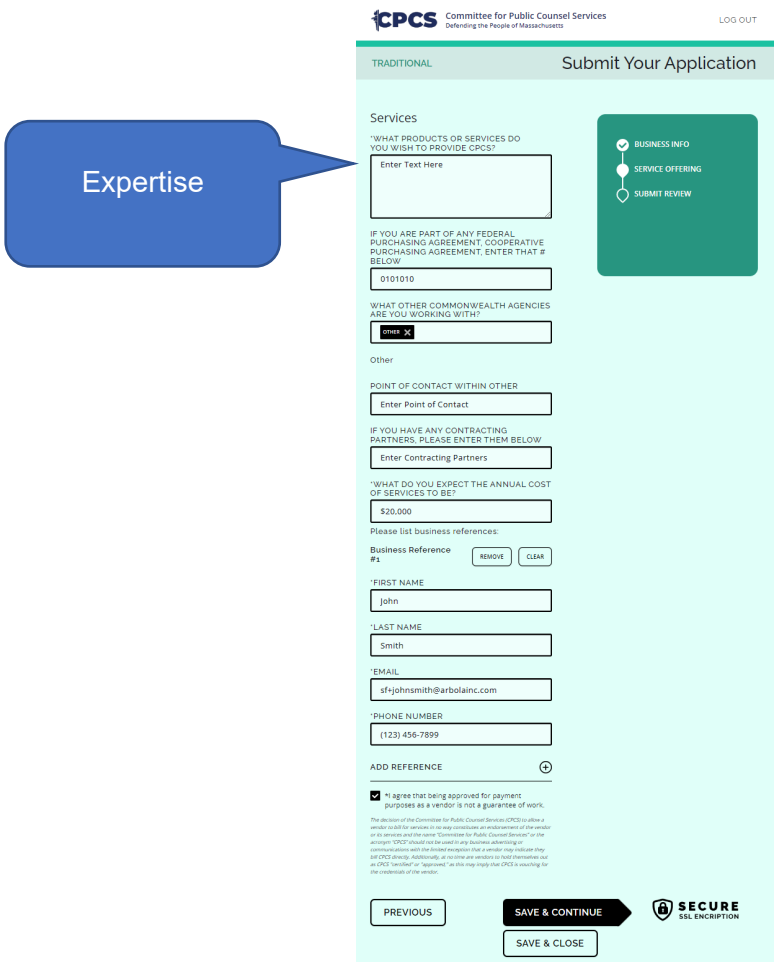


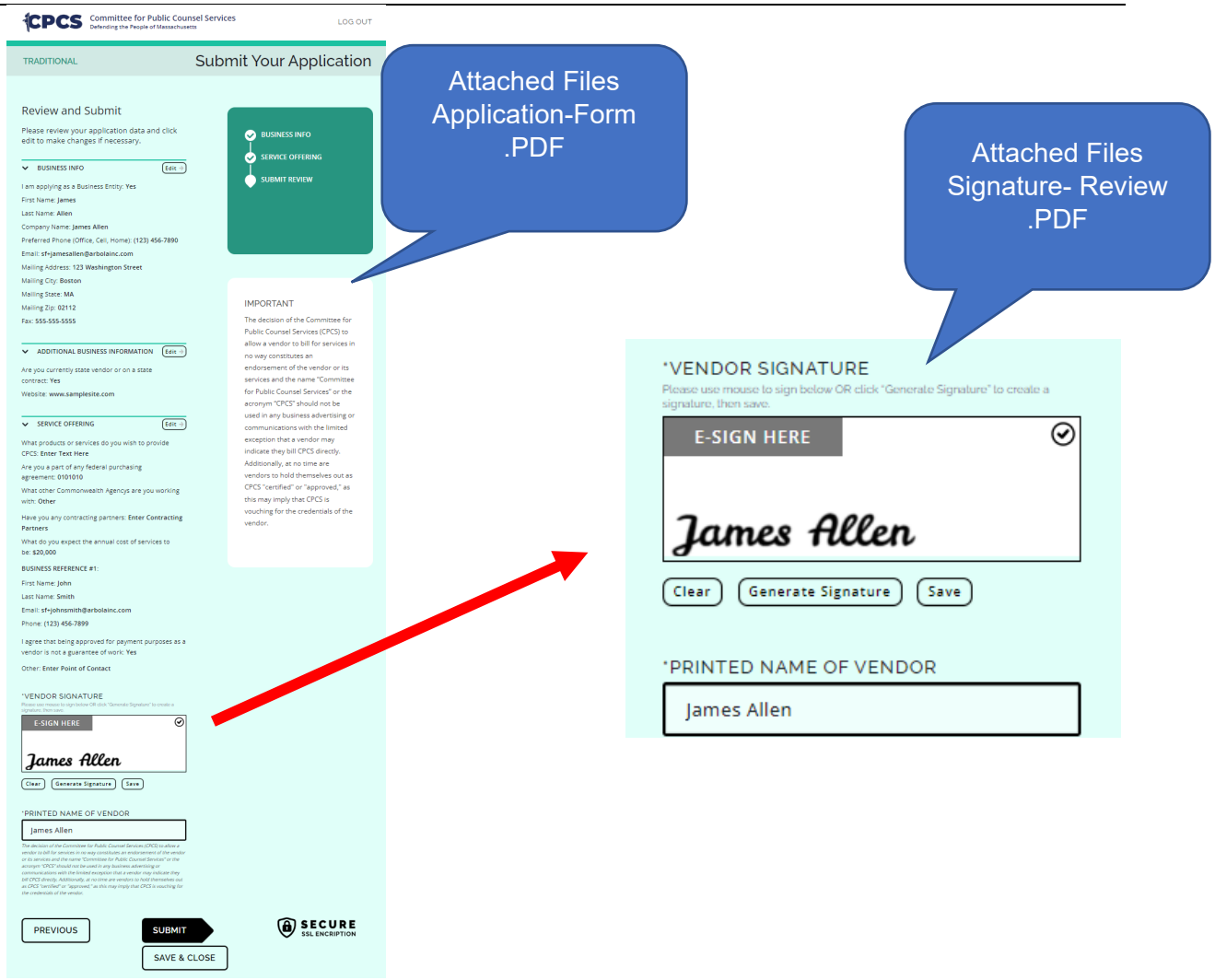
Agency Direct Service Vendor






Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRADITIONAL
Submit Your Application
Business Info
IF YOU ALREADY HAVE A VENDOR CODE, PLEASE ENTER THE 10 DIGITS BELOW (INCLUDING THE ZEROS)
VC0000000000
*ARE YOU CURRENTLY STATE VENDOR OR ON A STATE CONTRACT
YES
NO
WEBSITE
www.samplesite.com
BUSINESS INFO
SERVICE OFFERING
SUBMIT REVIEW
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION


Expertise
CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRADITIONAL
Submit Your Application
Services
*WHAT PRODUCTS OR SERVICES DO YOU WISH TO PROVIDE CPCS?
Enter Text Here
IF YOU ARE PART OF ANY FEDERAL PURCHASING AGREEMENT, COOPERATIVE PURCHASING AGREEMENT, ENTER THAT # BELOW
0101010
WHAT OTHER COMMONWEALTH AGENCIES ARE YOU WORKING WITH?
OTHER
Other
POINT OF CONTACT WITHIN OTHER
Enter Point of Contact
IF YOU HAVE ANY CONTRACTING PARTNERS, PLEASE ENTER THEM BELOW
Enter Contracting Partners
*WHAT DO YOU EXPECT THE ANNUAL COST OF SERVICES TO BE?
$20,000
Please list business references:
Business Reference #1
REMOVE
CLEAR
*FIRST NAME
John
*LAST NAME
Smith
*EMAIL
sf+johnsmith@arbolainc.com
*PHONE NUMBER
(123) 456-7899
ADD REFERENCE
*I agree that being approved for payment purposes as a vendor is not a guarantee of work.
BUSINESS INFO
SERVICE OFFERING
SUBMIT REVIEW
PREVIOUS
SAVE & CONTINUE
SAVE & CLOSE
SECURE
SSL ENCRIPTION


CPCS Committee for Public Counsel Services
Defending the People of Massachusetts
LOG OUT
TRADITIONAL
Submit Your Application
Review and Submit
Please review your application data and click edit to make changes if necessary.
BUSINESS INFO
SERVICE OFFERING
SUBMIT REVIEW
IMPORTANT
Attached Files Application-Form .PDF
Attached Files Signature- Review .PDF
*VENDOR SIGNATURE
E-SIGN HERE
James Allen
Clear
Generate Signature
Save
*PRINTED NAME OF VENDOR
James Allen
PREVIOUS
SUBMIT
SAVE & CLOSE
SECURE SSL ENCRIPTION

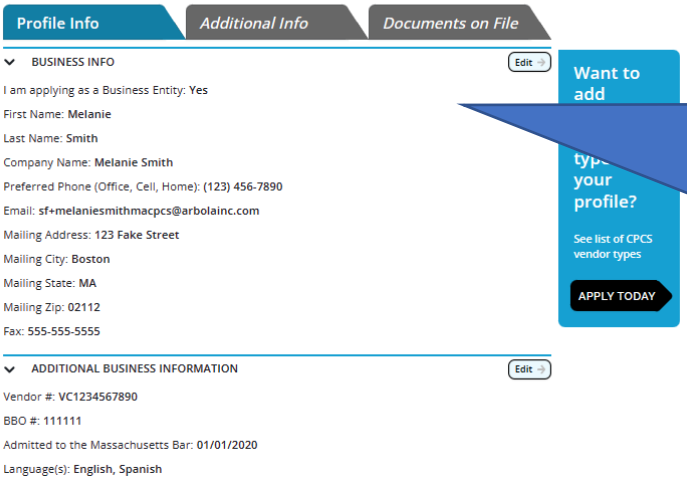
Portal Dashboard

Notifications

FAQ

CPCS Vendor Handbooks

Portal My Profile



Users can edit fields on the portal.

Fields that can't be edited will be grey out and need to be submitted to MA CPCS