Logging in to CBMS Salesforce

CBMS | Process Manual | Revised: July 2024 v12

OVERVIEW

This document provides a step-by-step process for how to log in to the different CBMS Salesforce environments. Chrome icons for Production, TRN and UPA were unable to be created on the CDHS Portal, so instead you will need to bookmark the URL Links for each environment. CBMS Salesforce will only work in Google Chrome, not in IE or Firefox.

PROCESS

Logging in to Salesforce

1. Open a Google Chrome browser.

2. Enter the appropriate URL in the search bar.

    a. Production (PRD) — https://cees.my.salesforce.com/

        i. This environment is live production. Anything you enter in this environment should be actual cases and eligibility will be determined on actual customers.

    b. Training (TRN) — https://cees--trn.sandbox.my.salesforce.com/

        i. You must select the 'Log in with PingFederate-TRN' button first before logging in.

        ii. This environment is used as a training tool. A user can enter cases in this environment to practice data entry. Eligibility Sites with Certified Trainers have specific username and passwords for this environment.

    c. User Practice Area (UPA) — The link for UPA changes every few months as it is refreshed with build updates. You can find the most current link to this environment in the Quick Links section on the homepage of CBMS or through CBMS Communications.

        i. You must select the 'PingFederate-UPA' button first before logging in.

        ii. This environment is used as a practice area. A user can enter cases in this environment to practice data entry. County Security Administrators can allow access to this environment. MA sites will not have access to the UPA environment until they have completed the assessments.

3. Log in using your assigned CBMS Username and Password

Note: Users are encouraged to bookmark the URLs for each environment. Follow the process on the following page for how to bookmark.

Process to Bookmark the URL

1. Open a **Google Chrome** browser

2. From the three dots in the top right corner, select **Bookmarks**

3. Select **Bookmark Manager** (or Ctrl+Shift+O)

4. From the three dots on the blue bar, select **Add new bookmark**

5. Type the **Name** of the Bookmark as you want it to show (CBMS UPA, CBMS TRN, etc.)

6. Type the hyperlink in the **URL** field

7. Select **Save**

8. Repeat these steps for each URL you want to bookmark

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.