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October 2023

MART Brokerage Application Instructions

User Guide for Contract

Prepared For:

Montachusett Regional Transit Authority

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COMPLETING YOUR AWARDED CONTRACT

1. When your contract is ready for you to complete, you will receive the following notification:

FY2023 MART Brokerage Contract Link External Inbox x  

 **autocene.mart@gmail.com** 10:54 PM (3 minutes ago)   
to me, autocene.mart

RE: JS Transport, Inc., JSTR

Below is a link to your contract document for FY2023. Complete all sections, sign all signature pages, and submit it through MART VMS.

[Click here to view your contract in MART VMS](#)

Please be advised that by signing this contract, you are agreeing to ALL terms therein, as they appear. Altering the contents of any portion of this contract may void it.

If you find anything within the contract or attachments that you do not agree to or need clarification on, do not sign the contract. Please contact us at Compliance@mrta.us so we can discuss it and provide any clarification that you may need before you submit your contract.

The contract and all attachments are to be submitted on VMS no later than October 31, 2023.

*Please note, there are two pages that require a notary. You must mail the original notarized hard copies of these two pages to MART within 14 days of your contract submission. Your submission must include the following:

1. Certificate of Good Standing from MA Department of Revenue (DOR)
2. Certificate of Good Standing/Legal existence from the Secretary of State (SOC)
3. W9
4. Direct Deposit Authorization Agreement (Notary Required)
5. Voided check* for your business checking account (your business name must be printed on the check)
6. Direct Deposit Electronic Notification Form
7. Commercial Auto Liability Insurance Certificate
8. Workers Comp Insurance Certificate
9. MART FY2023 Contract

Thank you,
Compliance Department
MART Brokerage

2. Click the **link** in the email. You will then be directed to the **Contract Status** page:



MART HUMAN SERVICE TRANSPORTATION (HST)

JS Transport, Inc. CURRENT CONTRACT STATUS						
Contract Overview						
Code	FY	Contract Type	Contract Due Date	Contract Endorse Date	Contract Effective Date	Contract End Date
JSTR	2023	DMA	10/31/2023		11/01/2023	06/30/2024
Status Summary						
Current Contract Status:	Contract sent to Vendor for completion					
Next Action:	Fill out Contract					
Action Link	https://mart-dev.formverse5.com/AUTOCENESERVER_MART/WebApp/RenderForm.aspx?workflowid=404F4FB4-DFC3-487D-B47D-05B5B21C40D6...					
Last Updated:	10/8/2023 4:53:51					

3. On this page, click the **Action Link** to go to your contract. The Cover Letter of your contract should load:



Bruno J Fisher, Administrator
 Headquarters: 1427R Water Street, Fitchburg, MA 01420
 (978) 345-7711 or 1-800-922-5636

COVER LETTER	October 8, 2023
AGREEMENT	
ATTACHMENT A	John Smith, CEO
ATTACHMENT B	JS Transport, Inc.
ATTACHMENT C	888 Smith Road
ATTACHMENT D	Boston, MA 88888-8888
ATTACHMENT E	Dear John Smith:
ATTACHMENT F	This document is your contract agreement with Montachusett Regional Transit Authority (MART). Please review and complete all sections. The CEO/Owner or Authorized Signatory Representative must sign all signature pages. Once complete, please submit your contract package through the VMS platform. Please be advised that by signing this contract you are agreeing to ALL terms therein, as they appear. Altering the contents of any portion of this contract may void it.
ATTACHMENT G	
ATTACHMENT H	
ATTACHMENT I	

4. Read each section carefully. Use the **“Next”** and **“Back”** buttons, and the **Navigation side bar** to go to the different sections of your contract.
5. Fill out each section accordingly.

SECTION SPECIFIC NOTES:

Attachment A

- i. Fill out the digital version of Attachment A first. Notice that the following fields are prepopulated based on your company profile:
 - For Profit/Non-profit
 - Full legal name of Organization
 - Business Address
 - Mailing Address
 - Telephone Number
 - Fax Number (if applicable)
 - Email address
 - Legal Status of Organization
 - SDO Certification status
- ii. When complete, click the **“Attachment A printable Version”**. You will be redirected to a page where it shows instructions on how to print the populated Attachment A. Print it, sign it, and get it notarized.

Note: Use the **Save as Draft** functionality to save your work before leaving the platform to get the attachment notarized.

Attachment C – Employee Log

- i. The list of employees that is shown in Attachment C is from your application. Fill out the rest of the Employee information that was not entered in the application phase.

Note: When filling out the fields, let the system recognize your changes before moving on to the next field. Wait until your text entry becomes highlighted before moving to the next field.

- ii. To **add** an employee to the list, use the **“+ Add an employee”** button at the bottom of the Employee Log. A new row of the Employee log should show.

Employee Type (Check all that apply):	Service Types (Check all that apply):
<input type="checkbox"/> Driver <input type="checkbox"/> Monitor <input type="checkbox"/> Admin	<input type="checkbox"/> Demand Response <input type="checkbox"/> ECCS <input type="checkbox"/> DDS/DH (DayHab) <input type="checkbox"/> DMH <input type="checkbox"/> DPH/EIP <input type="checkbox"/> MRC/MCB

+ Add an Employee

- iii. To **remove** an employee from the list, click the corresponding remove button for the employee row that you would like to remove:

Employee Details:				Remove
Status	Last Name	First Name	DOB	
Select... ▼	Banner	Steve	9/1/2023	

Attachment D – Vehicle Log

- i. The list of vehicles that are shown in Attachment D is from your application. Fill out the rest of the vehicle information that was not entered in the application phase.
- ii. To **add** a vehicle to the list, use the “+ Add a Vehicle” button at the bottom of the Vehicle Log. A new row of the Vehicle log should show.

Service Types (Check all that apply):					
<input type="checkbox"/> Demand Response	<input type="checkbox"/> ECCS	<input type="checkbox"/> DDS/DH (DayHab)	<input type="checkbox"/> DMH	<input type="checkbox"/> DPH/EIP	<input type="checkbox"/> MRC/MCB
+ Add a Vehicle					

- iii. To **remove** a vehicle from the list, click the corresponding remove button for the employee row that you would like to remove:

Vehicle Details:				Remove
Vehicle Type	Vehicle Year	Make	Model	
SUV ▼	2013 ▼	LEXUS ▼	RX400H ▼	

Attachment G and Attachment G1

- i. To view Attachment G, you must click the link on the Attachment G Section

COVER LETTER	
AGREEMENT	
ATTACHMENT A	
ATTACHMENT B	
ATTACHMENT C	
ATTACHMENT D	
ATTACHMENT E	
ATTACHMENT F	
	ATTACHMENT G
	Please review Attachment G by clicking below before continuing to the signature section.
	Click Here to View Attachment G
	**Reminder: If you have any concerns about any part of this contract, please contact MART at compliance@mrta.us for clarification <i>before</i> submitting your signed contract package.

- ii. You will be directed to a page where Attachment G is shown in separate sections. Use the Navigation Side Bar to navigate through Attachment G.

	
Bruno J Fisher, Administrator Headquarters: 1427R Water Street, Fitchburg, MA 01420 (978) 345-7711 or 1-800-922-5636	
TABLE OF CONTENTS	**Reminder: If you have any concerns about any part of this contract, please contact MART at compliance@mrta.us for clarification <i>before</i> submitting your signed contract package.
SECTION 1	
SECTION 2	
SECTION 3	
SECTION 4	ATTACHMENT G
SECTION 5	TRANSPORTATION PROVIDER PERFORMANCE STANDARDS
SECTION 6	Revised July 1, 2022
SECTION 7	TABLE OF CONTENTS
SECTION 8	Section 1. INTRODUCTION

- iii. Once you are done reviewing, providing the necessary information, and signing Attachment G, go back to the main contract page by clicking **“GO BACK TO CONTRACT”** button located in the navigation buttons or bottom right of the page to continue.

SIGNATURE

GO BACK TO CONTRACT

I acknowledge that I have received the aforementioned documents and understand that they are incorporated as part of my contract with MART for the provision of transportation services.

I hereby certify to abide by all the conditions, requirements and responsibilities contained in the aforementioned documents.

Signed under the pains and penalties of perjury on this date:

John Smith

Signature of Chief Executive Officer/Owner or Designated Representative

John Smith

Printed Name of Chief Executive Officer/Owner or Designated Representative

CEO

Printed Title

Please indicate below your company's designated Privacy and Security Officer(s), who will be responsible for compliance with VIII Data Privacy and Security

Jay Smithson	Analyst
Printed Name Acting Data Privacy and Security Officer #1 <i>(*Required)</i>	Title of Acting Data Privacy and Security Officer #1 <i>(*Required)</i>
Joe Smithson	Manager
Printed Name of Acting Data Privacy and Security Officer #2	Title of Acting Data Privacy and Security Officer #2
Jim Smithson	Director
Printed Name of Acting Compliance Officer <i>(*Required)</i>	Title of Acting Compliance Officer <i>(*Required)</i>

Montachusett Regional Transit Authority and JS Transport, Inc.
MART Brokerage Transportation Provider Contract
 Effective November 1, 2023

Attachment J

- i. The following fields will be prepopulated based on your application or company profile:
 - Contact for individual completing the form – Name and Email
 - Section1 – Disclosing Entity SL/DBA Name, Address, City, State, & Zip Code
- ii. Information and help text are available in each section. Click the “i” button on a section to view the help text for each section:

SECTION 2: Ownership or Control Interest in Disclosing Entity

List any individual or corporation with an ownership or control interest in the disclosing entity. Instructions for determining ownership or control percentages can be found at 42 CFR § 455.102 and 130 CMR 450.221(B).

Individuals must provide their home address. Corporations must list, as applicable, their primary business address, all business locations, corporate addresses, and P.O. Box addresses.

If your business is **not** incorporated, you **MUST** include the name(s) of the business' individual owner(s) as well as their home address, DOB, and 9-digit SSN.



Documents

- i. The following will be prepopulated with the files that you uploaded in your application:
 - Certificate of Good Standing from the MA Department of Revenue (DOR)
 - Certificate of Good Standing from the MA Secretary of the Commonwealth (SOC)
 - W9
- ii. If you would like to replace the uploaded file, click the **Replace** button.



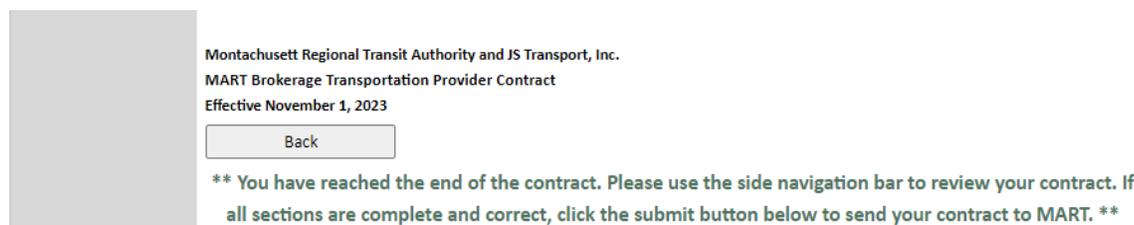
Note: Use the “**Click here to attach a file**” button to upload the new file. Click “**Back**” if you decide to just keep what was previously uploaded.



- iii. To fill out the Direct Deposit Authorization Agreement, fill out the digital version first. Then, click the “**Direct Deposit Authorization Agreement Printable Version**” button. You will be redirected to a page that shows instructions on how to print the populated Direct Deposit Authorization Agreement. Print it, sign it, and get it notarized.

Note: Use the **Save as Draft** functionality to save your work before leaving the platform to get the attachment notarized.

6. The last section of the contract is the Documents Section. At the end of this section, you will see the following:



7. When your contract is correct and complete, click **Submit**. Your contract will be sent to MART for review. Shortly after your submission, you should receive a notification about your successful submission.

MART VMS - Contract Submission Confirmation External Inbox x



autocene.mart@gmail.com

to me ▾

This is to confirm that you have successfully submitted your MART FY2023 Contract on MART VMS.

[Click here to check the status of your contract.](#)

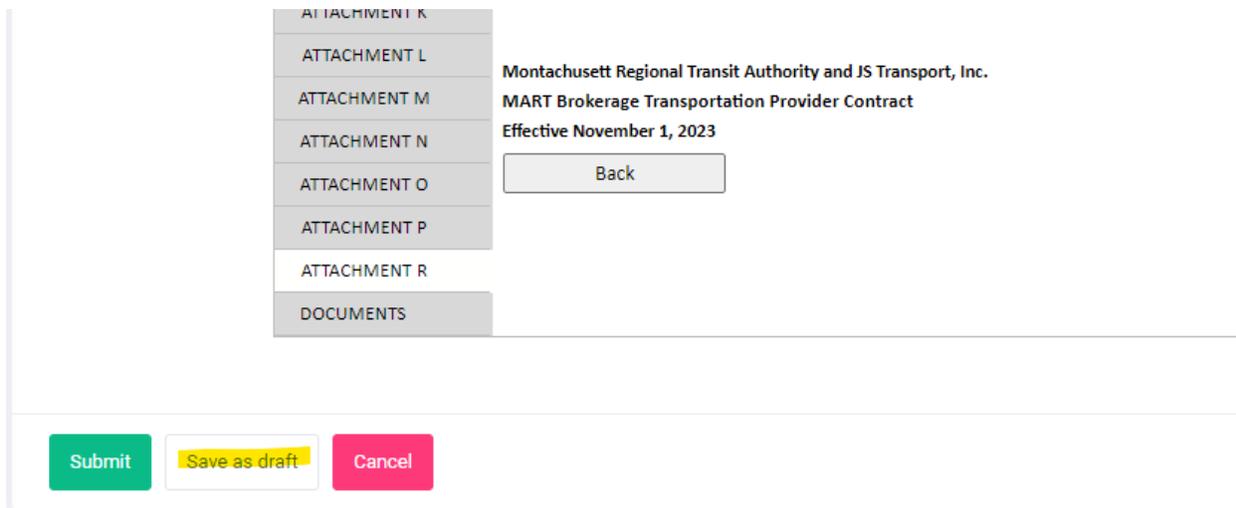
Thank you,
Compliance Department
MART Brokerage



Montachusett Regional Transit Authority
100 Main Street, Fitchburg, MA 01420
Compliance@mrta.us
hstrides.mrta.us

SAVE AS DRAFT

- You can save your progress at any time by clicking the **Save as draft** button.



- The next time you log in, you should see the **View Contract Status** button on your home page.

Contracting

MART has sent the contract to you on 10/08/2023 for completion. Click below to view your contract.



- Click the button to get redirected to the **Contract Status Details**. Click the **Action Link** to go to your draft.



MART HUMAN SERVICE TRANSPORTATION (HST)

JS Transport, Inc. CURRENT CONTRACT STATUS						
Contract Overview						
Code	FY	Contract Type	Contract Due Date	Contract Endorse Date	Contract Effective Date	Contract End Date
JSTR	2023	DMA	10/31/2023		11/01/2023	06/30/2024
Status Summary						
Current Contract Status:	Contract sent to Vendor for completion					
Next Action:	Continue Filling out your Contract					
Action Link	https://mart-dev.formverse5.com/AUTOCENESERVER_MART/WebApp/RenderForm.aspx?draftId=1A683C77-4977-4719-9C28-A050DDB71A36&te...					
Last Updated:	10/8/2023 5:27:42					

MAKING CORRECTIONS ON YOUR CONTRACT

1. If MART found areas in your contract that need corrections, they will send it back to you for corrections. You should receive the following notification:

MART VMS - MART FY2023 Contract Returned for Corrections 🖨️ 📧

External ▶ Inbox x



autocene.mart@gmail.com
to me, autocene.mart ▼

RE: JS Transport, Inc., JSTR

4:52 PM (1 minute ago) ☆ ↶ ⋮

Your MART FY2023 Contract has been reviewed and it was determined that it requires corrections.

[Please click here to view your contract and make corrections to it in MART VMS](#)

If you find anything within the contract or attachments that you do not agree to or need clarification on, do not sign the contract. Please contact us at Compliance@mrta.us so we can discuss it and provide any clarification that you may need.

Thank you,
Compliance Department
MART Brokerage



Montachusett Regional Transit Authority
100 Main Street, Fitchburg, MA 01420
Compliance@mrta.us
hstrides.mrta.us

2. Click the link on the email. This will direct you to the **Contract Status** page. On this page, click the **Action Link** to open your contract to make corrections.

Status Summary	
Current Contract Status:	Contract Reviewed and sent back to Vendor for Corrections.
Next Action:	Update Contract
Action Link	https://mart-dev.formverse5.com/AUOCENESERVER_MART/WebApp/Actions.aspx?workflowId=404F4FB4-DFC3-487D-B47D-05B5B21C40D8&sta...
Last Updated:	10/8/2023 22:50:31

- Your contract will then load with some buttons on the Navigation Side Bar highlighted. These highlighted sections are the sections in your contract that require correction. Click the button to go to the section.

**** ATTENTION: Your contract has been sent back for corrections. The sections that require corrections are highlighted in orange. Use the side navigation bar to go to the sections that need corrections and apply the changes appropriately.**

COVER LETTER	October 8, 2023
AGREEMENT	
ATTACHMENT A	John Smith, CEO
ATTACHMENT B	JS Transport, Inc.
ATTACHMENT B	888 Smith Road
ATTACHMENT C	Boston, MA 88888-8888
ATTACHMENT D	
ATTACHMENT E	Dear John Smith:

- At the bottom of these highlighted sections are notes from MART on what to correct in the current section. Make the necessary corrections to each highlighted section.

Attachment C Corrections:

Steve Banner Driver's license State of Origin missing. Please fill it out.

Montachusett Regional Transit Authority and JS Transport, Inc.
 MART Brokerage Transportation Provider Contract
 Effective November 1, 2023

- Once you are done making the necessary corrections, submit. Shortly after you submit, you should receive a notification about your successful submission.

MART VMS - Contract Corrections Submission Confirmation 🖨️ 📧

External ➤ Inbox x

 autocene.mart@gmail.com 5:06 PM (8 minutes ago) ☆ ↶ ⋮

to me ▾

This is to confirm that you have successfully submitted corrections to your MART FY2023 Contract on MART VMS.

[Click here to check the status of your contract.](#)

Thank you,
 Compliance Department
 MART Brokerage

 Montachusett Regional Transit Authority
 100 Main Street, Fitchburg, MA 01420
Compliance@mrta.us
hstrides.mrta.us

CHECKING THE STATUS OF YOUR CONTRACT

- You can track the status and view your submission through the **Contract Status** page. To go to this page, click the **“View Contract Status”** on your home page.

Contracting

You have submitted your contract on 10/08/2023 and it is currently under MART review. Click below to view your contract.



- You will then see the Contract Status details. On this page, you will see the following:

Contract Overview Information



MART HUMAN SERVICE TRANSPORTATION (HST)

JS Transport, Inc. CURRENT CONTRACT STATUS						
Contract Overview						
Code	FY	Contract Type	Contract Due Date	Contract Endorse Date	Contract Effective Date	Contract End Date
JSTR	2023	DMA	10/31/2023		11/01/2023	06/30/2024

Contract Status Summary

- In this section, you can see what state your contract is in. The different states are:
 - Pending for you to complete or correct
 - Review in Progress
 - Contract Rescinded or Contract Endorsed

Status Summary	
Current Contract Status:	Vendor Submitted Contract
Next Action:	MART to Review Contract Submission
Action Link	N/A
Last Updated:	10/8/2023 22:21:26

Contract Preview

- If you would like to view and/or print your contract, click the “**Check Out Contract**” button.

Contract Preview:	<input type="button" value="Check Out Contract"/>
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- After clicking this button, you should see a link to view your contract.

Contract Preview:	https://mart-dev.formverse5.com/AUTOCENESERVER_MART/WebApp/RenderForm.aspx?workflowId=DCA13BE1-49A6-4217-B98C-8E69092F10B5...
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- Click the link to view your contract. Your contract in its entirety should show. On top of this page are instructions on how to print your contract.
- This is also the process for printing your endorsed contract.

To print the contract below:

1. Right Click on the page and select "Printable Version"
2. On the printable tab that opens, right click on the page and select "Print..."



Bruno J Fisher, Administrator
Headquarters: 1427R Water Street,
Fitchburg, MA 01420
(978) 345-7711 or 1-800-922-5636

AGREEMENT

This AGREEMENT is made this 1st day of November, 2023 through the period of June 30, 2024, by and between the Montachusett Regional Transit Authority (hereinafter referred to as "MART"), 1427R Water Street, Fitchburg, MA 01420, a body politic and

Uploaded Documents

- Use the download links in this section if you would like to view the documents that you have uploaded along with your Contract.

Uploaded Documents	
Document Type	Download Link
Attachment A	https://mart-dev.formverse5.com/AUTOCENESERV...
Certificate of Good Standing from the MA Department of Revenue (DOR)	https://mart-dev.formverse5.com/AUTOCENESERV...
Certificate of Good Standing from the MA Secretary of the Commonwealth (SOC)	https://mart-dev.formverse5.com/AUTOCENESERV...
W9	https://mart-dev.formverse5.com/AUTOCENESERV...

Status of the physical version of the Notarized documents

- Here you will see the date when MART has received the physical version of the Notarized documents you sent by mail.

Attachment A Hard Copy Status
Date Received: N/A
Direct Deposit Authorized Agreement Hard Copy Status
Date Received: N/A

CONTACT INFORMATION

For any technical questions or issues regarding the MART VMS, please reach out to the following:

USA

2010 Crow Canyon Pl. Suite 100

San Ramon, CA 94566

1.925.264.0045

mart@autocene.com