FORUM FAQ

Welcome to Forum, Colorado Judicial's online marketplace forming the center of Judicial and public business.

This document provides quick answers on the most frequently asked questions about Forum.

CONTENTS

LOGGING ON TO FORUM

All Judicial Vendors will be invited to join Forum via email sent from *noreply@ivalua.com.* Click the link in the email, and use the login credential and one-time password from the email to log in.

NOTE: For the best user experience, use Google Chrome as your browser.

Enter your username and one-time password from the email and click **Submit**.

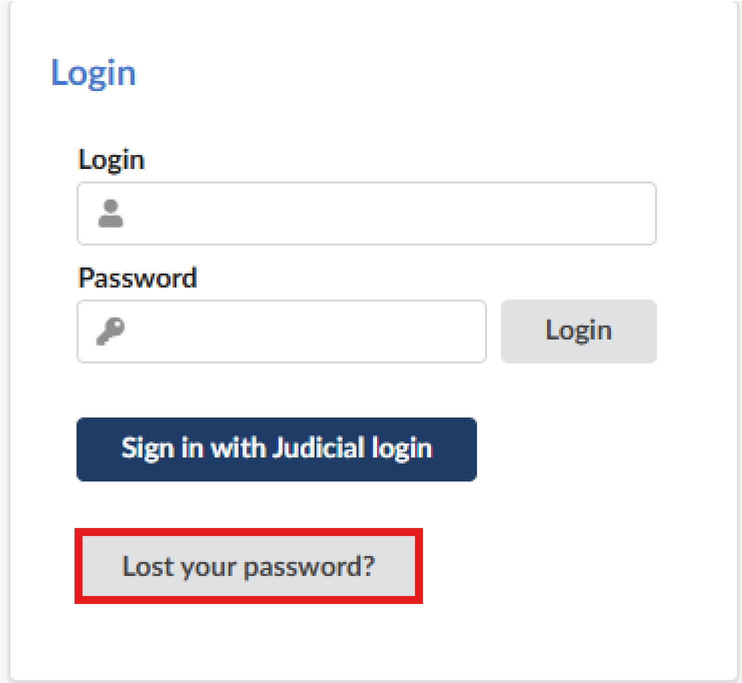
FIRST USE: ACCEPTING TERMS & CONDITIONS

If you are logging on to Forum for the first time, you must review and accept the Terms & Conditions of Use.

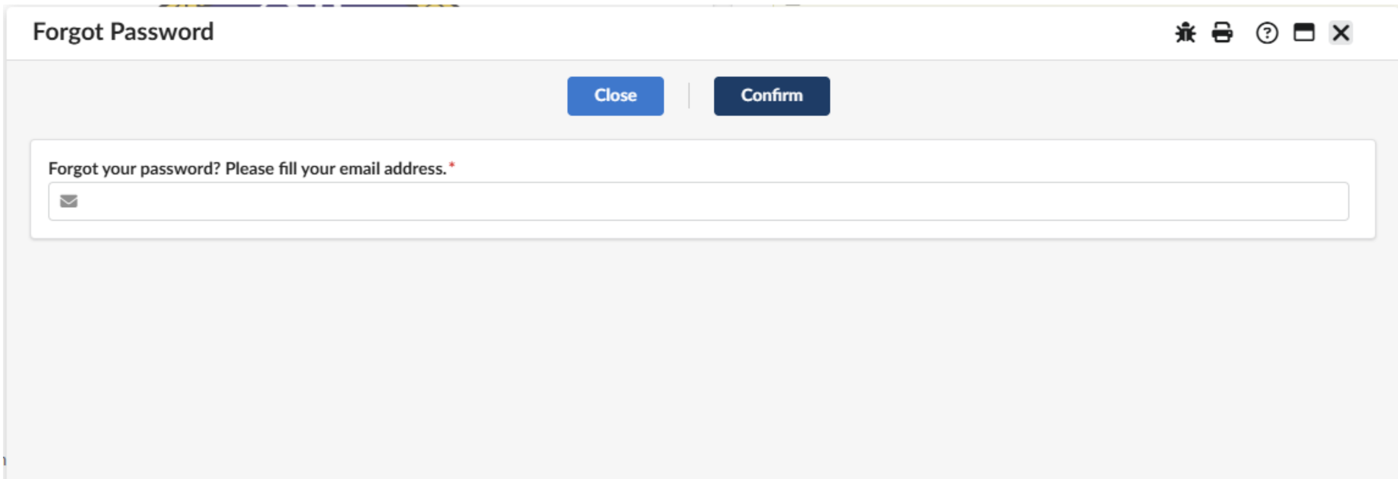
You should review the Terms & Conditions, then select the checkbox **I accept terms and conditions** and click **Validate** to access the system. If you are unable to accept the terms and conditions, please contact the help desk.

FORGOT YOUR PASSWORD?

If you should lose your **login password**, you can request a new temporary password from the *Login* frame.



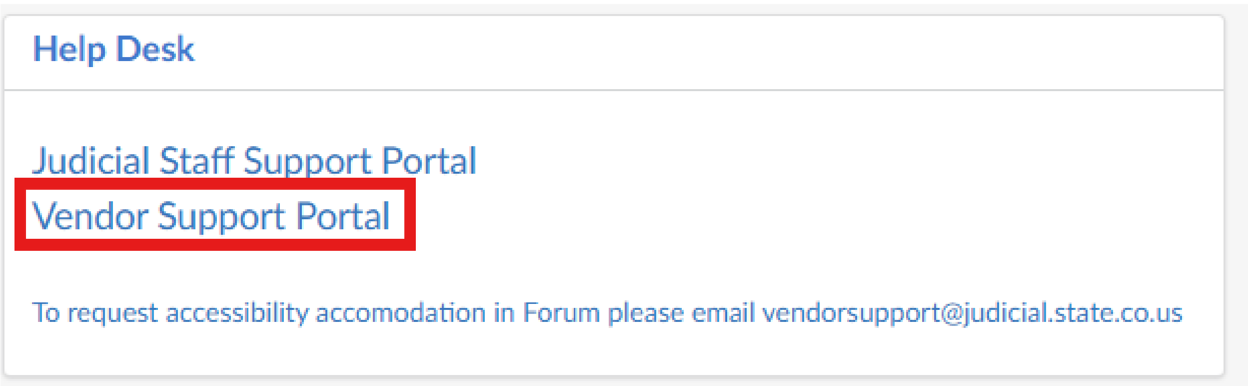
In the window that is displayed, enter your email address.



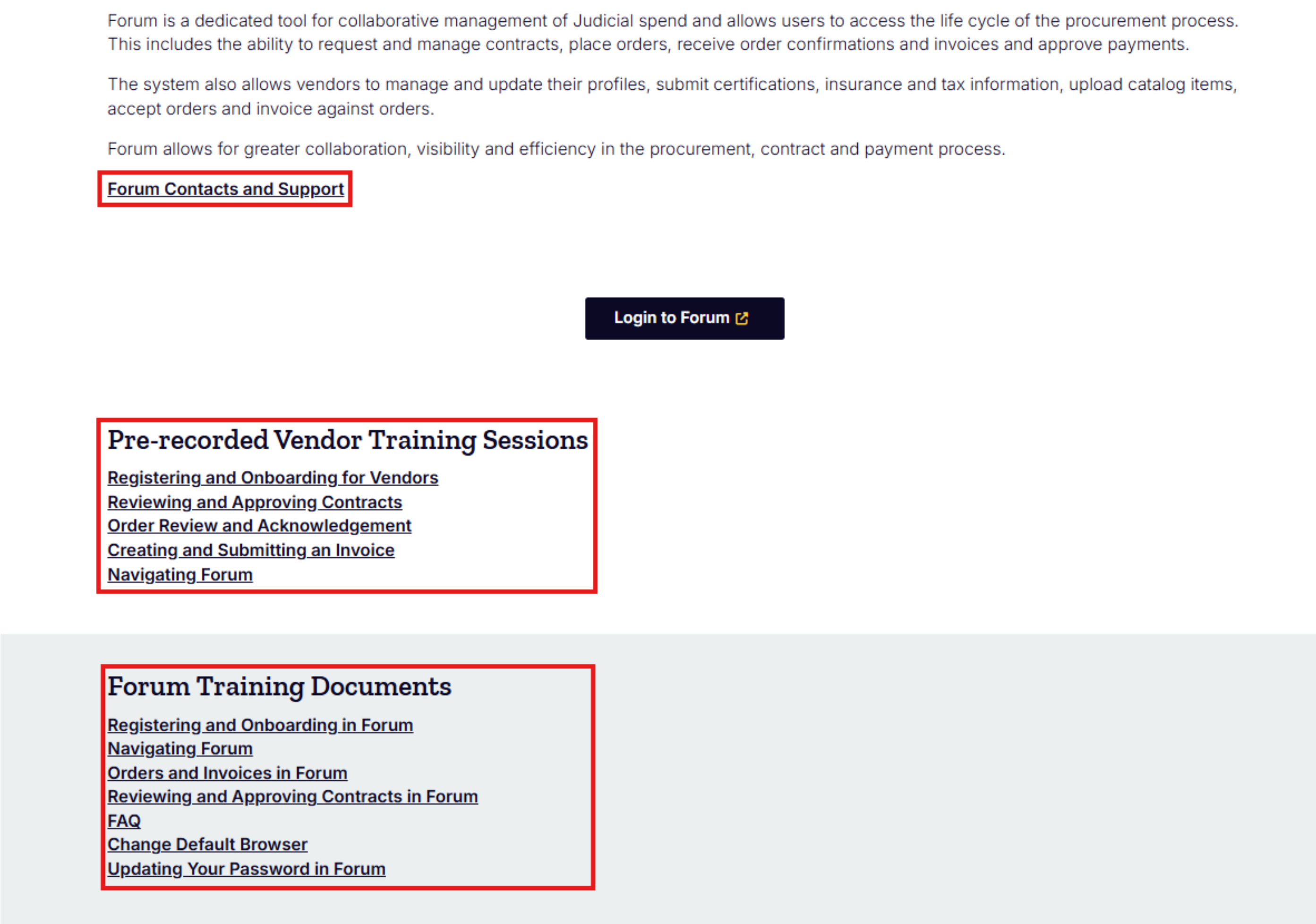
Click the **Confirm** button.

HOW TO RECEIVE HELP

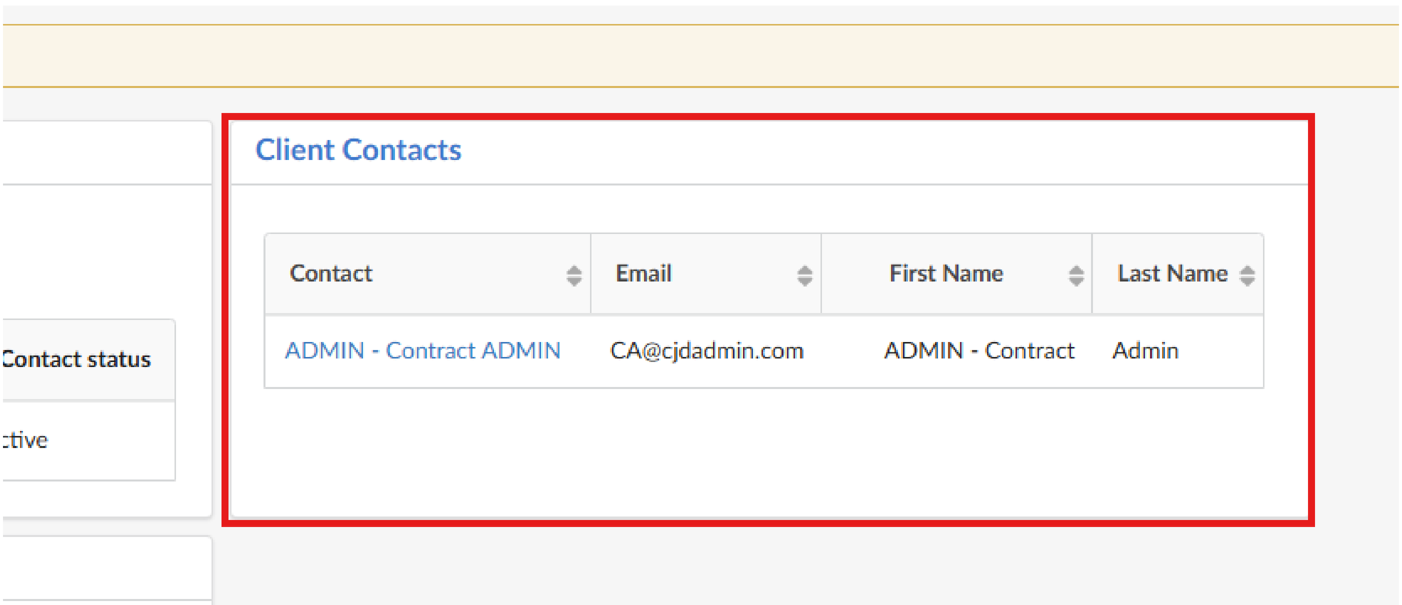
While using Forum you may run into instances where you need help to proceed. Training documents have been created to cover general problems and solutions you may experience. To find the training documents first click Vendors Click Here in the Help Desk section of the login screen.



This will bring you to the Forum page of the Colorado Judicial Branch website. Here you can find prerecorded training videos, training documents, and a link to a document which shows Judicial contracts by district.



Another way to receive help is to reach out to your Judicial contact. To view who your Judicial contact is navigate to the Contacts screen of your company information. Your Judicial contact(s) will be listed under the Client Contacts section.



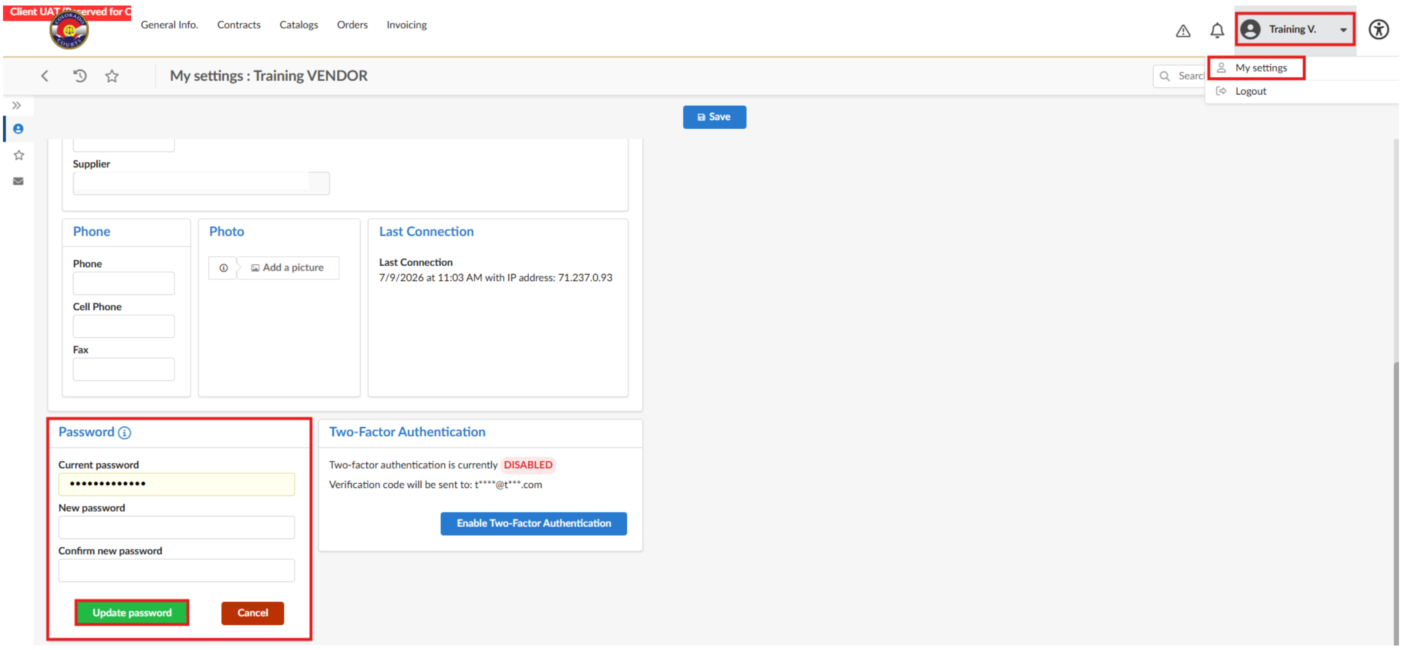
UPDATING YOUR PASSWORD

All users must update their password every 90 days. Users will see an alert after logging in if their password is withing 14 days from expiring. This alert will be present until your password is updated and will provide a link to your settings page to update your password. Your password can be updated after you have logged in or by following the steps in the Forgot your Password? section of this document.

UPDATING YOUR PASSWORD ONCE LOGGED IN

Your password can be updated from your My settings page.

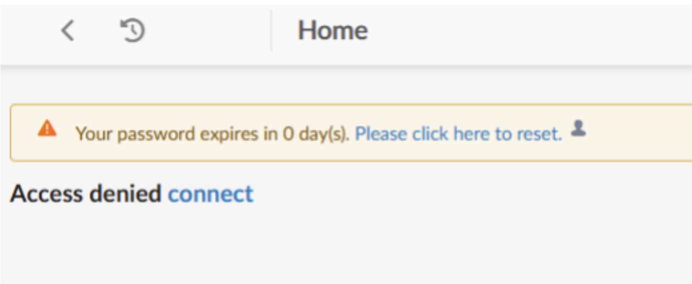
In the upper right corner first click your name, then click My settings. In the password section enter your current password in the current password field and your new password in the new password and confirm new password fields.



The new password must follow the same rules as described in the Updating Your Password From the Login Page section. After you have entered your new password click Update password.

UPDATING AN EXPIRED PASSWORD

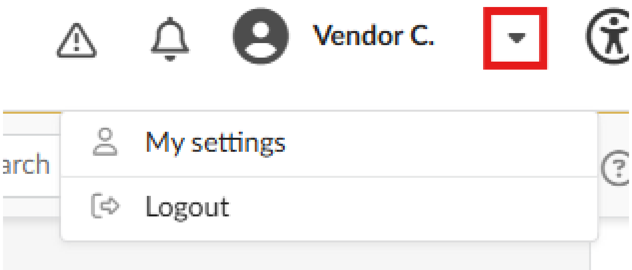
If your password has expired, you will see a message to reset it when you log in.



Click the reset link and enter your new password.

SETTING UP YOUR USER PREFERENCES

To view your user profile and update your preferences, click the *down arrow* to the right of your name in the upper right corner of your screen.

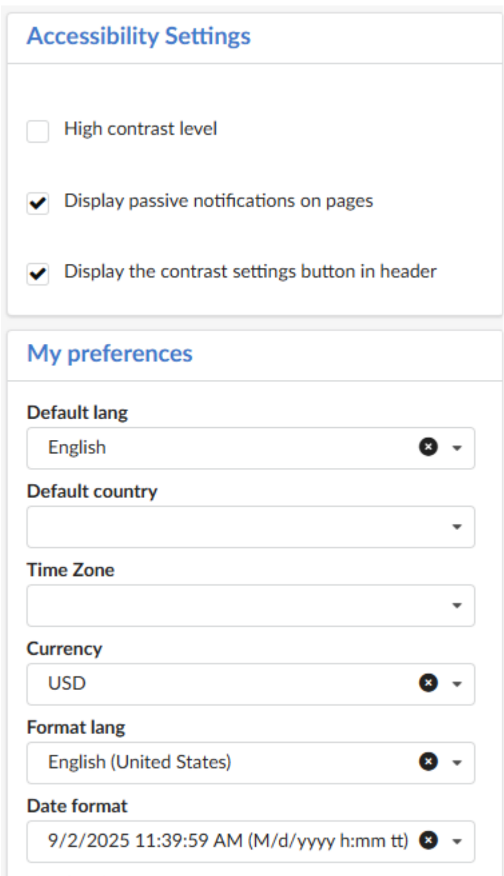


MY SETTINGS

My settings is divided into three pages Profile, General preferences, and Notifications

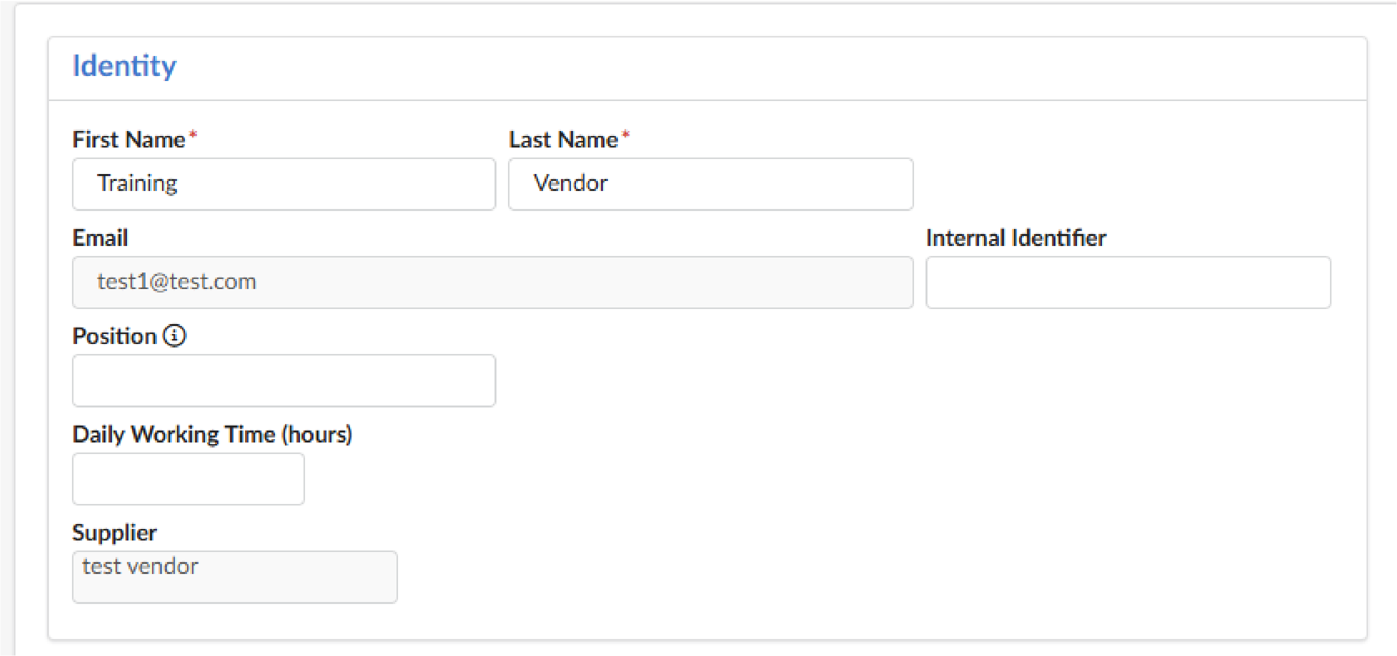
GENERAL PREFERENCES

Use the General preferences section to set your default Time Zone, as well as set any format, accessibility, or language preferences.



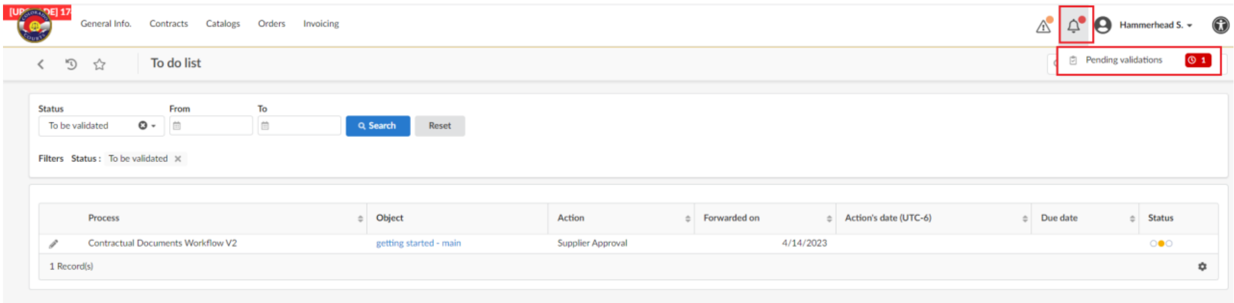
PROFILE

Use the Identity section to add or update your contact information as well as updating your password.



MY PENDING VALIDATIONS

Pending Validations is your “To do list”. Any items requiring action on your part will be displayed here. Click the edit (pencil) icon to the left of the process name to complete the process.

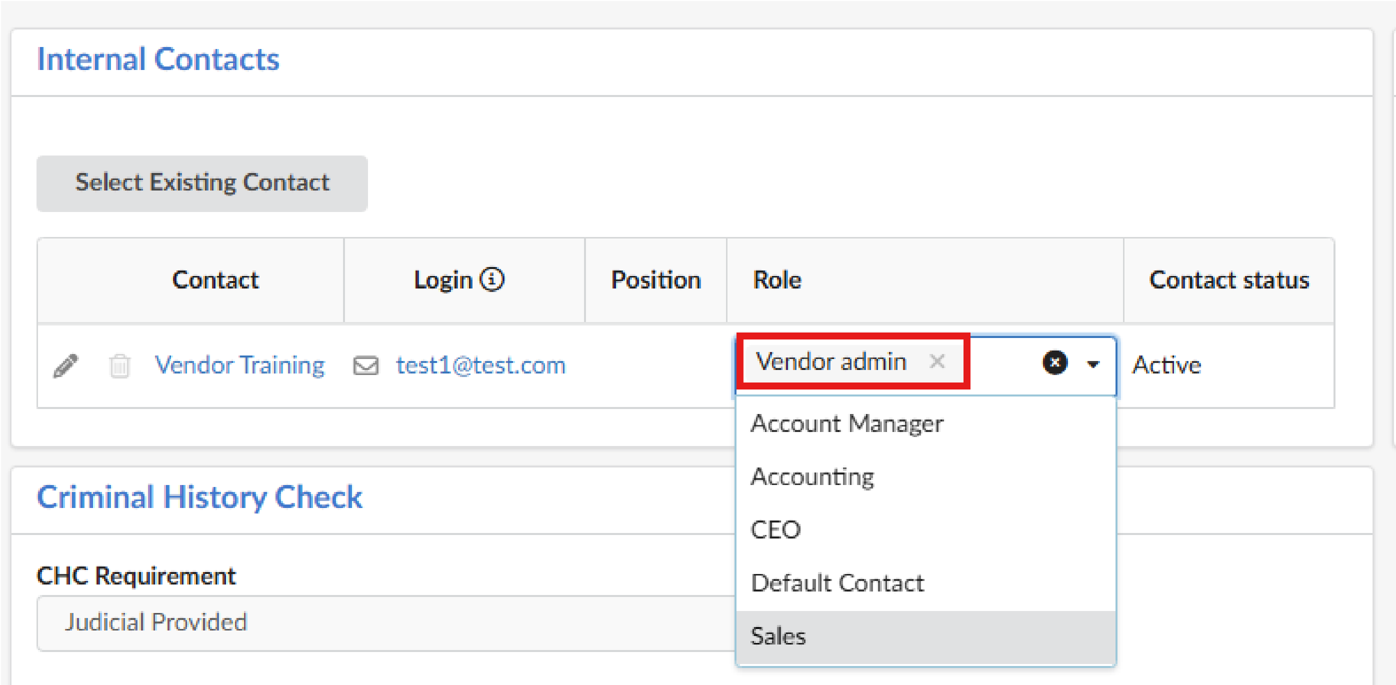


ADDING STAFF AND USERS

From the left-side menu, click the **Contacts** link.

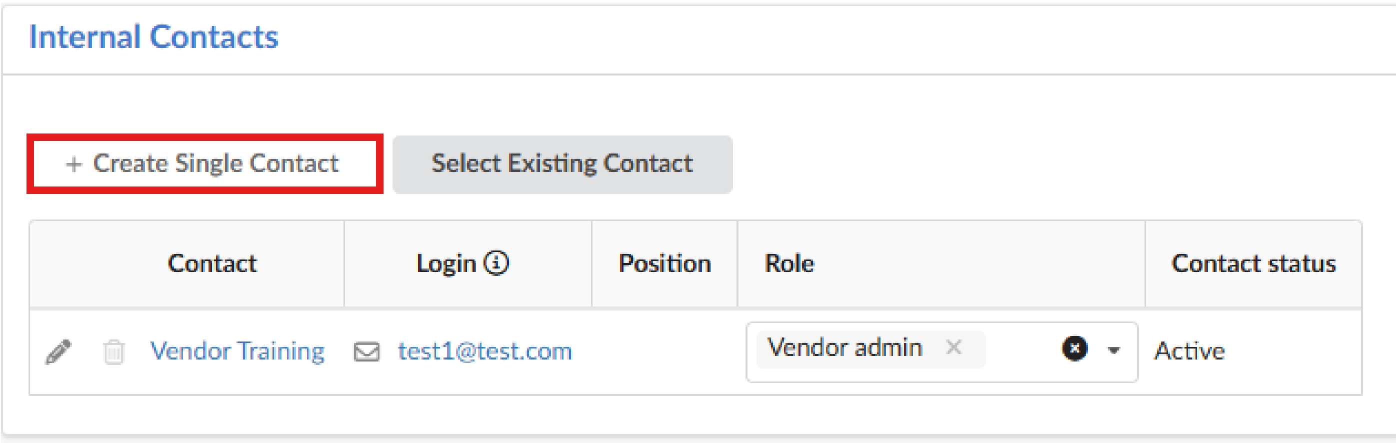
You will see a list of your company contacts. Review this list and assign roles to staff as appropriate. All of your staff members that require a criminal history check (CHC) must be added in Forum.

NOTE: You must be assigned the Vendor Admin role to add staff for system access and criminal history checks



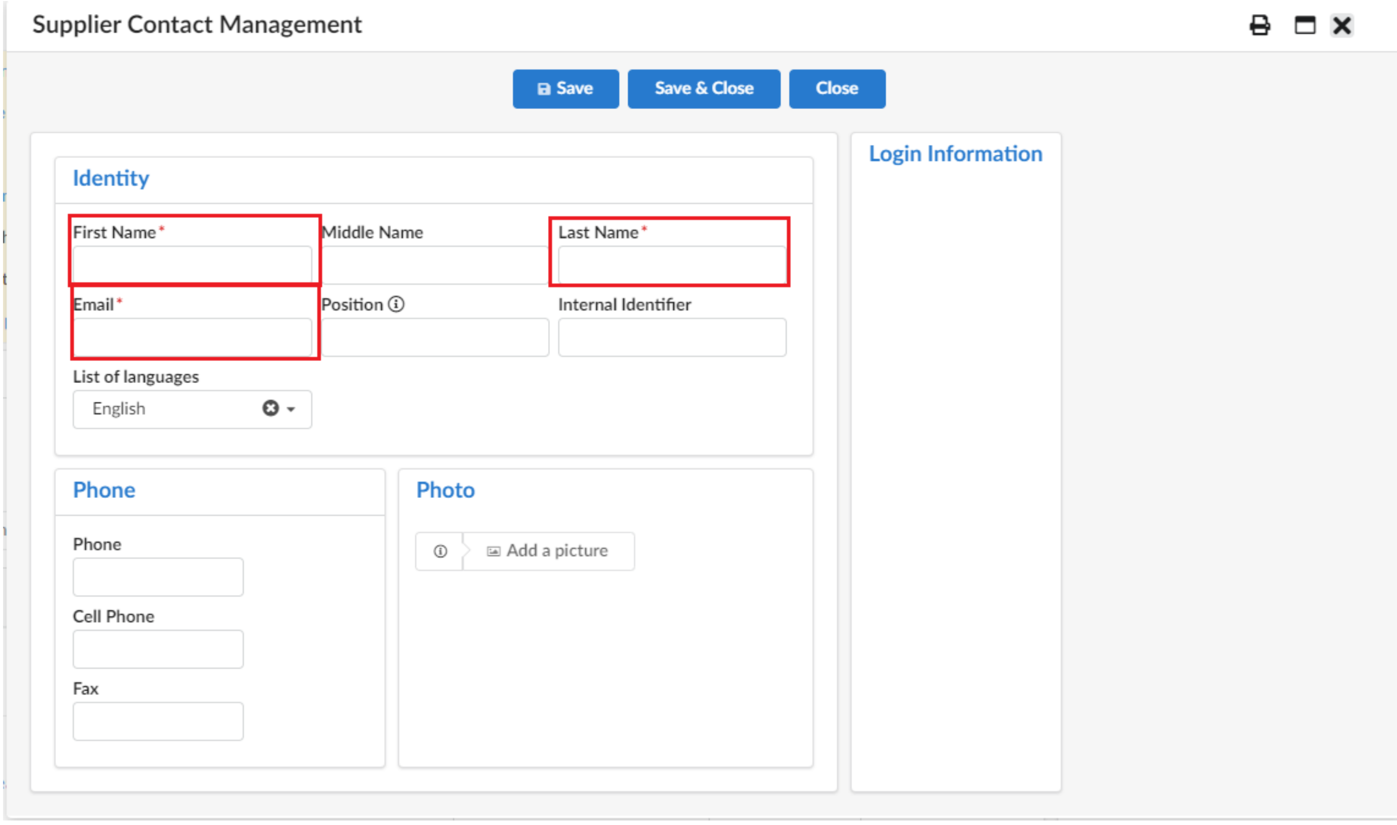
ADDING NEW USERS

To add a new user to the system, click **Create Single Contact.**

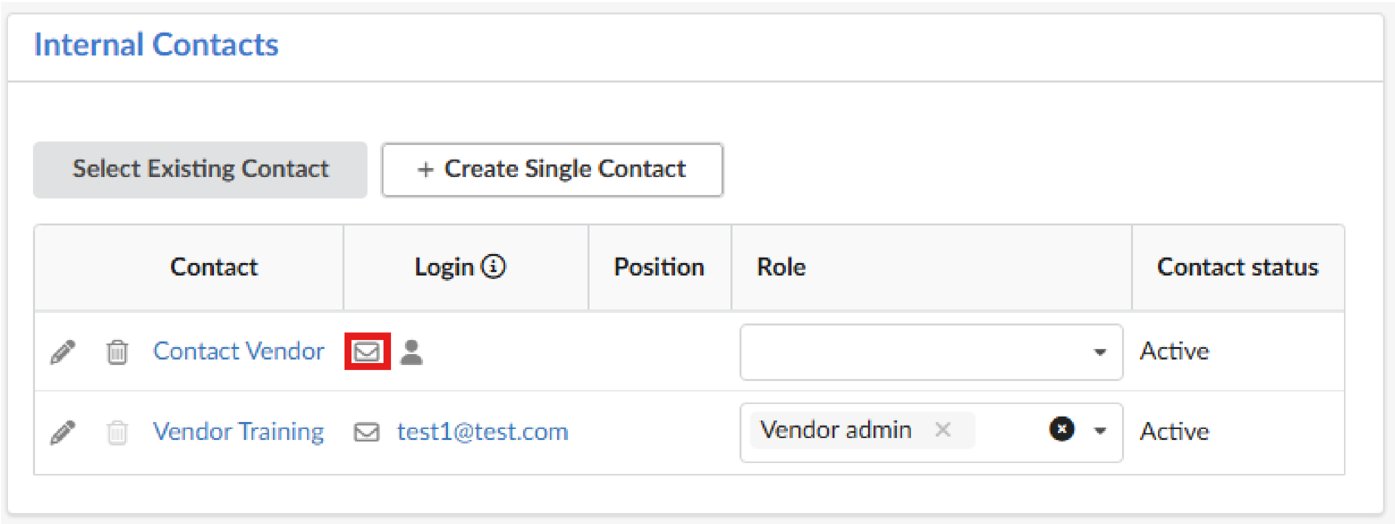


Fill in the appropriate information for this user. First Name, Last Name, and email are required.

You can save your information as you go by clicking **Save**, when you are finished click **Save & Close**.



To invite users to login to Forum, click the envelope to the right of their name. Forum will send an email with a username and a one-time password allowing the user to register.



INCLUDING EXISTING STAFF MEMBERS

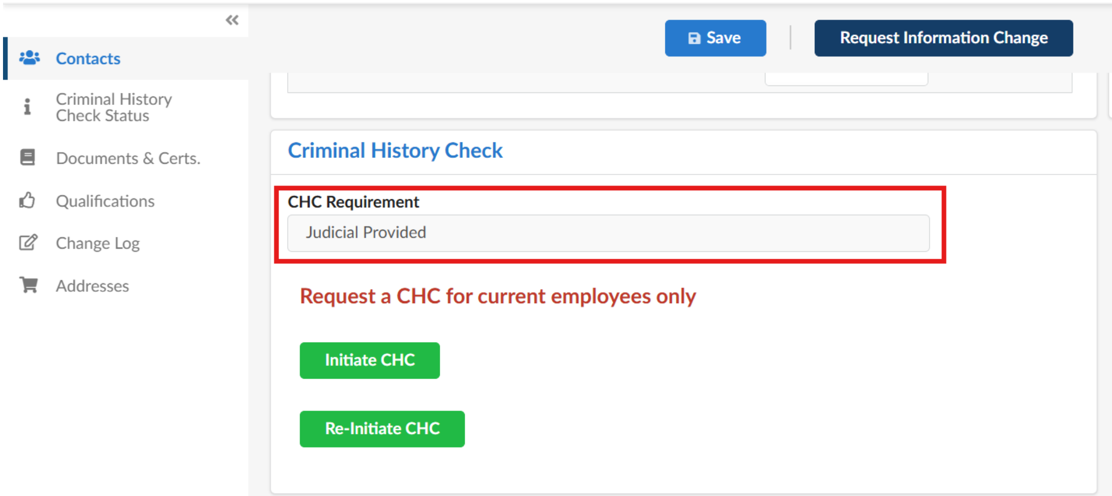
If you have a staff member who is already present in the system (for example, a staff member that works for your company in a different location), click **Select Existing Contact** and select the user from the list of names provided.

CHC (CRIMINAL HISTORY CHECK) REQUIREMENTS

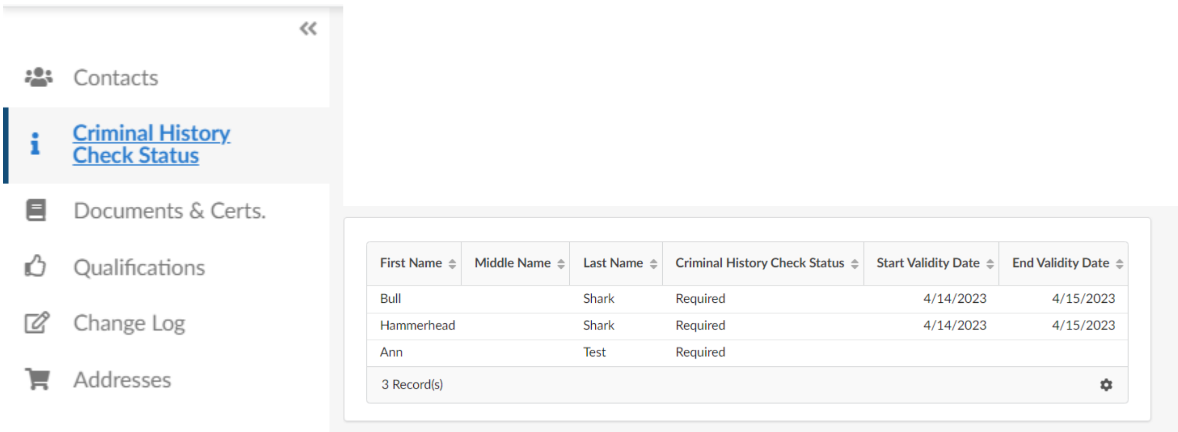
Criminal History Checks (CHC) may be performed and managed by Judicial, by the vendor, or not required at all. How Criminal History Checks are managed and performed is determined by Colorado Judicial.

CHC Requirement	Process
Judicial Provided	Judicial determines how CHC are performed
Vendor Provided	The vendor determines how CHC are performed
N/A	No Criminal History Check is required

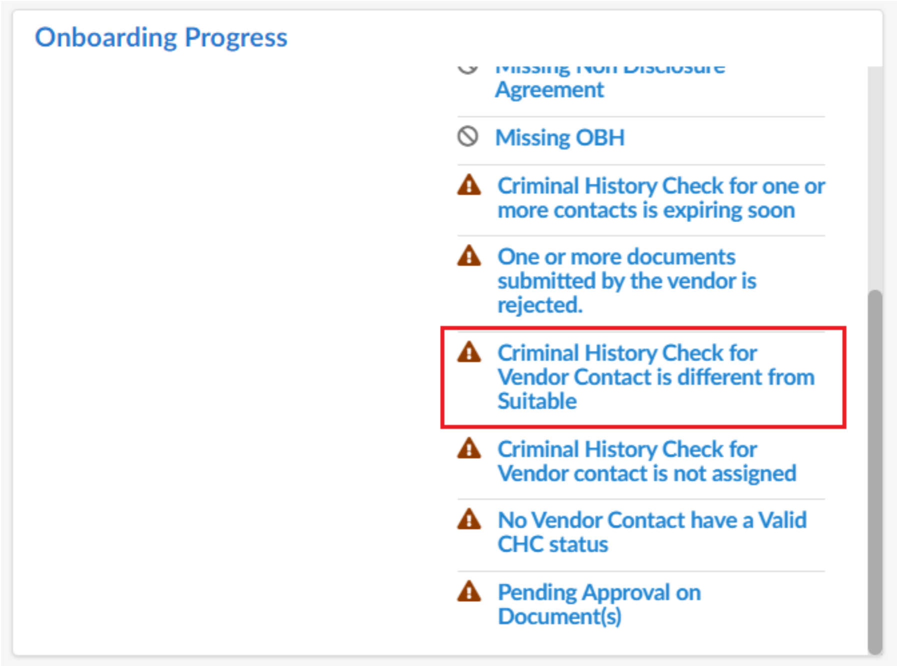
To view your CHC requirement click on the Contacts link in the left-side menu and look in the Criminal History Check section.



To view the CHC status for your users, from the left-side menu, click the **Criminal History Check Status** link.



When one or more person’s CHC is not in Suitable or Suitable (upon appeal) status, the following warning will appear on the Home Page



Work may not commence on many Judicial contracts until all required background checks are complete. The status for background checks are shown below:

CHC Status	CHC Status definitions
Required	The default status of CHC for everyone. Link to CHC will be sent via email from no-reply-colorado@ivalua.com.
Pending	The individual's authorization form has been received and the CHC is in progress.
Suitable	The individual may access information and perform services for Colorado Judicial.
Not Suitable	Not suitable finding.
Expired	CHC validity has expired. CHC are generally valid for two years.
N/A	Not Applicable status to be determined by Judicial based on contract terms.

NOTE: You must have at least one eligible staff member with a "Suitable" CHC status before your services or goods can be purchased by Colorado Judicial.

CHC REQUIREMENT: JUDICIAL PROVIDED

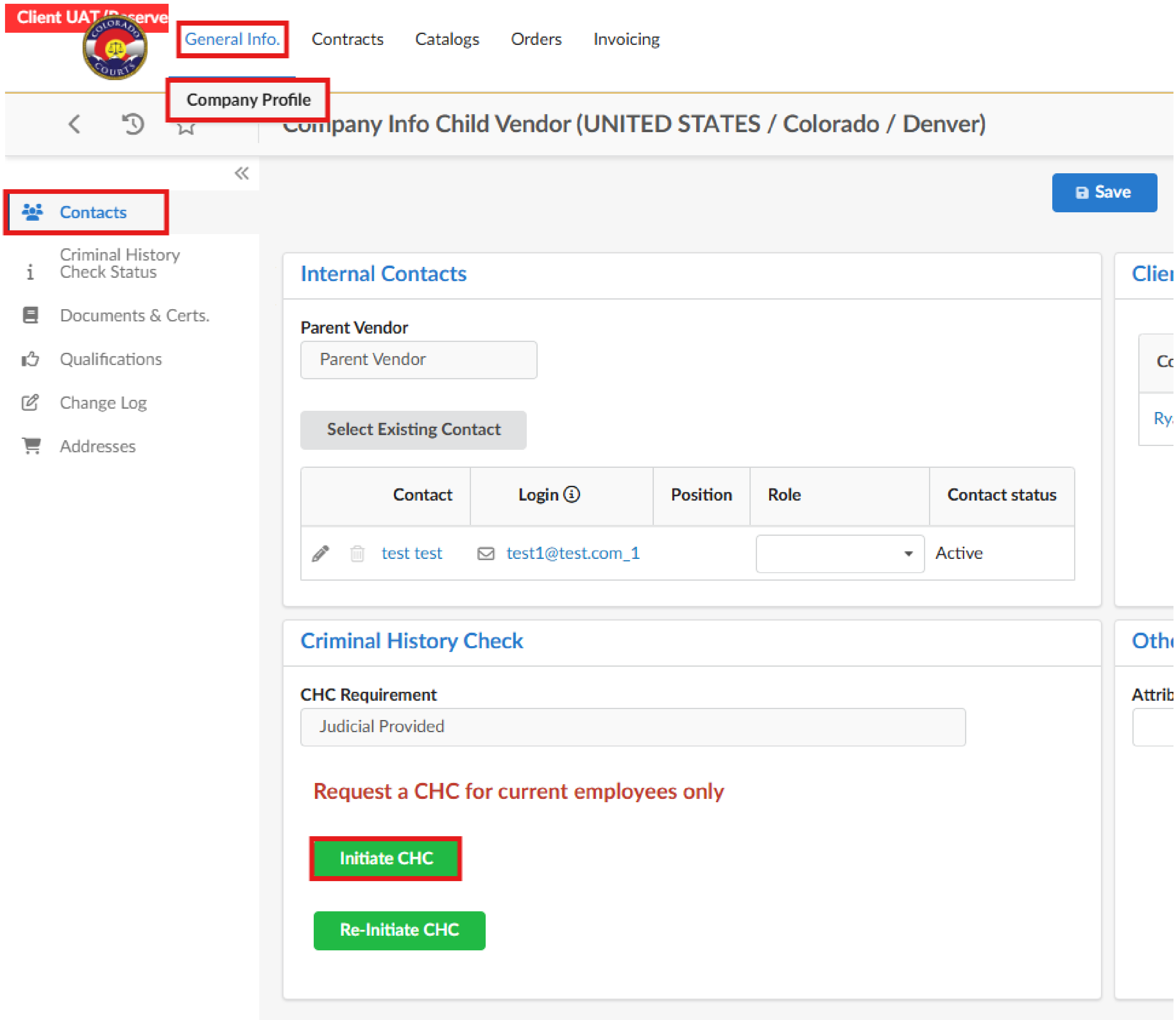
When the CHC Requirement is set to Judicial Provided you will be responsible for initiating the CHC process and Colorado Judicial will perform the CHC as the authorization forms are received. You can view the status and validity date of your staff's CHC as they are completed.

Vendors will not receive copies of the background check form from Judicial. Instead, an email will be sent directly to your employee. The employee will follow a link and can submit the information and authorization to perform a criminal history check.

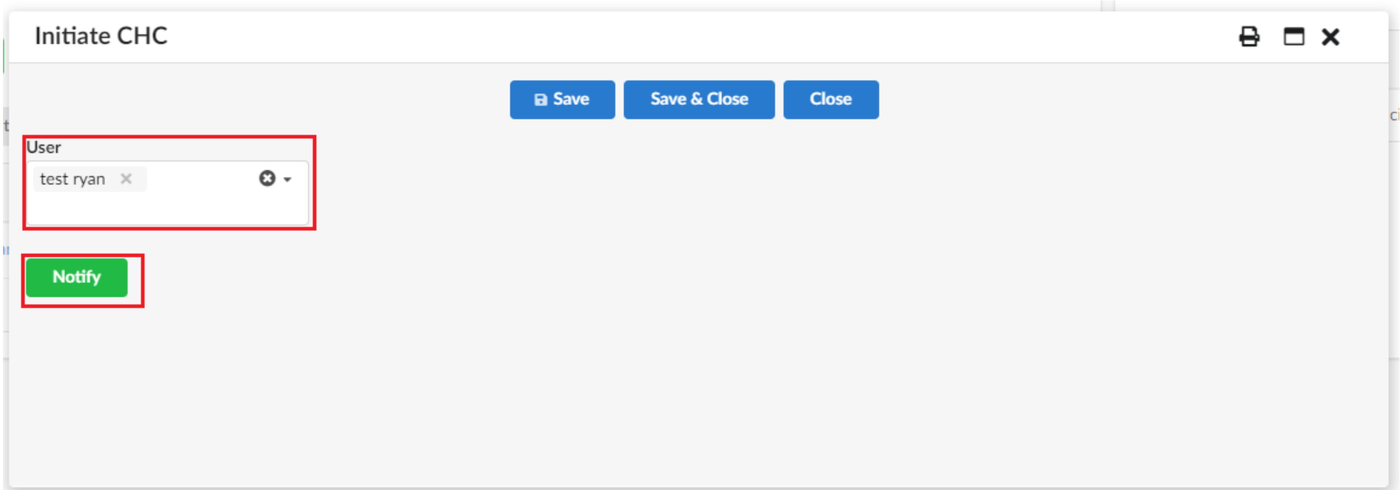
INITIATING A CHC FOR JUDICIAL PROVIDED CRIMINAL HISTORY CHECKS

When a new user is added to Forum the CHC process needs to be initiated. To initiate the CHC process click **Company Profile** under the **General Info**. tab at the top of the screen then navigate to the **Contacts** tab.

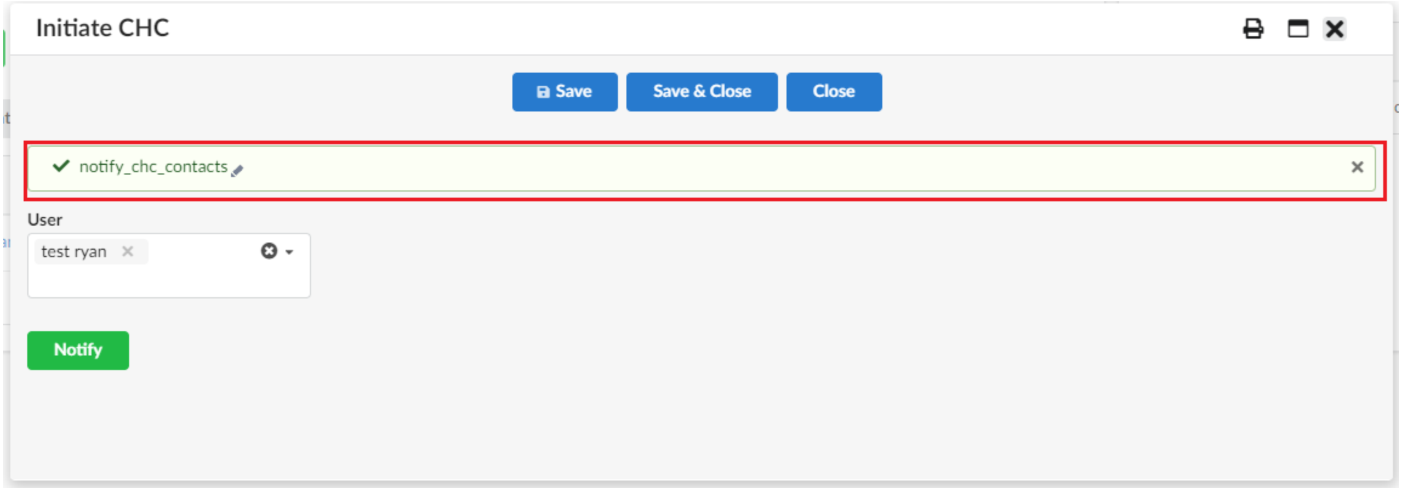
On the Contacts tab click the green **Initiate CHC** button in the Criminal History Check section.



This will bring up a window with a drop down where you can select the user(s) who need to have their CHC initiated. Once you have selected the required user(s) click **Notify**.



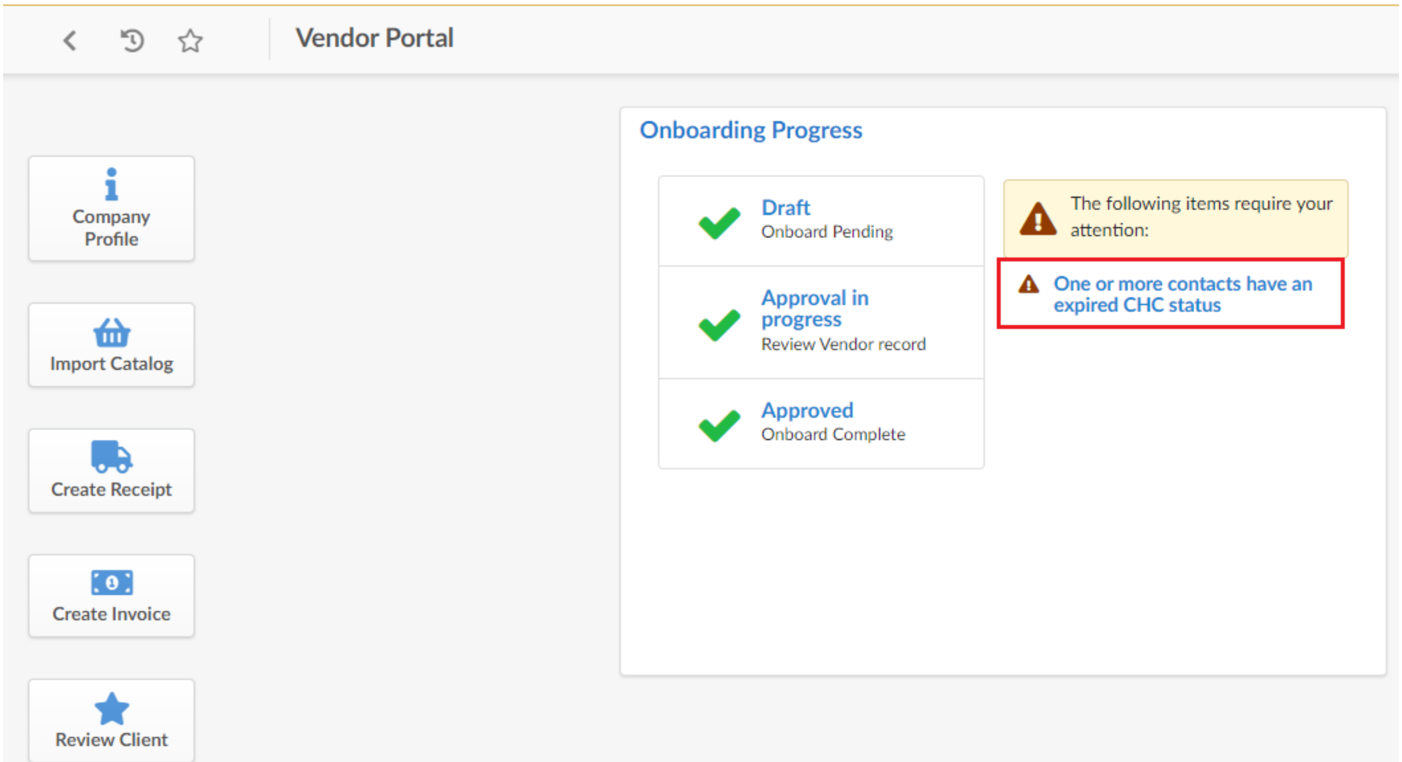
You will know that the notification has been sent if this message appears in the window.



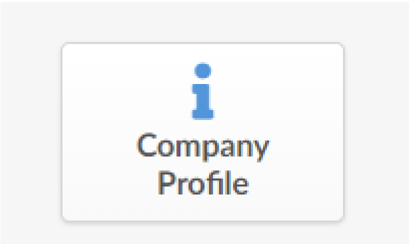
You can now click **Save & Close**, **Close**, or the X in the corner of the screen.

RENEWING AN EXPIRED CHC

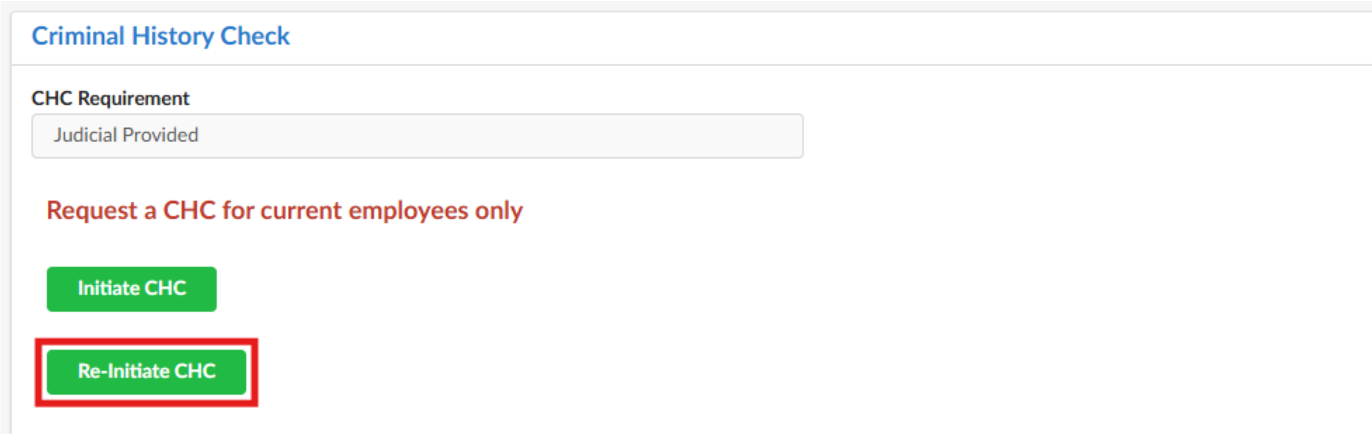
When one of your staff members has a CHC about to expire, or that has expired, you will see a notification on your home page.



For vendors with Judicial Provided CHC, you can re-initiate a CHC by selecting **Company Profile**



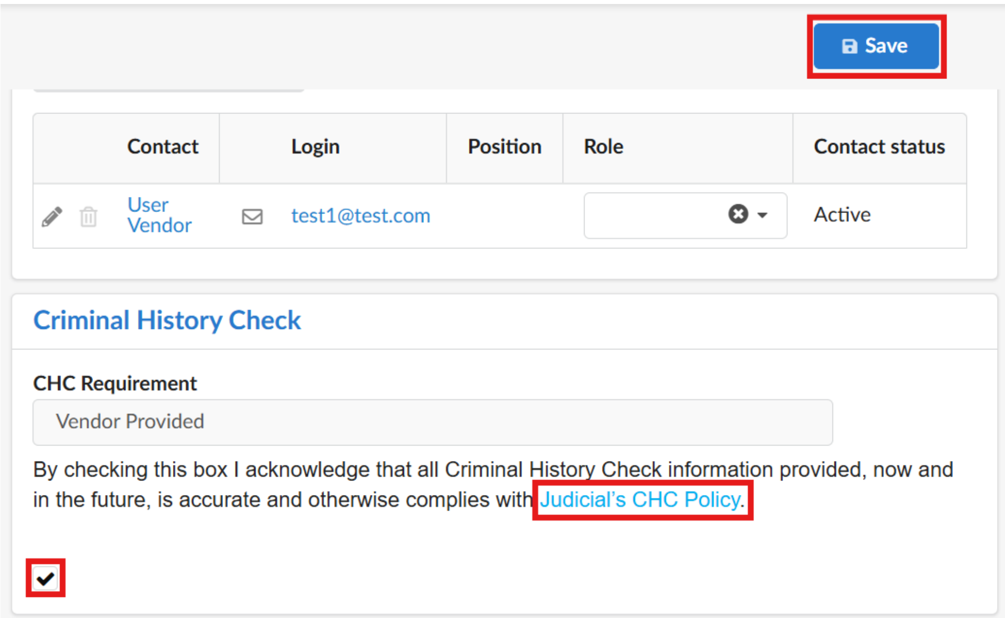
from the left-hand menu, then **Contacts**. From the Contact screen, in the Criminal History Check section, click **Re-Initiate CHC**.



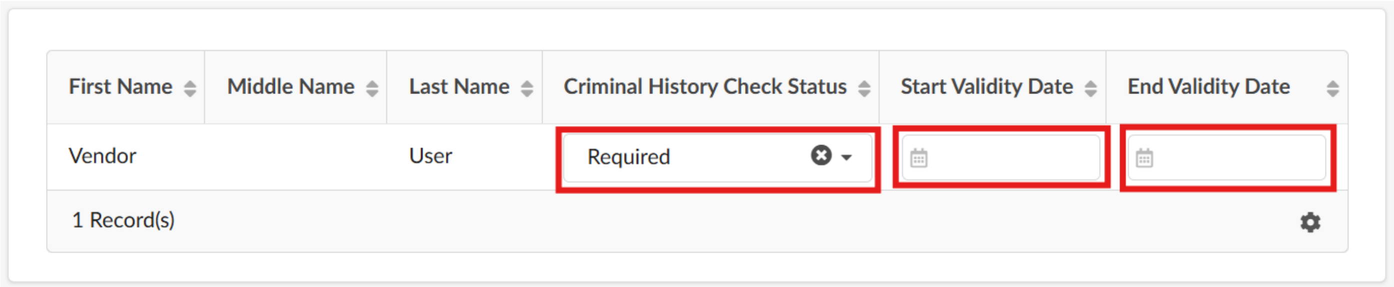
From the next screen, select your contact and click **Notify**.

CHC REQUIREMENT: VENDOR PROVIDED

If your CHC Requirement is set to Vendor Provided you will be responsible for maintaining your CHC records. Before you can edit your CHC records you must first accept Judicial's CHC Policy. This can be done by going to the Contacts page and then clicking the checkbox in the Criminal History Check section. After clicking the checkbox click save. The policy can be viewed by clicking the Judicial's CHC Policy link.

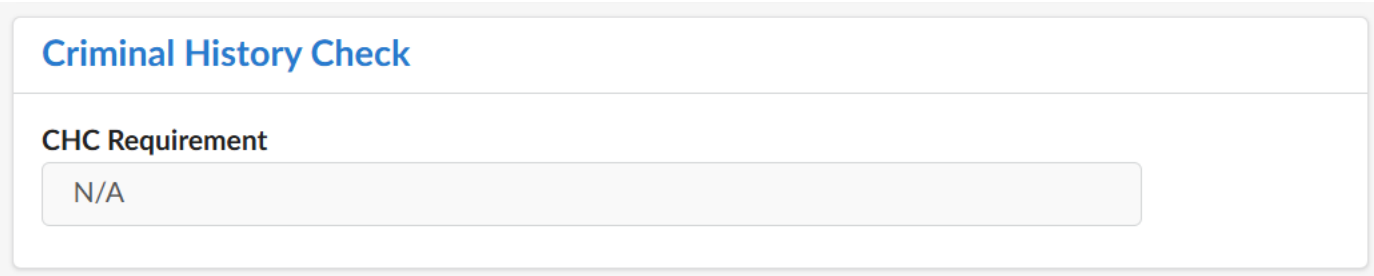


After clicking the box and clicking Save you can go to the Criminal History Check Status page where the Criminal History Check Status, Start Validity Date, and End Validity Date fields can be updated.



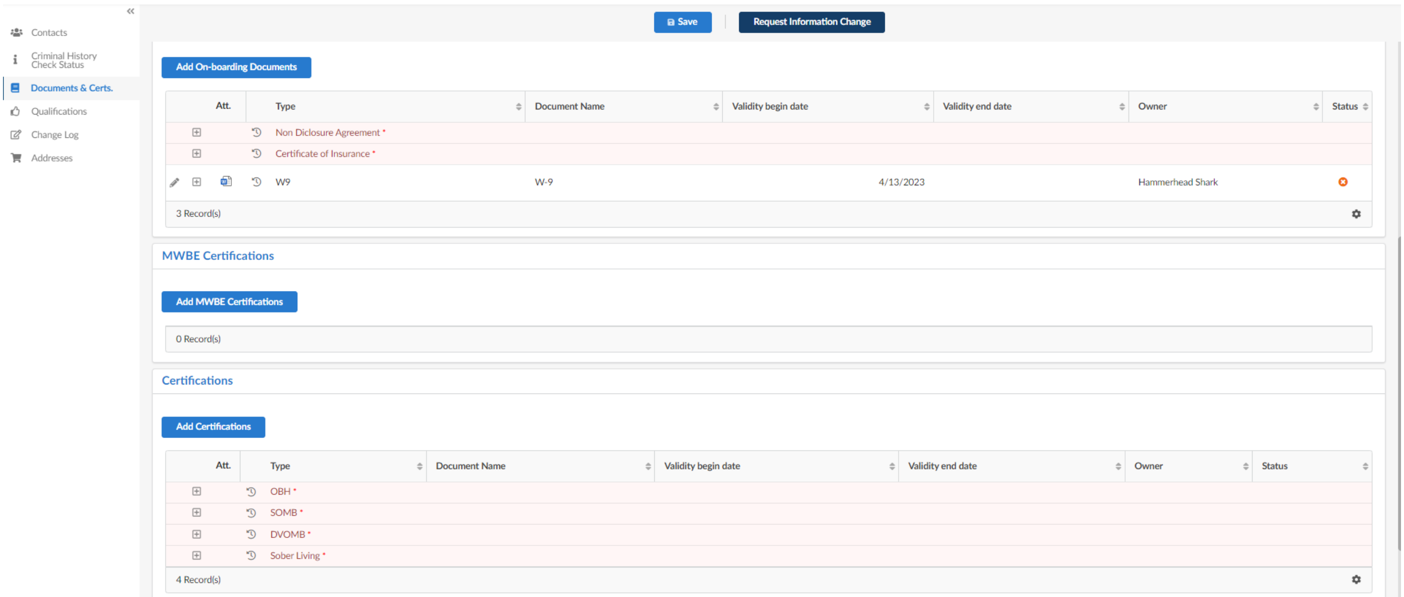
CHC REQUIREMENT: N/A

When the CHC Requirement is set to N/A this means that no Criminal History Check is required.

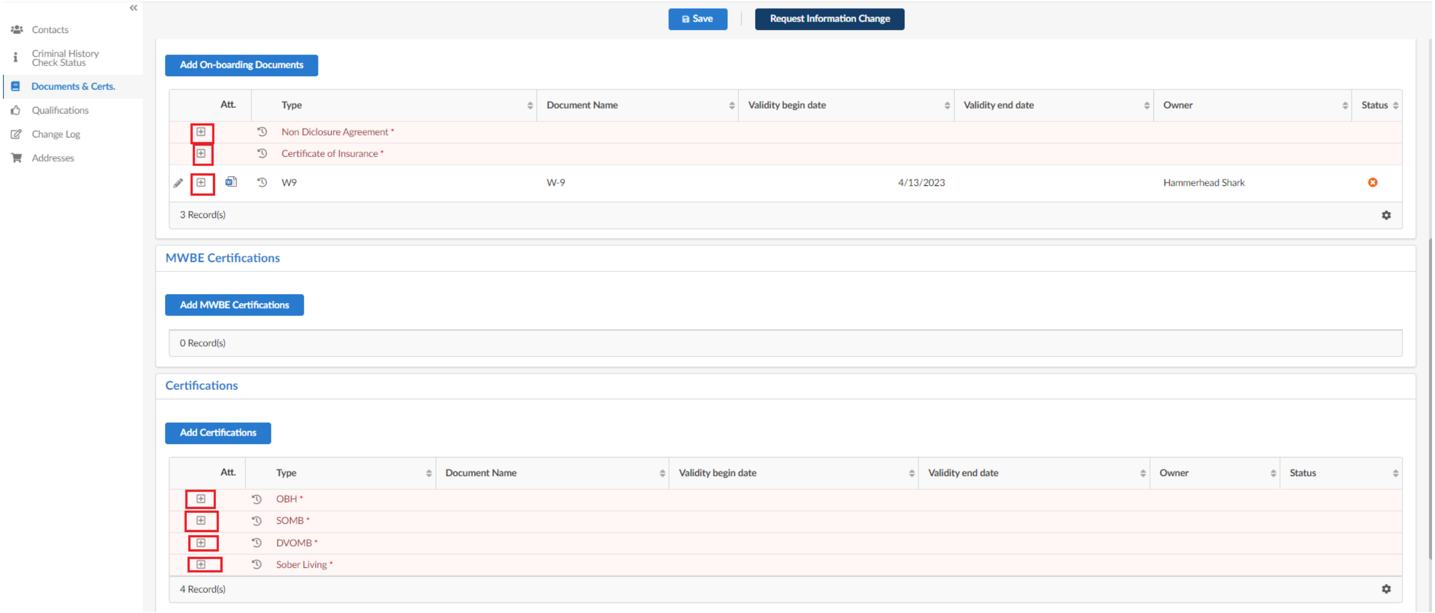


ADDING REQUIRED DOCUMENTS

From the left-side menu, click the **Documents & Certs** link.

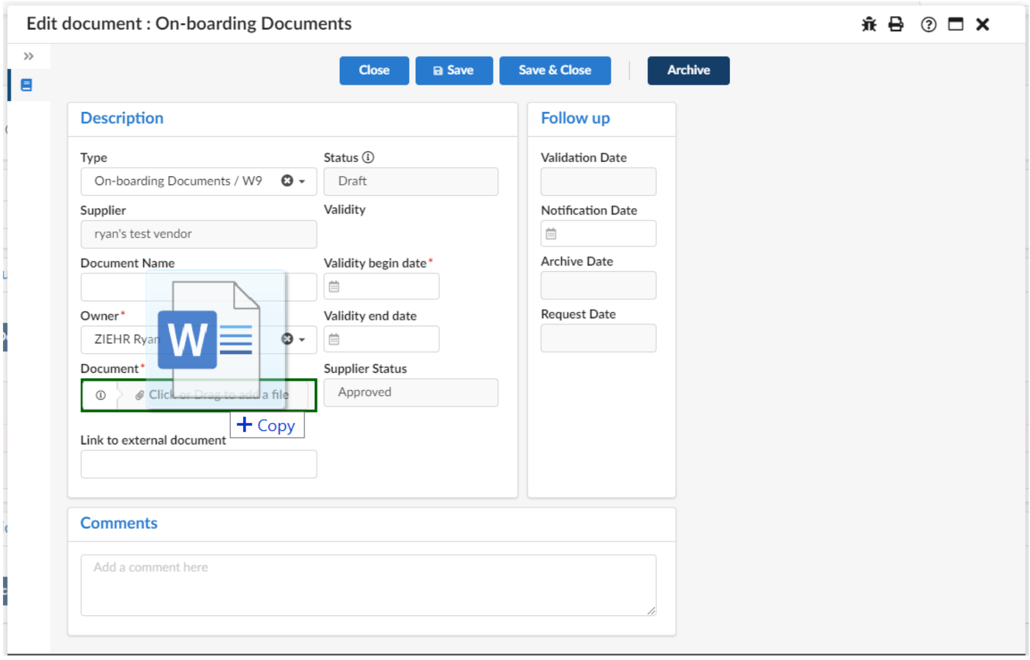


Select the document type you want to upload.

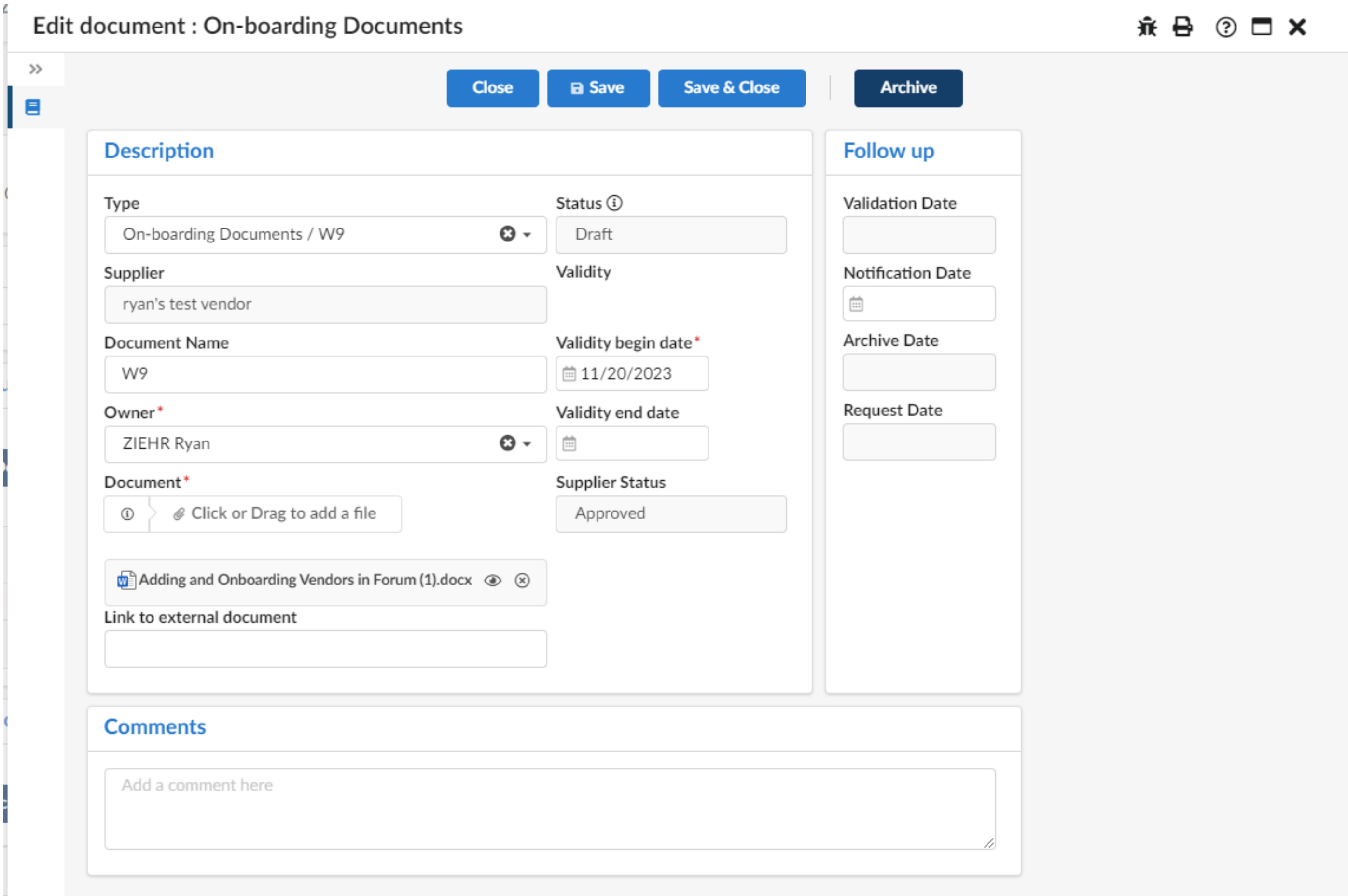


W9 documents are required for all vendors. Other documents may or may not be required based on the terms of your contract. If a Non-Disclosure Agreement or a Certificate of Insurance is required, they will be added in the On-boarding Documents section.

You may click in the *Document* box and browse for a document, or you may drag-and-drop the document from your computer. If you use drag-and-drop, make sure a green frame appears around the *Document* box before you "drop" the document.

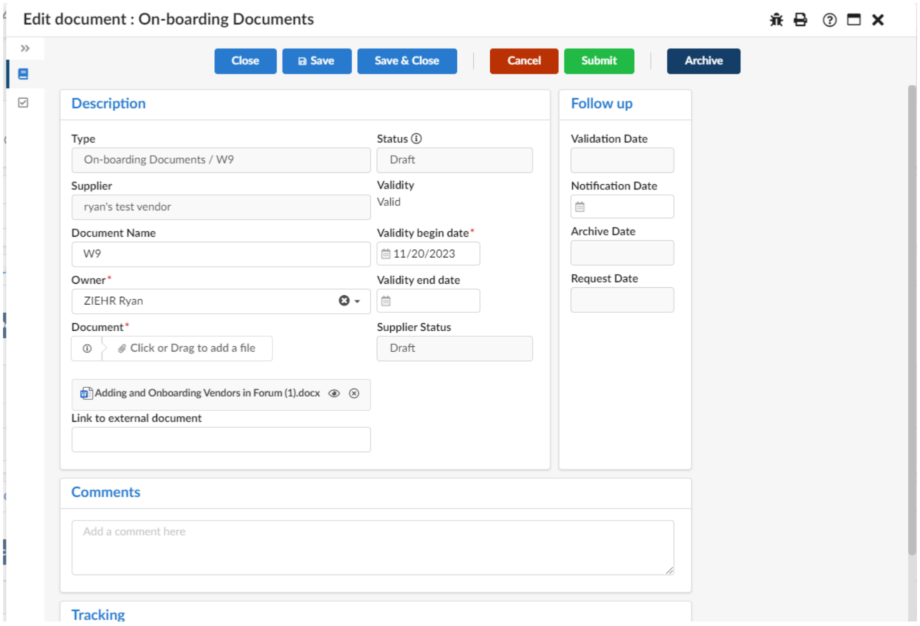


Add the *Document Name* and enter the *Validity begin date*. Enter any additional information or comments.



Click **Save**.

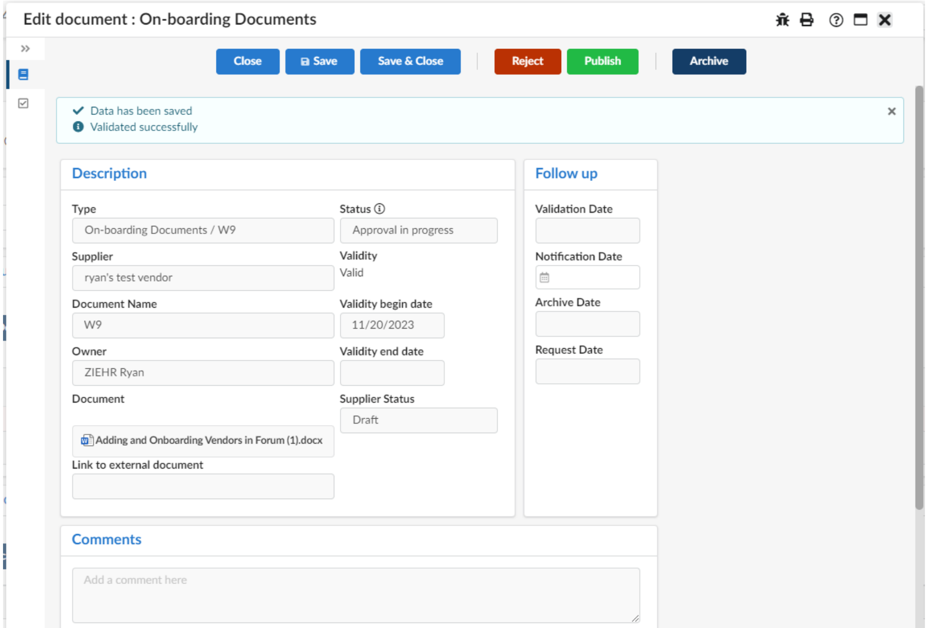
You will now see a screen with **Cancel** and **Submit** buttons.



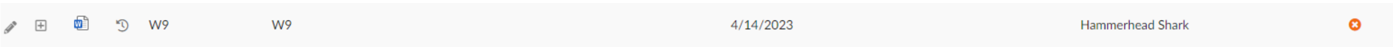
If you have completed all required information and are ready to submit this document to Judicial, click **Submit**. If you have not completed all required information and would like to come back to complete later, click **Save & Close.**

If there is an issue with the document and you would like to delete it and start again, click **Cancel**.

Once you have submitted your document, you will see a confirmation message at the top of the screen. Click **Save & Close** or the **X** in the upper right corner to close the dialog box.

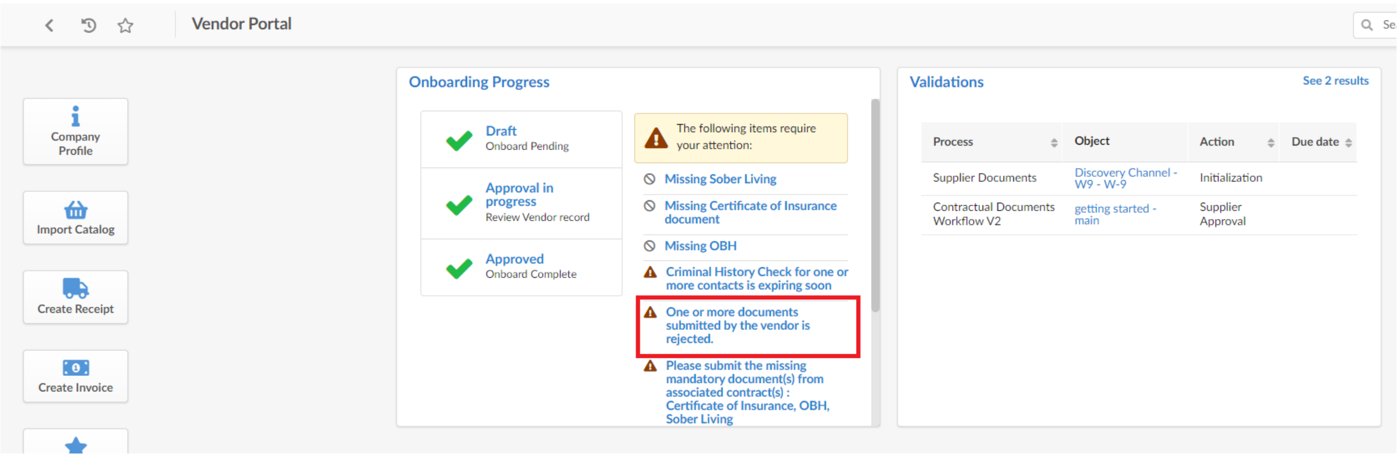


You will note that the document status will show as an orange x.

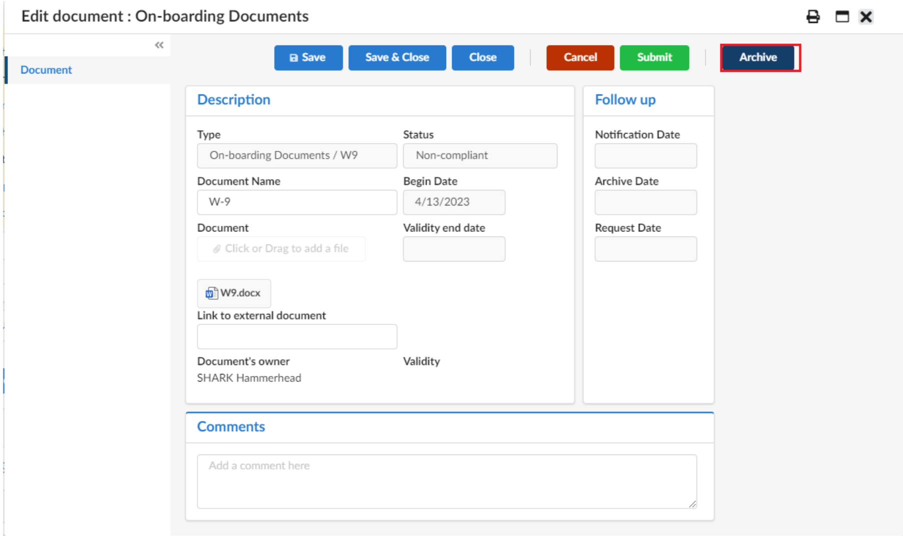


Once Judicial reviews and approves the document, the status will change to a green checkbox, indicating the document was approved. All required documents must be approved before your services or products can be purchased.

If your document is rejected, the person who added the document will receive an email indicating why the document was rejected. The user will also see a notification in the Onboarding Progress section of the Vendor Portal.

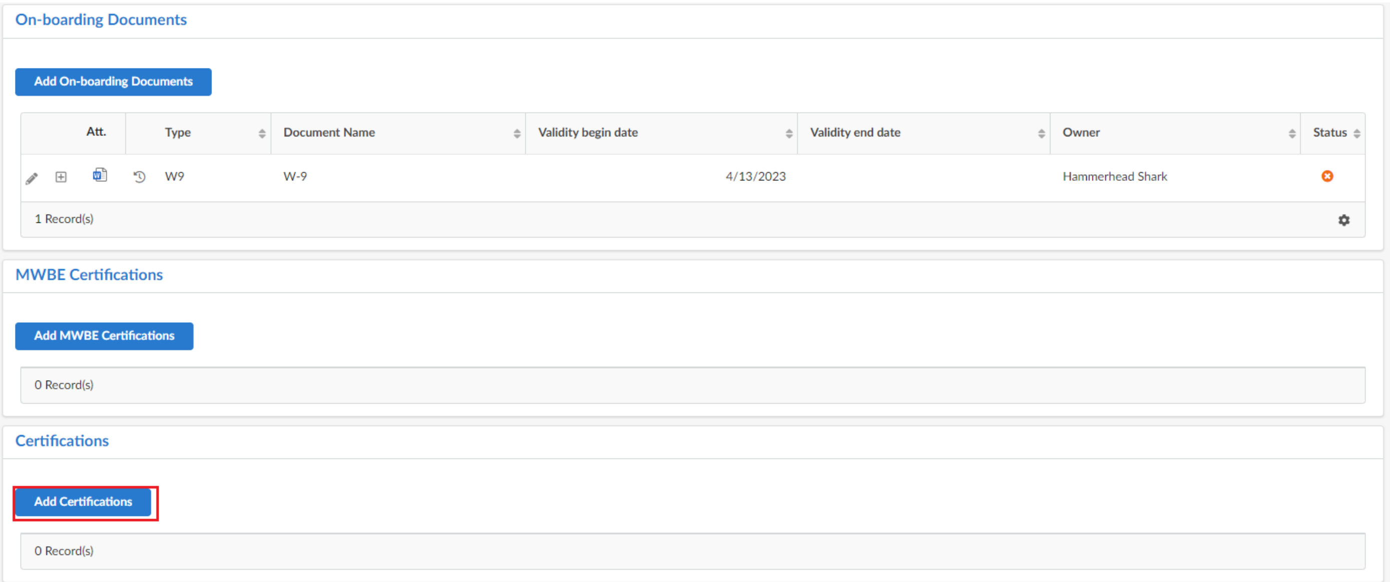


To archive a document, or to review the data entered, click the edit (pencil) icon to the left of the document name. Then click the Archive button.



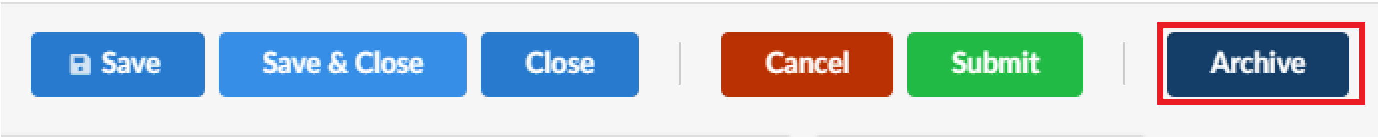
To download the document for viewing, click the document icon to the left of the document name.

Other certifications such as DVOMB, OBH, Sober Living, and SOMB are uploaded using the same process described above but are added to the Certifications section and not the On-boarding Documents section.



ARCHIVING DOCUMENTS

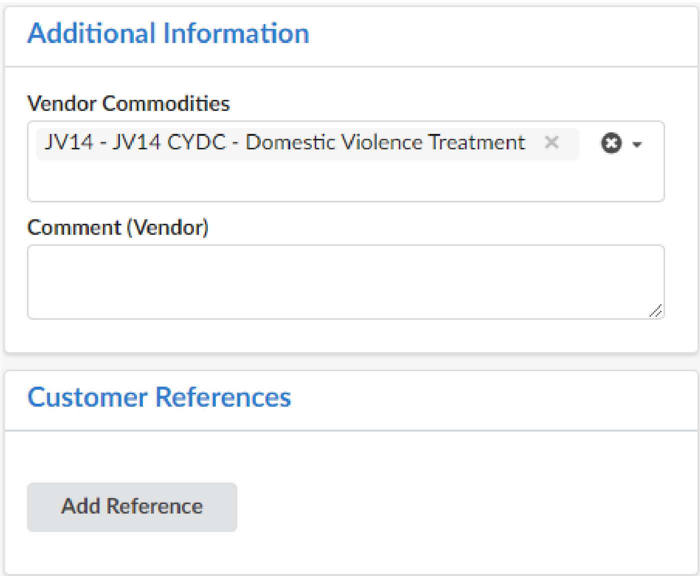
If you have a document that is no longer valid, you can archive it. When a document is archived, the validity end date is filled in with the current date and the document is removed from the list of available documents. Archiving is done by viewing the document information and clicking the **Archive** button.

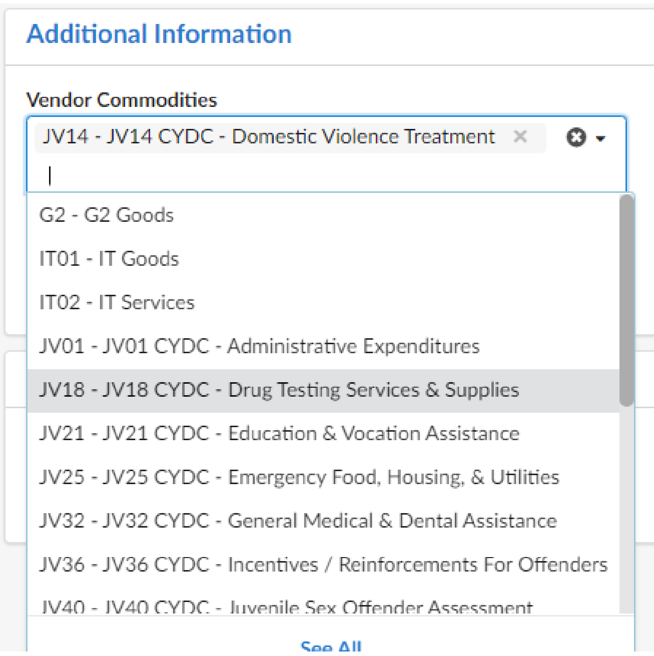


OPTIONAL: DECLARING YOUR QUALIFICATIONS

From the left-side menu, click the **Qualifications** link.

Qualifications list the districts and services and/or goods that you are approved to provide for Colorado Judicial. Colorado Judicial will add and update these for you based on your contract. If you wish to declare your suitability to provide additional goods and/or services, you may add them here.



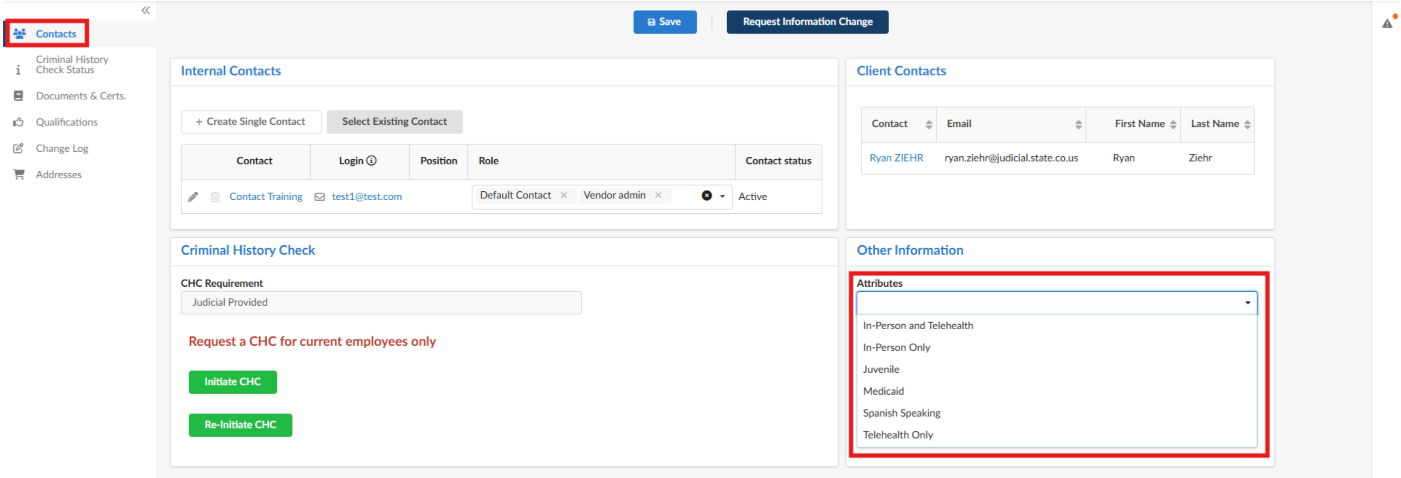


OPTIONAL: DECLARING VENDOR ATTRIBUTES

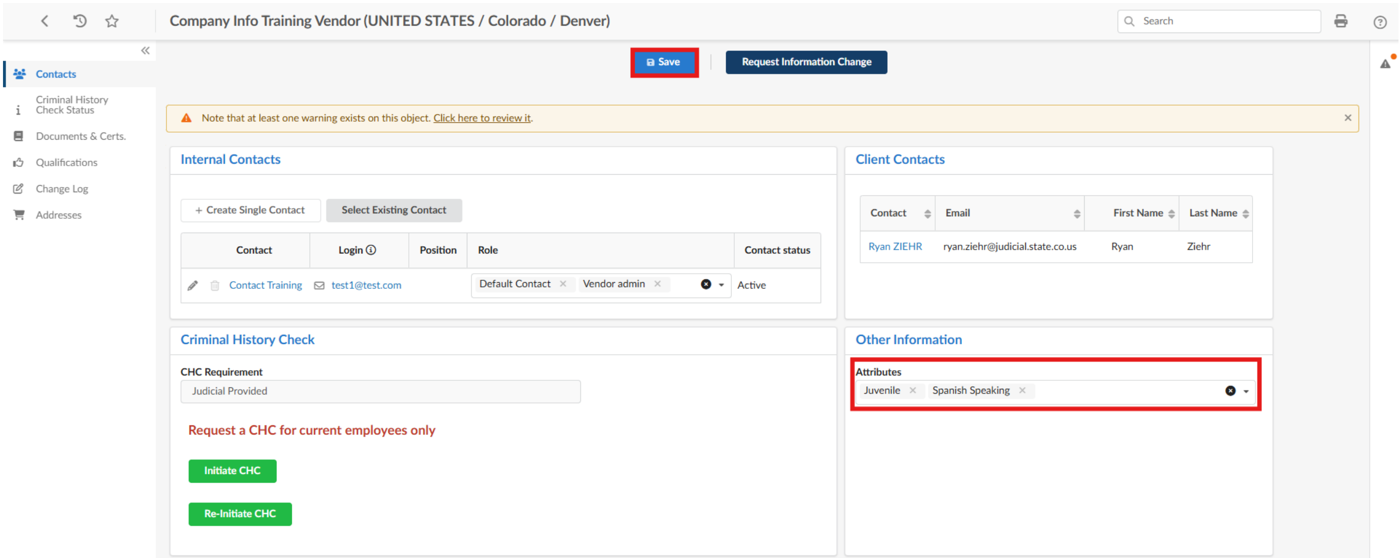
Vendor Attributes are quick tags that showcase what your organization offers—like Medicaid eligibility, languages, service delivery formats, and populations served—so Judicial users can easily find the right fit. Add attributes at the organization or location level in Forum to accurately highlight what each site provides.

ADDING ATTRIBUTES

Attributes can be added from the Contacts page of your vendor record. Select one or more attributes from the Attributes dropdown in the Other Information section.



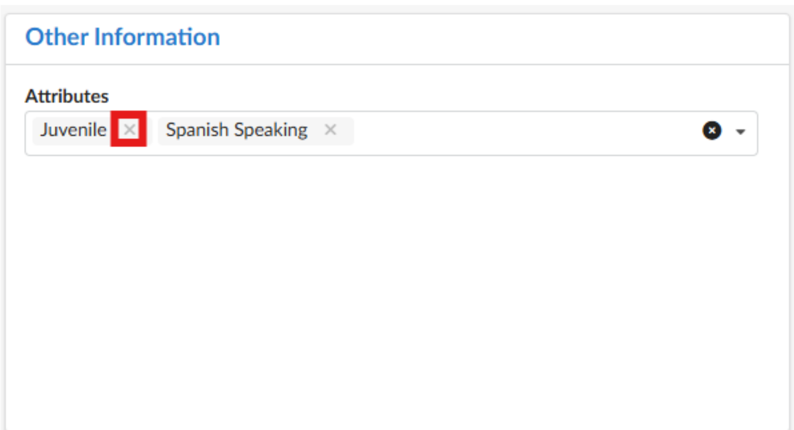
After you have selected your attributes click Save.



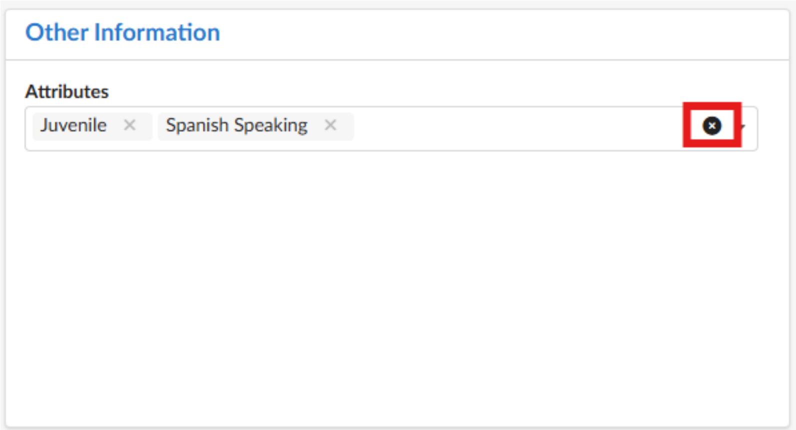
The selected attributes will remain in the dropdown. You do not need to use the Request Information Change option to update your attributes list.

REMOVING ATTRIBUTES

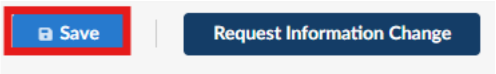
Attributes that were previously selected can be removed if they were added by mistake or are no longer applicable. To remove a single attribute, click the X icon to the right of the attribute's name.



All attributes can be removed at once by clicking the X icon in the dropdown.

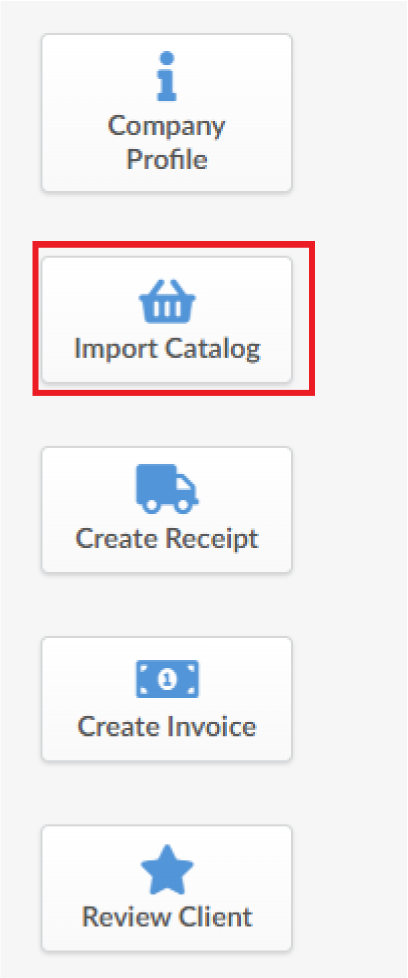


After removing one or more attributes click Save.



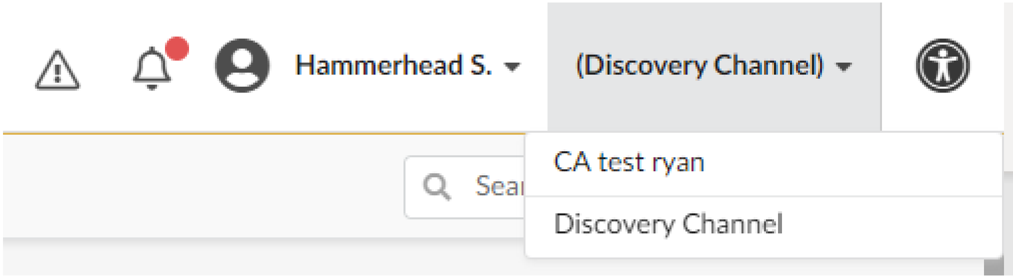
LOADING YOUR CATALOG

From the Home Page, click the **Import Catalog** link.



MANAGING MULTIPLE LOCATIONS

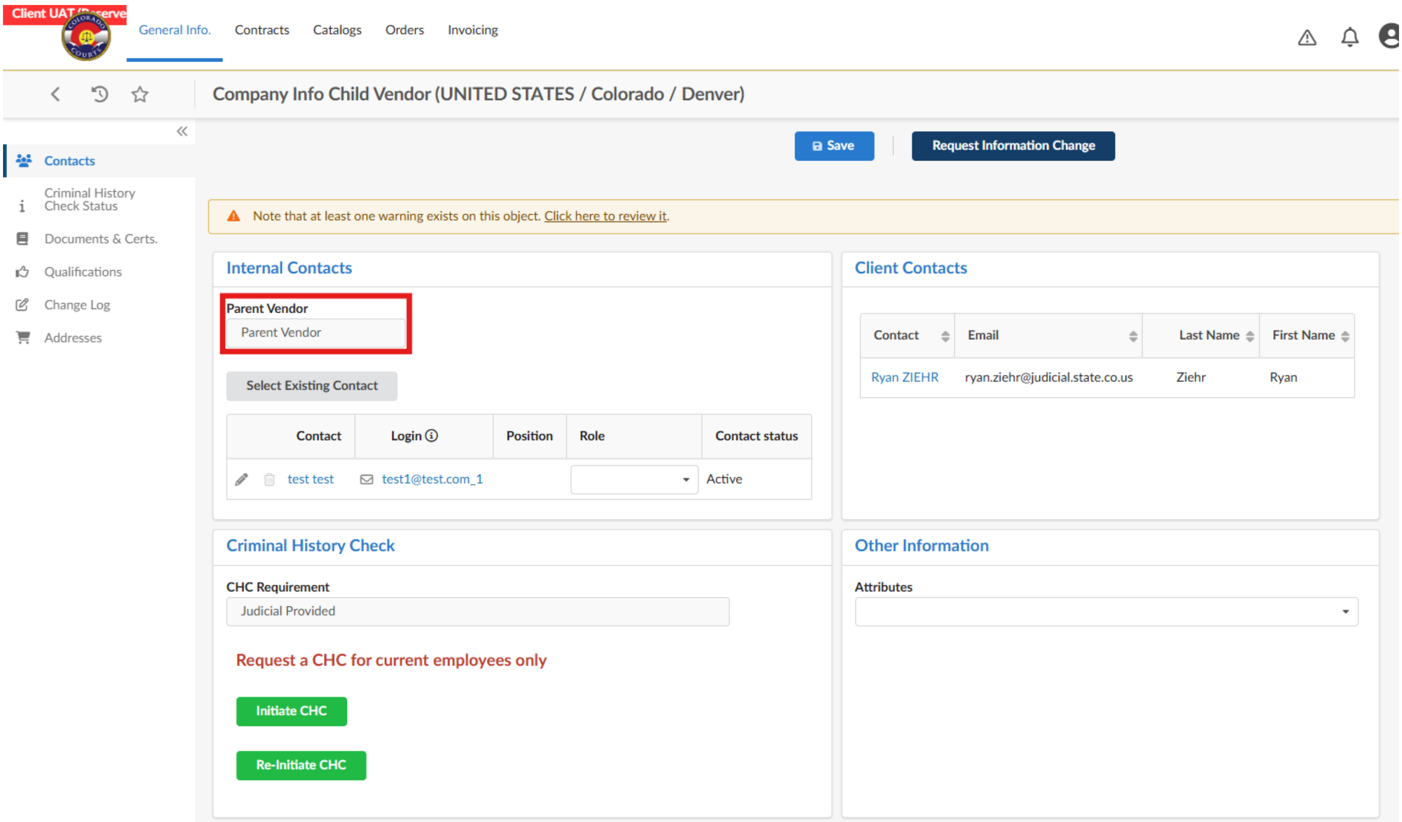
In Forum, vendors are identified by their distinct physical location. Each location will have a distinct Forum Vendor ID. If you are a contact for multiple locations, you will see them in a drop down in the upper right corner of the screen. Select the location you wish to manage from the list.



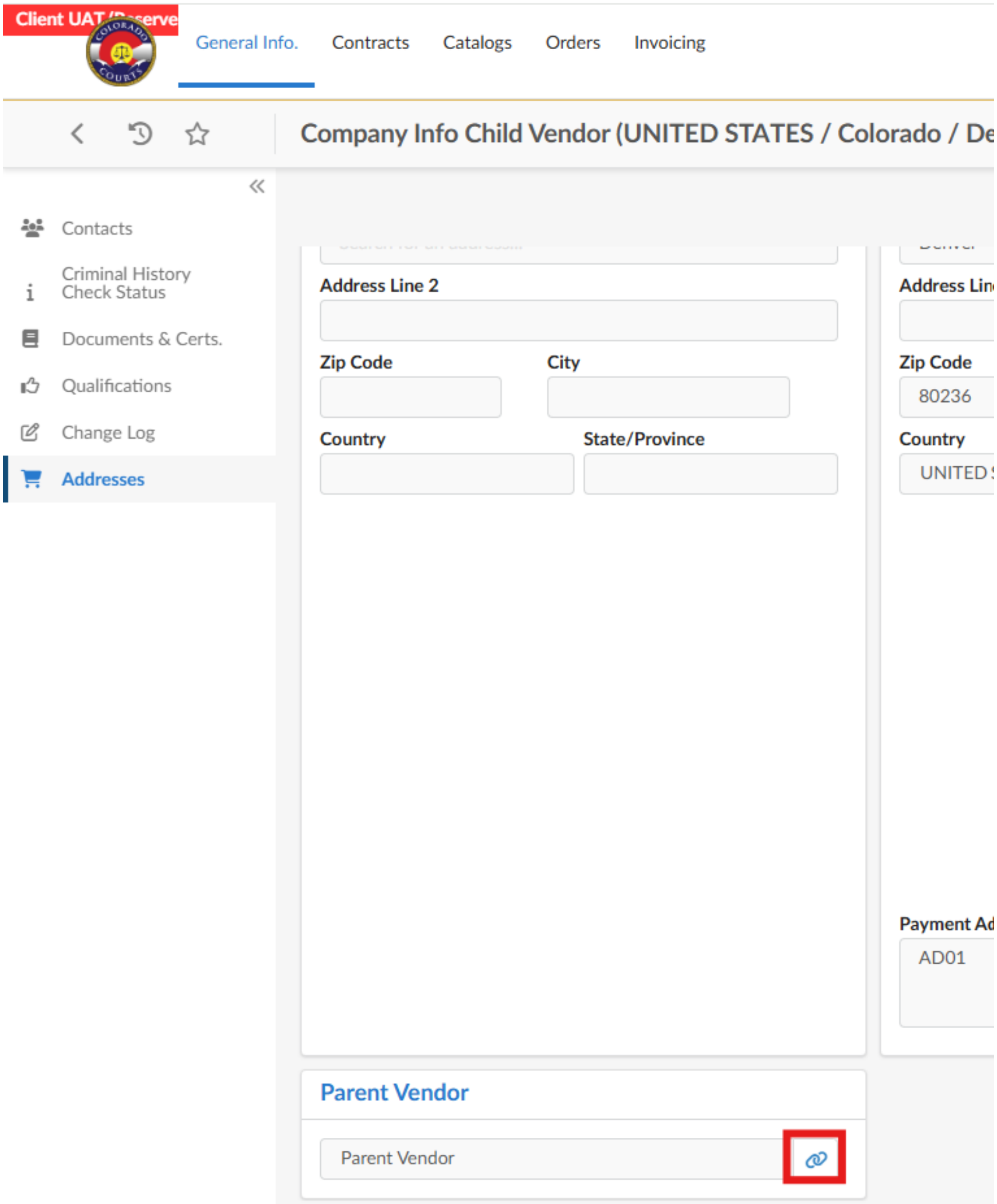
NOTE: You must be assigned the Vendor Admin role to manage multiple locations.

IDENTIFIYING YOUR PARENT VENDOR

In Forum multiple vendors can be connected to one vendor known as the parent vendor. Vendors must be connected by Judicial and is typically used when one vendor has severally vendor locations. Users who are assigned to and viewing a child vendor record can view who the parent vendor is from the Contacts page.



The same information will also be present on the Addresses page. If you are assigned to the parent vendor you will be able to click the blue link icon to view the parent record.



You will still need to switch between vendor records as described in the Managing Multiple Locations section to view the orders and other records assigned to the parent vendor.

If your vendor record does not have a parent vendor these fields will not be visible.