REGISTERING AND ONBOARDING WITH FORUM FOR VENDORS

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

This document covers the steps required to complete the vendor onboarding process. Once this process is complete, Judicial will be able to purchase your services and goods and receive invoices through Forum.

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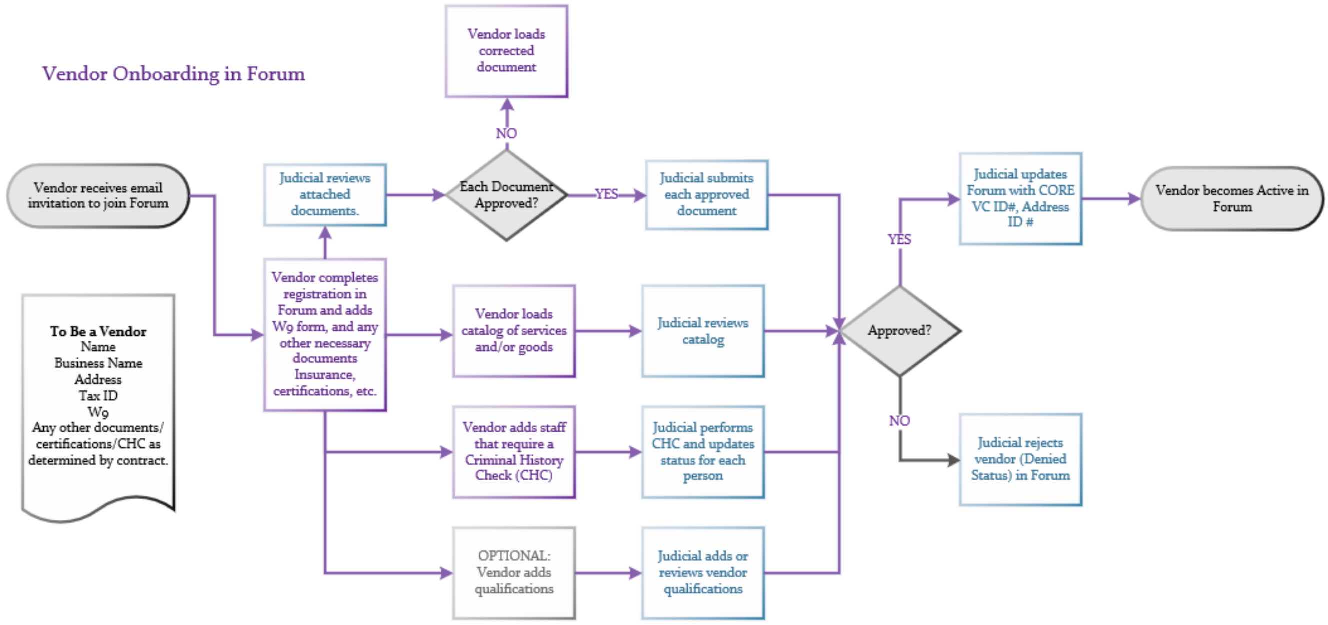


PRE-RECORDED TRAINING VIDEO

The pre-recorded training video [Registering and onboarding in Forum] can be found on the Colorado Judicial website which covers the topics in this document.

Pre-recorded Vendor Training Sessions

Registering and Onboarding for Vendors
Reviewing and Approving Contracts
Order Review and Acknowledgement
Creating and Submitting an Invoice
Navigating Forum

Forum Training Documents

Registering and Onboarding in Forum
Navigating Forum
Orders and Invoices in Forum
Reviewing and Approving Contracts in Forum
FAQ
Change Default Browser
Updating Your Password in Forum

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.

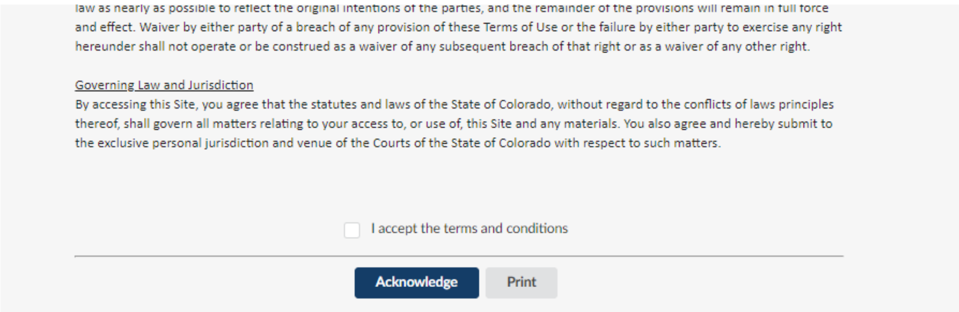
NOTE: For the best user experience, use Google Chrome as your browser.

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

FIRST USE: ACCEPTING TERMS & CONDITIONS

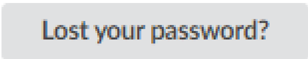
If you are logging on to Forum for the first time, you must review and accept the Terms & Conditions of Use.

You should review the Terms & Conditions, then select the checkbox **I accept terms and conditions** and click **Acknowledge** to access the system. If you are unable to accept the terms and conditions, please reach out to your support contact. You can find your support contact on the [Forum Portal](#).

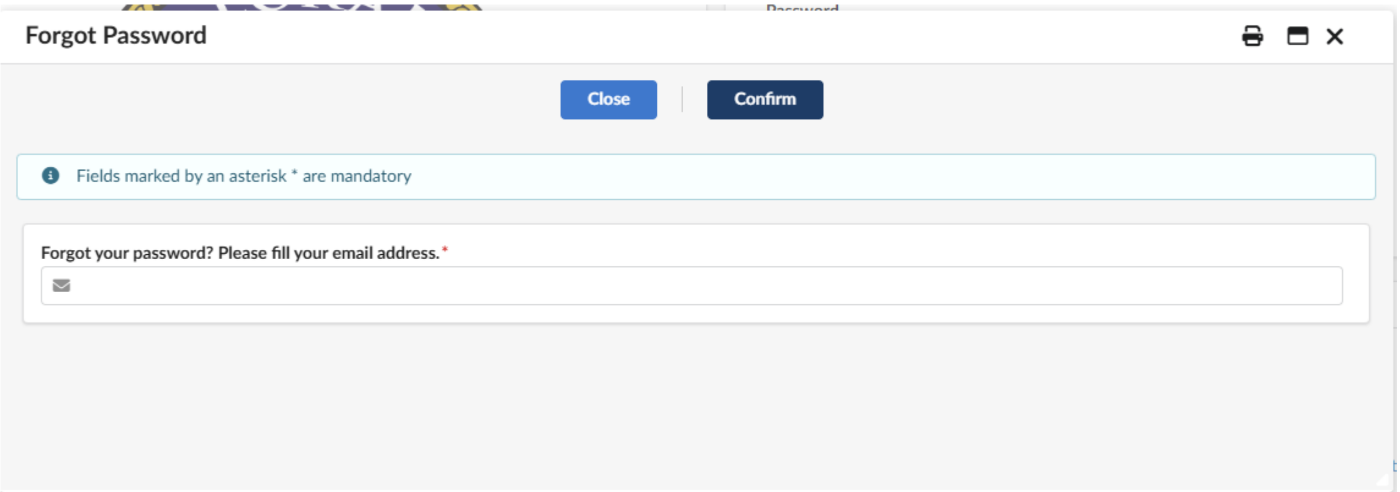


FORGOT YOUR PASSWORD?

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



In the window that displays, enter your email address.



Click the **Confirm** button.

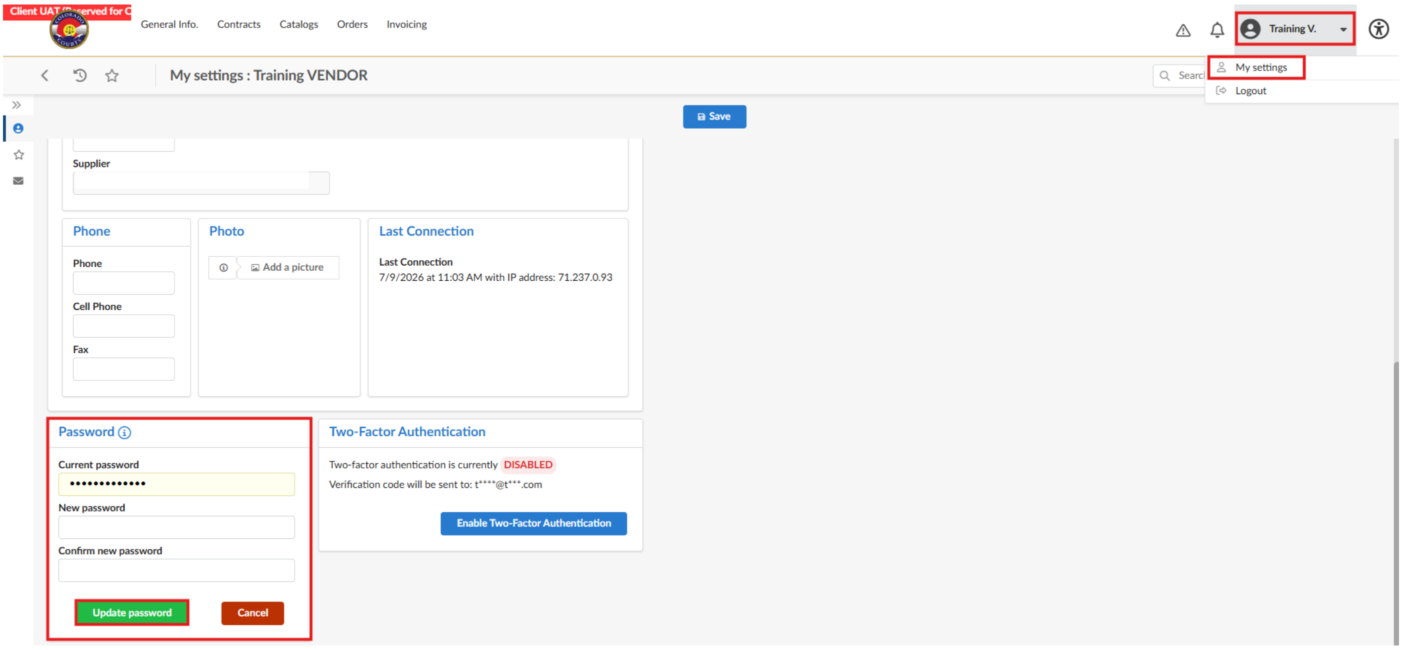
UPDATING YOUR PASSWORD

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.

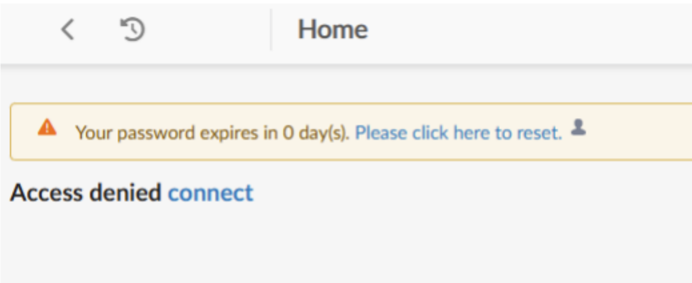
In the upper right corner first click your name, then click My settings. In the password section enter your current password in the current password field and your new password in the new password and confirm new password fields.



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

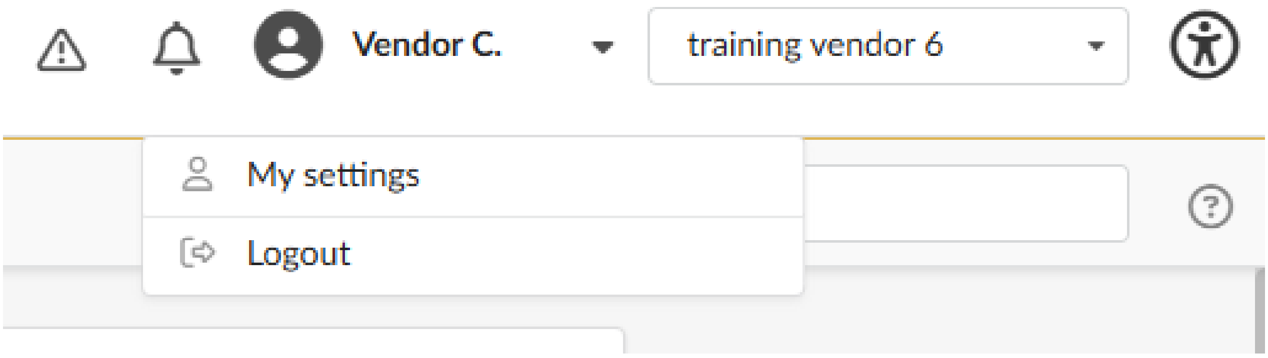
If your password has expired, you will see a message to reset it when you log in.



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.



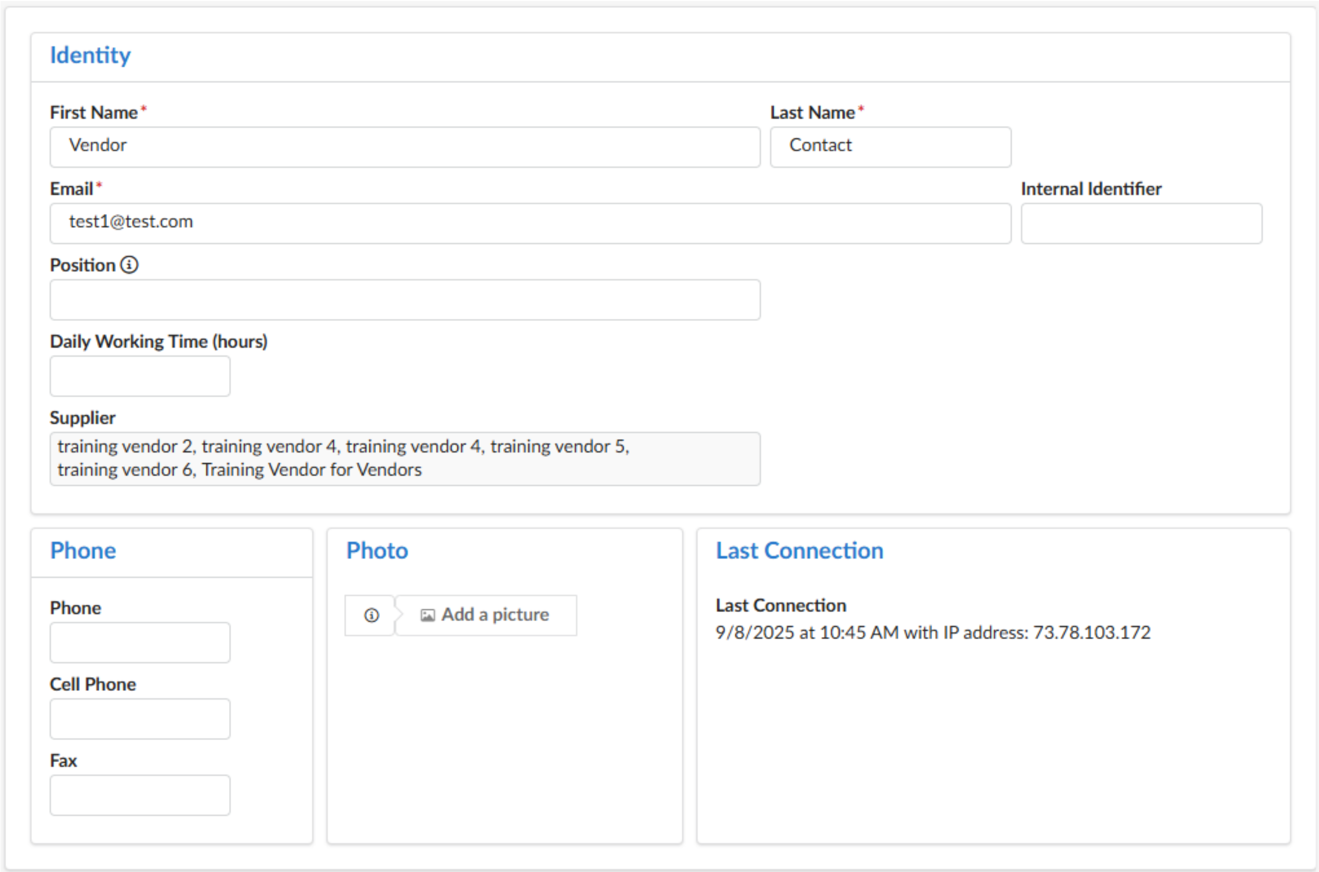
Menu option	Description
My Settings	View your Account Settings and Preferences
Logout	Click to exit Forum

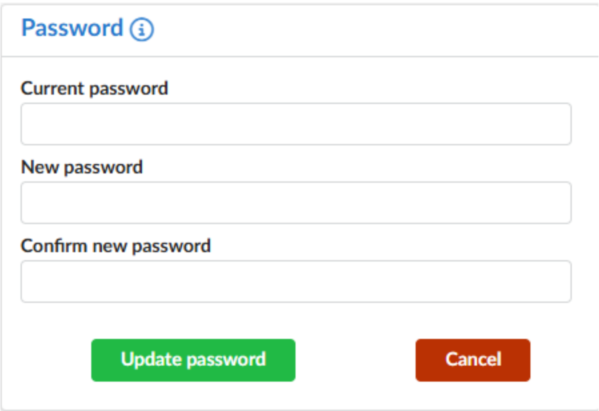
MY SETTINGS

Your settings section is divided into three pages: My preferences, General preferences, and Notifications.

PROFILE

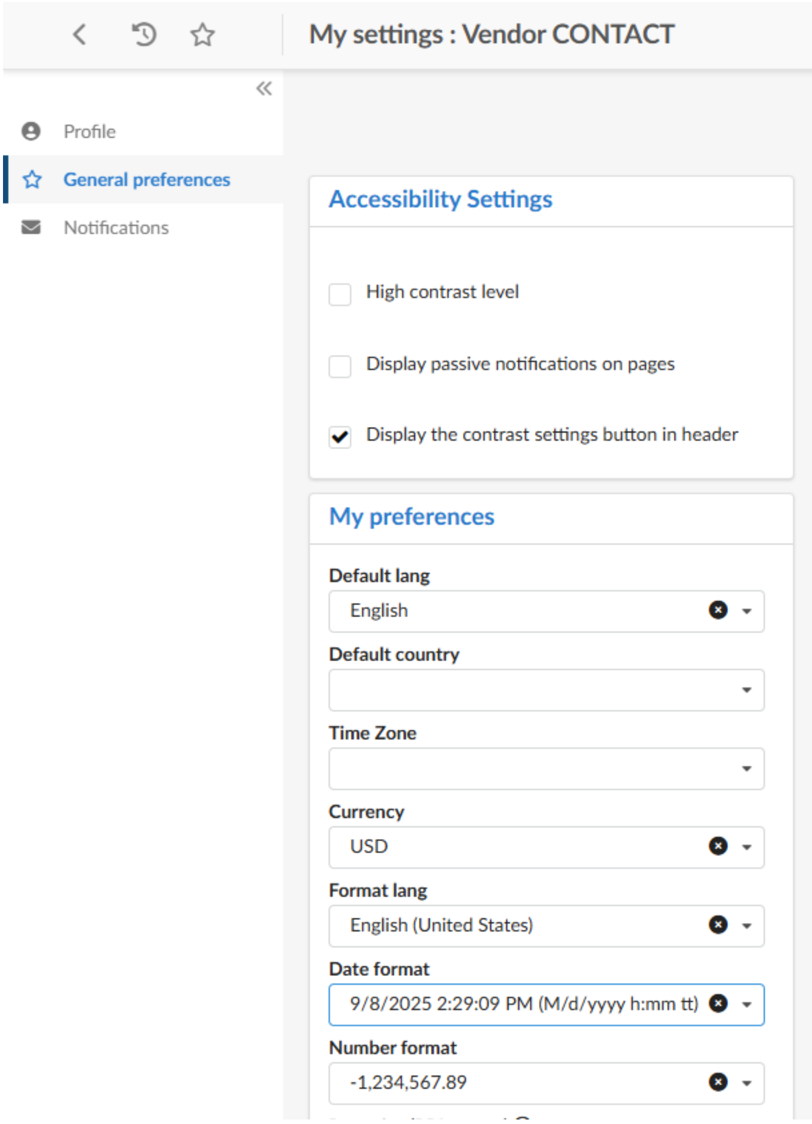
Use the page to set your name and contact information as well as your password.





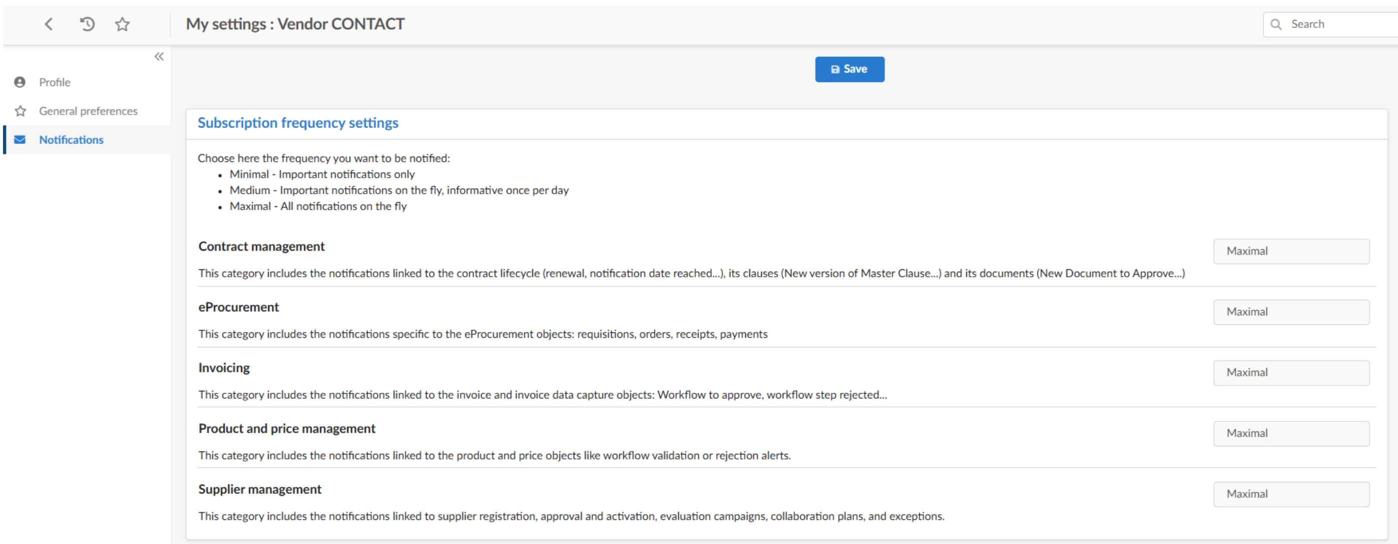
GENERAL PREFERENCES

Here you can set your accessibility settings as well as settings like language and time zone.



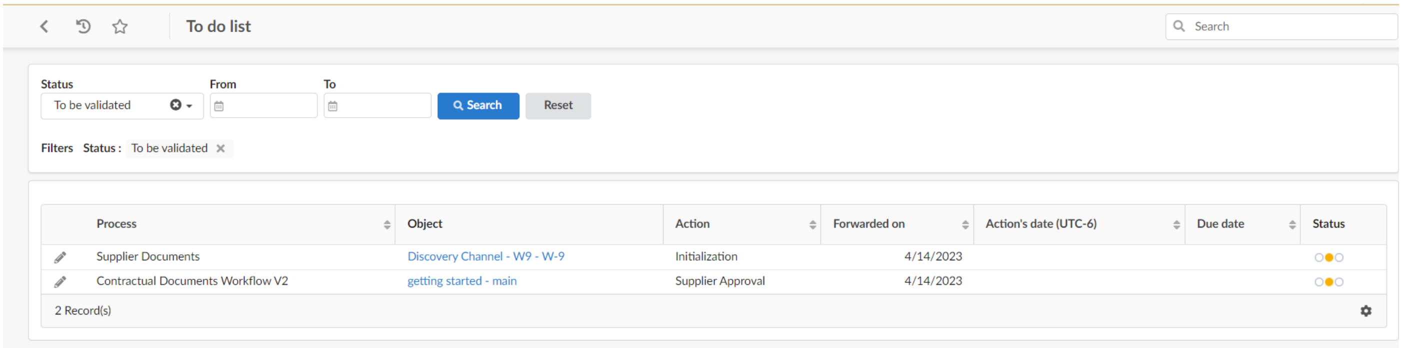
NOTIFICATIONS

Here you can see what notifications you will receive.



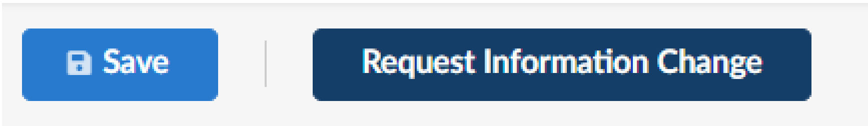
PENDING VALIDATIONS

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.



UPDATING YOUR COMPANY INFORMATION

You can change your company information by clicking **Request Information Change** on the top of the *Company Information* page.



Judicial will review the changes and approve, or work with you to ensure the changes are also updated in Colorado’s payment system (CORE) before approving.

This process is used to ensure that payment information is synchronized between systems, so that you do not have any issues or delay in receiving payment.

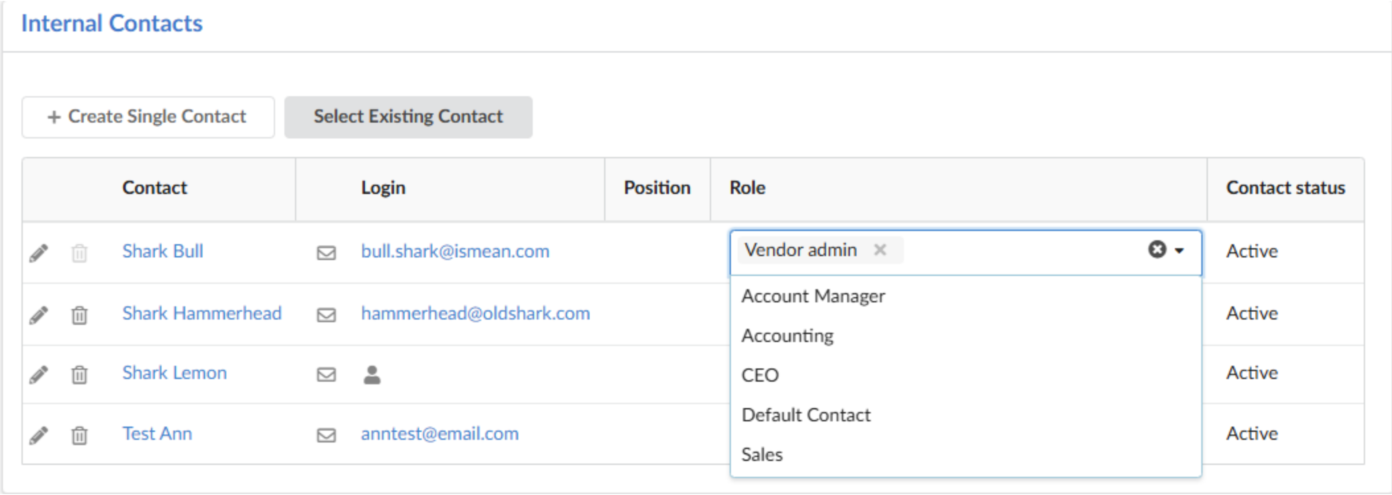
NOTE: You do not need to use Request Information change to add company contacts, initiate CHC, or add requested documents (i.e. W9, certificate of insurance).

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.** Only staff that will need to view contracts, PO, or Invoice need to be given a login.

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

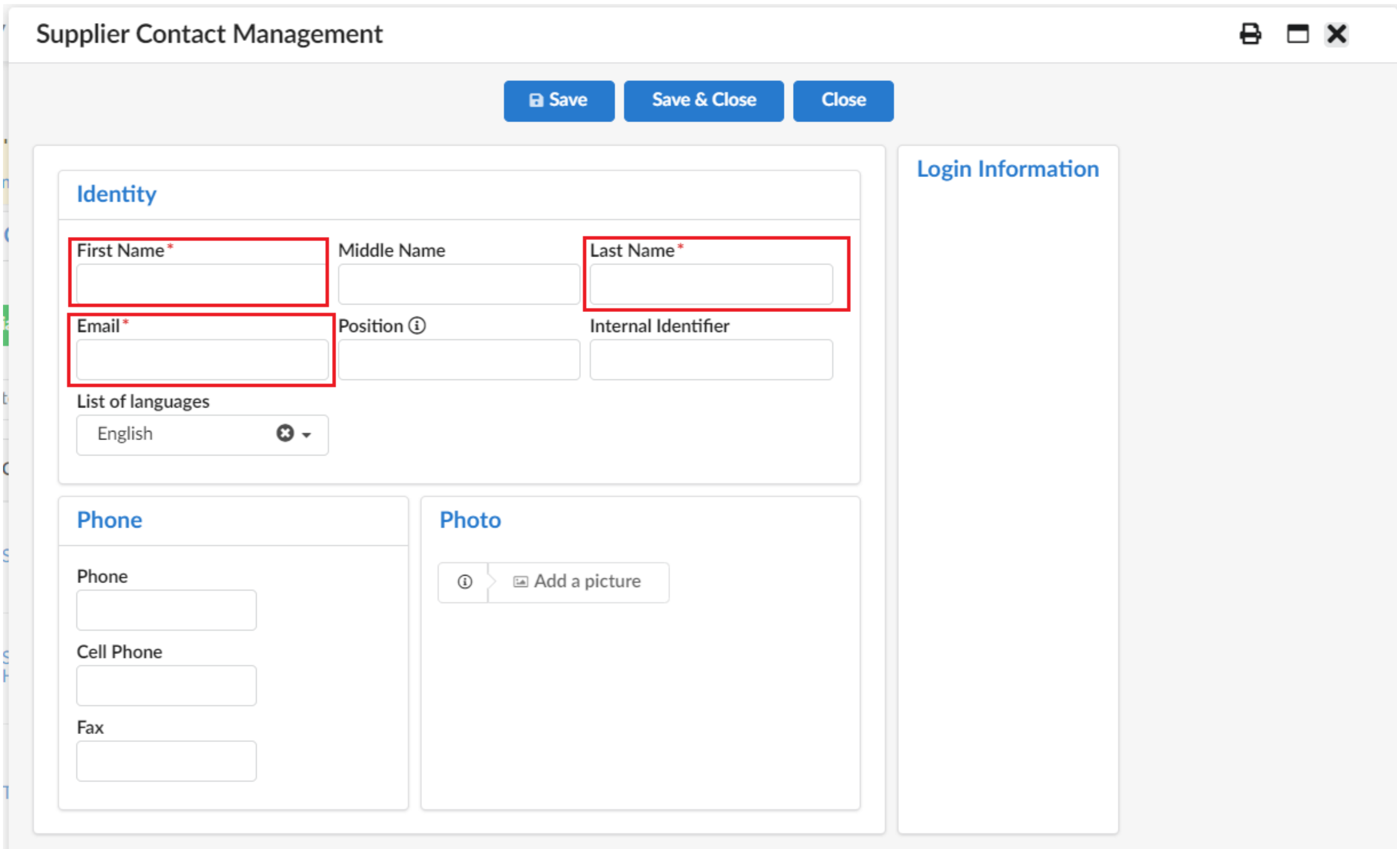


ADDING NEW USERS

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.

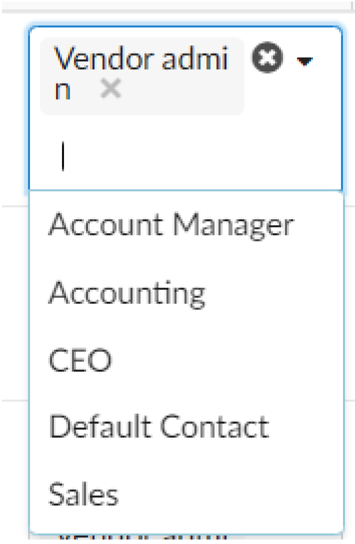
You can save your information as you go by clicking **Save**, when you are finished click **Save & Close**.



Once the user has been added, you can assign them to a role and invite them to login.

ROLES

To assign a user to a role, click the dropdown and select the role. A user may be added to multiple roles.



Vendor admin can view the company's Tax ID number, add staff, and manage Criminal History Checks (CHC) as well as can view, edit, and manage PO and Invoices.

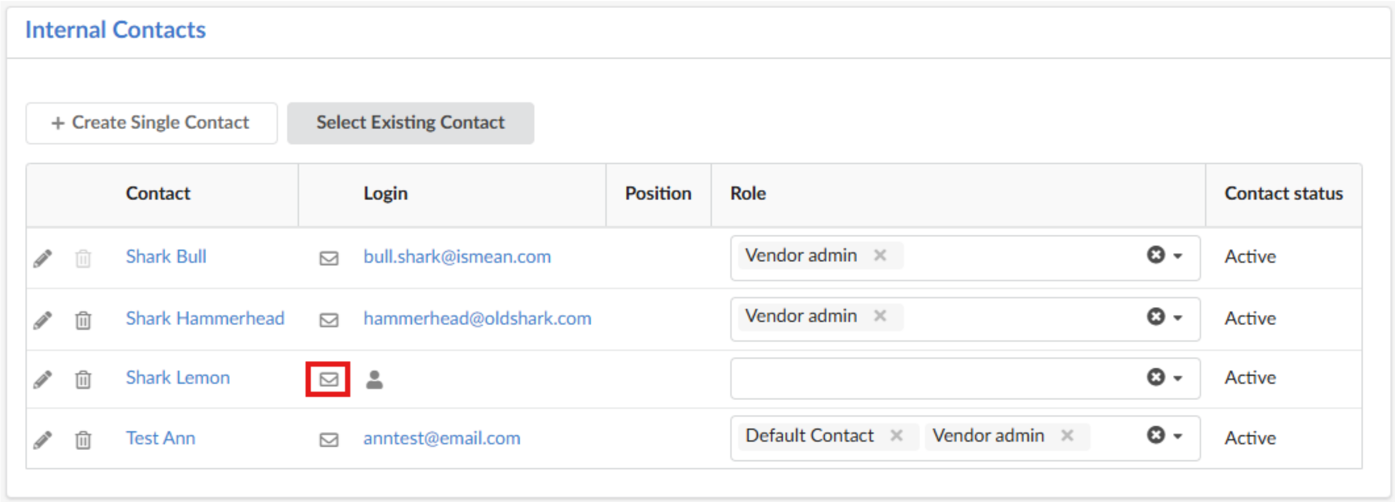
Default Contact has the same abilities as Vendor Admin but will be the person that PO are sent to by default. Forum cannot send PO to multiple users. The Default Contact cannot view the Tax ID number or add staff, but a user can be assigned the Default Contact role and the Vendor Admin role.

If you would like to have PO sent to multiple users, Judicial recommends using your email provider (Outlook, Gmail, etc.) set up an Inbox rule to forward emails from Forum to the appropriate contacts. Search the help section of your email provider for step by step instructions on how to do this.

The remaining roles are informational only, and all have the same general access to view, edit, and manage PO and Invoices as well as view signed contracts.

LOGIN

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

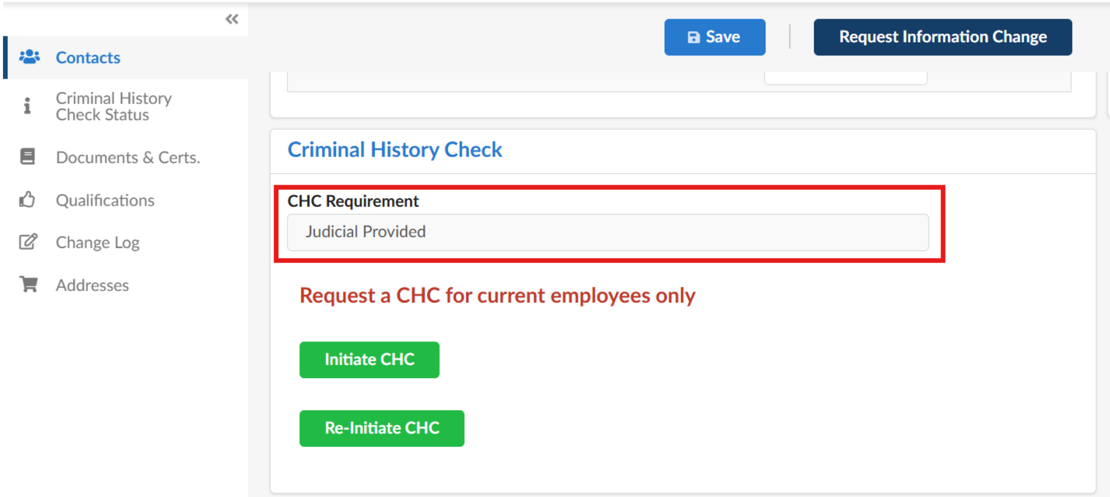
If you have a staff member who is already present in the system (for example, a staff member that works for your company in a different location), click **Select Existing Contact** and select the user from the list of names provided. Do not add the same user as a single contact to multiple locations, as they will be recorded as distinct users in the system.

CHC (CRIMINAL HISTORY CHECK) REQUIREMENTS

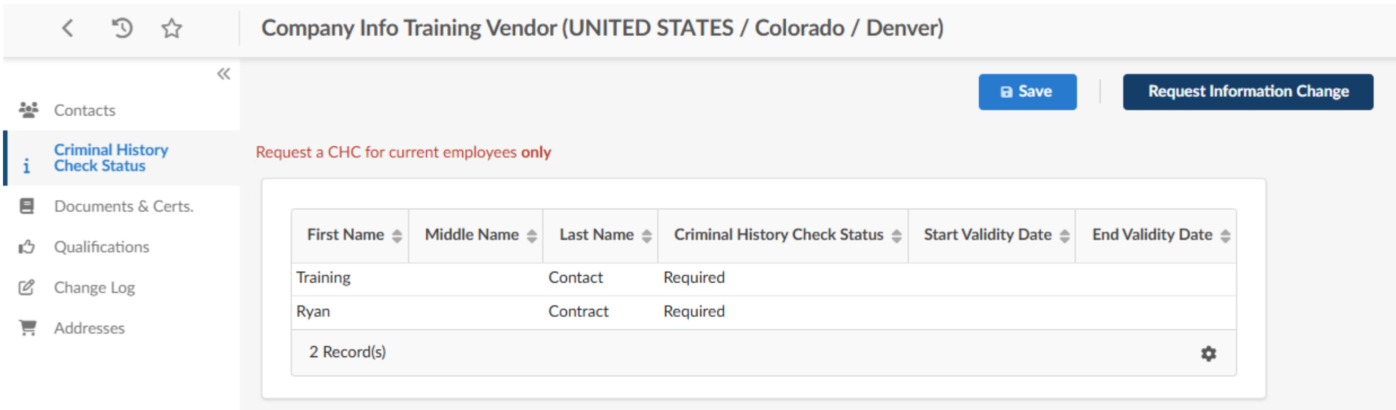
Criminal History Checks (CHC) may be performed and managed by Judicial, by the vendor, or not required at all. How Criminal History Checks are managed and performed is determined by Colorado Judicial.

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

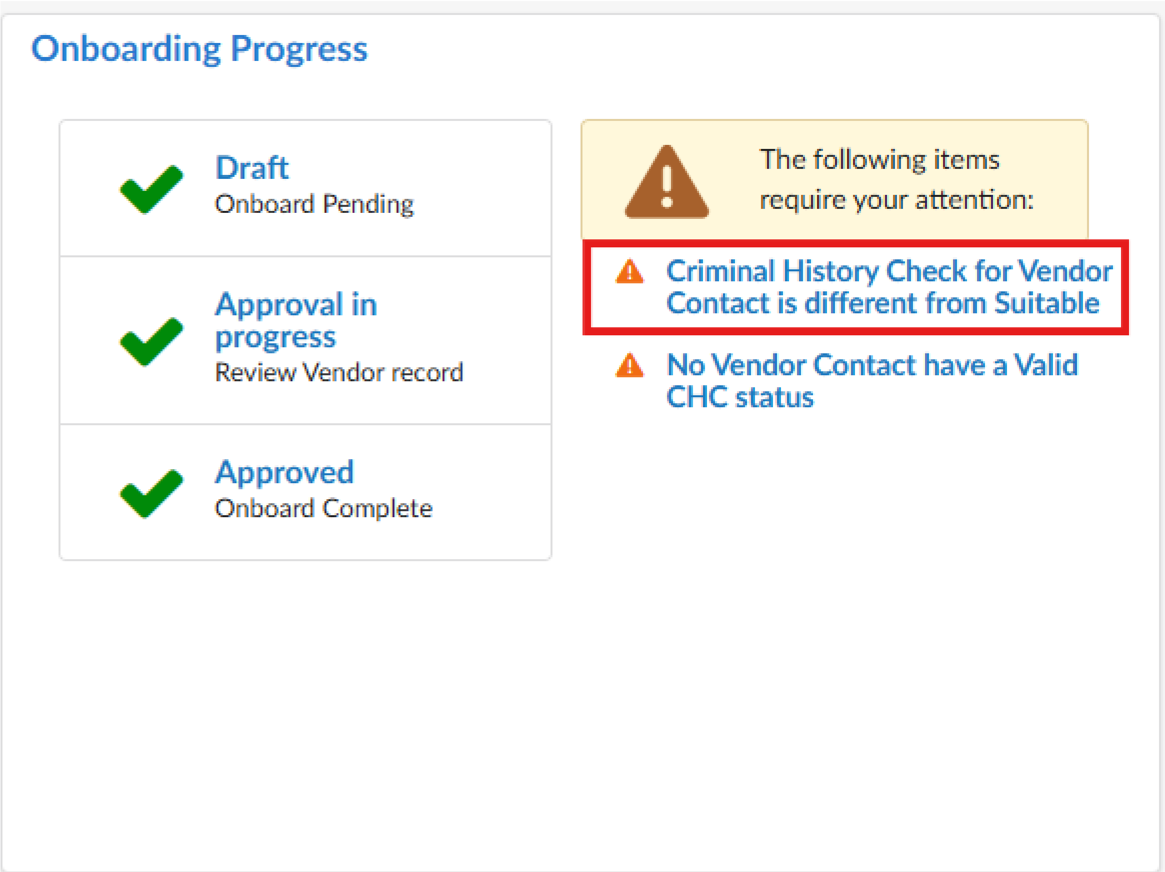
To view your CHC requirement click on the Contacts link in the left-side menu and look in the Criminal History Check section.



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

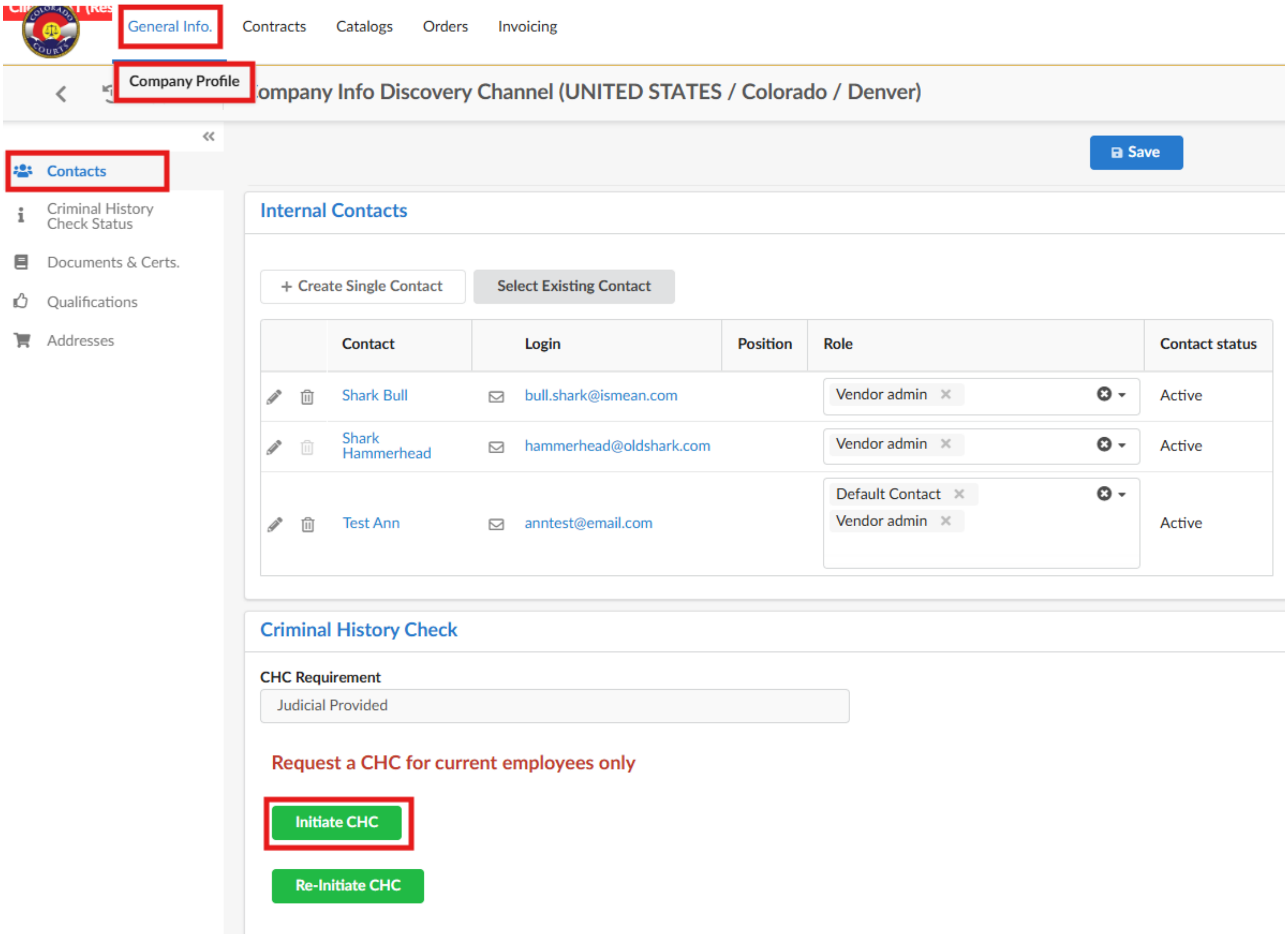
When the CHC Requirement is set to Judicial Provided you will be responsible for initiating the CHC process and Colorado Judicial will perform the CHC as the authorization forms are received. You can view the status and validity date of your staff's CHC as they are completed.

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.

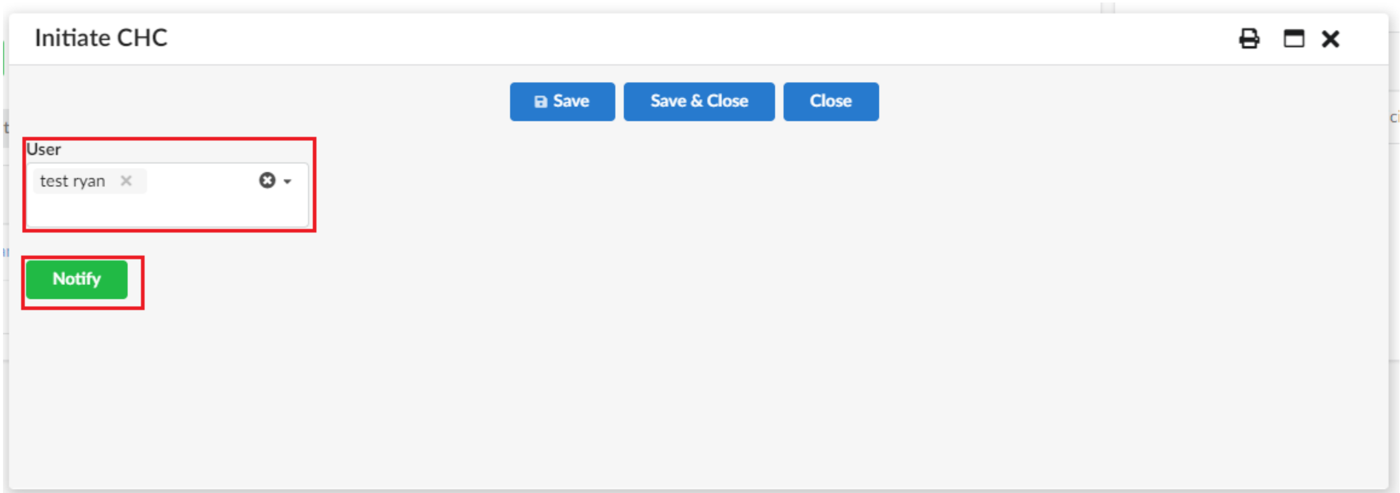
INITIATING A CHC FOR JUDICIAL PROVIDED CRIMINAL HISTORY CHECKS

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.

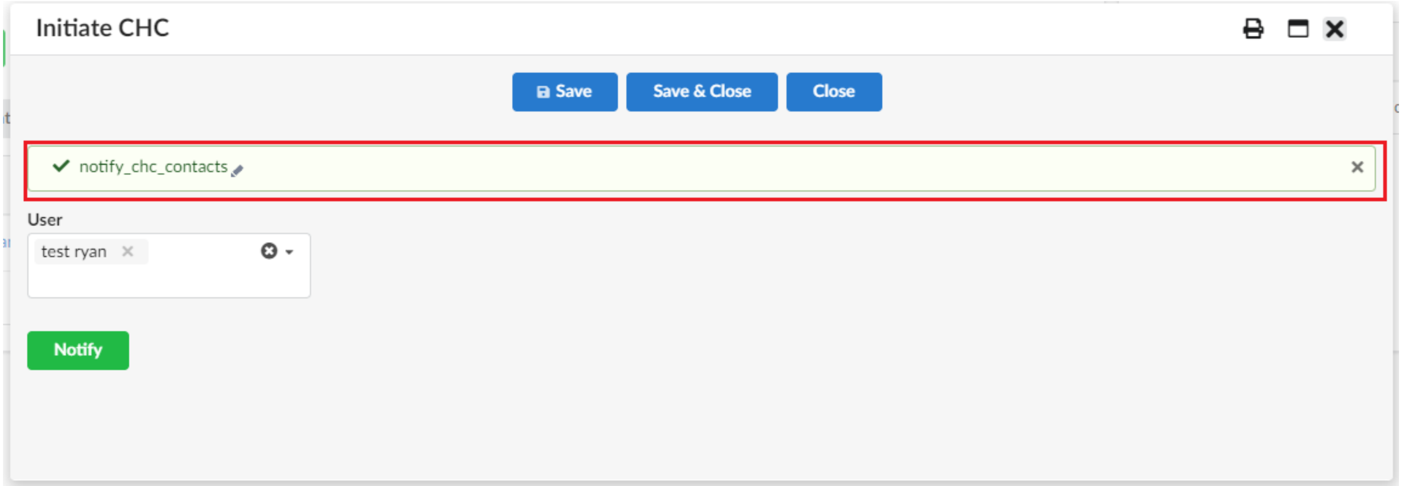
On the Contacts tab click the green **Initiate CHC** button in the Criminal History Check section.



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**.



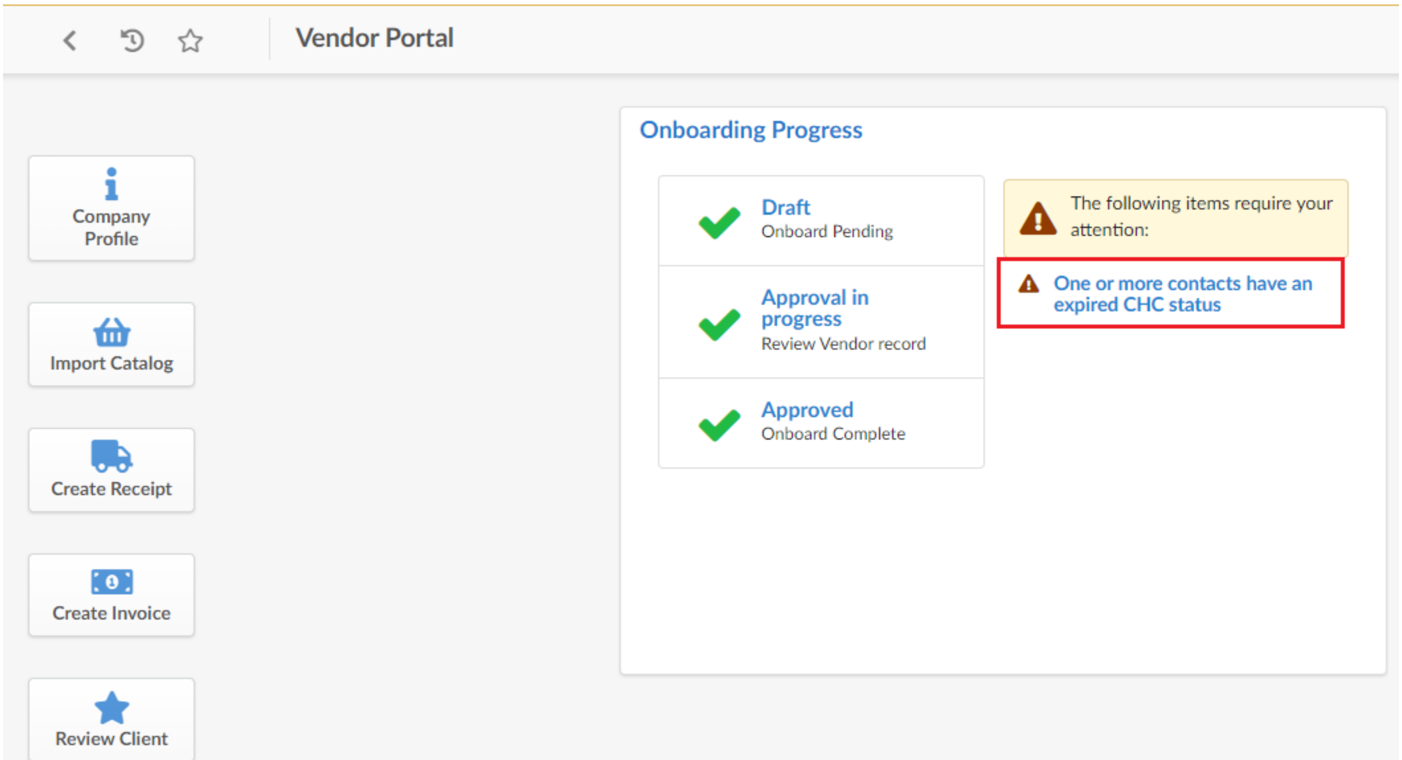
You will know that the notification has been sent if this message appears in the window.



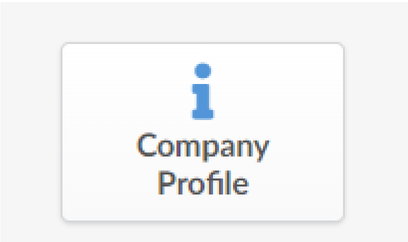
You can now click **Save & Close**, **Close**, or the X in the corner of the screen.

RENEWING AN EXPIRED CHC

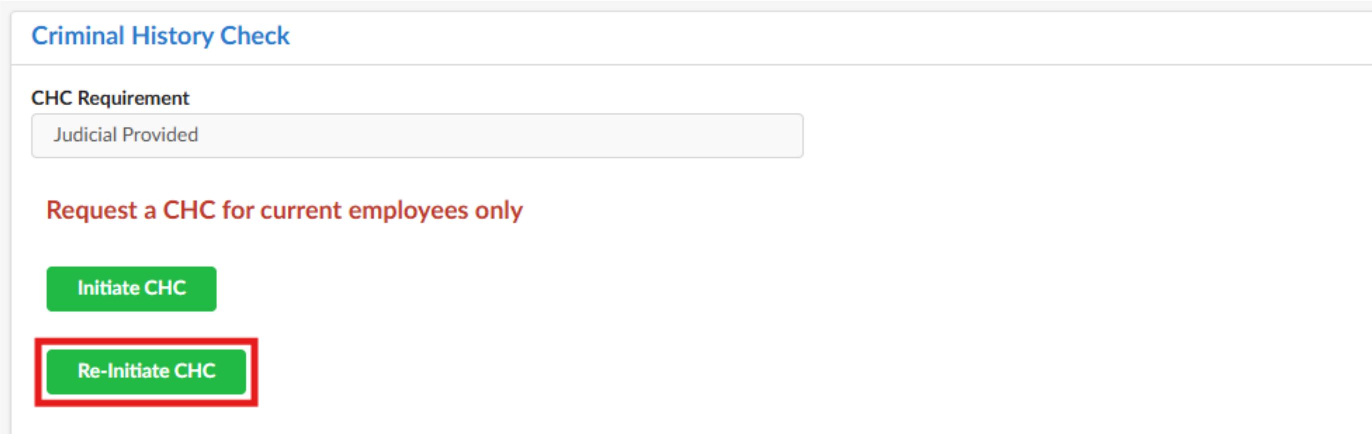
When one of your staff members has a CHC about to expire, or that has expired, you will see a notification on your home page.



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



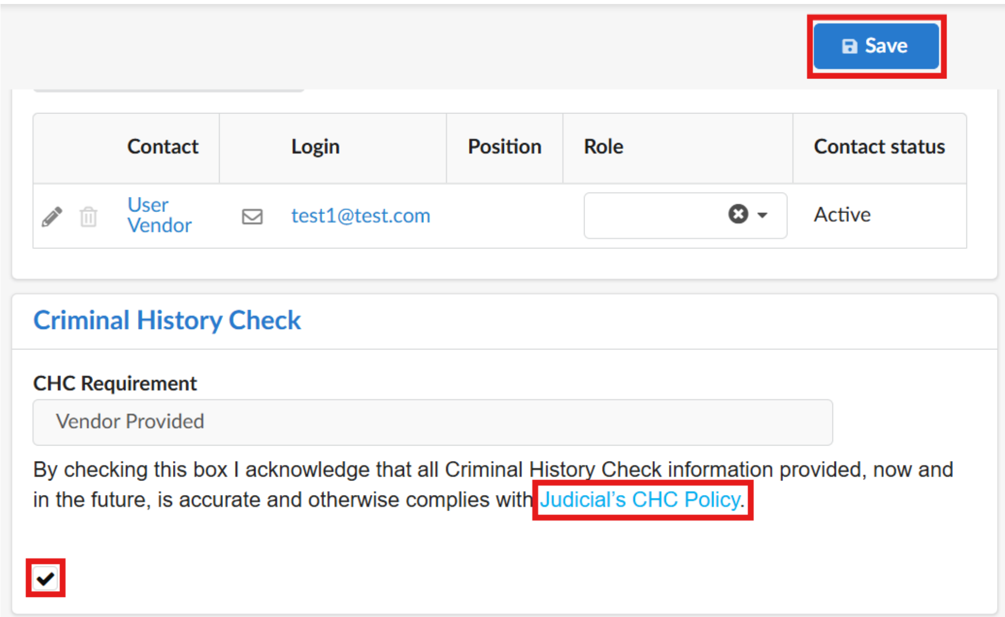
from the left-hand menu, then **Contacts**. From the Contact screen, in the Criminal History Check section, click **Re-Initiate CHC**.



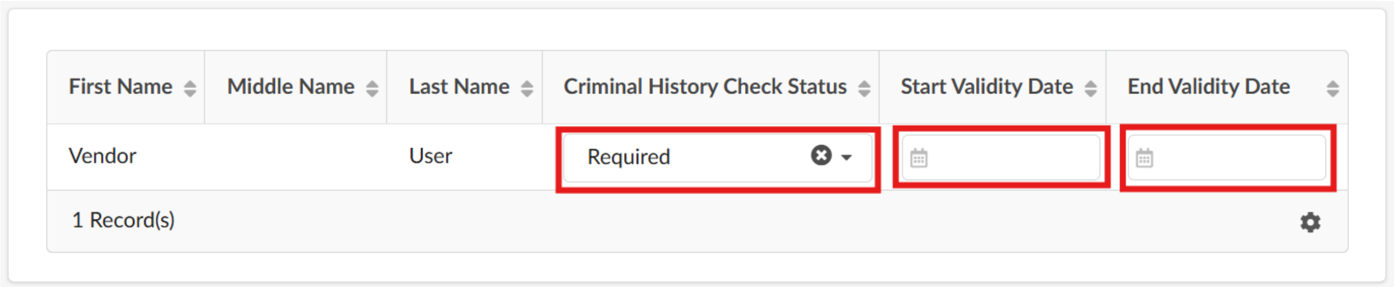
From the next screen, select your contact and click **Notify**.

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.

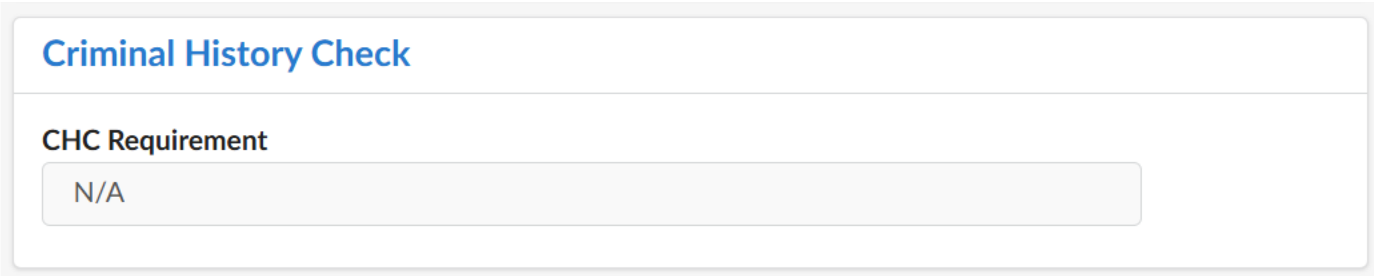


After clicking the box and clicking Save you can go to the Criminal History Check Status page where the Criminal History Check Status, Start Validity Date, and End Validity Date fields can be updated.



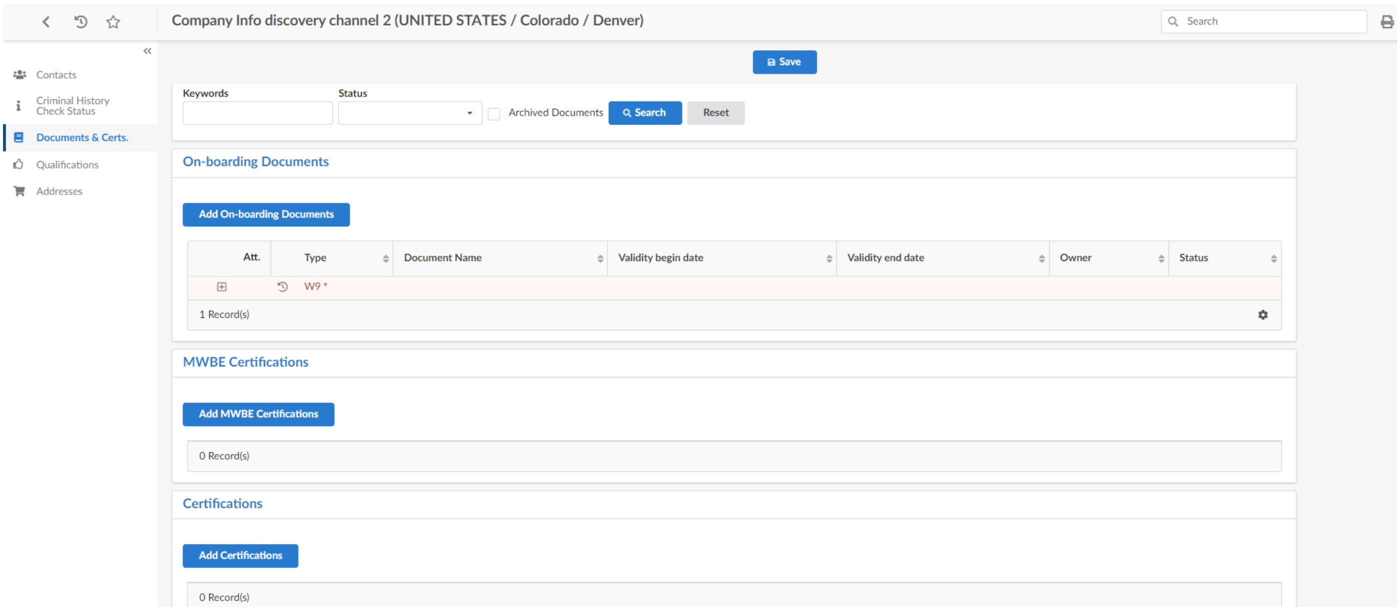
CHC REQUIREMENT: N/A

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

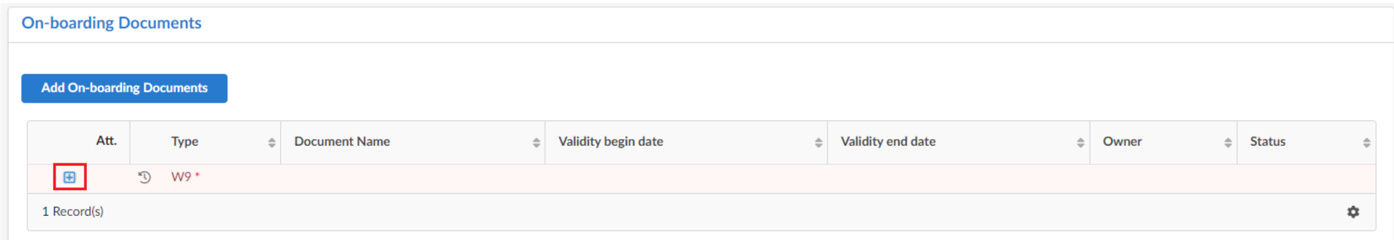


ADDING REQUIRED DOCUMENTS

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

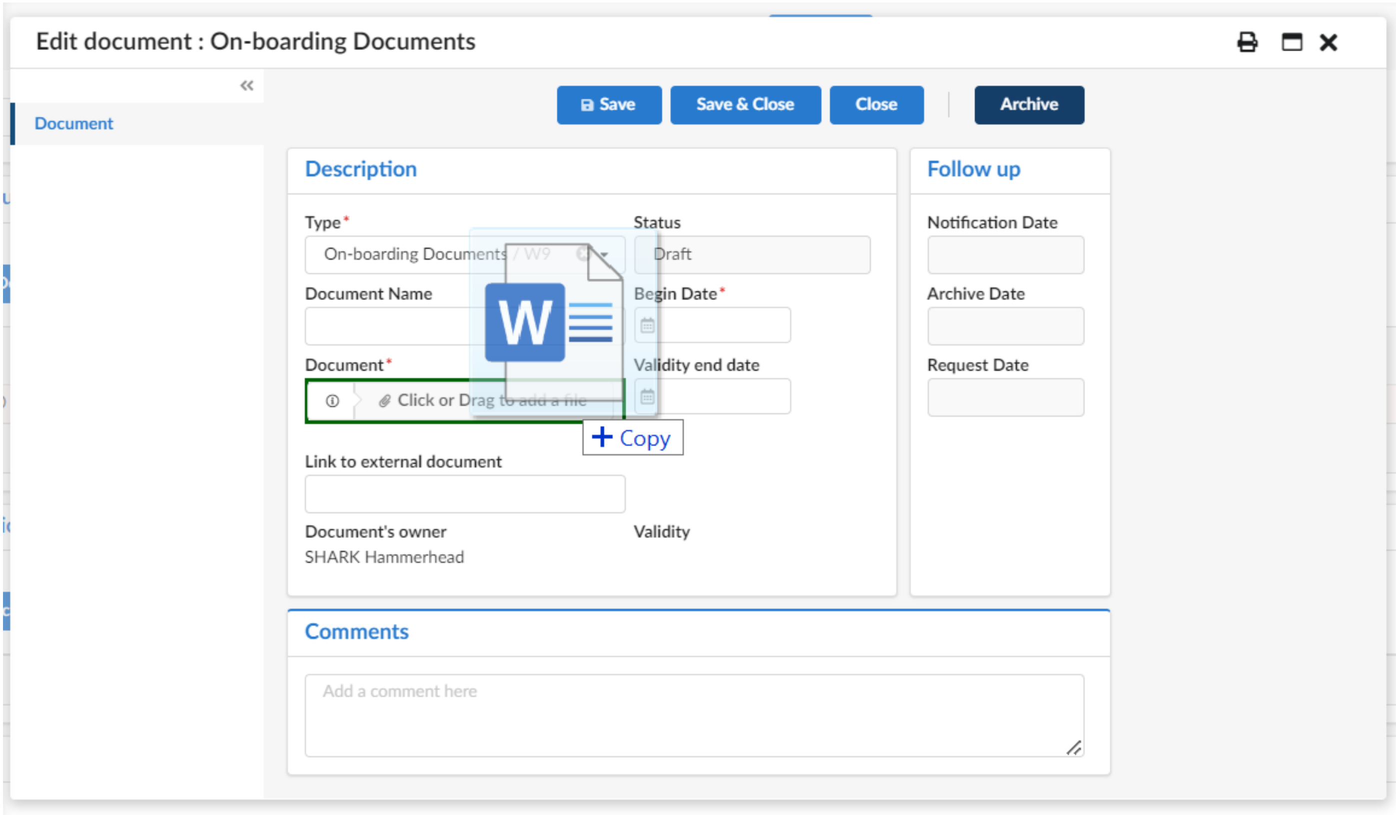


Click the + icon next to the w9 document

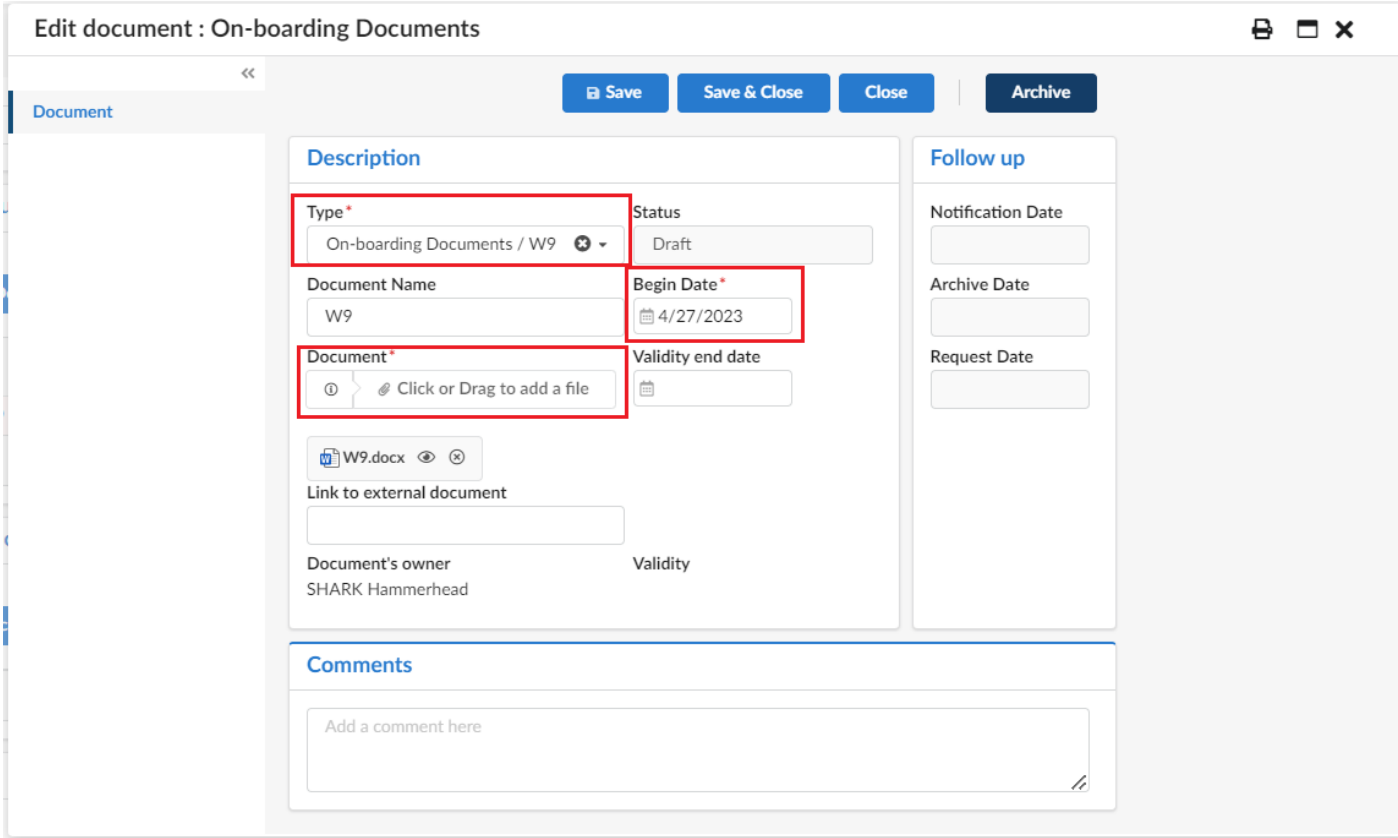


W9 documents are required for all vendors. Other documents may or may not be required based on the terms of your contract.

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.

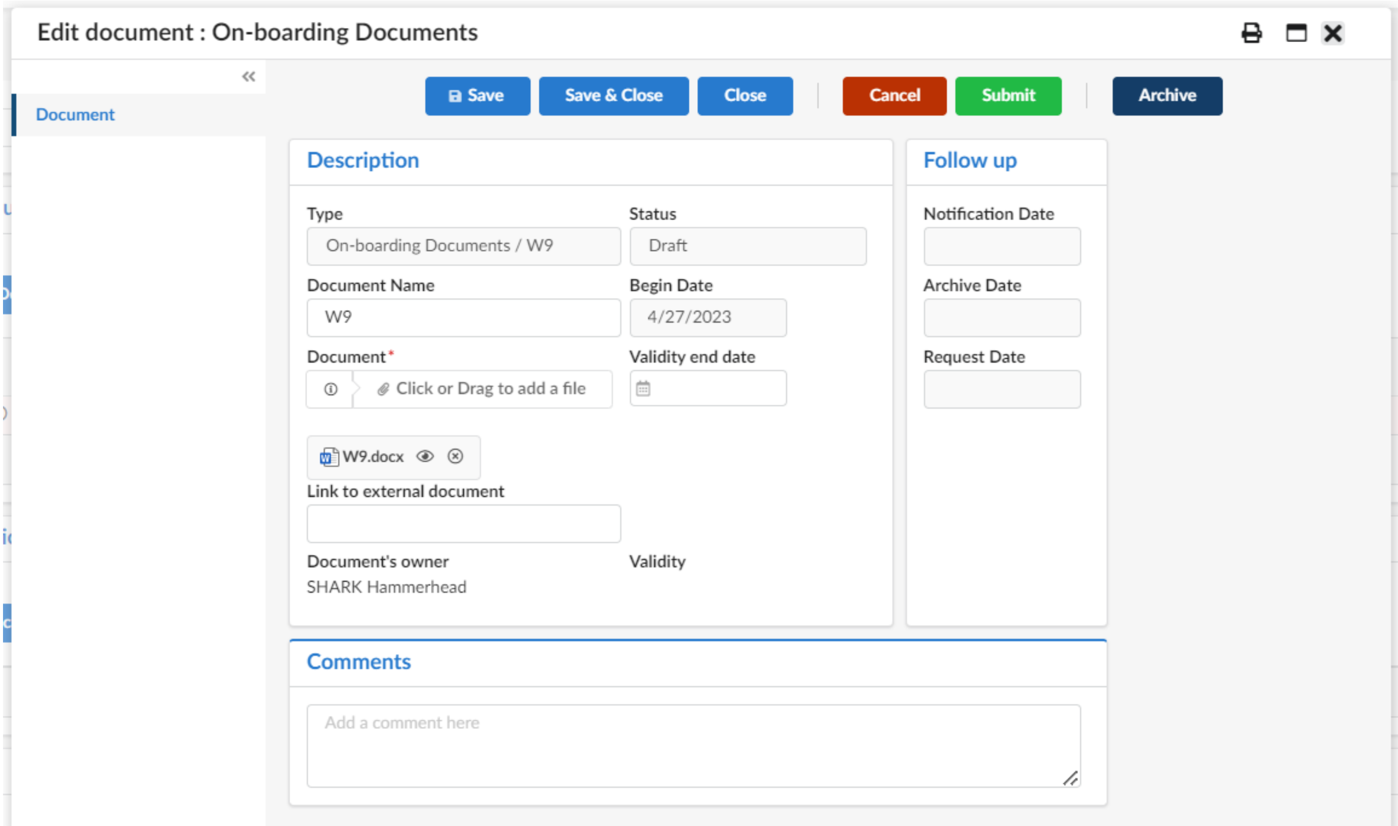


Add the *Document Name* and enter the *Validity begin date*. Enter any additional information or comments.



Click **Save**.

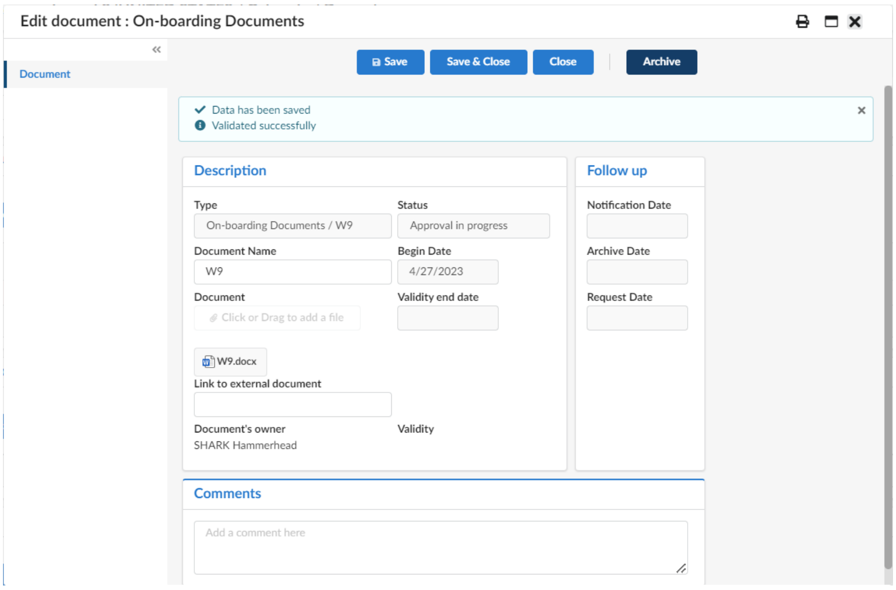
You will now see a screen with **Cancel** and **Submit** buttons.



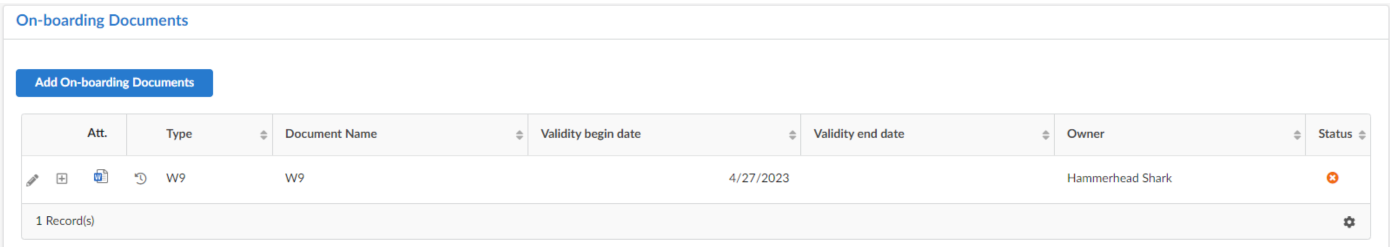
If you have completed all required information and are ready to submit this document to Judicial, click **Submit**. If you have not completed all required information and would like to come back to complete later, click **Save & Close.**

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

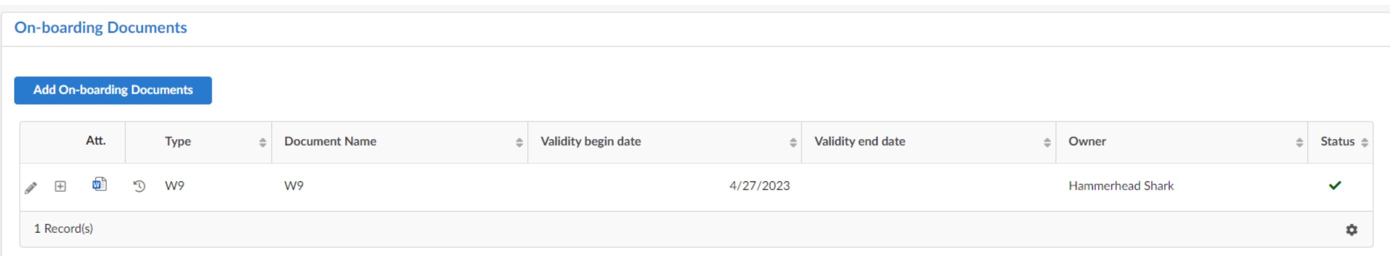
Once you have submitted your document, you will see a confirmation message at the top of the window. Click **Save & Close** or the **X** in the upper right corner to close the dialog box.



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 you document is rejected, the person who added the document will receive an email indicating why the document was rejected.

To archive a document, or to review the data entered, click the edit (pencil) icon to the left of the document name. To download the document for viewing, click the document icon to the left of the document name.

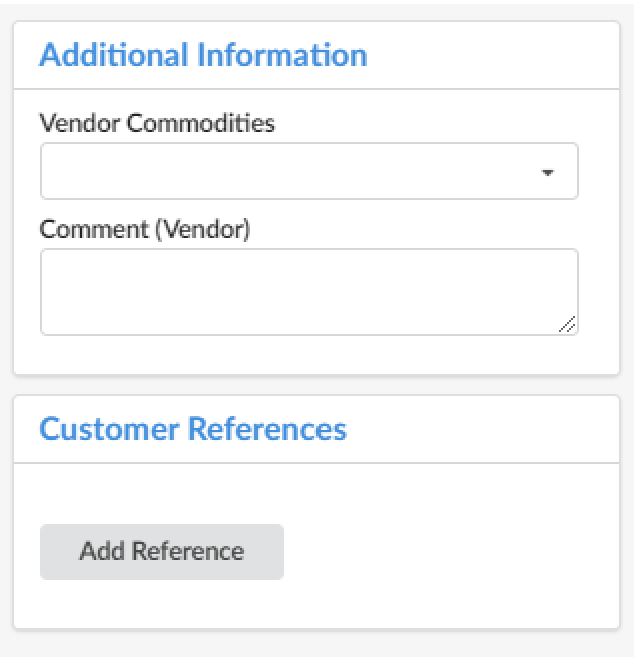
ARCHIVING DOCUMENTS

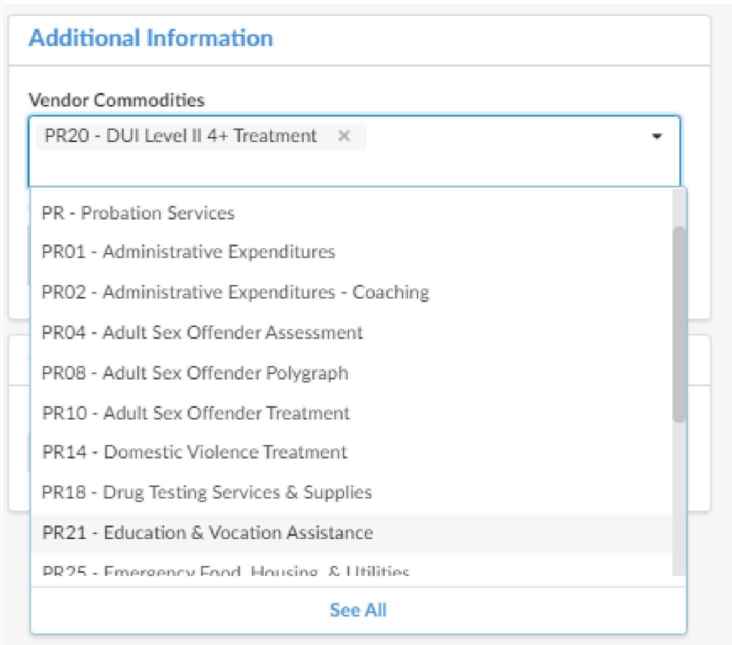
If you have a document that is no longer valid, you can archive it. When a document is archived, the validity end date is filled in with the current date and the document is removed from the list of available documents. Archiving is done by viewing the document information and clicking the **Archive**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

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.



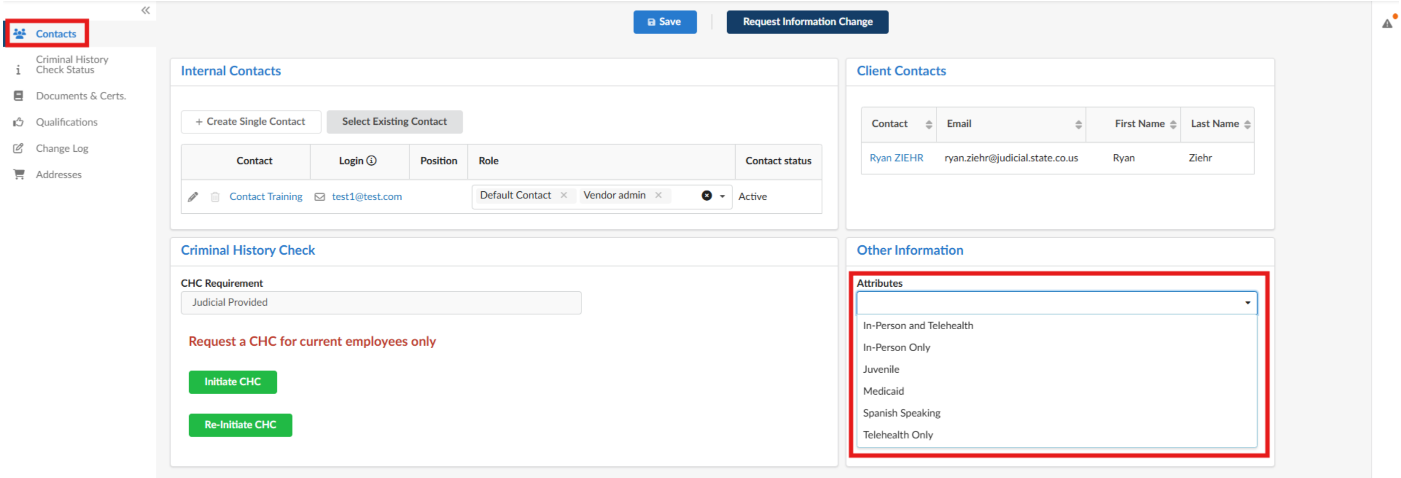


OPTIONAL: DECLARING VENDOR ATTRIBUTES

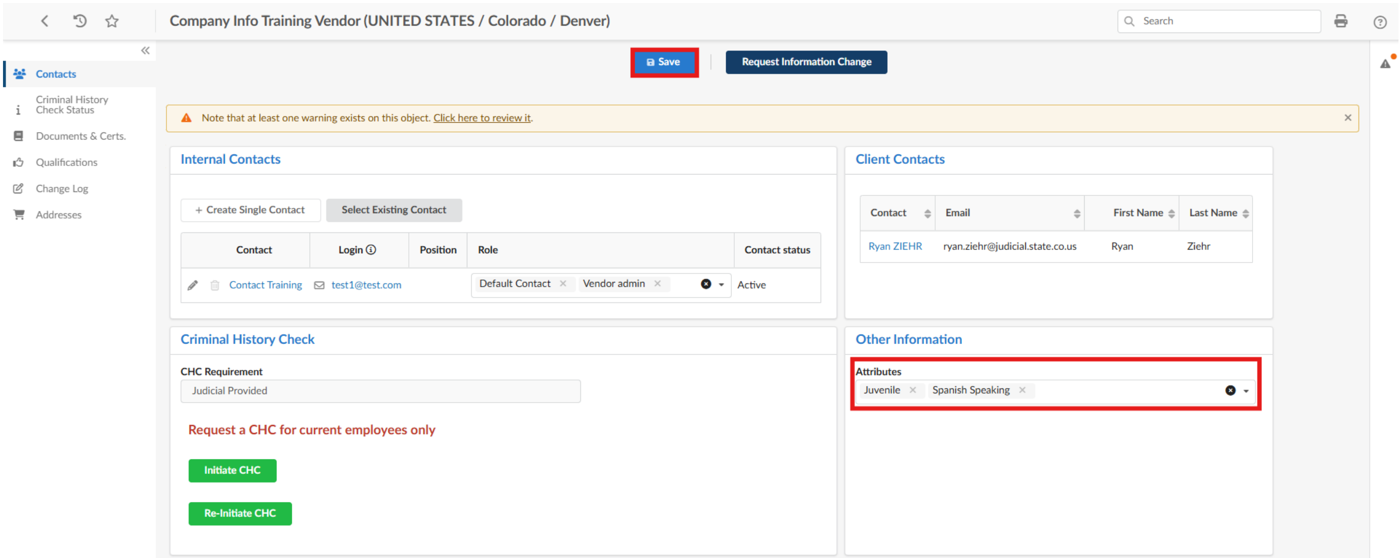
Vendor Attributes are quick tags that showcase what your organization offers—like Medicaid eligibility, languages, service delivery formats, and populations served—so Judicial users can easily find the right fit. Add attributes at the organization or location level in Forum to accurately highlight what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



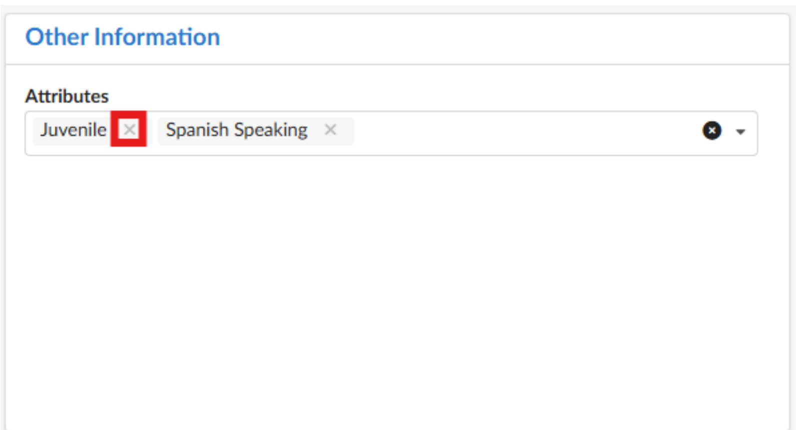
After you have selected your attributes click Save.



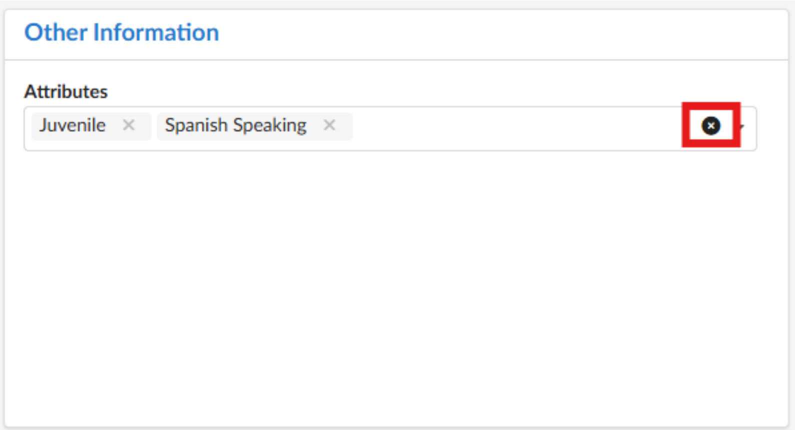
The selected attributes will remain in the dropdown. You do not need to use the Request Information Change option to update your attributes list.

REMOVING ATTRIBUTES

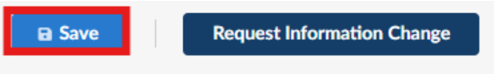
Attributes that were previously selected can be removed if they were added by mistake or are no longer applicable. To remove a single attribute, click the X icon to the right of the attribute's name.



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



After removing one or more attributes click Save.



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.