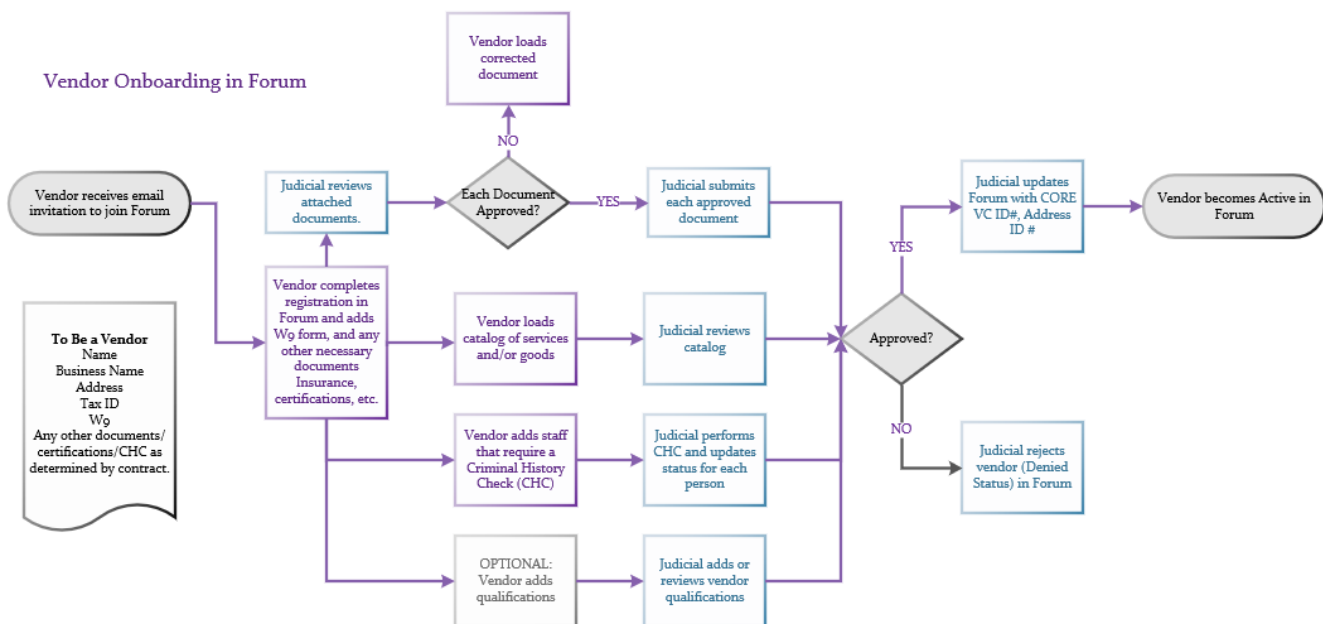


# REGISTERING AND ONBOARDING WITH FORUM FOR VENDORS

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.

CONTENTS	
<b>PRE-RECORDED TRAINING VIDEO.....</b>	<b>2</b>
<b>LOGGING ON TO FORUM .....</b>	<b>2</b>
FIRST USE: ACCEPTING TERMS & CONDITIONS .....	3
<i>Forgot your password?.....</i>	3
<b>SETTING UP YOUR USER PREFERENCES .....</b>	<b>4</b>
MY PROFILE .....	4
<i>My preferences .....</i>	4
UPDATING YOUR COMPANY INFORMATION .....	6
<b>ADDING STAFF AND USERS .....</b>	<b>6</b>
ADDING NEW USERS.....	7
<i>Roles.....</i>	8
<i>Login .....</i>	8
<i>Including existing staff members.....</i>	9
<b>CHC (CRIMINAL HISTORY CHECK) REQUIREMENTS.....</b>	<b>9</b>
CHC REQUIREMENT: JUDICIAL PROVIDED .....	12
<i>Initiating a chc for Judicial Provided Criminal History Checks .....</i>	12
<i>Renewing an expired CHC.....</i>	14
CHC REQUIREMENT: VENDOR PROVIDED.....	15
CHC REQUIREMENT: N/A .....	16
<b>ADDING REQUIRED DOCUMENTS.....</b>	<b>16</b>
ARCHIVING DOCUMENTS .....	19
<b>OPTIONAL: DECLARING YOUR QUALIFICATIONS .....</b>	<b>20</b>
<b>MANAGING MULTIPLE LOCATIONS .....</b>	<b>20</b>



## 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 →

### 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 →

## LOGGING ON TO FORUM

All Judicial Vendors will be invited to join Forum via email sent from [noreply@ivalua.com](mailto: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.**

Welcome to Forum



Welcome to Forum, the online marketplace for the Colorado Judicial Department.

Forum is a comprehensive management tool designed to optimize the procurement, contracts, and payment processes.

Login

Login

Password

Login

Sign in with Colorado login

Lost your password?

Help Desk

Judicial Staff click here

Vendors click here

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](#).

law as nearly as possible to reflect the original intentions of the parties, and the remainder of the provisions will remain in full force and effect. Waiver by either party of a breach of any provision of these Terms of Use or the failure by either party to exercise any right hereunder shall not operate or be construed as a waiver of any subsequent breach of that right or as a waiver of any other right.

Governing Law and Jurisdiction

By accessing this Site, you agree that the statutes and laws of the State of Colorado, without regard to the conflicts of laws principles thereof, shall govern all matters relating to your access to, or use of, this Site and any materials. You also agree and hereby submit to the exclusive personal jurisdiction and venue of the Courts of the State of Colorado with respect to such matters.

☐ I accept the terms and conditions

Acknowledge

Print

## FORGOT YOUR PASSWORD?

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

Lost your password?

In the window that displays, enter your email address and the secure field (captcha).

Password lost?

Close

Confirm

Forgot your password? Please fill your email address. \*

Security Control



Security Control


4F4H

Click the **Confirm** button.

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.







Hammerhead S. ▾

(Discovery Channel) ▾



 My Profile

 Logout

MENU OPTION	DESCRIPTION
My Profile	View your Account Profile and Preferences
Logout	Click to exit Forum

MY PROFILE

Your profile section is divided into three areas: My preferences, Identity, and Password.

MY PREFERENCES

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

### My preferences

Default lang

English

Default country

Time Zone

Currency

USD

Format lang

English (United States)

Date format

4/27/2023 11:33:05 AM

Number format

-1,234,567.89

## IDENTITY

Use the Identity section to add or update your contact information.

### Identity

First Name \*

Hammerhead

Last Name \*

Shark

Email \*

hammerhead@oldshark.com

Internal Identifier

Position ⓘ

Supplier

CA test ryan, Discovery Channel

Daily Working Time (hours)

Phone

Phone

Cell Phone

Fax

Photo

ⓘ Add a picture

Last Connection

Last Connection

4/27/2023 at 10:32 AM with IP address: 165.127.97.9

## PASSWORD

Use the Password section to update your password.

### Password ⓘ

Current password


New password

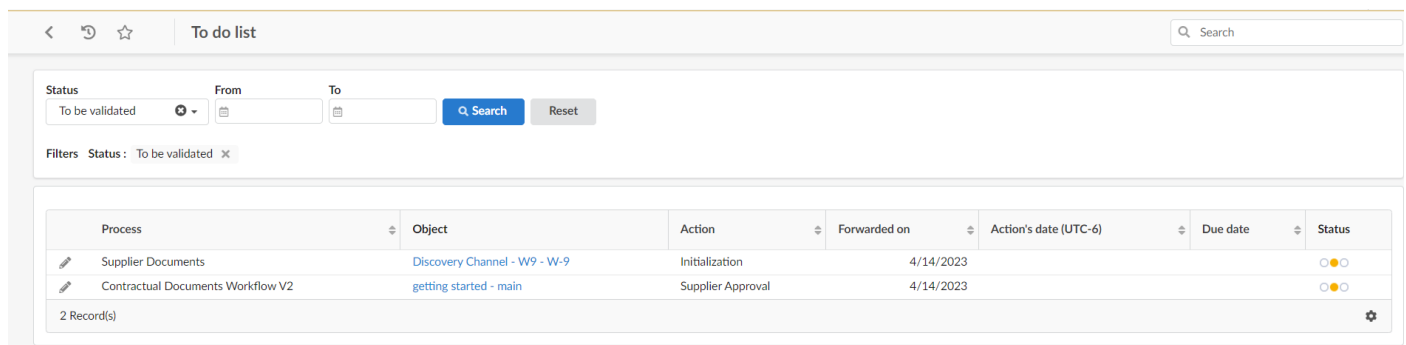
Confirm new password

Update









Cancel

## MY PENDING VALIDATIONS

My 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.



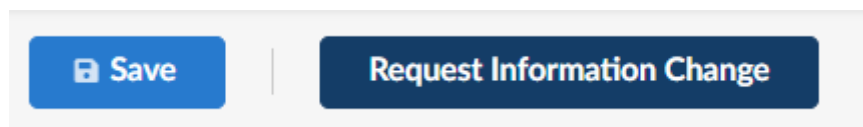
The screenshot shows a web interface titled "To do list" with a search bar and filters. The filters section shows "Status: To be validated". Below this is a table with the following columns: Process, Object, Action, Forwarded on, Action's date (UTC-6), Due date, and Status. There are two rows of data:

Process	Object	Action	Forwarded on	Action's date (UTC-6)	Due date	Status
 Supplier Documents	Discovery Channel - W9 - W-9	Initialization	4/14/2023			  
 Contractual Documents Workflow V2	getting started - main	Supplier Approval	4/14/2023			  

At the bottom of the table, it says "2 Record(s)" and there is a gear icon for settings.

## UPDATING YOUR COMPANY INFORMATION

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



The image shows two buttons side-by-side. The first button is blue with a white floppy disk icon and the text "Save". The second button is dark blue with white text that says "Request Information Change".

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**

## Internal Contacts

+ Create Single Contact

Select Existing Contact

Contact	Login	Position	Role	Contact status
  Shark Bull	 bull.shark@ismean.com		Vendor admin  	Active
  Shark Hammerhead	 hammerhead@oldshark.com		Account Manager	Active
  Shark Lemon	 		Accounting	Active
  Test Ann	 anntest@email.com		CEO	Active
			Default Contact	
			Sales	

## ADDING NEW USERS

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




+ Create Single Contact

Select Existing 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**.

### Supplier Contact Management

 Save  Save & Close  Close

#### Identity

First Name\*


Middle Name

Last Name\*

Email\*

Position ⓘ

Internal Identifier

List of languages  
English 



#### Phone

Phone

Cell Phone

Fax

#### Photo

  Add a picture

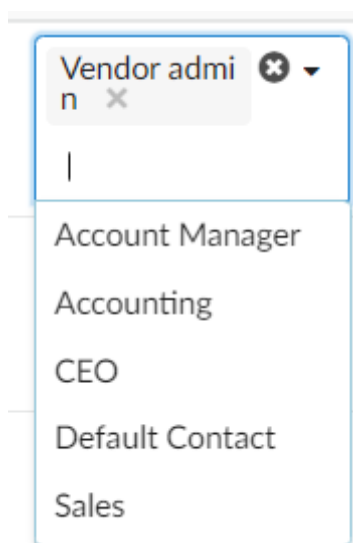
#### Login Information

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.



Internal Contacts

+ Create Single Contact

Select Existing Contact

Contact	Login	Position	Role	Contact status
Shark Bull	bull.shark@ismean.com		Vendor admin	Active
Shark Hammerhead	hammerhead@oldshark.com		Vendor admin	Active
Shark Lemon				Active
Test Ann	anntest@email.com		Default Contact  Vendor admin	Active

## 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.

Save | Request Information Change

### Criminal History Check

**CHC Requirement**  
Judicial Provided

**Request a CHC for current employees only**

Initiate CHC

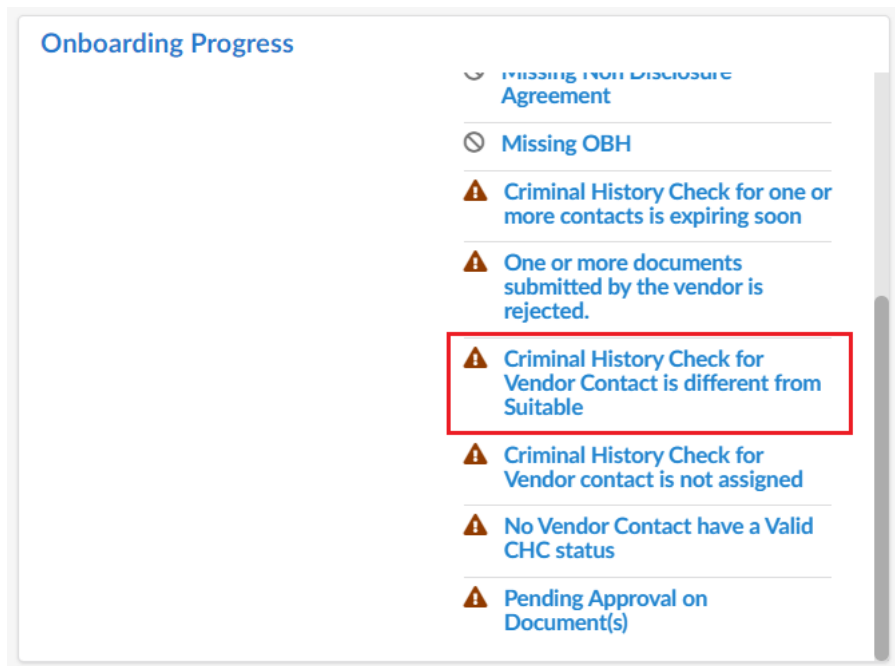
Re-Initiate CHC

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

First Name	Middle Name	Last Name	Criminal History Check Status	Start Validity Date	End Validity Date
Bull		Shark	Required	4/14/2023	4/15/2023
Hammerhead		Shark	Required	4/14/2023	4/15/2023
Ann		Test	Required		

3 Record(s)

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
<b>Required</b>	The default status of CHC for everyone. Link to CHC will be sent via email from no-reply-colorado@ivalua.com.
<b>Pending</b>	The individual's authorization form has been received and the CHC is in progress.
<b>Suitable</b>	The individual may access information and perform services for Colorado Judicial.
<b>Suitable (upon appeal)</b>	Status updated from <i>Non Suitable (appealable)</i> when further information is received and the appeal is successful.
<b>Not Suitable (appealable)</b>	Not suitable finding, however status may be changed to Suitable (upon appeal) if more information is provided by individual.
<b>Not Suitable (non-appealable)</b>	The individual may not access information and perform services for Colorado Judicial.
<b>Expired</b>	CHC validity has expired. CHC are generally valid for two years.
<b>N/A</b>	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" or "Suitable (upon appeal) 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.

General Info. Contracts Catalogs Orders Invoicing

Company Profile Company Info Discovery Channel (UNITED STATES / Colorado / Denver)

Save

Contacts

- Criminal History Check Status
- Documents & Certs.
- Qualifications
- Addresses

### Internal Contacts

+ Create Single Contact Select Existing Contact

Contact	Login	Position	Role	Contact status
Shark Bull	bull.shark@ismean.com		Vendor admin	Active
Shark Hammerhead	hammerhead@oldshark.com		Vendor admin	Active
Test Ann	anntest@email.com		Default Contact Vendor admin	Active

### Criminal History Check

CHC Requirement

Judicial Provided

Request a CHC for current employees only

Initiate CHC

Re-Initiate CHC

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**.

Initiate CHC

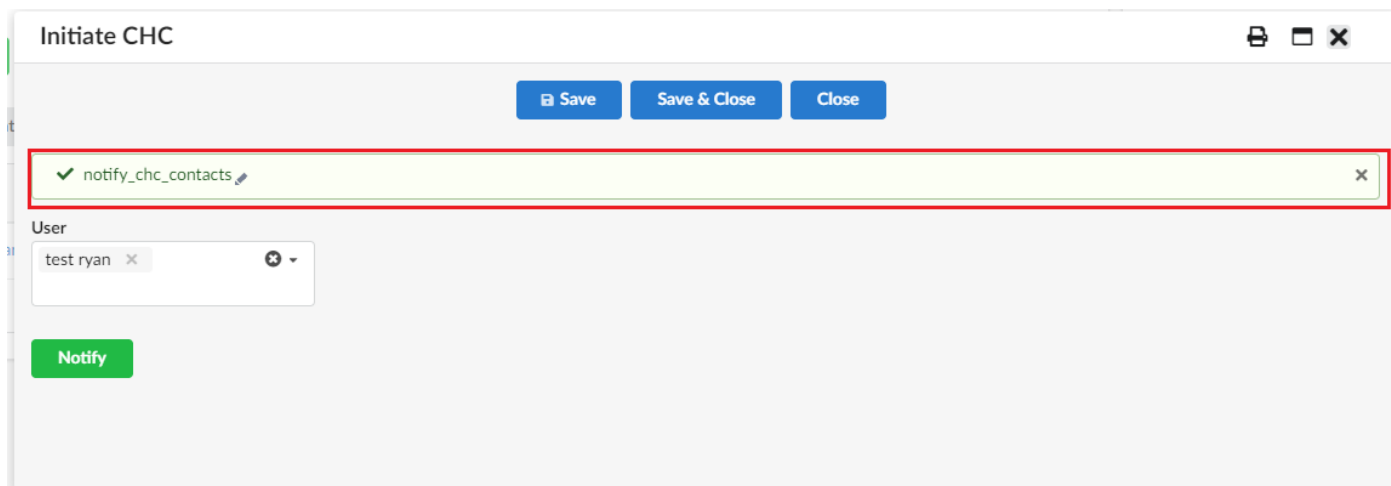
Save Save & Close Close

User

test ryan

Notify

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

A dialog box titled "Initiate CHC" with a light gray background. At the top right are icons for print, maximize, and close. Below the title bar are three blue buttons: "Save", "Save & Close", and "Close". A green bar at the top contains a checkmark, the text "notify\_chc\_contacts" with a pencil icon, and a close button (X). Below this is a "User" section with a text input field containing "test ryan" and a dropdown arrow. At the bottom is a green "Notify" button.

Initiate CHC

Save Save & Close Close

✓ notify\_chc\_contacts ✎

User

test ryan ✕

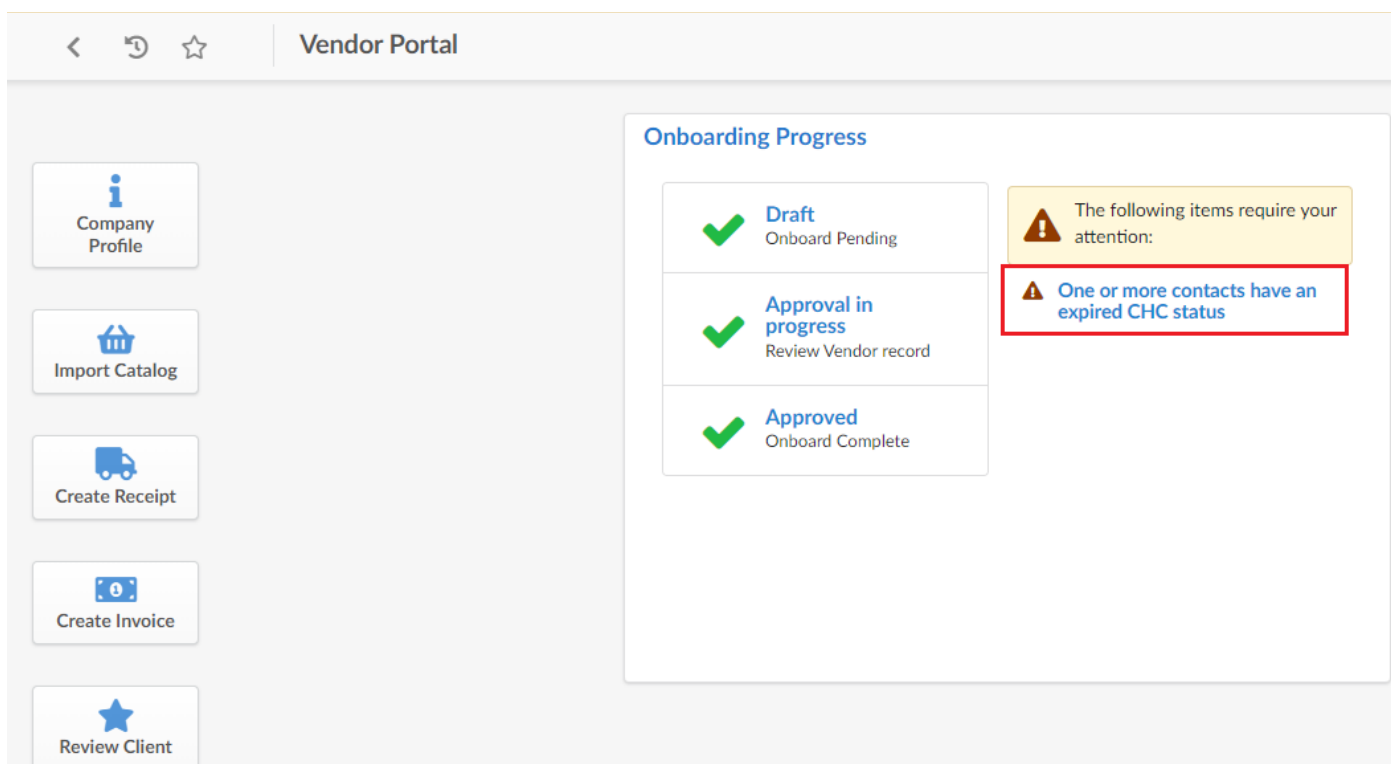
Notify

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.

A screenshot of the "Vendor Portal" home page. On the left is a sidebar with five buttons: "Company Profile" (info icon), "Import Catalog" (shopping cart icon), "Create Receipt" (truck icon), "Create Invoice" (dollar sign icon), and "Review Client" (star icon). The main area is titled "Onboarding Progress" and shows a list of three items: "Draft Onboard Pending", "Approval in progress Review Vendor record", and "Approved Onboard Complete", each with a green checkmark. To the right of this list is a yellow warning box with a red border containing two messages: "The following items require your attention:" and "One or more contacts have an expired CHC status".

< ↺ ☆ Vendor Portal

Company Profile

Import Catalog

Create Receipt

Create Invoice

Review Client

Onboarding Progress

✓ Draft Onboard Pending

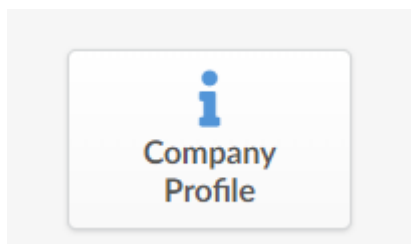
✓ Approval in progress Review Vendor record

✓ Approved Onboard Complete

⚠ The following items require your attention:

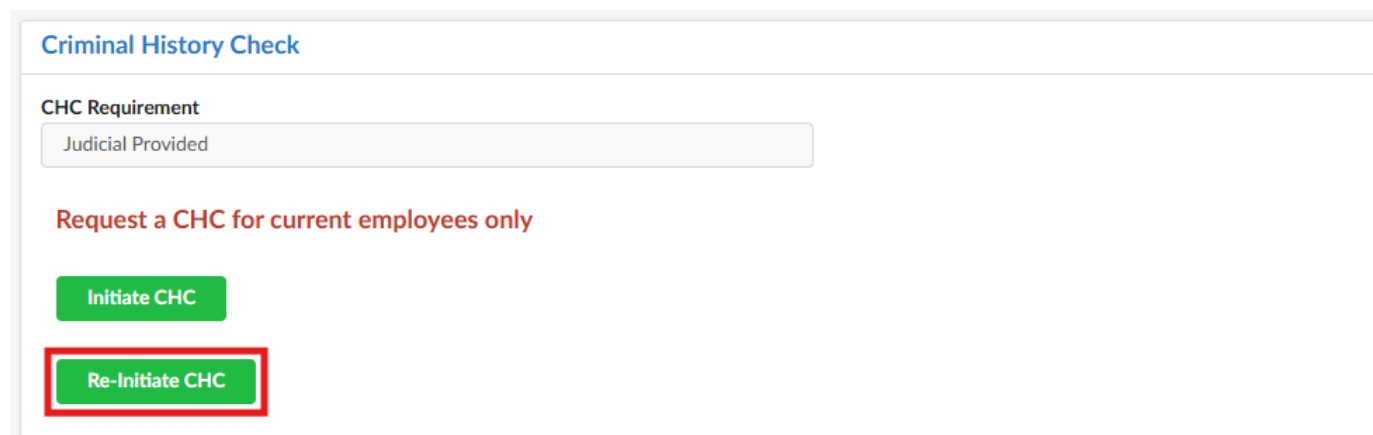
⚠ One or more contacts have an expired CHC status

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

A button with a light gray background, a blue information icon, and the text "Company Profile".

Company Profile

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



**Criminal History Check**

CHC Requirement

Judicial Provided

Request a CHC for current employees only

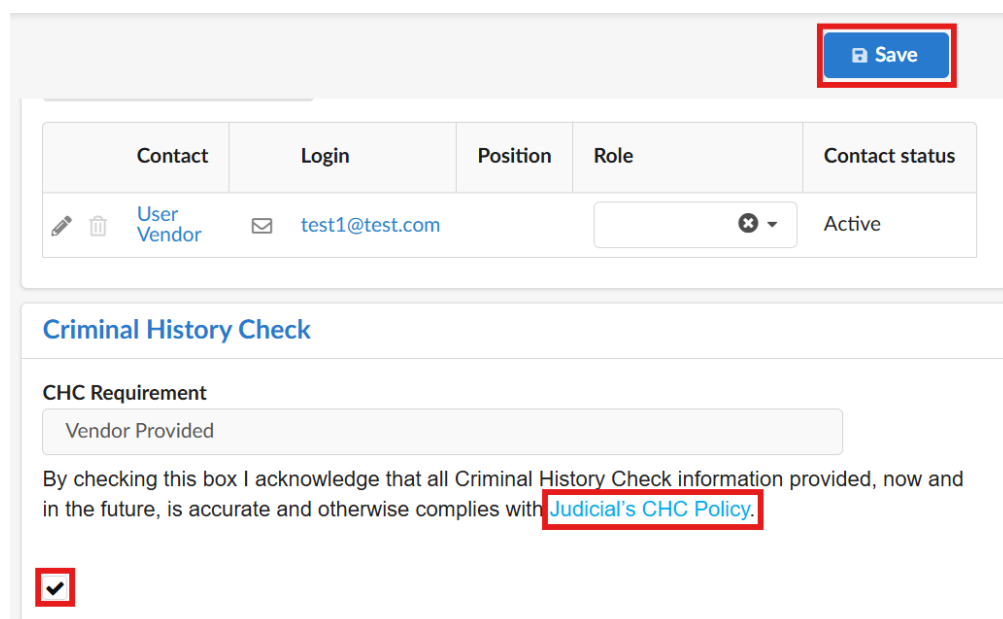
Initiate CHC

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.



Save

Contact	Login	Position	Role	Contact status
User Vendor	test1@test.com			Active

**Criminal History Check**

CHC Requirement

Vendor Provided

By checking this box I acknowledge that all Criminal History Check information provided, now and in the future, is accurate and otherwise complies with [Judicial's CHC Policy](#).

☒

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.

First Name	Middle Name	Last Name	Criminal History Check Status	Start Validity Date	End Validity Date
Vendor		User	Required		
1 Record(s)					

## CHC REQUIREMENT: N/A

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

### Criminal History Check

**CHC Requirement**

N/A

## ADDING REQUIRED DOCUMENTS

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

Company Info discovery channel 2 (UNITED STATES / Colorado / Denver)

Keywords: Status: Archived Documents Search Reset

On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	W9 *					
1 Record(s)						

MWBE Certifications

Add MWBE Certifications

0 Record(s)

Certifications

Add Certifications

0 Record(s)

Click the + icon next to the w9 document

On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	W9 *					
1 Record(s)						

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.

**Edit document : On-boarding Documents**

Document

Save Save & Close Close Archive

**Description**

Type\* On-boarding Documents / W9

Document Name

Document\* Click or Drag to add a file + Copy

Link to external document

Document's owner SHARK Hammerhead

Status Draft

Begin Date\*

Validity end date

Validity

**Follow up**

Notification Date

Archive Date

Request Date

**Comments**

Add a comment here

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

Edit document : On-boarding Documents

Document

Save Save & Close Close Archive

**Description**

Type\* On-boarding Documents / W9 Status Draft

Document Name W9 Begin Date\* 4/27/2023

Document\* Click or Drag to add a file Validity end date

W9.docx Link to external document

Document's owner SHARK Hammerhead Validity

**Follow up**

Notification Date

Archive Date

Request Date

**Comments**

Add a comment here

Click **Save**.

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

Edit document : On-boarding Documents

Document

Save Save & Close Close Cancel Submit Archive

**Description**

Type On-boarding Documents / W9 Status Draft

Document Name W9 Begin Date 4/27/2023

Document\* Click or Drag to add a file Validity end date

W9.docx Link to external document

Document's owner SHARK Hammerhead Validity

**Follow up**

Notification Date

Archive Date

Request Date

**Comments**

Add a comment here

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.

**Edit document : On-boarding Documents**

Document

Save Save & Close Close Archive

✓ Data has been saved  
Validated successfully

**Description**

Type: On-boarding Documents / W9  
Status: Approval in progress  
Document Name: W9  
Begin Date: 4/27/2023  
Document: Click or Drag to add a file  
Link to external document:   
Document's owner: SHARK Hammerhead  
Validity:

**Follow up**

Notification Date:   
Archive Date:   
Request Date:

**Comments**

Add a comment here

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

On-boarding Documents							
Add On-boarding Documents							
Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status	
	W9	W9	4/27/2023		Hammerhead Shark		
1 Record(s)							

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.

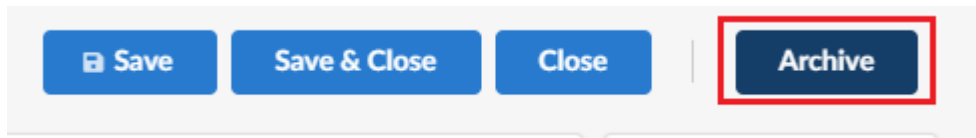
On-boarding Documents							
Add On-boarding Documents							
Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status	
	W9	W9	4/27/2023		Hammerhead Shark		
1 Record(s)							

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.

### Additional Information

Vendor Commodities

Comment (Vendor)

### Customer References

Add Reference

### Additional Information

Vendor Commodities

PR20 - DUI Level II 4+ Treatment

PR - Probation Services

PR01 - Administrative Expenditures

PR02 - Administrative Expenditures - Coaching

PR04 - Adult Sex Offender Assessment

PR08 - Adult Sex Offender Polygraph

PR10 - Adult Sex Offender Treatment

PR14 - Domestic Violence Treatment

PR18 - Drug Testing Services & Supplies



PR21 - Education & Vocation Assistance

PR25 - Emergency Food, Housing, & Utilities

See All

## 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.

 Ann T.

▼ A Test Vendor - 123 Street▼

▪ A Test Vendor - 123 Street

▪ A Test Vendor - 456 Drive

Search