

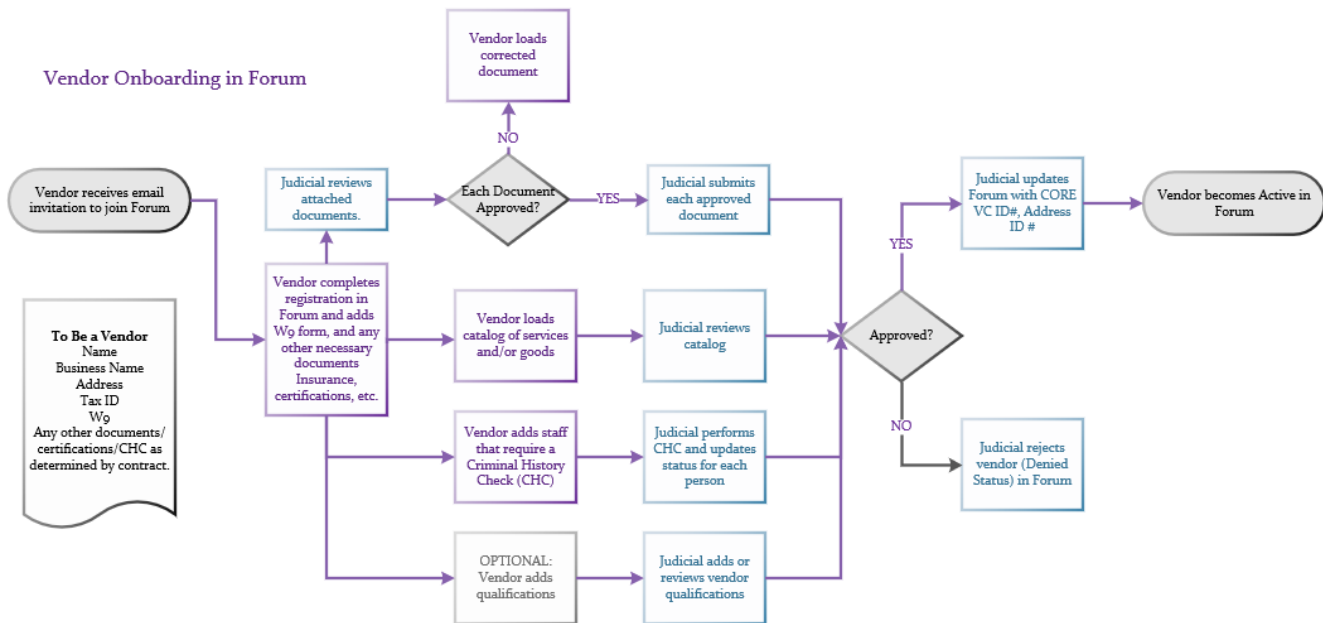
REGISTERING AND ONBOARDING WITH FORUM FOR VENDORS

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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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.

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](#)

1. 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?

1. 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

2. 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.

<div> <div>< ⌂ ☆</div> <div>To do list</div> <div>Q Search</div> </div>						
<div> <div>Status</div> <div>To be validated</div> <div>From</div> <div></div> <div>To</div> <div></div> <div>Q Search</div> <div>Reset</div> </div>						
<div>Filters Status : To be validated x</div>						
Process	Object	Action	Forwarded on	Action's date (UTC-6)	Due date	Status
 Supplier Documents	Discovery Channel - W9 - W-9	Initialization	4/14/2023			<div><div></div><div></div><div></div></div>
 Contractual Documents Workflow V2	getting started - main	Supplier Approval	4/14/2023			<div><div></div><div></div><div></div></div>
2 Record(s) 						

UPDATING YOUR COMPANY INFORMATION

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

Save

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

Request a CHC for current employees only

Re-Initiate CHCInitiate CHC

+ Create Single ContactSelect Existing Contact

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

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.

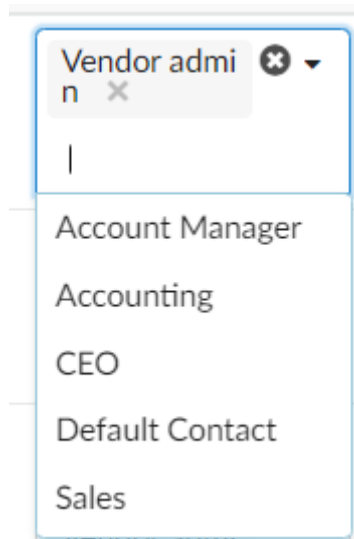
You can save your information as you go by clicking **Save**, when you are finished click **Save & Close**.

The screenshot shows a web application window titled "Supplier Contact Management". At the top right are icons for print, maximize, and close. Below the title bar are three buttons: "Save", "Save & Close", and "Close". The main content area is divided into two panels. The left panel, titled "Identity", contains several input fields: "First Name*" (highlighted with a red box), "Middle Name", "Last Name*" (highlighted with a red box), "Email*" (highlighted with a red box), "Position" (with a help icon), and "Internal Identifier". Below these is a "List of languages" section with a dropdown menu showing "English". The right panel, titled "Login Information", is currently empty. Below the "Identity" panel is a "Phone" section with three input fields: "Phone", "Cell Phone", and "Fax". To the right of the "Phone" section is a "Photo" section with a help icon and a button labeled "Add a picture".

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

Re-Initiate CHC

Initiate CHC

Request a CHC for current employees only

+ 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.

COMPLETING CRIMINAL HISTORY CHECK (CHC)

From the left-side menu, click the **Criminal History Check Status** link.

Contacts

Criminal History Check Status

Documents & Certs.

Qualifications

Change Log

Addresses

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)					

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.

Colorado Judicial will perform the CHC for each of your staff members, as the authorization forms are received. You can view the status and validity date of your staff’s CHC as they are completed. 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

Onboarding Progress

Missing Non Disclosure Agreement

Missing OBH

Criminal History Check for one or more contacts is expiring soon

One or more documents submitted by the vendor is rejected.

Criminal History Check for Vendor Contact is different from Suitable

Criminal History Check for Vendor contact is not assigned

No Vendor Contact have a Valid CHC status

Pending Approval on Document(s)

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.
Suitable (upon appeal)	Status updated from <i>Non Suitable (appealable)</i> when further information is received and the appeal is successful.
Not Suitable (appealable)	Not suitable finding, however status may be changed to Suitable (upon appeal) if more information is provided by individual.
Not Suitable (non-appealable)	The individual may not access information and perform services for Colorado Judicial.
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” or “Suitable (upon appeal)” CHC status before your services or goods can be purchased by Colorado Judicial.

INITIATING A CHC

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.

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**.

The screenshot shows a window titled "Initiate CHC" with standard window controls (print, maximize, close) in the top right. Below the title bar are three blue buttons: "Save", "Save & Close", and "Close". On the left side, there is a "User" dropdown menu with "test ryan" selected and a red box around it. Below the dropdown is a green "Notify" button, also highlighted with a red box.

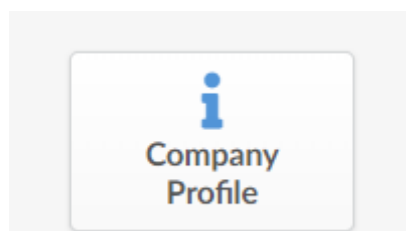
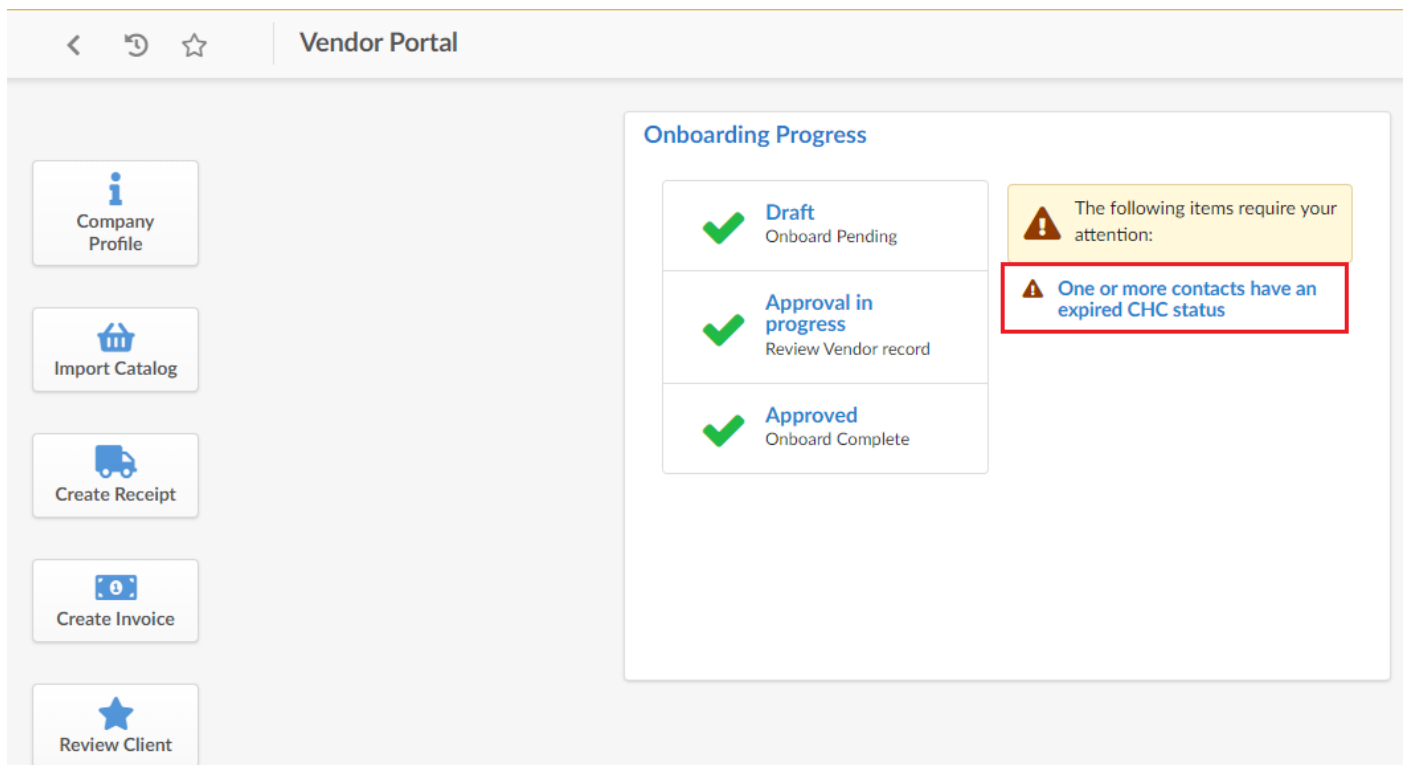
You will know that the notification has been sent if this message appears in the window.

This screenshot shows the same "Initiate CHC" window after the notification has been sent. A yellow-green message bar with a green checkmark and the text "notify_chc_contacts" is now visible at the top, enclosed in a red box. The "User" dropdown and "Notify" button are still present below it.

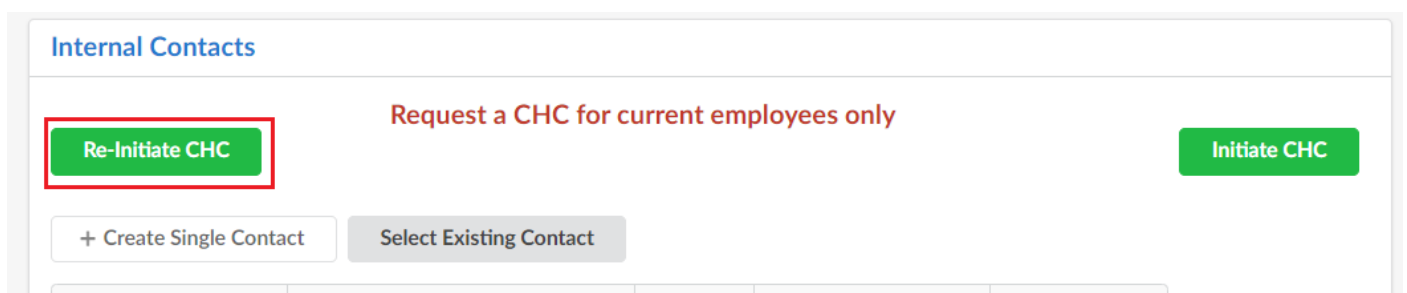
You can now click **Save & Close**, **Close**, or the X in the corner of the screen.

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.



To re-initiate a CHC, select **Company Profile** from the left-hand menu, then **Contacts**. From the Contact screen, click **Re-Initiate CHC**.



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

ADDING REQUIRED DOCUMENTS

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

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



Contacts
Criminal History
Check Status
Documents & Certs.
Qualifications
Addresses


Save

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
W9

Document*
Click or Drag to add a file

Link to external document

Document's owner
SHARK Hammerhead

Status
Draft

Begin Date*
4/27/2023

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

Document Name
W9

Document*
Click or Drag to add a file

Link to external document

Document's owner
SHARK Hammerhead

Status
Draft

Begin Date*
4/27/2023

Validity end date

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

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

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



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.

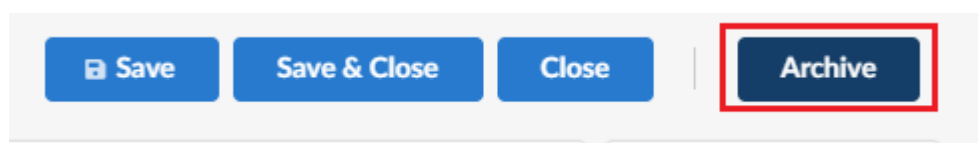
On-boarding Documents							
Add On-boarding Documents							
Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status	
   	W9	W9		4/27/2023	Hammerhead Shark		
1 Record(s)							

If your 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.

