



Ohio Department of Transportation

Division of Construction Management

Electronic Project Delivery Management

Appendix T

CUF Site Review - GoFormz

LPA

Contract Compliance

End User Guide



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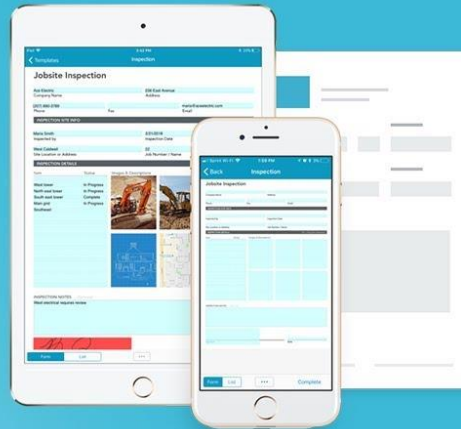
LPA CUF GoFormz

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GoFormz Overview



Overview: The purpose of this guide is to allow an ease of flow to any professional end user attempting to utilize GoFormz whether from their computer or any mobile device.

What is GoFormz: A mobile application used to maintain and complete ODOT / LPA forms in a digital format.



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Web Version – HTML GoFormz Website

Logging in:

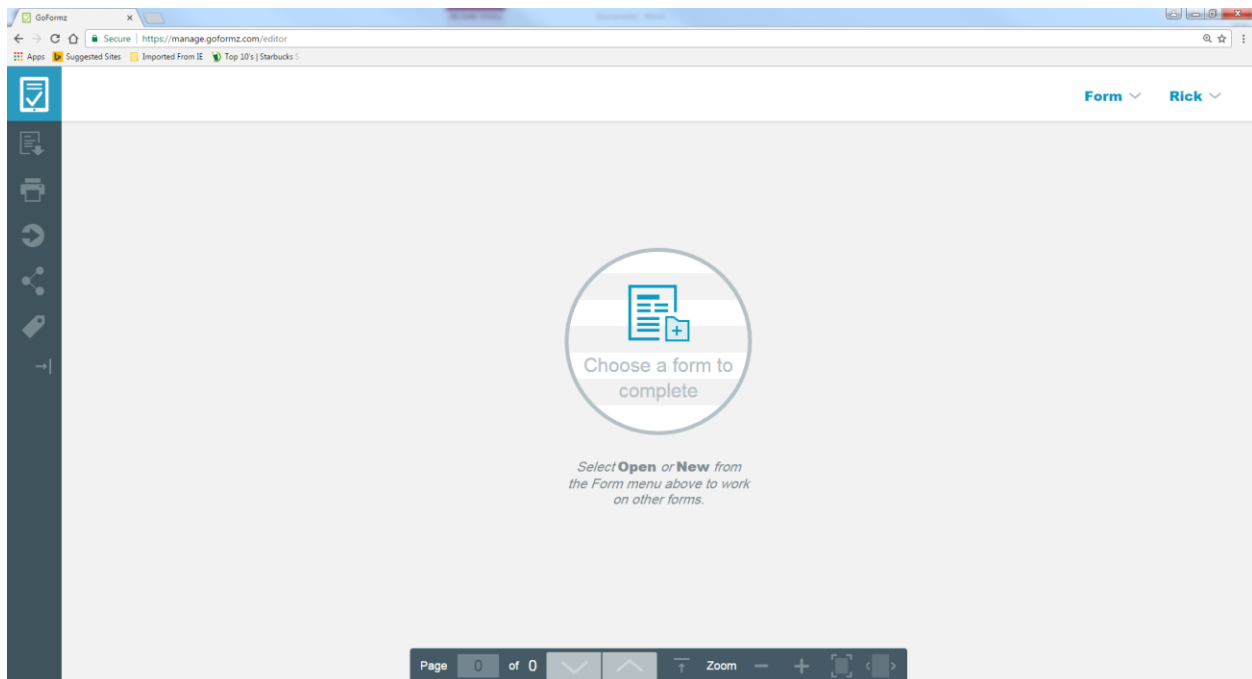
1. Open web browser (preferably Google Chrome)
2. Navigate to GoFormz website:
 - a. www.goformz.com
3. In the upper right corner of the screen, select the Login button.
 - a. There are 3 different things that can be done from the login screen:
 - i. log in
 - ii. reset your password
 - iii. or create a new account.
 1. ***Since your account will be created within ODOT your credentials will be sent to you accordingly.***

A screenshot of the GoFormz login page. The page has a blue header with the GoFormz logo (a checkmark icon followed by the text "goformz"). Below the header, the text "Login to your account" is centered. There are two input fields: the first is empty with a cursor, and the second is labeled "Password". Below the input fields is a yellow "Login" button. At the bottom of the form, there is a link that says "Forgot your password?".



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- The first screen you will see upon logging into GoFormz is the Web Form Editor pictured below
 - o The Web Form Editor allows you to:
 - Navigate and fill out your form
 - Complete or save the form
 - Perform various other actions that include printing, tagging, deleting, transferring, etc.

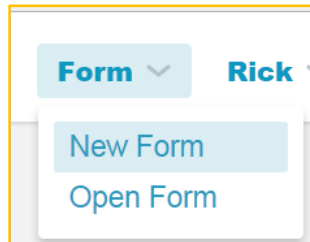




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New Form View

- Accessing a form can be done a few different ways; by navigating to the forms tab and clicking on New Form button in the upper right corner of the screen; or by clicking on Open Form.
 - New Form selection will allow you to select the LPA Prompt Payment Form
 - Open Form selection will display a complete list of all completed forms, and forms in that are in a Draft status



Select a form template

FOLDER **MAIN** > Compliance forms in process

INACTIVE_CUF_Key_...
Ques updated

INACTIVE_Field OD...
CUF Form_Contractors

INACTIVE_Field OD...
CUF Form_Trucking

INACTIVE_ODOT_LP...
INACTIVE_ODOT_LP...
thru 19



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Form Modes

- The form will be displayed in the center of the computer screen, with toolbars at the top, and left side. The editor of a form has two basic modes:
 - **Edit Mode (Draft Forms):** In this mode, users can make changes to the form. Forms in Draft status can only be viewed in Edit Mode.
 - **DRAFT mode** is the default method the form will be placed in upon creation.
 - **View Mode (Completed Forms):** In this mode, users can view and navigate the form, as well as perform secondary actions like printing, tagging, etc.; but the form cannot be edited (i.e. fill out the form).
- The following actions are available in the Form dropdown menu:
 - **New Form** – Create a new form from an existing template. A dialog will appear prompting the user to select the template for intended use. Once a template is selected, an empty form based on that template will open in the editor.
 - **Switch Form** – Open an existing form in the editor. A dialog will appear that lists all forms available to the user. The dialog box allows users to filter and search the form list to make it easier to find a form** this will be like the Forms Tab function. Once the form is found and selected, it will open in the editor.
 - **Reopen – (View Mode)** – Change the forms status from Completed to Draft and allow it to be edited again.
 - **Duplicate** – Create a copy of your form and save it under a different name.
 - **Close** – Close the form that is currently open in the editor. If the form has any unsaved changes, the user will be asked if the form should be saved.
 - **Delete** – Delete a form.
- To edit a field, simply click on it. Depending on the field you are selecting, either a cursor will appear prompting the user to start typing, or a control will prompt the user to select or enter data. For example: a dropdown menu, date selector, signature field, etc.



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Open Form View

Searching for Forms using the Web Interface

- GoFormz provides several tools to make it easier to find forms. These tools can include filtering by form status, form tag, and form owner; searching by keyword; and sorting by various form questions.
- 1. Login at www.goformz.com
 - a. Enter username and password as provided.
 - b. Navigate to the Forms Tab
 - c. Select Open Form
 - i. All forms whether in a Draft or Completed status will then display on the screen.



Open		
Name	Owner	Last Updated
INACTIVE_ODOT CUF DBE Owner Ques	Rick Grimes	5/26/2020 2:45 P
INACTIVE_Subcontractor Invoice Spreadsheet 2	Rick Grimes	3/6/2020 6:58 AM
<input checked="" type="checkbox"/> INACTIVE_CA-Q-0607-20170120 53455	Rick Grimes	10/15/2019 5:21
INACTIVE_CA-Q-0607-20170120 5655457	Rick Grimes	10/15/2019 4:44

Searching

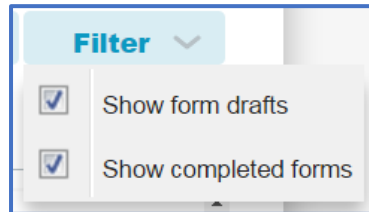
1. Select the search bar at the top left of the screen.
 - a. Enter a search term in the search field, then press Enter to see all forms that contain the search term in their name.

Filtering

- There are several choices to choose from when filtering:
 - o To filter by Form Status, Click on the Filter menu. There will be 2 choices to Filter from: Show from drafts and Show completed forms.
- Once a selection is made, all the forms whether in Draft or Completed status will then display respectively.

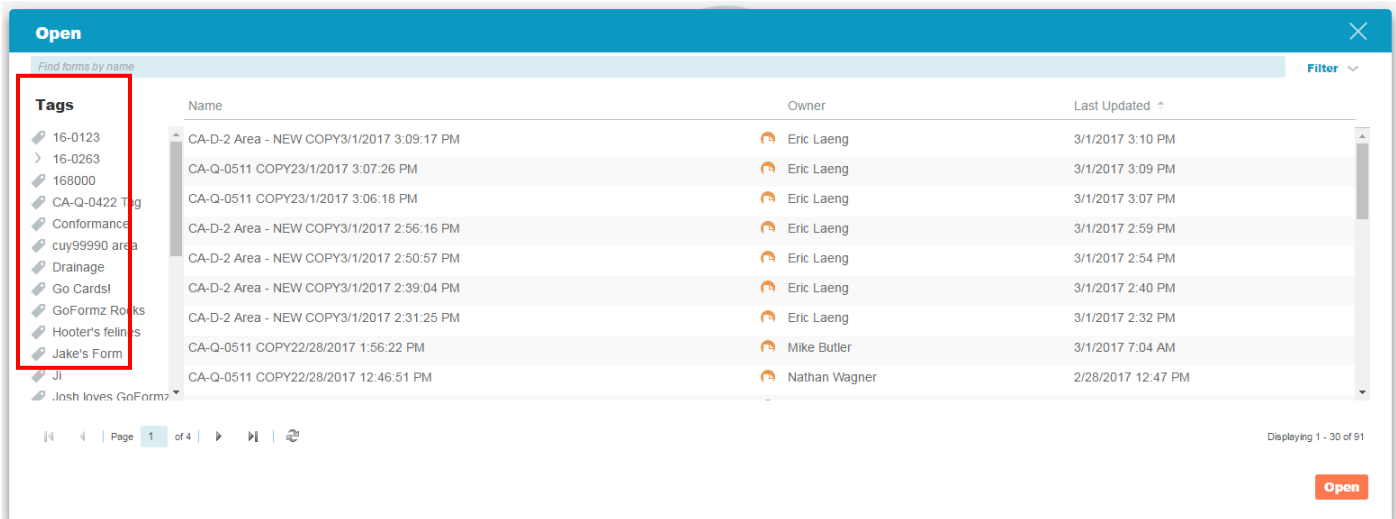


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- To filter by Tags, just click the tag name. Users can only filter on one tag at a time ****Multiple Tags CANNOT be selected.****

1. Once the filter has been selected, the appropriate forms will then populate.

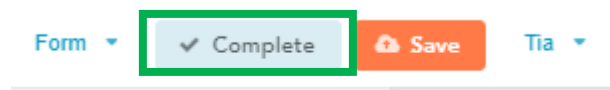


Clearing Filters

- Use the Filters Applied section above the forms list to clear any filters. To clear all filters that are currently applied in the forms list, click the Filter menu and check the appropriate box to resume displaying the default filters.

Completing a Form

- To complete a form,
 - Select the complete button located in the upper right corner of the screen.



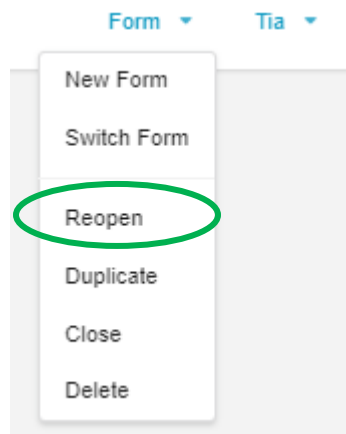
- Once a form has been completed, it will automatically convert to a PDF version, and file within the designated location in SharePoint.



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Reopening a Form

1. To reopen a form that has been completed,
 - a. Locate the form from the completed forms list
 - i. **Note:** *If the user is still within the completed form there is no need to navigate to the completed forms list.*
 - b. Once the form has been located,
 - i. Select the Form menu in the upper right corner of the screen.
 1. From there a drop-down menu will appear.
 - ii. Navigate to the option: Reopen



- iii. Select reopen
 1. **Note:** GoFormz has a smart functionality built in to make the use of digital forms easier for the end user. When a form is selected to be reopened, this smart functionality will cause a verification message to appear prompting the user to further verify that the form should in fact be reopened.
- iv. Select option to Reopen and change to Draft status in the bottom right of the message.

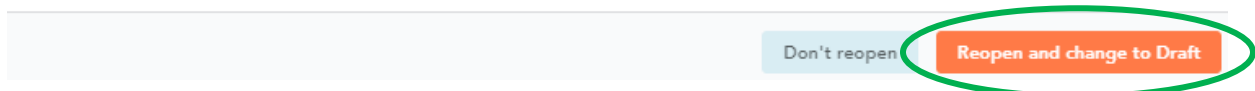
Form Status Change Warning

Reopening a completed form will change its status to Draft.

Workflow events may run again when the form is completed later.

[Learn about managing events](#)

Don't show me this next time



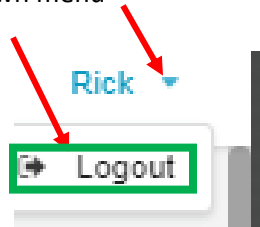
*****NOTE: It is important to remember that when a form has been completed, reopened, and then recompleted that a new version of that form in a PDF format will be sent to SharePoint in addition to the original. The recompleted form will not override the original. *****



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Logging out

1. In the top right corner of screen locate username
2. Open dropdown menu
3. Select logout.



Sidebar: Secondary form Actions

- These actions are available via the sidebar on the left side of the Form Editor.



Open PDF

- Download a PDF version of the current form to the computer.
****Note: the PDF will reflect the state of the forms when it was last saved.**** Any changes that were made to the form since it was last saved will not be reflected.



Tags

- Add tags to this form. Tags group similar forms together, making them easier to find later.
 - *****NOTE: though users will be able to see other tags that have been created by other users, they will only have access to the templates that they own as a user within the specific tag that it has been saved in.*****

- Footer: Form Navigation



- The Forms footer contains all form navigation controls, like zooming and pagination:



Select Page

- This shows the page that you are currently working on within the form.
 - To navigate to a different page, type in the page number and press Enter.






Previous / Next Page

- Navigate to the previous or next page in this form.



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-  **Zoom Out/In**
 - Zoom out or into the form in 10% increments.
-  **Fit to page**
 - Change zoom level so that the entire form page fits in your browser window. This is useful if you want to inspect the entire page at once, to make sure you didn't miss anything.
-  **Fit to Width**
 - Change zoom level so that the form width matches your browser width.
 - This is a useful zoom level for filling out the form.



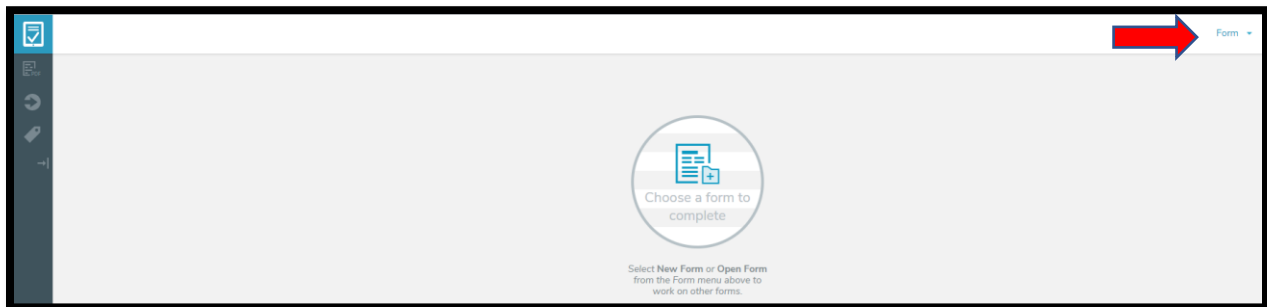
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LPA CUF Form

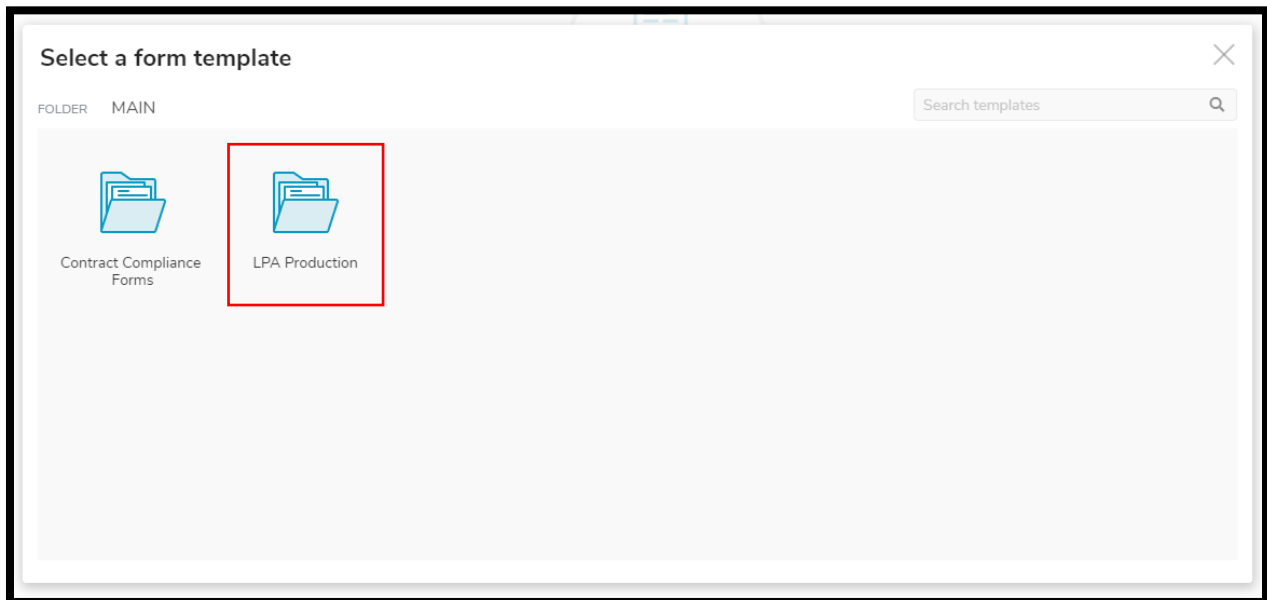
Overview:

The LPA must ensure the elements of work performed by a Disadvantaged Business Enterprise (DBE) contractor are monitored and evaluated according to the CUF and counting requirements of 49 CFR §26.55.

1. Log into **GoFormz**
2. Navigate to the **Form** button at the top right hand corner of the page and select **Open Form** from the drop down menu



3. Navigate to the LPA CUF form located within the **LPA Production** folder.



4. Open form



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5. Complete Section 1(Project and Payment Data) Section:

a. Enter PID

NOTE: The ODOT PID is also known as the Project Identifier for the project and can be located on the title sheet of the project plans. The ODOT PID should be entered in the following format: Ex: 876543 (The ODOT PID can be 5 or 6 digits in length)

b. ODOT District Number

c. Prime Contractor

d. Name of DBE Employee Interviewed

e. DBE Company

f. Select either DBE is Performing as: Prime Contractor or Subcontractor

CUF Form_Contractors Form Complete Save

LPA - Commercially Useful Function (CUF)/Compliance Evaluation Form - Contractor

Purpose: Proper use of this form serves as written certification that the elements of work performed by a Disadvantaged Business Enterprise (DBE) contractor were monitored and evaluated according to the CUF and counting requirements of 49 CFR §26.55. This form also contains data and questions related to the termination of work, and changes in contract scope that may require prompt action to ensure final compliance.

Section I- Project and Payment Data

a. PID:

b. District:

c. Prime Contractor:

d. Name of DBE Employee Interviewed:

e. DBE Company Name:

f. DBE is Performing as: Prime Contractor Subcontractor

6. Continue completing the CUF Form in its entirety.

7. Upon completing of the form, select **Complete** to save and route the CUF form to the appropriate LPA SharePoint Site for storage

LPA Field ODOT CUF Form_Contractors Form Complete Save

ve unsaved changes

LPA - Commercially Useful Function (CUF)/Compliance Evaluation Form - Contractor

Purpose: Proper use of this form serves as written certification that the elements of work performed by a Disadvantaged Business Enterprise (DBE) contractor were monitored and evaluated according to the CUF and counting requirements of 49 CFR §26.55. This form also contains data and questions related to the termination of work, and changes in contract scope that may require prompt action to ensure final compliance.



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Contact Information:

All questions and concerns regarding the GoFormz application can be directed to the following email address GoFormz.Help@dot.ohio.gov or the Admin Owners below.

GoFormz Admin Owners:

Janet Treadway: 614-466-7514

Tia Williams-Hayes: 614-644-6463