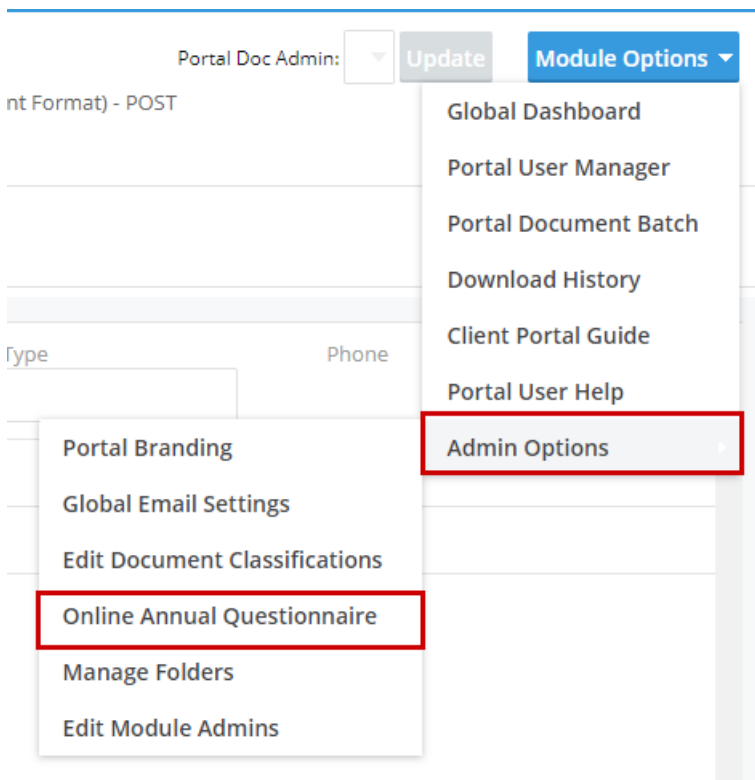


How to Add or Edit an Online Annual Questionnaire for Non-Compliance Module Users

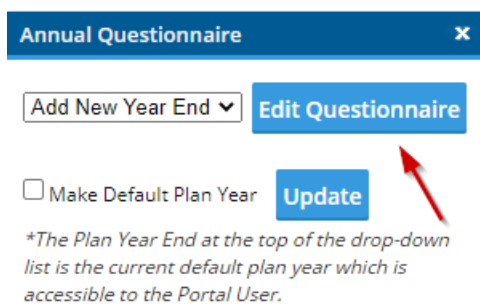
07/23/2024 12:22 pm CDT

If you subscribe to ftwPortal Pro, but not the Compliance Software, you are able to go to the Admin Menu > Portal Settings to click on 'Default Online Annual Questionnaire' to edit the global default Online Annual Questionnaire. This default will populate when first adding a questionnaire to a plan.

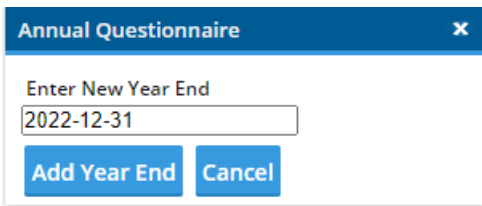
To add the Online Annual Questionnaire to a plan, you must first select a company and a plan. Then, click on Portal Module. Once in the Plan level dashboard, select the Module Options Link > Admin Options > Online Annual Questionnaire:



Once you make this selection a new window will populate to either select an existing year from the dropdown to edit, or create a new year end and selecting Edit Questionnaire:



If entering a new year end you will be prompted to complete the data information and then select the 'Add Year End' button:



Annual Questionnaire

Enter New Year End

2022-12-31

Add Year End Cancel

You will be directed to the Portal Files screen where you will be able to Edit/Publish.



Home > Edit Company > Edit Plan > Portal > Portal Files

Company: Example Company ID:
Plan: Example Company ID:
Year End: 12/31/2023

Online Annual Questionnaire: Edit / Publish

Edit Portal Users
Portal

| Description | Year | File Name | Size | Posted Date | Review | Status | Options |
|-------------|------|-----------|------|-------------|--------|--------|---------|
| None | | | | | | | |

Once you click on the link, the default Online Annual Questionnaire will display. You will be able to modify the questionnaire, add plan document questions, etc.

Once prepared, select to 'Publish to Portal' checkbox and 'Save' the questionnaire. This will be the trigger to add a Portal user and invite the user to complete the questionnaire within the Portal. Use the breadcrumbs in the upper left corner to return to the Portal Files page:

Company: Example Company
Plan: Example Company 2
Year: 12/31/2022

[Edit Default Online Annual Questionnaire](#)

[Saved Online Annual Questionnaire](#)

Online Annual Questionnaire Options

Title: 2022 Online Annual Questionnaire

Disable the file upload option

Publish to the portal

Disable Prior Year Portal User Responses

Save Reset Clear | Copy Questionnaire Export Questions Import Questions | Print

Online Annual Questionnaire Questions

| Prompt | Type | Req | Default | |
|--|----------|--------------------------|---------|--|
| Company Information | Group | | | |
| Name: | Text | <input type="checkbox"/> | | |
| Mailing Address: | TextArea | <input type="checkbox"/> | | |
| Business Type (C Corp, LLP, etc.): | Text | <input type="checkbox"/> | | |
| If the business is a sole proprietor, partnership, or LLC/LLP, | List | <input type="checkbox"/> | | |
| EIN: | Text | <input type="checkbox"/> | | |

Here you will see the Online Annual Questionnaire available to review, change or remove. You will now need to add a portal user to the plan and add or alter the Online Annual Questionnaire permissions. By selecting the Edit Portal Users link:

Home > Edit Company > Edit Plan > Portal > Portal Files Help

Company: Example Company ID:
 Plan: Example Company ID:
 Year End: 12/31/2023

[Edit Portal Users](#)

[Portal](#)

| Portal Files | | | | | | | |
|--|------------|----------------------------------|------|---------------------|--------|--------|---|
| Description | Year | File Name | Size | Posted Date | Review | Status | Options |
| Online Annual Questionnaire (Upload / Download) | 12/31/2023 | 2023 Online Annual Questionnaire | N/A | 09/20/2022 12:01:43 | Review | OK | Change Remove |

You will need to select the user from the dropdown, and set permissions:

Edit Portal User Options X

All Contacts: Vincent Valentine (VincentValentine) Manage Add

Example Company - Compliance Permissions
Selected Year: 12/31/2023

Portal Users: Vincent Valentine (VincentValentine) ▼

Compliance Options

Census Worksheet (Download): No ▼

Edit Census Worksheet: No ▼

Census Worksheet (Upload): No ▼

Annual Questionnaire (Download): Yes ▼

Annual Questionnaire (Upload / Complete Online): Yes ▼

Participant Statements (Download): No ▼

Client Package (Download): No ▼

Email Settings

From Name: Allison.Bailey@wolterskluwer.com

• **Bold** indicates the required permission.

• **RED** indicates the portal user does not currently have the plan or permission.

Help Save Changes Close

Once the Portal User is added you will be able to select the 'Invite User to the Portal' link and a new communication will populate with the classification and OAQ email template selected to invite the user to complete the Online Annual Questionnaire.

Company: Example Company ID:
Plan: Example Company ID:
Year End: 12/31/2023

Edit Portal Users

Portal

Invite Vincent Valentine to the portal

Portal Files

Description

Online Annual Questionnaire (Upload /

Download)

Communication Manager - ftwilliam.com - Google Chrome

devtest4.ftwilliam.com/cgi-bin/MasterIndex.cgi?windowed=1#go=/Portal/Communication&CommonField=418499302&ChildField=523393307&Classificati...

To: Annual Questionnaire (1) - Vincent Valentine, [Edit Portal Users](#)

Subject: OAQ

Send Email Invite | Confirmation Email Recipient: | Expires (Optional): MM/DD/YYYY

[Email Invite](#) | [Portal Message](#) | [Folder Name](#) | [Edit Folders](#)

Default Annual Questionnaire Email

!@!CustomLanguage The annual questionnaire for !@!PlanName is ready for your response.
You can log on at:
!@!loginlink
You can log in using the following credentials:
Username: !@!Username
Password: !@!Password
Thank You

Add ToDo for Portal User's with View Access:

FileName | E-Sign | Add Signer

[Do with Selected](#) | [Upload Files](#)

[Close](#) | [Post + Send Invite](#)