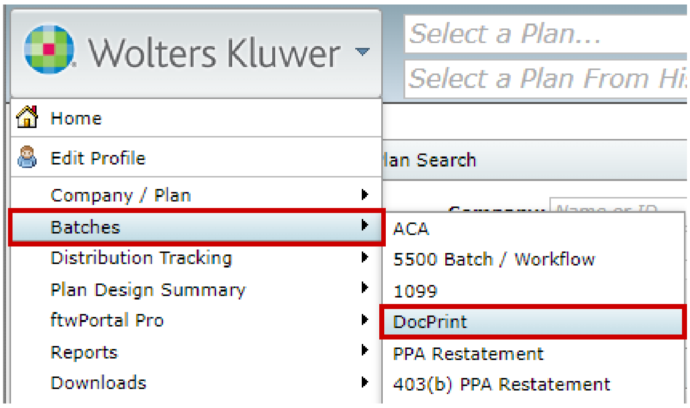
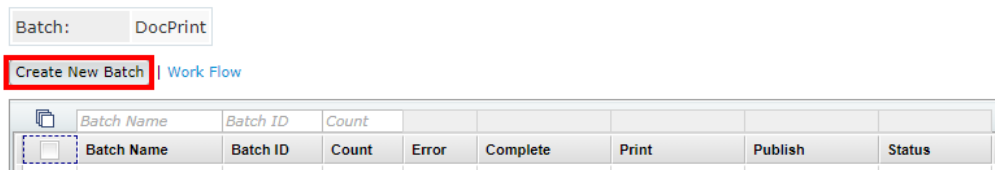
How to Post a Batch Annual Notice to the Portal

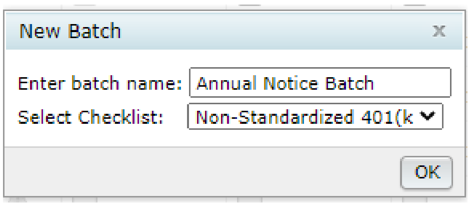
07/29/2024 4:01 pm CDT

Note: You do have to subscribe to the Documents Module and ‘ftwPortal Pro’ to post annual notices. To batch generate batch Annual Notices, select the Wolters Kluwer logo >Batches>DocPrint :

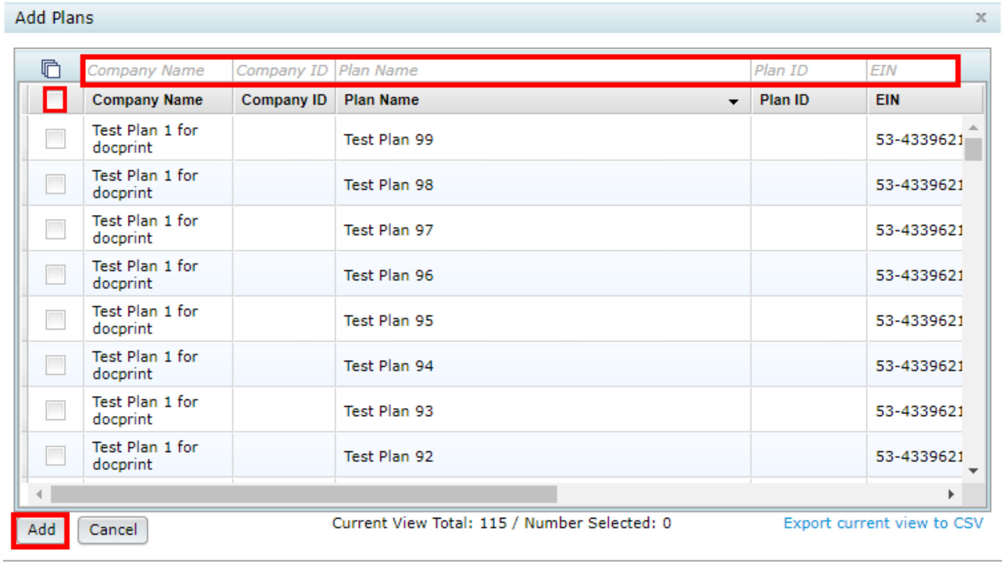


In the DocPrint menu you will first need to create a batch file. Click the “Create New Batch” button and give your batch file a name. You will also need to select the checklist type you will be generating the amendment for via the drop-down menu. Once you have made your selection, click “OK”.

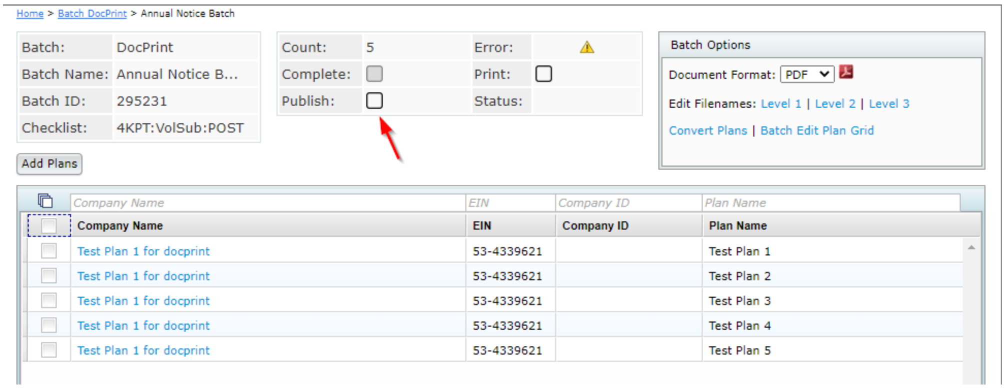




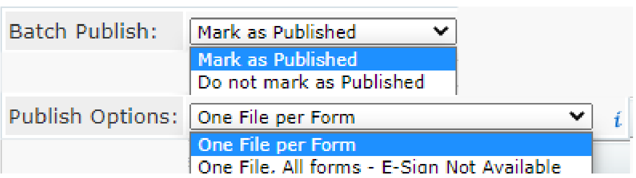
Once your plan list appears, you can utilize the filters at the top of the box to search for specific plans and narrow down your search results. When finished, use the checkboxes to the left of the menu to select the plans you want to add to your batch file. You can use the top checkbox to select all the plans in the menu. Once you have made your selection, click on the “Add” button.



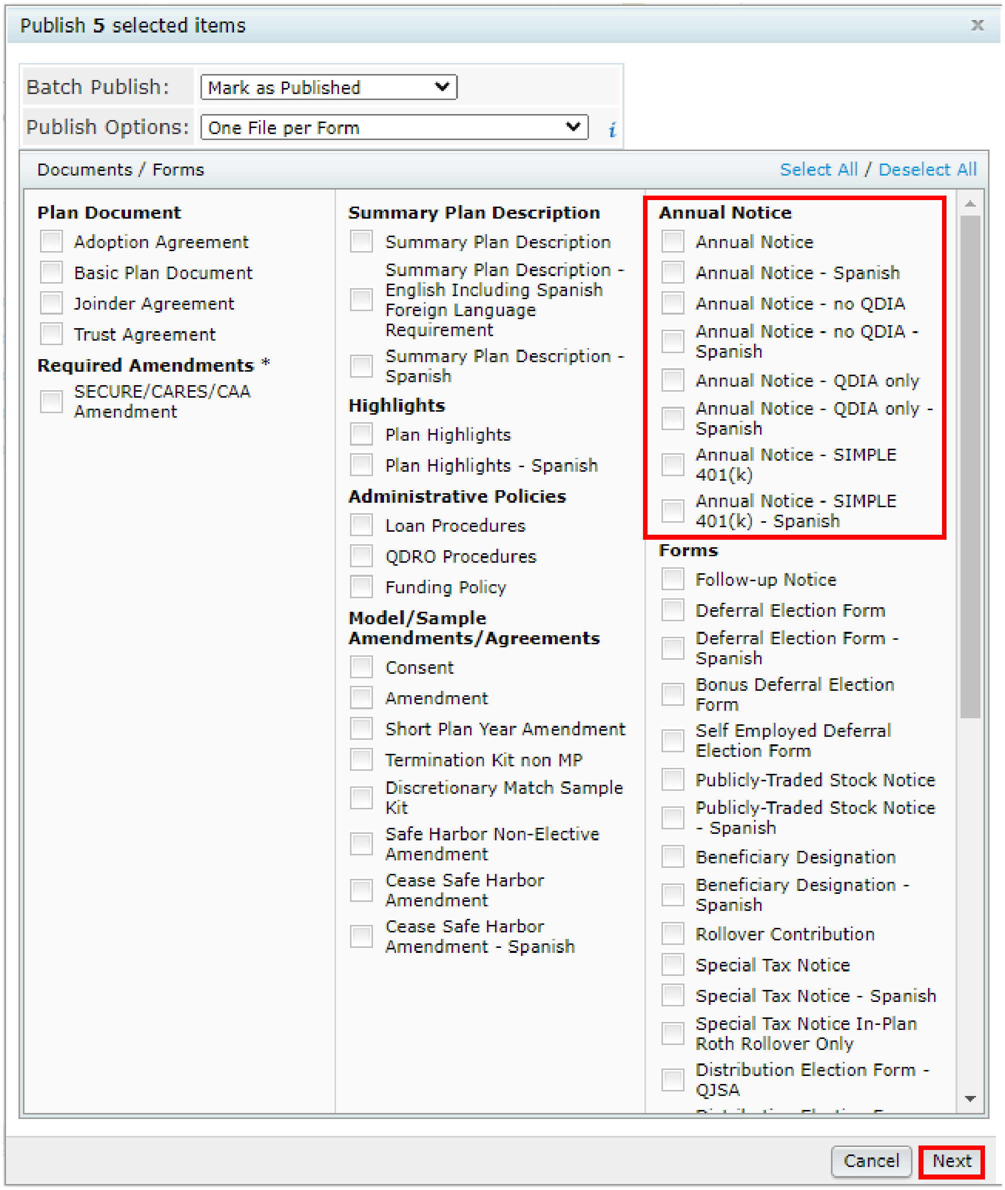
From within the batch screen, you are able to identify the document format you prefer (Word or PDF) in the Batch options menu in the upper right-hand corner. Once your plans have been selected and added to the batch, select the "Publish" option from above the grid



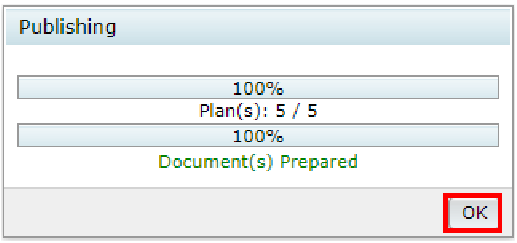
This will populate a new window where you are able to select which items you wish to publish to your Portal users. For publishing options, you can choose to mark your batch as published or not as well as indicate if you wish to send all your selected documents and forms in individual files by choosing "One File per Form" – this is recommended for E-Signing. If you prefer all documents and forms be contained in one big file, choose "One File, All forms" (the second option does not allow for e-signature options). This section defaults to "Mark as Published" and "One File per Form":



Next you will need to indicate what items you wish to publish to the portal; in this instance you will select from the Annual Notice option. Once selected, click "Next":



This will pull the Annual Notice information and prepare the documents to send, a progress bar will populate to indicate you are ready to proceed, select OK:



This will create a communication window where you will specify the following information:

A. Classifications: If you are publishing more than one document with different types of "Classifications", the classification type of "Plan Forms" will be used. If you have just one type, for example, Amendments, the classification type of "Required Amendment" will be used.

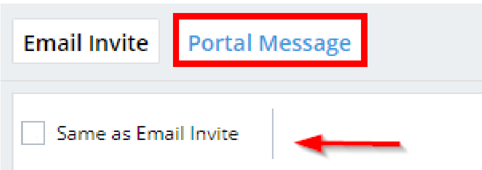
B. Subject: Each communication needs a subject for it to be sent.

C. Send Email Invite: This toggle option indicates whether a communication will be sent to the portal user that the items are available, or you can choose to simply publish the items to the portal without sending them an email invitation.

D. Confirmation Email Recipient: This field indicates who will receive a confirmation that the Portal User has downloaded or e-signed the documents in the communication (this will either be the Admin associated with the plan or the Master User on the account)

E. Expiration Field: this field allows you to set an expiration date. Once this date has passed these documents will no longer be on the Portal Users Portal. (this is an uncommon field, as most users would like their portal users to have access to these documents in an ongoing basis)

F. Email Invite: This is the field that indicates what template to use when sending the invitation to your portal user to inform them they have items to review or sign. You can select from system generated or custom templates by selecting the dropdown icon in this section. You are also able to create or edit templates by selecting the gear icon to the right of the template dropdown. You also have an option to add information to the **Portal Message**, which is the message that displays within the portal view for your users. This can be left blank, you may be able to enter a custom message, or you can elect to have the e-mail invitation copied to the Poral messages by marking the indicated box below.



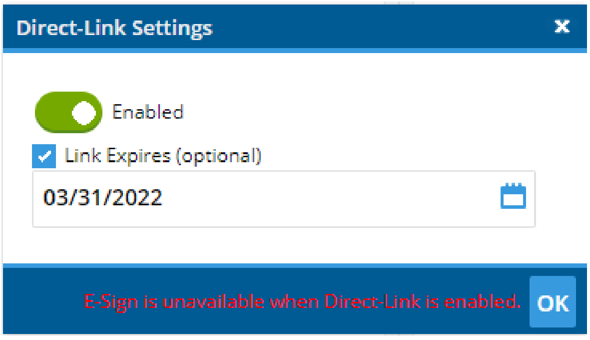
G. Folder Name: This allows you to specify a folder for the documents you are publishing to portal. This is often used to help organize documents by specific years or item type.

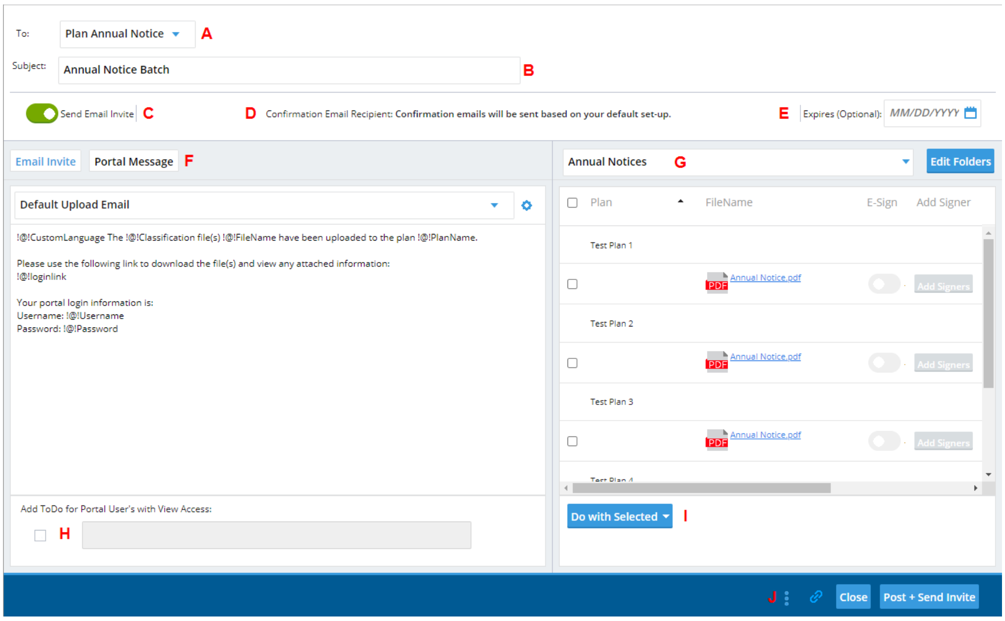
H. Add ToDo with Portal Access: this allows you to add items that do not require actions to a client's 'To Do' list. Adding items to the To Do list will also trigger reminders if reminders are set in the Global Email Settings. The task of E-Signing a document will appear on the portal user's To Do List. Yet, allowing the portal user to have view access to the document after E-Signing will not. If you would like to add viewing the document to the user's To Do List after E-Signing, be sure to check the box.

I. Do with Selected: In this field you are able to Add e-sign options, Remove E-sign options, or Remove selected plans/files from the batch.

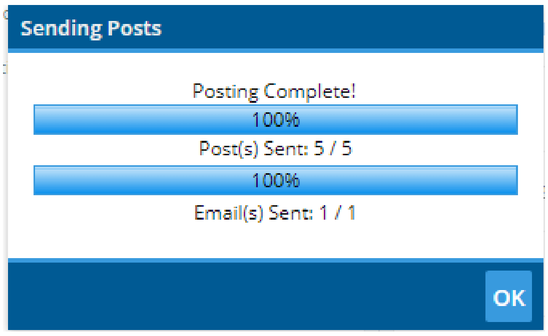
J. This field contains the ability to **Preview** your communication as well as create a Direct Link, the direct link option (that looks like two chains linked together) offers users the ability to access the documents within the communication/Direct Message without having to log in to the Portal. **Please Note:** Direct Link cannot be used for items set for e-signing. When Direct Link is enabled, the link will turn green:

When Using Direct Link, you can also set an expiration for how long the link is viable:





Once the communication is set as you specify and the 'Post+Send Invites' or "Post' button are selected (based on if you wish to send an e-mail to your portal users or simply post the document to the user's portal, a window will populate with a progress bar:



The communications can then be viewed on the Global or Plan Level Dashboards. The red flag on your dashboard indicates there are unread messages for that portal user. The paper icon next to the flag indicates this portal user was sent files from a batch.