

Add, Edit, or Remove Portal Users

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How to Alter a Portal User's Username

A **User** with permission to **Edit** the Portal module can update a portal username from the **Edit Portal User** screen.

- **Navigate to the Portal Users Tab** in the Portal module.
- Click the **menu icon** (three dots) next to the user whose username needs updating.

The screenshot shows the 'ABC Bank' header with navigation tabs for 'PORTAL' and 'DISTRIBUTIONS'. Under 'PORTAL', the 'Portal Users' tab is active. A table displays user information with columns: Username, Name, Email, Contact Type, and Phone. The first row shows 'AerithG' with name 'Aerith Gainsborough' and contact type 'Record Keeper'. A menu icon (three dots) is located to the right of the 'AerithG' username. A red arrow points to this icon. A dropdown menu is open, listing actions: 'Edit Portal User', 'View User Portal', 'View Direct Messages', 'View All User Comms', and 'Delete Portal User'. The 'Edit Portal User' option is highlighted with a red rectangular box.

- Select **Edit Portal User**.
- In the **User Info** tab, enter the new username.
- Click the **Save** button to confirm the changes.

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

View

Add

Add Existing

Delete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

Add

Delete

> Document

> 5500

User Info

User Information

Portal Username: AerithG

Name: Aerith Gainsborough

Prefix:

First: Aerith

Middle:

Last: Gainsborough

Suffix:

Split name

Title/Position:

Company Name: Flower Merchant Avalanche

Password:**

Reset Password

Main Contact Type:

Record Keeper

Edit

Addl Contact Types: None

Select Contact Types

**Note: When the Reset Password button displays, the portal user has logged into the portal to set up security questions and a password. You do not need to click the button unless your client needs assistance resetting their password.

Contact Information

Save Tab

Help

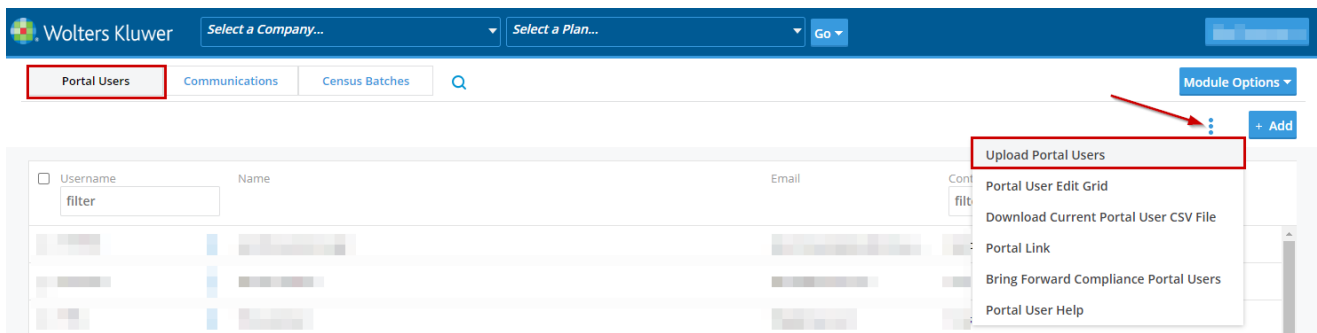
Close

NOTE: The Portal user will need to log in with the new username. Any references to that user will update to the new username as well.

How to Upload Portal Users in Bulk

Portal Users may be added or updated in bulk through the 'Upload Portal Users' interface.

The Upload Portal User interface is accessible from the Global or Plan level Dashboards through the tricolon menu option on the Portal Users Tab.



This interface may also be accessed by selecting the Wolters Kluwer Logo>ftwPortalPro>Upload Portal Users.

Within this window are 2 files:

1. Download Current Portal User CSV File- This will be the file that needs to be uploaded.
2. Download CSV Schema- This file explains how the data should be entered within the 'Download Current Portal User CSV File'.

It is recommended the "Important Notes" be reviewed prior to entering data into the spreadsheet. The notes read as follows:

Important Notes:

- All data rows must contain the username and plan information (with the exception of rows for the Messaging module).* If you would like the Name column to be automatically parsed into first, middle, and last names you must remove the columns with those names from the header (the first row, of the uploaded file).
- Misspelled column names will be silently skipped - unless they are required.
- Rows with bad data will be skipped.**
- Existing portal user records will be updated.
- If you do not specify passwords for new portal users in a "Password" column, they will automatically be assigned random passwords.***

Example. You want to add a portal user, Jane Doe, who will be given Messaging, 5500 and Document permissions. On the spreadsheet, you would list Jane Doe once for Messaging, once for Documents and twice for 5500s (for the 2020 and 2021 plan year). In all, Jane Doe will be listed four times on the spreadsheet.

Note: Plans need to already be established in the software to assign Document, 5500, and/or Admin permissions to those plans. If there is not a 5500 set up for a specified plan year that you are assigning a portal user, that plan year will be skipped.

| | A | B | C | D | F | G | Q | R | T | U | V | Y | Z | AA |
|---|----------|----------|--------|-------|------|--------|----------------|--------------|------------|-------------|----------------------|-------------|-----------|------|
| 1 | Username | Name | Prefix | First | Last | Suffix | Email | Contact Type | EIN | Plan Number | Plan Name | Signing As | Module | Year |
| 2 | Jdoe22 | Jane Doe | Mrs. | Jane | Doe | | Jdoe@123co.com | CPA | | | | | Messaging | |
| 3 | Jdoe22 | Jane Doe | Mrs. | Jane | Doe | | Jdoe@123co.com | CPA | 86-7530932 | 1 | 123 Demo 401(k) Plan | ADMIN:SPONS | 5500 | 2020 |
| 4 | Jdoe22 | Jane Doe | Mrs. | Jane | Doe | | Jdoe@123co.com | CPA | 86-7530932 | 1 | 123 Demo 401(k) Plan | ADMIN:SPONS | 5500 | 2021 |
| 5 | Jdoe22 | Jane Doe | Mrs. | Jane | Doe | | Jdoe@123co.com | CPA | 86-7530932 | 1 | 123 Demo 401(k) Plan | | Document | |

** Note: The portal Username must be at least 4 characters, and cannot contain leading or trailing spaces, [%] [#] [+] [;] [&] [/] [?] ['] or [].

*** Note: If you create passwords, they must be at least 8 characters, with at least one number, one letter, and one

special character. Passwords are case sensitive.

After the spreadsheet is completed return to the “Upload Portal User” screen. Select “Browse” select the file and click “Upload”. Please be patient if the upload contains a lot of portal users; it may take a few moments.

Upload Portal Users

Important Notes:

1. All data rows must contain the username, name, email, and module.

2. Any rows that skip the username field will assume to be using the username, password and demographic information from the last row above it that lists a username.

3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.

4. Misspelled column names will be silently skipped - unless they are required.

5. Rows with bad data will be skipped.

6. Existing portal user records will be updated (with the exception of passwords).

7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. Note: If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.

8. Additional contact types must be listed on the messaging module row.

[Download Current Portal User CSV File](#)

[Download CSV Schema](#)

Browse...

Remove

Upload

Upload Progress:

Close

When the file has completed the upload process, a status result will populate in the window to the right. Make note of any users that need alterations from the status box.

For example, if a user has been assigned signing permissions that are assigned to another user on the plan, the following error will populate.

Upload Progress:

Portal User Upload Example.csv

Processing Portal User Upload Example.csv

unable to mark user as Signing As 'ADMIN:SPONS'

for user Ferb on row 2. 'hk5w' is already marked as

Signing As ADMIN:SPONS.

Processing Complete.

If the ‘Upload Progress’ window populates as shown in the screen shot below, the upload process has been successfully completed and the window may be closed.

Upload Portal Users

Important Notes:

1. All data rows must contain the username, name, email, and module.

2. Any rows that skip the username field will assume to be using the username, password and demographic information from the last row above it that lists a username.

3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.

4. Misspelled column names will be silently skipped - unless they are required.

5. Rows with bad data will be skipped.

6. Existing portal user records will be updated (with the exception of passwords).

7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. Note: If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.

8. Additional contact types must be listed on the messaging module row.

[Download Current Portal User CSV File](#)

[Download CSV Schema](#)

Upload More Portal Users

Upload Progress:

Portal User Upload Example using contact types.csv
Processing Portal User Upload Example using contact types.csv...
Processing Complete.

Close

Assigning Portal Users to a Plan

Users can be assigned to a plan in three ways:

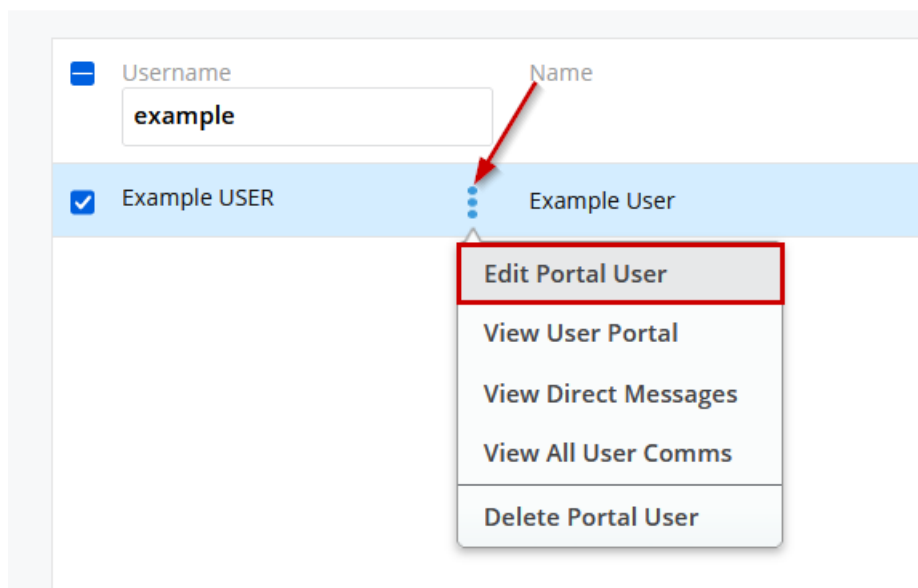
- From the Global Dashboard
- From the Plan-Level Dashboard
- During the Portal User Upload Process

Global Dashboard

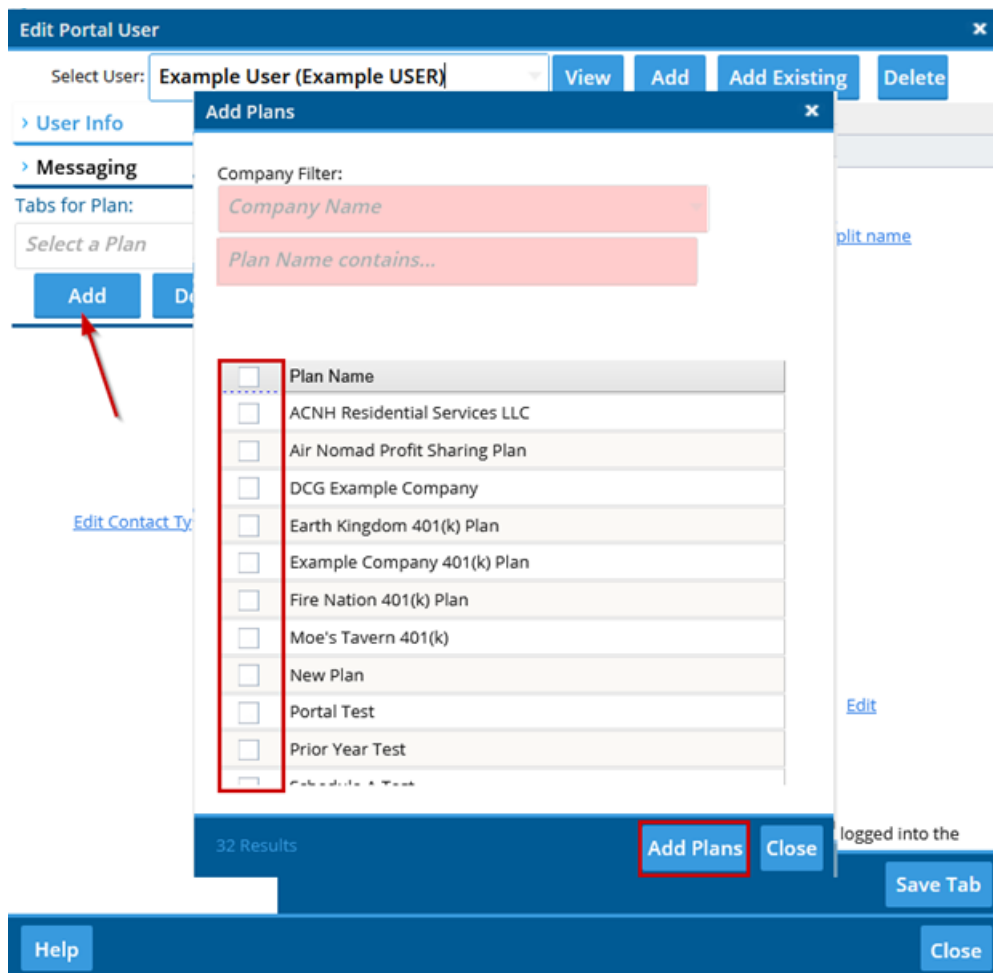
Wolters Kluwer Logo > ftwPortalPro > Global Dashboard

Steps:

1. Locate the Portal User in the list (must already be added or uploaded).
2. Select the menu icon (⋮) next to the Portal User's name.
3. Choose **Edit Portal User**.



4. In the Edit screen, select the **Add** button on the left.
5. Filter by Company Name, Plan Name, or scroll through the list of available plans.
6. Check the box next to the desired plan.
7. Select **Add Plans** to complete the assignment.



Plan-Level Dashboard

Steps:

1. Select the desired plan.
2. Navigate to the Portal via the **GO** menu or the **Portal** button on the **Edit Plan** screen.

Wolters Kluwer Example Company Go

Select a Plan From History...

Home > Edit Company > Edit Plan

Company: Example Company ID:

Plan: Example Company ID:

Checklist: **Non-Standardized 401(k) (Adoption Agreement Format) - POST**

Details: EIN: 867530936 • PN: 002 • PYE: 12-31

Plan Menu

- Conv
- Clon
- Dele
- Shov
- Docu
- MEP
- Post

Edit Plan

Edit Company

Documents

IRS

5500

1099

ACA

Compliance

Portal

Plan Modules

| Module | Plan Documents | IRS Forms | 5500 Forms | 1099-R | Compliance | Portal | Prop |
|--------|----------------|-----------|------------|--------|------------|--------|------|
| Resp | Yes | Yes | 2024 | 2024 | Yes | Yes | Yes |
| Admin | | | | | | | |

3. In the **Portal Users** screen, select the **Add** button above the user grid.

Wolters Kluwer Example Company Example Company Go David Rose

Example Company Portal Doc Admin: Update Module Options

Company ID: | Plan ID: | PYE: 12-31 | EIN: 86-7530936 | Plan Number: 002 | Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

PORTAL COMPLIANCE

Portal Users Communications

+ Add

| Username | Name | Email | Contact Type | Phone |
|----------|------|-------|--------------|-------|
| filter | | | filter | |

No results found.

4. In the **Edit Portal User** screen, choose one of the following options:

- **Add**
 - Use to create a new Portal User.
 - Enter a username and password (minimum 8 characters, including at least one letter, one number, and one special character).
 - Provide the first and last name, email address, and optionally, the associated company.

The screenshot shows the 'Edit Portal User' window. At the top, there's a 'Select User:' dropdown with 'Select a Contact' and buttons for 'View', 'Add' (highlighted with a red box), 'Add Existing', and 'Delete'. Below this are tabs for 'User Info' and 'Messaging'. Under 'User Info', there's a 'Tabs for Plan:' dropdown with 'Select a Plan' and 'Add'/'Delete' buttons. A blue link 'Edit Contact Types' is visible. The 'Add New Contact' modal is open, showing options for 'No portal access' and 'Grant portal access' (selected). It includes fields for 'Username', 'Password', 'Confirm', 'Full Name' (with sub-fields for Prefix, First, Middle, Last, Suffix), 'Company Name', and 'Email'. The 'Create New Contact' button in the modal is also highlighted with a red box. At the bottom of the main window are 'Save Tab', 'Help', and 'Close' buttons.

- **Add Existing**

- Use when the Portal User has already been added to another plan or exists in the Global Dashboard.
- Filter by username, name, or email.
- Select the user and confirm with **OK**.

Edit Portal User

Select User: *Select a Contact*

ViewAddAdd ExistingDelete

> User Info

> Messaging

Tabs for Plan: *Select a Plan*

Add

Select a Contact

Filters:

UserName: *UserName starts with...*

Name: *Name starts with...*

Email: *E-mail address starts with...*

| | UserName | Name | Email |
|-----------------------|----------------|------------------------|-------|
| <input type="radio"/> | Aang | Aang | |
| <input type="radio"/> | AerithG | Aerith Gainsborough | |
| <input type="radio"/> | AndyDwyer | Andy Dwyer | |
| <input type="radio"/> | BarretW | Barret Wallace | |
| <input type="radio"/> | Billy Ocean | Billy Ocean | |
| <input type="radio"/> | Bubblyglasses | bubbly Glasses | |
| <input type="radio"/> | CandaceF | Candace Flynn | |
| <input type="radio"/> | Mr.Burns | Charles Monty Burns | |
| <input type="radio"/> | CidH (Retired) | Cid Highland (Retired) | |
| <input type="radio"/> | ClientPortal | Client Portal Test | |

OK

Close

Save Tab

Help

Close

Upload Portal Users

Portal Users can also be assigned to plans during the upload process.

Refer to the article: [How to Upload Portal Users in Bulk](#) for detailed instructions.