

Permissions, Contact Types, and Document Classifications

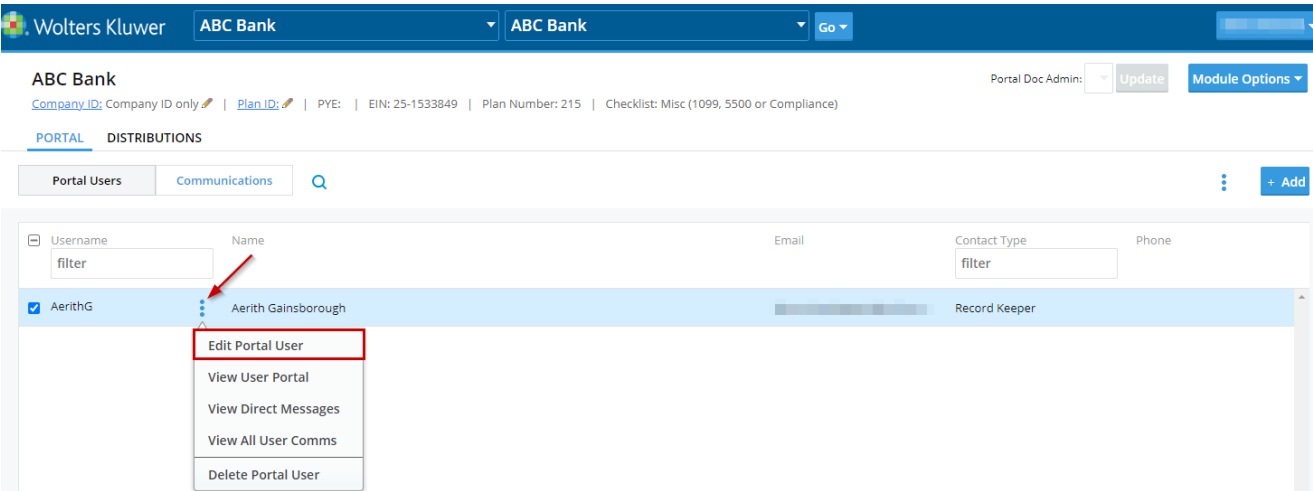
02/26/2025 4:58 pm CST

How to Add Module Permissions to Portal Users

After a Portal User has been assigned to a plan module permissions are enabled. Standard Users with permissions to 'Edit' the Portal module may update Module permissions from the "Edit Portal User" screen.

Note: If portal user were uploaded in bulk, are added with default settings, or the contact types have been updated, permissions may already apply.

To allow module permissions, or to update permissions, select the portal user from either the Global or Plan level dashboards and selecting 'Edit Portal User':



Once the Portal User is selected, permissions may be set by either selecting a contact type from within the 'User Info' tab:

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

ViewAddAdd ExistingDelete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

AddDelete

> Document

> 5500

Edit Contact Types

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:

Actuary

Attorney

CPA

Financial Advisor

Plan Sponsor

Record Keeper

Trustee

**Note: When the Reset Password button is clicked, the portal user has logged into the portal to set up security questions and answers. If the user does not need to click the button, the user will not need to click the button.

Save Tab

Close

Alternatively, permissions may be edited by module. This view may vary based on the a firms module subscription:

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

ViewAddAdd ExistingDelete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

AddDelete

> Document

> 5500

> Compliance

[Edit Contact Types](#)

Document -

Portal Users: Aerith Gainsborough (AerithG)

User Information

Portal Username: AerithG

Signing As: None

Document Classification Access Permissions

Set all document classification permissions:

5500 Document: No

Annual Questionnaire: No

Audit Report: No

Census Report: No

Fee Schedule: No

Final Compliance Package: No

Other: No

Plan Annual Notice: No

Plan Board Consent: No

Plan Document: No

Plan Forms: No

Plan Trust: No

Required Amendment: No

Save Tab

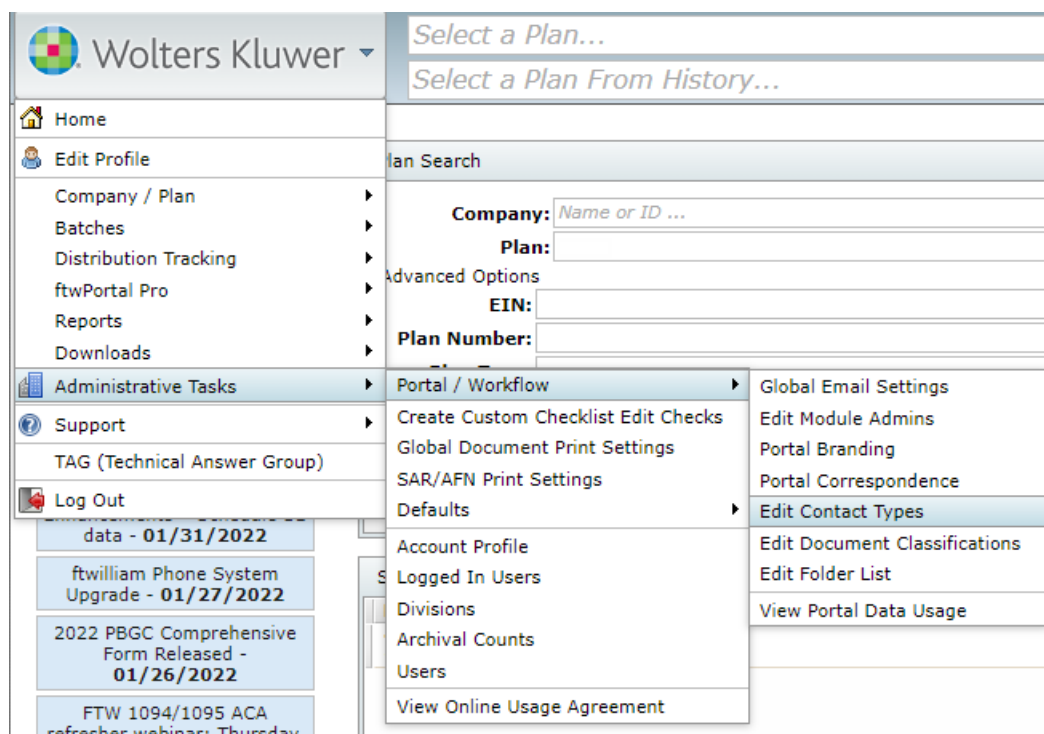
Help

Close

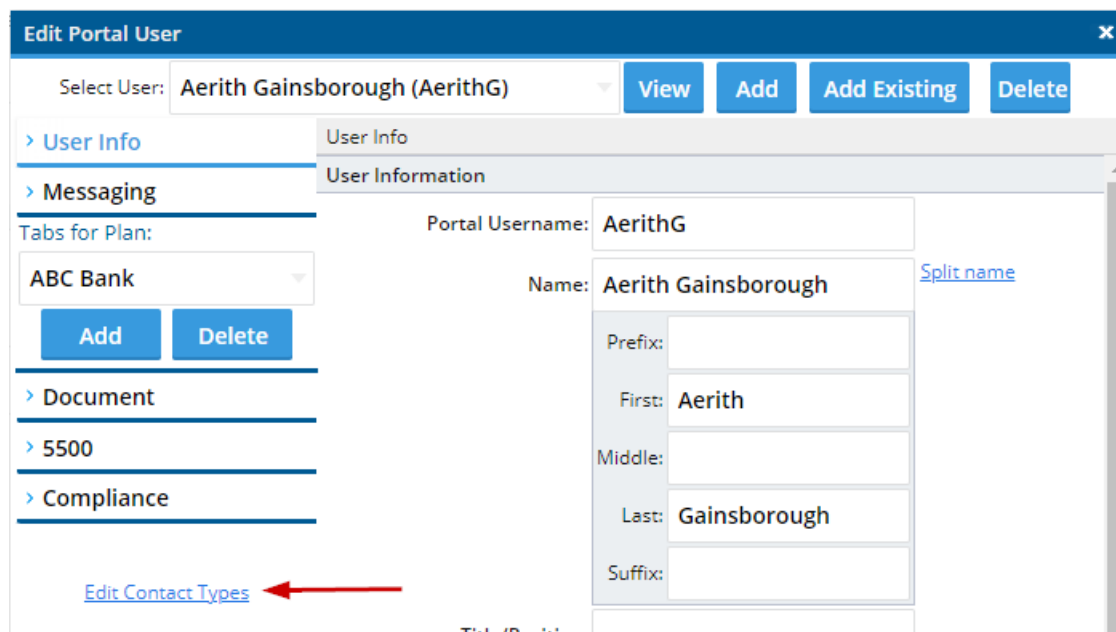
How to Add Contact Types with ftwPortal Pro

To Edit/Add Contact Types, you do have to be the Master Admin User or a Designated Admin. The “Edit Contact Type” window may be accessed two different ways.

1. Select the Wolters Kluwer Logo>Administrative Tasks>Portal/Workflow>Edit Contact types:



2. Select the link from within the 'Edit Portal User' Screen:



The "Edit Contact Types" link will open to the '*default*' contact type. On the left-hand side of the screen, are the modules the account subscribes to. For example, if the account does not have the Compliance software, the 'Compliance' tab will not populate. The '*default*' permissions are those that each portal user is added with if a contact type is not specified.

Edit Contact Types

Select Contact Type: *default*

AddDelete

> Messaging

> Document

> 5500

> Compliance

Document

Document Classification Access Permissions

Set all document classification permissions:

5500 Document:

Annual Questionnaire:

Audit Report:

Census Report:

Fee Schedule:

No

No

No

No

No

☐ Apply to portal users
 Save Tab

Help

Close

Additional contact types will appear if the drop down is selected. The existing contact types may be edited or a custom contact type may be created.

Edit Contact Types

Select Contact Type: *default*

AddDelete

Messaging

Document

5500

Compliance

default

Actuary

Attorney

CPA

Financial Advisor

New User

Personal Account

Plan Sponsor

Record Keeper

Trustee

☐ Apply to portal users
 Save Tab

Help

Close

Updated permissions to existing contact types may be applied to existing portal users that currently have that contact type listed on the Edit Portal User Screen.

To apply the changes to current portal users in the system, check the “Apply to portal users” box before clicking on “Save Tab”. A window will pop up to select all portal users of that specified type, or select specific users to update.

Edit Contact Types

Select Contact Type: ***default*** **Add** **Delete**

> **Messaging**

> **Document**

> **5500**

> **Compliance**

Document

Document Classification Access Permissions

Set all document classification permissions: **No**

5500 Document: **No**

Annual Questionnaire: **No**

Audit Report: **No**

Census Report: **No**

Fee Schedule: **No**

☒ **Apply to portal users** **Save Tab**

Help **Close**

Contact Types may also be added or deleted by selecting the applicable button to the right of the drop-down list. If deleting a contact type, be sure to select the specific contact type from the drop down prior to selecting the 'Delete' button.

How To Edit Document Classifications

Document Classifications allows portal user permissions to access documents based on their classification; if a portal user has access to a document classification, they will be able to view all documents with that classification.

To Edit Document Classifications, you have to be the Master Admin User or a Designated Admin. To access the classifications, select the Wolters Kluwer logo, from the drop-down menu, select Administrative Tasks, then Portal/Workflow, then Edit Document Classifications.

Once on the 'Document Classification' screen, Admin users can override the names given to 'Standard Classifications' that are provided with ftwPortal Pro.

Admin users can also add additional custom classifications at the bottom of this screen and provide classification abbreviations for quicker reference. After updating classifications, you must click Save Changes before you exit the screen for changes to take effect.

Document Classifications

Document Classifications

Standard Classifications

<u>Default</u>	<u>Default Abbr.</u>	<u>Custom Name</u>	<u>Custom Abbr.</u>
5500 Document	5500	<input type="text"/>	<input type="text"/>
Annual Questionnaire	Questionnaire	<input type="text"/>	<input type="text"/>
Audit Report	Audit	<input type="text"/>	<input type="text"/>
Census Report	Census	<input type="text"/>	<input type="text"/>
Final Compliance Package	Final	<input type="text"/>	<input type="text"/>
Other	Other	<input type="text"/>	<input type="text"/>
Plan Annual Notice	Notice	<input type="text"/>	<input type="text"/>
Plan Board Consent	Consent	<input type="text"/>	<input type="text"/>
Plan Document	Plan	<input type="text"/>	<input type="text"/>
Plan Forms	Form	<input type="text"/>	<input type="text"/>
Plan Trust	Trust	<input type="text"/>	<input type="text"/>
Required Amendment	ReqAmendment	<input type="text"/>	<input type="text"/>
Standard Amendment	Amendment	<input type="text"/>	<input type="text"/>
Summary of Benefits and Coverage	SBC	<input type="text"/>	<input type="text"/>
Summary Plan Description	SPD	<input type="text"/>	<input type="text"/>

Custom Classifications

<u>Name</u>	<u>Abbr.</u>	
<input type="text" value="Sample Classification"/>	<input type="text" value="SClass"/>	<input type="button" value="Delete"/>

*Note: removing an existing document classification will remove it from all portal users.

Admin