# Permissions, Contact Types, and Document Classifications

08/25/2025 11:06 am CDT

#### 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':

🌲 Wolters Kluwer	ABC Bank	▼ ABC Bank	▼ Go ▼		
ABC Bank <u>Company ID:</u> Company ID on PORTAL DISTRIBUTION	ly 🖋   <u>Plan ID:</u> 🖋   PYE:   EIN: 25-1! IS	533849   Plan Number: 215   Checklist: Misc (1	099, 5500 or Compliance)	Portal Doc Admin: Update	Module Options 🔻
Portal Users Co	mmunications Q				+ Add
Username filter	Name		Email	Contact Type Phone Filter	
AerthG	Aerith Gainsborough Edit Portal User View User Portal View Direct Messages View All User Comms Delete Portal User			Record Keeper	

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								x
Select User: Aerith Gains	sborough (AerithG)	• Vie	ew	Add	Add Exis	sting	Delete	
> User Info	User Info							
> Messaging	User Information					1		_
Tabs for Plan:	Portal Username:	Aerith	IG					
ABC Bank	Name:	Aerith	Gai	nsborou	gh	<u>Split n</u>	ame	
Add Delete	_	Prefix:						
> Document		First:	Aer	rith				
> 5500		Middle:						
		Last:	Gai	insborou	gh			
Edit Contact Types		Suffix:						
	Title/Position:							
	Company Name:	Flowe	r Me	erchant A	valanche			
	Password:**	Reset	Pass	sword				
	Main Contact Type:	Recor	d Ke	eper	•	Ec	lit	
	Addl Contact Types:				-			
	++++ · · · · · · · · · · · · · · · · ·	Actua	ry				te contra	
	portal to set up security questi unless your client needs assista	Attorr	ney		not nee rd.	nas iog d to cli	ck the butto	n
		СРА						
		Finan	cial A	Advisor			Save I	ab
Help		Plan S	pon	sor			Clo	se
		Recor	d Ke	eper				
		Truste	e					

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

Edit Portal User		×					
Select User: Aerith Gains	oorough (AerithG) 🛛 🗸 View 🛛 Add 🛛 Add E	xisting Delete					
> User Info	Document -						
> Messaging	Portal Users: Aerith Gainsborough (AerithG)						
Tabs for Plan:	User Information	A					
ABC Bank	Portal Username: Aer	rithG					
Add Delete	Signing As: None						
	Document Classification Access Permissions						
> Document	Set all document classification permissions:	×					
> 5500		No					
> Compliance	5500 Document:	NO					
	Annual Questionnaire:	No					
Edit Contact Types	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					
	Poquirad Amondmonts	No -					
		Save Tab					
Help		Close					

## How to Add or Edit 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:

1							
🔒 Wolters Kluwe	Select a Plan	Select a Plan					
	Select a Plan From Histor	Select a Plan From History					
🚰 Home							
🐣 Edit Profile	lan Search						
Company / Plan	Company: Name or ID						
Batches	Company. Name of 10						
Distribution Tracking	Plan:						
ftwPortal Pro	Advanced Options						
Reports	EIN:	EIN:					
Downloads	Plan Number:						
Administrative Tasks	<ul> <li>Portal / Workflow</li> </ul>	Global Email Settings					
Support	Create Custom Checklist Edit Checks	Edit Module Admins					
TAG (Technical Answer Group)	Global Document Print Settings	Portal Branding					
	SAR/AFN Print Settings	Portal Correspondence					
	Defaults •	Edit Contact Types					
data - <b>01/31/2022</b>	Account Profile	Edit Document Classifications					
ftwilliam Phone System	S Logged In Users	Edit Folder List					
Opgrade - 01/2//2022	Divisions	View Portal Data Usage					
2022 PBGC Comprehensive	Archival Counts						
01/26/2022	Users						
FTW 1094/1095 ACA refresher webinar: Thursday	View Online Usage Agreement						

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

Edit Portal Use	r								×
Select User:	Aerith Gains	borough (AerithG)	Vie	w	Add	Add Exis	ting	Delete	
> User Info		User Info							
> Messaging		User Information							
Tabs for Plan:		Portal Username:	Aerith	G					
ABC Bank		Name:	Aerith	Gai	nsborou	gh	<u>Split na</u>	ame	
Add	Delete		Prefix:						
> Document			First:	Aer	ith				
> 5500			Middle:						
> Compliance			Last:	Gai	nsborou	gh			
Edit Conta	act Types		Suffix:						
		Title/Pesition							

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				x
Select Contact Type:	*default*	Add	Delete	
Messaging	Document			
	Document Classification Access Permissions			*
> Document	Set all document classification permissions:			L
> 5500	5500 Document:	No	v	L
Compliance	Annual Questionnaire:	No		1
	Audit Report:	No		
	Census Report:	No		
	Fee Schedule:	No		
	Apply to port	al users	Save Tal	•
Help			Clo	se

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*	Add	Delete
Messaging	*default*		
	Actuary		
Document 5500	Attorney		
Compliance	СРА		
	Financial Advisor		
	New User		
	Personal Account		
	Plan Sponsor		
	Record Keeper		
	Trustee	rtal 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				x
Select Contact Type:	*default*	Add	Delete	
Messaging	Document			
	Document Classification Access Permissions			<u>_</u>
> Document	Set all document classification permissions:			L
> 5500		•••		
> Compliance	5500 Document:	NO		
	Annual Questionnaire:	No		
	Audit Report:	No		
	Census Report:	No		
	Fee Schedule:	No		
				-
	Apply to por	rtal users	Save Tal	D
and a second				
Help			Clo	se

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.

#### Home > Document Classifications

# **Document Classifications**

Document Classifications					
Standard Classifications	Default Abbr	Custom Name		Custom Abbr	
<u>Derault</u>	Derault Abbr.	Custom Name		Custom Abbr.	
5500 Document	5500				
Annual Questionnaire	Questionnaire				
Audit Report	Audit				
Census Report	Census				
Final Compliance Package	Final				
Other	Other				
Plan Annual Notice	Notice				
Plan Board Consent	Consent				
Plan Document	Plan				
Plan Forms	Form				
Plan Trust	Trust				
Required Amendment	ReqAmendment				
Standard Amendment	Amendment				
Summary of Benefits and Coverage	SBC				
Summary Plan Description	SPD				
Custom Classifications					
Name			Abbr.		
Sample Classification			SClass	Delete	
·	Add C	lassification	· · · · · · · · · · · · · · · · · · ·		
*Note: removing an existing document classification will remove it from all portal users. Save Changes					

Admin