

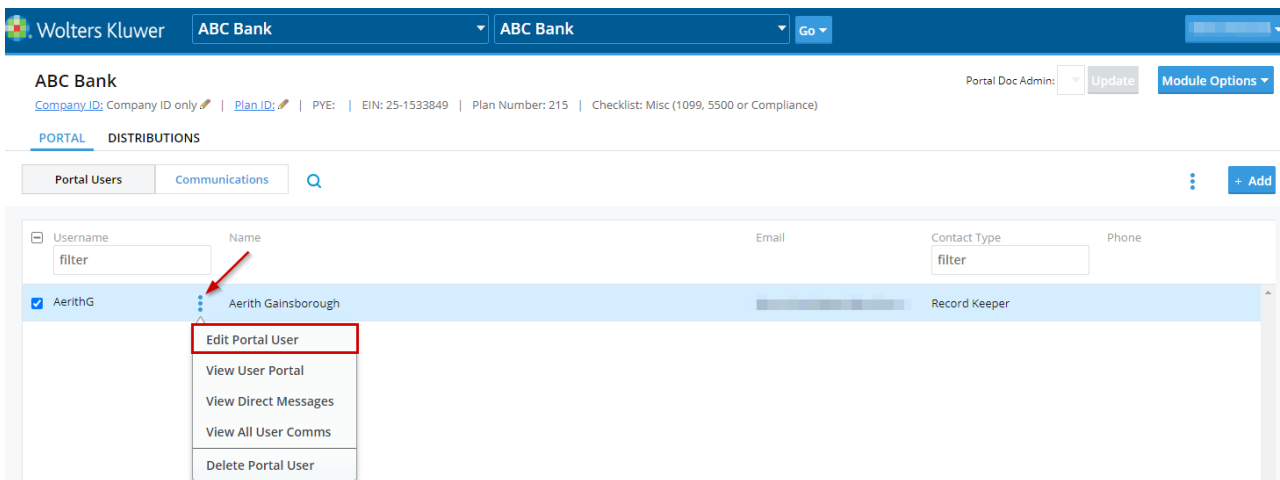
How to Add Module Permissions to Portal Users

07/29/2024 1:20 pm CDT

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)

View
Add
Add Existing
Delete

> User Info

> Messaging

> Document

> 5500

[Edit Contact Types](#)

User Info

User Information

Portal Username:

Name:

[Split name](#)

Prefix:

First:

Middle:

Last:

Suffix:

Title/Position:

Company Name:

Password:**
Reset Password

Main Contact Type:

Record Keeper

[Edit](#)

Add Contact Types:

**Note: When the Reset Password button is clicked, the portal user has logged into the portal to set up security questions and must not need to click the button again unless your client needs assistance.

Actuary

Attorney

CPA

Financial Advisor

Plan Sponsor

Record Keeper

Trustee

Help
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)
View
Add
Add Existing
Delete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

Add
Delete

> 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:	<div style="border: 2px solid red; padding: 2px;"> No </div>
5500 Document:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Annual Questionnaire:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Audit Report:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Census Report:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Fee Schedule:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Final Compliance Package:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Other:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Plan Annual Notice:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Plan Board Consent:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Plan Document:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Plan Forms:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Plan Trust:	<div style="border: 2px solid red; padding: 2px;"> No </div>
Required Amendment:	<div style="border: 2px solid red; padding: 2px;"> No </div>

Help
Save Tab
Close