

How To Edit Document Classifications

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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.

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Document Classifications

Document 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