## How to Delete Folder Names Associated with Portal Communications

08/01/2024 11:41 am CDT

To delete document folders, you must be the Master Admin User or a Designated Admin. With these designations you may access the folder options through the following paths:

1. From the Global/Plan dashboard select the Module Options button in the upper right-hand corner. The 'Manage Folder' option is within the 'Admin Options' dropdown:

🔹. Wolters Kluwer	Select a Company	Select a Plan	▼ Go -		
Portal Users	Communications Census Batches	Q			Module Options 🔻
					Portal User Manager
					Portal Document Batch
Username	Name		Email	Contact Type Phone	Download History
filter				filter	Client Portal Guide
				<	Portal User Help
				Portal Branding	Admin Options
				Global Email Settings	
	1.000		To Brance Control of C	Edit Document Classifications	
				Manage Folders	
	1.00			Edit Module Admins	

2. From within a new communication (other than a Direct Message):

To: Plan Forms (1)  Subject:	Edit Portal User	5
Send Email Invite	Confirmation Email Recipient: <u>Ali Test (allison.bailey@wolterskluwer</u>	.com) Expires (Optional): MM/DD/YYYY
Email Invite Portal Message	Folder	Vame Edit Folders
Default Upload Email	✓ ♦ □ F	ileName E-Sign Add Signer

3. From within the Wolters Kluwer Menu, select Administrative Tasks> Portal/Workflow> Edit Folder List:

	Calact a Dian				
🚺 Wolters Kluwer 🤉	Select a Plan				
. Wollers Rawer	Select a Plan From History				
🚮 Home					
🐣 Edit Profile	Ian Search				
Company / Plan	Company: Name or ID				
Batches Distribution Tracking	Plan: Name or ID				
ftwPortal Pro	•				
Reports	•				
Downloads					
🟭 Administrative Tasks	Portal / Workflow	Global Email Settings			
🔞 Support	Create Custom Checklist Edit Checks	Edit Module Admins			
TAG (Technical Answer Group)	Global Document Filenames	Portal Branding			
BTO Benefits	Global Document Print Settings	Portal Correspondence			
	<ul> <li>SAR/AFN Print Settings</li> </ul>	Edit Contact Types			
Log Out	Defaults •	Edit Document Classifications			
	Users	Edit Folder List			
	View Online Usage Agreement	View Portal Data Usage			

After clicking on "Edit Folders" or "Edit Folder List", a list of folder names will appear in a pop-up. Select the check the box for the desired folders to delete and click on "Delete Folders". The pop-up box will update with the text "Changes Saved". \*

Please Note- Once removed, a folder can not be restored, any documents within the folders will be moved to display as a loose documents within the Portal Users view.

Edit Fold	ler List	х
	Folder Name	
	Annual Notices	
	Compliance Information	
	DB Checklist Tests	
	EXPIRE	
	Plan Document	
	Plan Document/2021	
	Plan Document/2022	
	Plan Documents	_
	Required Documentation	
	Trustee	
	WELFARE Tests	
	Delete Folders Clo	ose