How to Roll Forward Compliance Users

07/25/2024 4:40 pm CDT

Rolling Forward Users for an Individual Plan

- 1. Select the **Portal Module** of the desired plan.
- 2. Click the Menu icon (three vertical dots) on the right-hand side of the screen.
- 3. Choose 'Bring Forward Compliance Portal Users' from the menu.

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Rolling Forward Users for All Plans

- 1. Navigate to the Global Dashboard (WK logo > ftwPortalPro > Global Dashboard).
- 2. Click the Menu icon (three vertical dots) on the right-hand side of the screen.
- 3. Select 'Bring Forward Compliance Portal Users.' This action will pull forward all users across all plans.

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