

Inviting Portal Users to the Portal to Edit, Review and/or Upload Attachments

01/10/2025 1:21 pm CST

If you would like to invite users to the portal, you first must add a portal user under the [Work with Signers/Portal Users](#) link from the "Form 5500 - Year" screen. Once the portal user is added, you should have links available on the "Form 5500 - Year" screen next to the "Signed Status" line near the top of the screen. If the filing is not yet locked and users have proper permissions to view/print, edit or upload, the links to invite will appear as "Invite [Portal User's Name] to Portal". (Note that if the filing is not locked and a user(s) does not have permissions to view/print, edit or upload, then links to invite will only appear once the form has been locked).

Click on the link to "Invite [User name] to Portal" and the "Invite Signers/Portal Users" screen will appear with summaries of the user(s) name, username and email.

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Invite Portal Users

Email Template: [Edit](#)

Administrator Summary

Email Link:	Click to open email
To Name:	Example User
To Username:	ExampleUser1234
To Email:	Example.Uer@email.com

Some email programs may limit the number of characters allowed when creating an email through the "Click to open email" link above. If the link fails to open a new email you can copy the content below and paste it into your preferred email program.

Your 5500 is Ready to Be Signed

Your 5500 is ready for a signature. You can log on at:

<https://www.ftwilliam.com/cgi-bin/sp.cgi?id=PH4CGM7&Year=2022>

You can log in using the following credentials:

Username: ExampleUser1234
Password: Lost password? Use the 'Forgot Password' link on the login screen to reset your password.

Thank You

[Return to Previous Page](#) [Mark 5500 as 'Invited'](#)

If you select "Yes" for "May Edit 5500" and select "Yes" for your signer to upload attachments to the filing, you will be able to click on "Select Attachments" to select which attachment(s) you would like your client to upload in the portal. Once your client logs into the portal, he/she will be able to view and/or delete the attachment after uploading the attachment to the filing.

View, Edit, Sign 5500 Settings		
View/Print Draft 5500:	Yes	<input type="checkbox"/> Add ToDo (Optional)
Include Watermark:	No	
View/Print SAR:	No	
View/Print AFN:	No	
View/Print 8955-SSA:	No	
Allow 8955-SSA E-File:	No	
View/Print 5558:	No	
May Edit 5500:	No	Select Fields
Upload Attachments:	No	Select Attachments
Lock/Sign When 5500 is Completed:	No	

After clicking on "Select Attachments," you will be able to select which attachment(s) your client will be able to upload via the portal. Please be sure to click "Update" after selecting your attachment(s) to save the changes you have made.

Select Attachments

- 5500 Line A Multiple ER Plans - CSEC Participating employer information for multiple employer plans
- Manually signed Form 5500/SF/EZ (Signature and Date)
- Other attachment
- Reasonable Cause for late filing
- Reasonable Cause for late or missing IQPA Report
- Sch H line 3a or Sch I line 4k - Accountant Opinion / IQPA report
- Sch H line 4i - Schedule of Assets Held at End of Year
- Sch H line 4j - Schedule of Reportable Transactions - FivePrntTrans
- Sch I line 4k - 2520.104-50 Statement
- Sch MB line 11 - Justification for Change in Actuarial Assumptions
- Sch MB line 3d - Withdrawal Liability Amount
- Sch MB line 3d - Withdrawal Liability Amount (CSV)
- Sch MB line 4b - Actuarial Certification
- Sch MB line 4b - Illustration Supporting Actuarial Certification of Status
- Sch MB line 6 or Sch SB Part V - Actuarial Assumption Methods
- Sch MB line 6 or Sch SB Part V - Summary of Plan Provisions
- Sch MB line 8b1 - Projection of Expected Benefit Payments (CSV)
- Sch MB line 8b2 - Active Participant Data (CSV)
- Sch MB line 8b2 or Sch SB line 26a - Active Participant Data
- Sch MB line 8b3 - Projection of ER Contribs and Withdrawal Liability Pymts (CSV)
- Sch MB line 9c/9h - Schedule of Funding Standard Account Bases
- Sch MB or Sch SB - Statement by Enrolled Actuary (Actuary has not fully reflected any regulation or ruling)
- Sch R Line 14 - Inactive Participant Information
- Sch R Line 17 - Assets Liability Transfer
- Sch R Part V - Funding Improvement Plan
- Sch R Part V - Rehabilitation Plan
- Sch R line 18 - Multiple Plan Liabilities
- Sch SB line 23 - Information on Use of Substitute Mortality Tables
- Sch SB line 24 - Change in Non-Prescribed Actuarial Assumptions
- Sch SB line 25 - Method Change
- Sch SB line 26a - Active Participant Data (CSV)
- Sch SB line 26b - Projection of Expected Benefit Payments (CSV)
- Sch SB line 27 - Alternative 17 - Year Funding Schedule for Airlines
- Sch SB line 27 - Balances Subject to Binding Agreement with PBGC
- Sch SB line 32 - Schedule of Amortization Bases
- Sch SB line 4 - Plan at Risk
- Signed Schedule MB or Schedule SB

Depending on your email settings, you will have different options to send and review the email:

- **Click to open email:** ("Preparer's Email Program" selected on the "Global Email Settings" screen)
 - Select the "Click to open email" link and an email will be generated on your desktop from your personal email program (Outlook, Thunderbird, etc.). The email body will be composed from the default templates you created for the "Portal Email" located on the [Global Email Settings](#) screen within the "Select an Email to Edit" box and the custom language (if any) provided for that user.

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Once you have reviewed the email one last time, you may then click the "Send" button in your email program to invite the user to the portal.

- **Send Email** ("Specify a Server" option selected on the "Global Email Settings" screen)
 - A link is provided to preview the email body by clicking on "Preview." The email body will be composed from the default templates you created for the "Portal Email" located on the [Global Email Settings](#) screen within the "Select an Email to Edit" box and the custom language (if any) provided for that user.

Global Email Settings

Select Division: DEFAULT ▼

5500 Distributions Messaging Documents Compliance Notifications

Email/Server Settings

Reminders: No ▼
Every (time since last invite): 1 Day ▼
Confirmation Emails: Yes ▼
Name Change Emails: No ▼
Use direct signing link: No ▼
Custom Language: No ▼
Email Sending Method: Specify a Server ▼

Select an Email to Edit

Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L	Edit
Portal Email	Default Portal Email	Edit
Signer Email	Default Signer Email	Edit

Email Template: Default Portal Email ▼ [Edit](#)
Default 8955-SSA Cover Letter
Default Portal Email

Portal User Summary

To Name: Example User
To Username: ExampleUser1234
To Email: Example.Uer@email.com
From Name: Admin
From Email: 5500@TPAEmail.com
Reply To:
Cc:
Bcc:
Subject: 5500 Portal Account
Email Body: [Preview](#)

[Send Email](#)

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