

# Adding Portal Users / Signers to Form 5330

02/03/2025 8:05 pm CST

There are two primary methods to add a Portal user for viewing or e-filing Form 5330.

## Method 1: Using the 5500 Menu

- Navigate to the **5500 menu**.
- Select **Work with Signers/Portal Users**.

Home > Edit Company > Edit Plan > 5500 > 2023

Company:	Sample Example Co 2	ID:	
Plan:	Example Co.	ID:	
Checklist:	<b>Misc (1099, 5500 or Compliance)</b>		
Details:	EIN: 86-7530955 • PN: 001 • PYE: 12-31		

Edit Status:	<b>Unlocked</b>
Signed Status:	<b>Not Signed</b>
Acceptance Status:	<b>Not Submitted</b>

<b>5500 Menu</b>
<ul style="list-style-type: none"><li>• SAR/AFN Print Settings <i>i</i></li><li>• Batch/Workflow</li><li>• Upload and Download Center</li><li>• View 5500 FAQs</li><li>• 55AutoFill</li><li>• Bring forward 2022 data to 2023 for <b>this plan only</b></li><li>• Bring forward 2022 portal users to 2023 for <b>this plan only</b> <i>i</i></li><li>• Clone 2023 Return/Report within 2023 for <b>this plan only</b> <i>i</i></li></ul>
<b>Portal Menu</b>
<ul style="list-style-type: none"><li>• <b>Work With Signers/Portal Users</b></li><li>• Portal Manager</li><li>• Portal Link 1</li></ul>

- If a Form 5500 or 8955-SSA has already been added for the filing year, any assigned Portal user will automatically populate, allowing permissions to be set for the 5330.
- If these forms haven't been added yet, follow these steps:
  1. **Select a Contact:** Choose from the dropdown, which lists all Portal users in the company.
  2. **Add a New User:** This option is used if the Portal user isn't already in the company system.
  3. **Add Existing:** Filter users by username, first/last name, or email address, and add them to the 5330 filing year.

## Method 2: Using the E-File Status Link

- Open the Form 5330 section.
- Click on the **E-File Status** link within the **5330 Box**.

<b>5330</b>			
I - FAQs for 5330	<b>E-File Status</b>	Upload	
DRAFT-EDIT	STATUS	FINAL	DEL
Form 5330 (📄)	✓	Form 5330	🗑️
p4/5 (New)	✓		
p4/5 (New)	✓		🗑️
➕Add p4/5			
Attachments		Attachments	

- From within the Plan level E-file Status dashboard, select the **Work with Signers** link.
- If a Form 5500 or 8955-SSA has already been added for the filing year, any assigned Portal user will automatically populate, allowing permissions to be set for the 5330.
- If these forms haven't been added yet, follow these steps:
  1. **Select a Contact:** Choose from the dropdown, which lists all Portal users in the company.
  2. **Add a New User:** This option is used if the Portal user isn't already in the company system.
  3. **Add Existing:** Filter users by username, first/last name, or email address, and add them to the 5330 filing year.

## 5330 User Permissions

Once added to the plan, 5330 users can be assigned two types of permissions:

The screenshot shows the 'Edit Portal Users' interface. At the top, the user is identified as 'Charles Montgomery Burns (Mr.Burns)' for the year '2023'. The 'User Information' section shows the 'Portal Username' as 'Mr.Burns' and 'Signing As' as 'None'. The 'View, Edit, File Settings' section contains a table of permissions:

Setting	Value	Optional
View Draft 5500:	No	<input type="checkbox"/> Add ToDo (Optional)
Include Watermark:	No	
View SAR:	No	
View AFN:	No	
View 8955-SSA:	No	
Allow 8955-SSA E-File:	No	
View 5558:	No	
May Edit 5500:	No	<a href="#">Select Fields</a>
Upload Attachments:	No	<a href="#">Select Attachments</a>
Lock/Sign When 5500 is Completed:	No	
View 5330:	Yes	<input type="checkbox"/> Add ToDo (Optional)
Allow 5330 E-File:	Yes	

The 'Email Settings' section includes fields for 'From Name', 'From Email', 'Reply To', 'CC', and 'BCC'. A 'Save Tab' button is located at the bottom right of the settings area.

- **View Permissions:** Allows the user to view Form 5330 within the portal.
  - Selecting the checkbox next to **Add ToDo (Optional)** will add viewing the Form 5330 to the Portal User's to do list as an actionable item. If reminders are enabled, users will receive notification to view Form 5330 until the task has been completed.

**NOTE:** Signers must view Form 5330 by default; selecting this checkbox adds a separate To-Do action requirement.

- **E-file:** Allows the user to view and e-file Form 5330 through the portal.
  - Multiple users can be assigned signing permissions, but only one can complete the e-filing process. Once a filer completes the process, e-filing is disabled and removed from other users' ToDo lists.

**NOTE:** The **Signing As** designation applies only to the 5500 and does not affect signing permissions for the 5330.

**\*Alternative Method 3 for Adding 5330 Portal User Access (Only available for ftwPortal Pro Module subscribers)**

- From the **Plan Level Dashboard**, select the portal user associated with the plan.
- Click the tricolon ( ⋮ ) and **Edit Portal User**.
- Select the **5500 Module** and the correct year from the dropdown.
- Click **Add Portal User**, and their permissions for that year will populate.

This process will successfully add a Portal user to the filing year to set permissions for the Form 5330.

Example Co.

Company ID: | Plan ID: | PYE: 12-31 | EIN: 86-7530955 | Plan Number: 001 |

PORTAL DISTRIBUTIONS

Portal Users Communications

Username	Name
<input checked="" type="checkbox"/> Mr.Burns	Charles Montgomery Burns
<input type="checkbox"/> Smithers	

- Edit Portal User
- View User Portal
- View Direct Messages
- View All User Comms
- Delete Portal User

**Edit Portal User** x

Select User: Charles Montgomery Burns (Mr.Burn) View Add Add Existing Delete

> User Info 5500 -

> Messaging Selected Year: 2023 Add Portal User Delete Portal User

Tabs for Plan: Portal Users: Charles Montgomery Burns (Mr.Burns)

Example Co. Add Delete

User Information

Click the Add Portal User button to add the portal user to this year.

> Document

> 5500

> Compliance

**Edit Portal User** x

Select User: Charles Montgomery Burns (Mr.Burn) View Add Add Existing Delete

> User Info 5500 -

> Messaging Selected Year: 2023 Add Portal User Delete Portal User

Tabs for Plan: Portal Users: Charles Montgomery Burns (Mr.Burns)

Example Co. Add Delete

> Document

> 5500

> Compliance

[Edit Contact Types](#)

View, Edit, File Settings	
View Draft 5500:	No <input type="checkbox"/> Add ToDo (Optional)
Include Watermark:	No
View SAR:	No
View AFN:	No
View 8955-SSA:	No
Allow 8955-SSA E-File:	No
View 5558:	No <a href="#">Select Fields</a>
May Edit 5500:	No <a href="#">Select Attachments</a>
Upload Attachments:	No
Lock/Sign When 5500 is Completed:	No
View 5330:	Yes <input type="checkbox"/> Add ToDo (Optional)
Allow 5330 E-File:	Yes

Save Tab

Help Close

