

Inviting a Portal User to View or Sign the 5330

02/03/2025 8:10 pm CST

Once a portal user has been assigned to the plan with 5330 permissions, a link will appear on the 5330 E-File Status dashboard.

Regardless of lock status, if a user has proper permissions to view/print the Form 5330, a link to invite will appear as **Invite [Portal User's Name] to Portal**".

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Company:	A.Demo	ID:	
Plan:	A.Demo	ID:	
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST		
Details:	EIN: 25-1533859 • PN: ??? • PYE: 12-31		

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<input type="checkbox"/>	Company Name	Company ID	Plan Name	Plan ID	EIN	Desc	Edit Check Status	Lock Status
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859			
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	2nd		
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	3rd		

If the filing is locked, and a portal user has been assigned with signing permissions only, the **Invite [Portal User's Name] to Sign** link will appear.

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<input type="checkbox"/>	Company Name	Company ID	Plan Name	Plan ID	EIN	Desc	Edit Check Status	Lock Status
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859			
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	2nd		
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	3rd		

If users have both view and signing permissions, two links will appear, allowing selection of the invitation template.

NOTE: The same username may be listed for both if the user has both permissions assigned.

Company:	A.Demo	ID:	
Plan:	A.Demo	ID:	
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[Invite Aang to the portal](#) 1

[Invite Aang to Sign](#) 2

<input type="checkbox"/>	Company Name	Company ID	Plan Name	Plan ID	EIN	Desc	Edit Check Status	Lock Status
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859			
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	2nd		
<input type="checkbox"/>	A.Demo		A.Demo		25-1533859	3rd		

The email templates used for sending invitations are pre-configured and can be found in the **Global Email Settings** under the **Select an Email to Edit** section. You can edit these templates to customize the content, but by default, the following are used:

- **Invite [Username] to Portal:** This link uses the **Default Portal 5330 Email** template.
- **Invite [Username] to Sign:** This link uses the **Default E-file 5330 Email** template.

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: Yes

Email Sending Method: ...

Select an Email to Edit

Email Name	Default Template	Edit
8955-SSA Cover Letter	Default 8955-SSA Cover L	Edit
E-File 5330 Email	Default E-File 5330 Email	Edit
Portal 5330 Email	Default Portal 5330 Email	Edit
Portal Email	Default Portal Email	Edit
Signer Email	Default Signer Email	Edit

Once the appropriate link is selected, the system redirects to the **Invite Signers/Portal Users** screen, displaying a summary of the user's First and Last name, username, and email.

Depending on your email sending method, the options to review and send the email will vary as outlined below:

Preparer's Email Program

1. Selecting the **Click to open email** link will generate an email on your desktop from your personal email program (Outlook, Thunderbird, etc.). Once the e-mail has been reviewed, select the **Send** button in your email program to invite the user to the portal.
2. To mark the filing as invited select the **Mark as Invited** box after sending the communication. This option will update the E-file Status dashboard as invited with a date timestamp * *The mark as invited button only populates when selecting the Invite [Username] to Sign link.*

Invite Portal Users

Email Template: [Edit](#)

Portal User Summary

Email Link: [Click to open email](#) **1**

To Name: Aang

To Username: Aang

To Email: Example@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 5330 is Ready to Be Viewed

Please log into your portal user account at:

<https://www.ftwilliam.com/cgi-bin/sp.cgi?idW55NIC3>

You can log in using the following credentials:

Username: Aang
Password: Lost password? Use the 'Forgot Password' link on the login screen to

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[Mark 5330 as 'Invited'](#) **2**

Specify a Server

1. Selecting the **Preview** link lets you review the email prior to sending.
2. After reviewing, click the **Invite Signers** button to send the invitation and update the E-file Status dashboard with a timestamp.

Invite Portal Users

Email Template: [Edit](#)

Portal User Summary

To Name: Aang

To Username: Aang

To Email: Example@email.com

From Name: allison.Bailey@wolterskluwer.com

From Email: allison.Bailey@wolterskluwer.com

Reply To:

Cc:

Bcc:

Subject: Your 5330 is Ready to Be E-Filed

Email Body: **1** [Preview](#)

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[Invite Signers](#) **2**

NOTE: *If you are only inviting the user to the portal rather than to sign, select the **Send Email** button from within the **Portal User Summary** box.

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Invite Portal Users

Email Template: [Edit](#)

Portal User Summary

To Name:	Aang
To Username:	Aang
To Email:	Example@email.com
From Name:	Admin@email.com
From Email:	Admin@email.com
Reply To:	
Cc:	
Bcc:	
Subject:	Your 5330 is Ready to Be Viewed
Email Body:	1 Preview

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