

Work with Signers/Portal Users

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This function will set up who will be signing the Form 5500 and/or making changes to the Form 5500 filing via the portal (editing the form via the portal and/or uploading files via the portal). You will assign each user a username, password and email address. This information will generally be different for each 5500 filing on the system and must be completed for each 5500 filing.

Note that signers are often consistent from year to year so you will likely be able to "Add Existing" in future years (note the option to do this in batch mode discussed below). If you only want a user to view the current year information (and not see a prior year completed 5500 for example), you will need to add that user as an existing user to the current plan year and then go into the prior year and delete the user.

Bring forward [prior year] signers to [current year] for all plans. This function will move forward signer data to the current year for ALL PLANS. The process may take a few minutes. NOTE: If signer(s) have already been added for a given plan and year, the bring forward operation will silently skip said plan. There must also be signers from the previous year. The current year plan must be unlocked. Additionally, if your signer is designated to be signing as "None" in the prior year, he/she will not be brought forward into the current year.

You may also upload portal user information (portal username, password, email, signer status, etc.) for all your plans on the system at once. See information regarding "Upload Signers" in the [Upload and Download Center](#).

Clicking on "Work with Signers/Portal Users" within the "Portal Menu" box will bring you to the "Edit Portal Users" screen where you will be viewing your user's profile. Below are the steps to follow to add/change user information:

Step 1: Click "Add" if the user is not already in the system for that plan/plan year. More information will appear as relevant for the user selected. If the user was on the system for last year's filing or for a different filing on the system, you may select "Add Existing" and choose the user from the list that will appear.

The screenshot shows a software window titled "Edit Portal Users". At the top, there is a "Select User:" dropdown menu with the text "Select a Portal User" and a downward arrow. To the right of this menu are four buttons: "View", "Add" (which is highlighted with a red rectangular border), "Add Existing", and "Delete". Below the "Select User:" menu is a section titled "User Info" containing a "Tabs for Plan:" dropdown menu with the text "Select a Plan" and a downward arrow. Below this dropdown are two buttons: "Add" and "Delete". In the main area of the window, there is a section titled "User Information" with the text "Please select a portal user to edit." Below this section is a large empty space. At the bottom of the window, there is a "Save Tab" button on the right and a "Help" button on the left. A "Close" button is also visible in the bottom right corner.

Step 2: Assign the user his/her relevant information. The fields highlighted in the image below are required when adding a new portal user. Each option will be discussed briefly below:

- **Signer/Portal User Information:**

The screenshot shows the 'Edit Portal Users' window. At the top, there's a 'Select User:' dropdown with the text 'Select a Portal User' and buttons for 'View', 'Add', 'Add Existing', and 'Delete'. Below this is a 'User Info' section with a 'User Information' tab. The main area contains a 'Tabs for Plan:' dropdown with 'Select a Plan' and 'Add'/'Delete' buttons. A 'Save Tab' button is at the bottom right. A 'Help' button is at the bottom left. A 'Close' button is at the bottom right. A 'Create New Portal User' button is highlighted with a red box in the 'Add New Portal User' dialog box.

Edit Portal Users

Select User: View Add Add Existing Delete

User Info

User Information

Please select a portal user to edit.

Tabs for Plan:

Select a Plan Add Delete

Edit Defaults

Add New Portal User

Username:

Password:

Confirm:

Full Name:

Prefix:

First:

Middle:

Last:

Suffix:

Company Name:

Email:

Create New Portal User Cancel

Save Tab

Help Close

- **Portal Username:** This is the Username that the portal user must enter (with the password, below) to enter the portal. The Username must be at least 6 characters and may not contain symbols. If you receive a message stating the username already exists, please note that portal usernames must be unique system-wide, over all ftwilliam.com customers. We do suggest making the portal username more unique by adding numbers, using your client's first and last name, etc. For example, you may use: JohnDoe123, JDoe123 or DoeJohn123.
- **Full Name (Populates 5500):** Each user will need a name to appear on the 5500 filing (if applicable). This information will be used to complete information at the bottom of page 1 of the Form 5500. If the user is signing as "Administrator and Sponsor," his/her name will only populate on the "Plan Administrator" signature line of the Form 5500. The name will also be used to identify the user in the ftwilliam.com 5500 software. (Signers will have the option to "change name" on the portal signing screen if their name is incorrect/misspelled.)
- **Email:** This is the email address that will be used to invite the user to the portal.

- **Password:** This is the password that the user will need to use to login to the portal and will be provided in the email with the link to the portal (assuming that the password placeholder has not been removed from the standard [Global Email Settings](#) options described above). The password must be at least 8 characters, a combination of letter(s), number(s), and special character(s). Please note: passwords are case-sensitive. The password will only be displayed for your clients within the Invitation Email if they are a new portal user within ftwilliam.com and have not previously logged into the portal and updated their password. Once your clients have updated their password, you will no longer see the "Password" and "Confirm Password" fields; rather, you will only see the "Reset Password" option as shown below. **Note:** 5500-Only customers (do not have access to ftwPortal Pro) have the option to turn off the security questions for 5500 portal users that do not have View/Print Permissions for the 8955-SSA. See [Portal 5500 Always Require Challenge Questions](#) above.
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