

Assigning Portal Users to a Plan

06/10/2025 5:20 pm CDT

Users can be assigned to a plan in three ways:

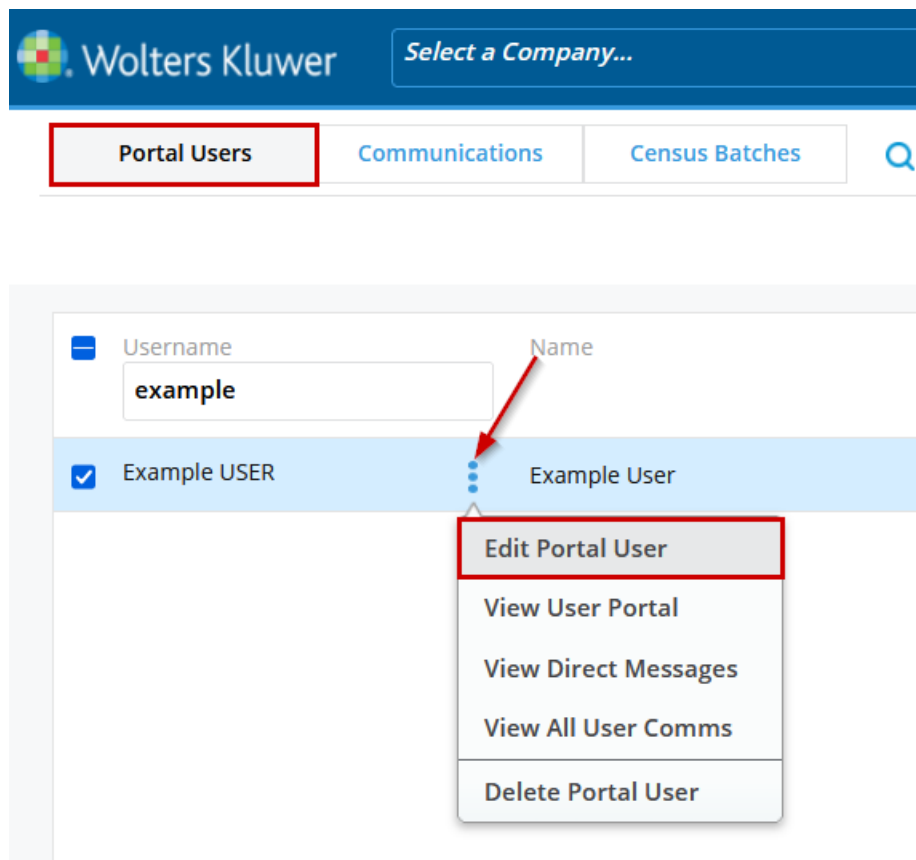
- From the Global Dashboard
- From the Plan-Level Dashboard
- During the Portal User Upload Process

Global Dashboard

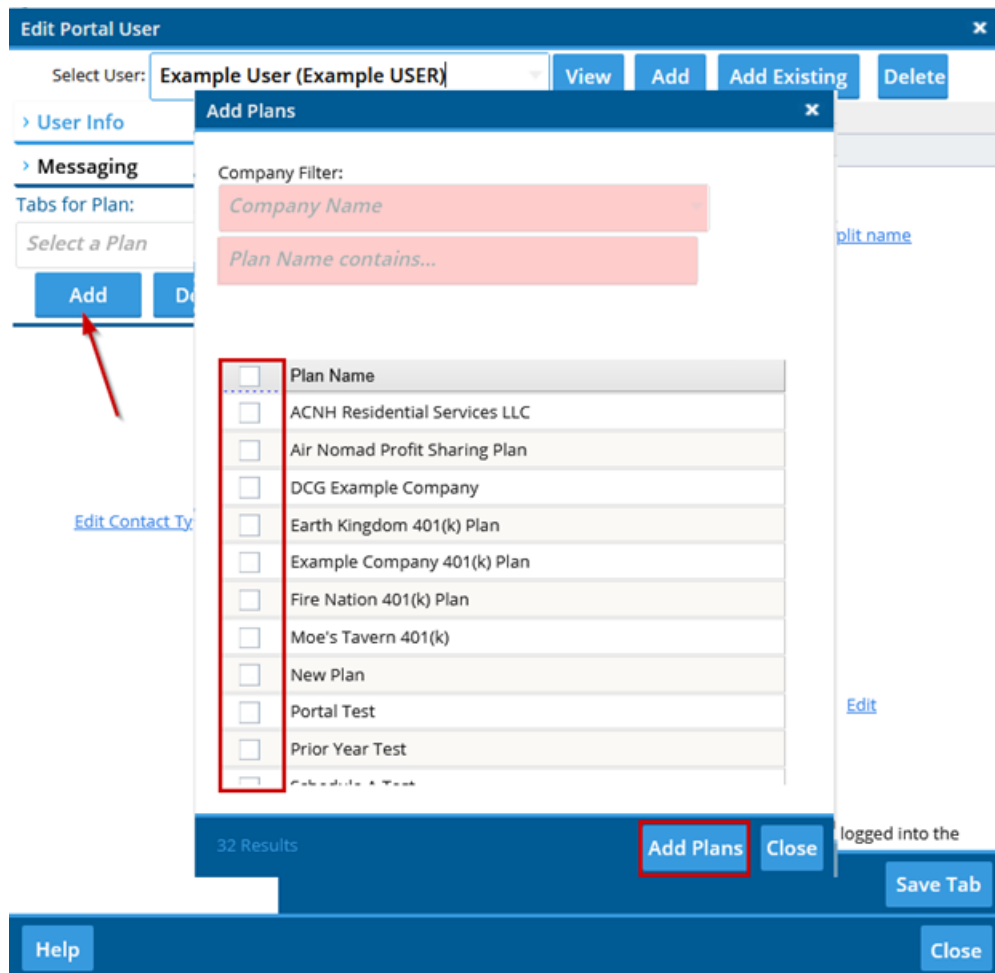
Wolters Kluwer Logo > ftwPortalPro > Global Dashboard

Steps:

1. Locate the Portal User in the list (must already be added or uploaded).
2. Select the menu icon (⋮) next to the Portal User's name.
3. Choose **Edit Portal User**.



4. In the Edit screen, select the **Add** button on the left.
5. Filter by Company Name, Plan Name, or scroll through the list of available plans.
6. Check the box next to the desired plan.
7. Select **Add Plans** to complete the assignment.



Plan-Level Dashboard

Steps:

1. Select the desired plan.
2. Navigate to the Portal via the **GO** menu or the **Portal** button on the **Edit Plan** screen.

Wolters Kluwer Example Company Go

Select a Plan From History...

Home > Edit Company > Edit Plan

Company: Example Company ID:

Plan: Example Company ID:

Checklist: **Non-Standardized 401(k) (Adoption Agreement Format) - POST**

Details: EIN: 867530936 • PN: 002 • PYE: 12-31

Plan Menu

- Convert
- Clone
- Delete
- Show
- Document
- MEP
- Post

Plan Modules

Module	Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Prop
Resp	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Admin							

Documents

IRS

5500

1099

ACA

Compliance

Portal

3. In the **Portal Users** screen, select the **Add** button above the user grid.

Wolters Kluwer Example Company Example Company Go David Rose

Example Company Portal Doc Admin: Update Module Options

Company ID: | Plan ID: | PYE: 12-31 | EIN: 86-7530936 | Plan Number: 002 | Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST

PORTAL COMPLIANCE

Portal Users Communications

+ Add

Username Name Email Contact Type Phone

filter filter

No results found.

4. In the **Edit Portal User** screen, choose one of the following options:

- **Add**
 - Use to create a new Portal User.
 - Enter a username and password (minimum 8 characters, including at least one letter, one number, and one special character).
 - Provide the first and last name, email address, and optionally, the associated company.

The screenshot shows the 'Edit Portal User' window. At the top, there's a 'Select User:' dropdown with 'Select a Contact' and buttons for 'View', 'Add' (highlighted with a red box), 'Add Existing', and 'Delete'. Below this are tabs for 'User Info' and 'Messaging'. The 'User Info' tab is active, showing 'User Information' and a message 'Please select a portal user to edit.' Below the tabs is a 'Tabs for Plan:' dropdown with 'Select a Plan' and 'Add'/'Delete' buttons. A blue link 'Edit Contact Types' is also present. The 'Add New Contact' modal is open, showing options for 'No portal access' and 'Grant portal access' (selected). It includes fields for 'Username', 'Password', 'Confirm', 'Full Name' (with sub-fields for Prefix, First, Middle, Last, Suffix), 'Company Name', and 'Email'. The 'Create New Contact' button is highlighted with a red box. At the bottom of the main window are 'Save Tab', 'Help', and 'Close' buttons.

- **Add Existing**

- Use when the Portal User has already been added to another plan or exists in the Global Dashboard.
- Filter by username, name, or email.
- Select the user and confirm with **OK**.

Edit Portal User

Select User: *Select a Contact*

View

Add

Add Existing

Delete

> User Info

> Messaging

Tabs for Plan:

Select a Plan

Add

Select a Contact

Filters:

UserName: *UserName starts with...*

Name: *Name starts with...*

Email: *E-mail address starts with...*

	UserName	Name	Email
<input type="radio"/>	Aang	Aang	
<input type="radio"/>	AerithG	Aerith Gainsborough	
<input type="radio"/>	AndyDwyer	Andy Dwyer	
<input type="radio"/>	BarretW	Barret Wallace	
<input type="radio"/>	Billy Ocean	Billy Ocean	
<input type="radio"/>	Bubblyglasses	bubbly Glasses	
<input type="radio"/>	CandaceF	Candace Flynn	
<input type="radio"/>	Mr.Burns	Charles Monty Burns	
<input type="radio"/>	CidH (Retired)	Cid Highland (Retired)	
<input type="radio"/>	ClientPortal	Client Portal Test	

OK

Close

Save Tab

Help

Close

Upload Portal Users

Portal Users can also be assigned to plans during the upload process.

Refer to the article: [How to Upload Portal Users in Bulk](#) for detailed instructions.