How to Upload a Batch Annual Questionnaire to the Portal (Compliance User)

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Note: You do have to subscribe to the Compliance Software, '***ftw***Portal Pro', and have 'Specify a Server' set up to post annual questionnaire batches. Please also know this is an Annual Questionnaire that is uploaded from your files to the software, and not an item that is generated by ftwilliam.com. These files will populate in the Portal Files of the Compliance Module.

1. Select **Annual Questionnaire** from the **Batches** drop-down list on the **Select Company** screen.

2. You have the option to edit a cover letter by clicking on **Edit Settings**.
Note: Any changes made here will also update the default email setting under the "Admin" tab for "Annual Questionnaire".

3. 'Create New Batch'.

4. You will be directed to the 'Edit Batch' screen where you can:
    1. **Edit Name:** Modify your batch name.
    2. **Browse:** Upload the annual questionnaire you want to post to the portal.
    3. **Add Plans:** Plans will display based on the current plan year end and if they are not in another batch.
        a. When plans have been added, you are able to add/update portal users assigned to the plan with 'Annual Questionnaire (Download):' and 'Annual Questionnaire'(Upload / Complete Online):' permissions.
        b. You are also able to 'Customize' the Annual Questionnaire for each of the plans within the batch.

5. **Post Batch:** Sends the Annual Notice to the portal. If the 'and send invites' box is checked, you will be able to post the batch and send the invites to the portal users at one time.