

Add, Edit, or Remove Portal Users

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How to Alter a Portal User's Username

A **User** with permission to **Edit** the Portal module can update a portal username from the **Edit Portal User** screen.

- Navigate to the **Portal Users Tab** in the Portal module.
- Click the **menu icon** (three dots) next to the user whose username needs updating.

The screenshot shows the Wolters Kluwer ABC Bank interface. At the top, there's a header with the company name and a dropdown menu. Below this, there's a section for 'ABC Bank' with various details like Company ID, Plan ID, EIN, Plan Number, and Checklist. The 'PORTAL DISTRIBUTIONS' section is active, showing a table of portal users. The user 'AerithG' is selected, and a context menu is open with the option 'Edit Portal User' highlighted. The table has columns for Username, Name, Email, Contact Type, and Phone. The user 'AerithG' has the name 'Aerith Gainsborough' and the contact type 'Record Keeper'.

- Select **Edit Portal User**.
- In the **User Info** tab, enter the new username.
- Click the **Save** button to confirm the changes.

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

ViewAddAdd ExistingDelete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

AddDelete

> Document

> 5500

User Info

User Information

Portal Username: AerithG

Name: Aerith Gainsborough

Prefix:

First: Aerith

Middle:

Last: Gainsborough

Suffix:

Title/Position:

Company Name: Flower Merchant Avalanche

Password:**

Reset Password

Main Contact Type: Record Keeper

Edit

Addl Contact Types: None

Select Contact Types

**Note: When the Reset Password button displays, the portal user has logged into the portal to set up security questions and a password. You do not need to click the button unless your client needs assistance resetting their password.

Contact Information

Save Tab

Help

Close

NOTE: The Portal user will need to log in with the new username. Any references to that user will update to the new username as well.

How to Upload Portal Users in Bulk

The Portal User Upload feature allows you to create new or update existing Portal users as well as assign users to plans for Documents, 5500, or Compliance module access. This article provides a simplified approach to the upload process while highlighting the fields required/ or suggested.

Table of Contents

- [Review Contact Types](#)
- [Download the Template Files](#)

- [Upload Module Field Requirements](#)
 - [Sample Upload](#)
 - [Upload the File and Review Results](#)
-

Review Contact Types (Recommended First Step)[\(return to top\)](#)

Before creating your upload file, review your Contact Types.

Contact Types determine the permissions available to Portal Users and can significantly reduce the number of fields that need to be completed within the upload file.

For additional information, refer to:

- **Help Article:** [Managing Contact Types](#)
- **Video Tutorial:** [Default Contact Types and Classifications](#)

Why Contact Types Matter

A properly configured Contact Type automatically applies Portal permissions to users. This greatly simplifies the upload process and reduces the number of permission-related fields that must be maintained. See notation

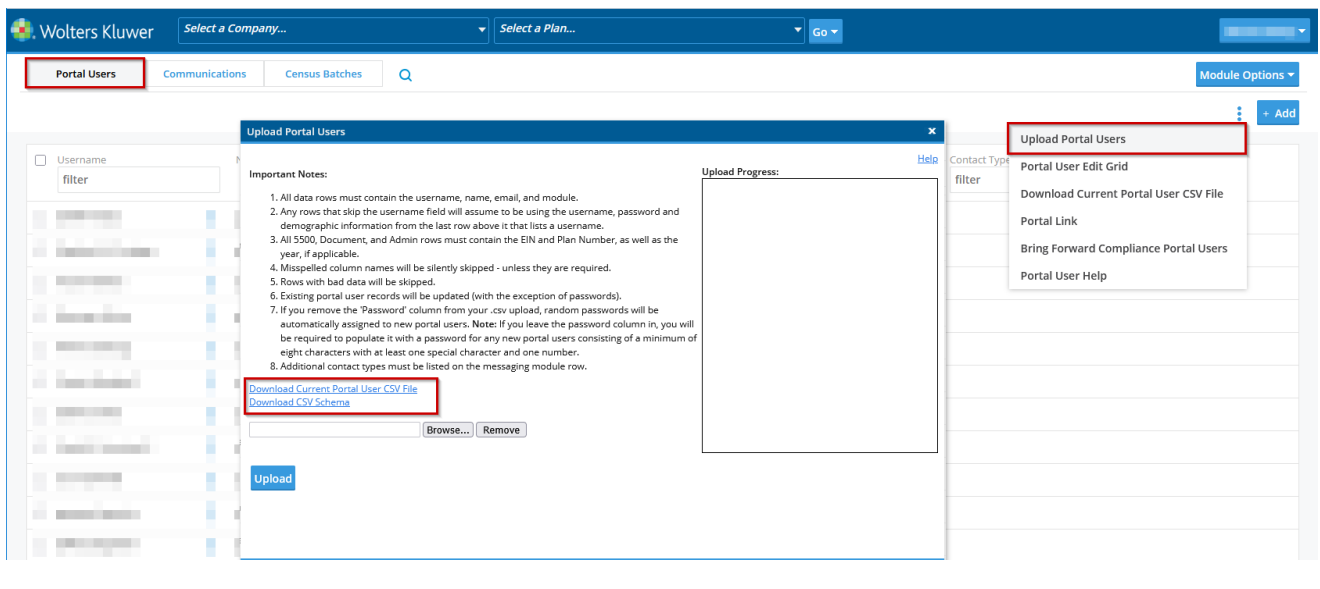
Access the Upload Template Files[\(return to top\)](#)

Navigate to: **Wolters Kluwer Logo > ftwPortal Pro > Global Dashboard**

From the Portal Users tab:

- Select the tricolon menu above the grid.
- Select **Upload Portal Users**.
 - A pop-up window will display where 2 files are available.
 - [Download Current Portal User CSV File](#)  – This is the file that will be updated and uploaded.
 - **NOTE:** When using **Contact Types**, permissions are controlled by the Contact Type entered in **Column S**. As a result, all columns after **AJ (Custom Language)** can be removed. Columns **AC-AJ** are optional and may be left blank.
Use the [Portal User Upload-simplified spreadsheet.csv](#)  template for the recommended format.
 - [Download CSV Schema](#)  – This file explains how the data should be entered in the upload file.

NOTE: The schema file in this article includes the system default contact types and classification options and is for reference only, as they may vary based on your firms settings.



Understanding the Upload Structure

Every Portal User upload follows the same basic process:



Important: Every Portal User listing begins with a row containing identifying characteristics and the Module is set to **Messaging**.

- If the Portal User **does not already exist**, the Messaging row creates the user.
- If the Portal User **already exists**, the Messaging row identifies the user associated with the plan assignment rows that follow.
- All plan assignment rows for that user should be listed directly below the applicable **Messaging** row.

The Messaging row serves as the starting point for each Portal User and establishes the relationship between that user and any plan assignment rows included below it. All rows listed directly below that Messaging row belong to that user until another Messaging row is encountered.

Module Requirements [\(return to top\)](#)

The table below summarizes the fields required for each module type.

When completing the module details, it is recommended that you first download the ftwilliam PlanIDs Report (**WoltersKluwer Logo > Reports > Download ftwilliam PlanIDs Report**). This report ensures that the details entered on the Portal User upload match the existing plans exactly. It is also helpful when completing the optional fields provided below.

Module Purpose	Module Value	Required Fields	Recommended Fields	Additional Requirements / Formatting
Create /Identify Portal User	Messaging	Username Password Name First Name Last Name Email Contact Type	N/A	Required for all users. Creates new users and identifies existing users. Username must be at least 4 characters, and cannot contain leading or trailing spaces, [%] [#] [+] [;] [&] [/] [?] ['] or [\\]. Passwords must be at least 8 characters, with at least one number, one letter, and one special character. Passwords are case sensitive.
Documents Access	Document	EIN Plan Number	Plan ID* Company ID* Plan Name* Signing As (optional)	Optional Signing As values: • NONE (or blank) • TRUST • ADMIN • ADMIN:TRUST

Module Purpose	Module Value	Required Fields	Recommended Fields	Additional Requirements / Formatting
Form 5500 Access	5500	EIN Plan Number Year	Plan ID* Company ID* Plan Name* Signing As (optional)	Year must be entered as a four-digit filing year only (Example: 2025). Optional Signing As values: • NONE • ADMIN:SPONS • ADMIN • SPONS • DFE
Compliance Access	Admin	EIN Plan Number Year	Plan ID* Company ID* Plan Name	Year must be entered using Month, Day, Year details with one of the following formats: • MM/DD/YYYY • MM-DD-YYYY • YYYY/MM/DD • YYYY-MM-DD

Recommendation notes: Include Plan ID and Company ID whenever possible. These values help ensure the upload is associated with the correct plan, particularly when multiple plans share the same EIN and Plan Number.

- **Plan ID** correlates to the ftwilliam PlanIDs Report column B, **FTWPlanID**.
- **Company ID** correlates to the ftwilliam PlanIDs Report column A, **FTWCustomerID**.
- **Plan Name:** This field is ignored for upload purposes and exists mainly for ease of use when reviewing the portal user list.
- Users may choose to upload additional details in the provided columns, the grid above (and sample below) simply define the required fields.

Example Upload File [\(return to top\)](#)

In the example below two new users are being added to the account. Each user is added with identifying information on the **Messaging** Module Line (highlighted blue).

Jane Smith is associated with **two** different plans with the following access:

- **Documents** module for both plans (highlighted green).
 - She is added as the Sponsor for signing permissions on one plan, and only viewing permissions on the other plan.
- **5500** module for one plan with signing access to two different filing years (highlighted purple).
- **Compliance** module for one plan with access to two different filing years (highlighted orange).

John Doe is added and associated with a **single** plan with the following access:

- **Documents** module (highlighted green).

- He is added as the Trustee for signing purposes.
- **5500 Module** for one year with viewing permissions only. (highlighted purple).

	A	B	C	E	G	R	S	U	V	W	X	Y	Z	AA	AB
1	Username	Password	Name	First	Last	Email	Contact Type	EIN	Plan Number	Plan Name	Plan ID	Company ID	Signing As	Module	Year
2	JaneSmith26	Password1!	Jane Smith	Jane	Smith	J.Smith@email.com	Actuary							Messaging	
3								86-7530911	1	Example Company	2552779824	1751503688	SPONS	Document	
4								12-3456789	1	AVALANCHE 401(k) Plan	2025933395	1678892773	NONE	Document	
5								12-3456789	1	AVALANCHE 401(k) Plan	2025933395	1678892773	ADMIN:SPONS	5500	2024
6								12-3456789	1	AVALANCHE 401(k) Plan	2025933395	1678892773	ADMIN:SPONS	5500	2025
7								12-3456789	1	AVALANCHE 401(k) Plan	2025933395	1678892773		Admin	12/31/2024
8								12-3456789	1	AVALANCHE 401(k) Plan	2025933395	1678892773		Admin	12/31/2025
9	John.Doe	Password1!	John Doe	John	Doe	J.Doe@email.com	CPA							Messaging	
10								25-1533392	51	ACNH Residential Services LLC	2297468854	1893990766	TRUST	Document	
11								25-1533392	51	ACNH Residential Services LLC	2297468854	1893990766	NONE	5500	2025

Additional Notes

- **Document Signer Restrictions:** Only one user may be designated as ADMIN or ADMIN:TRUST for a plan at any given time. If those permissions are already assigned to another user, the upload will generate an error.
- **Form 5500 Filing Years:** Form 5500 access and signer permissions are maintained by filing year. Separate rows are required for each filing year.
- **Compliance Plan Years:** Compliance access is maintained by plan year. Separate rows are required for each Compliance year.
- **Contact Types** Although multiple Contact Types may be assigned to a Portal User, Portal permissions are determined by the user's **Main Contact Type** only.

Upload the File and Review Results (return to top)

When the upload template has been completed, return to the Upload Portal Users screen.

- Select the completed CSV file.
- Select Upload.
- Review any messages or errors returned by the system.

Common upload issues include:

- Invalid Contact Types
- Incorrect EIN or Plan Numbers
- Invalid Plan ID or Company ID values
- Existing signer assignments
- Invalid year formats

The below is an example of what displays if there are errors present:

Upload Progress:

Portal User Upload Example.csv
Processing Portal User Upload Example.csv
 unable to mark user as Signing As 'ADMIN:SPONS'
 for user Ferb on row 2. 'hk5w' is already marked as
 Signing As ADMIN:SPONS.
Processing Complete.

The below is an example of what displays when everything imports without issue:

Upload Portal Users

Important Notes:

1. All data rows must contain the username, name, email, and module.

2. Any rows that skip the username field will assume to be using the username, password and demographic information from the last row above it that lists a username.

3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.

4. Misspelled column names will be silently skipped - unless they are required.

5. Rows with bad data will be skipped.

6. Existing portal user records will be updated (with the exception of passwords).

7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. Note: If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.

8. Additional contact types must be listed on the messaging module row.

[Download Current Portal User CSV File](#)

[Download CSV Schema](#)

Upload More Portal Users

Upload Progress:

Portal User Upload Example using contact types.csv
Processing Portal User Upload Example using contact types.csv...
Processing Complete.

Close

Assigning Portal Users to a Plan

Users can be assigned to a plan in three ways:

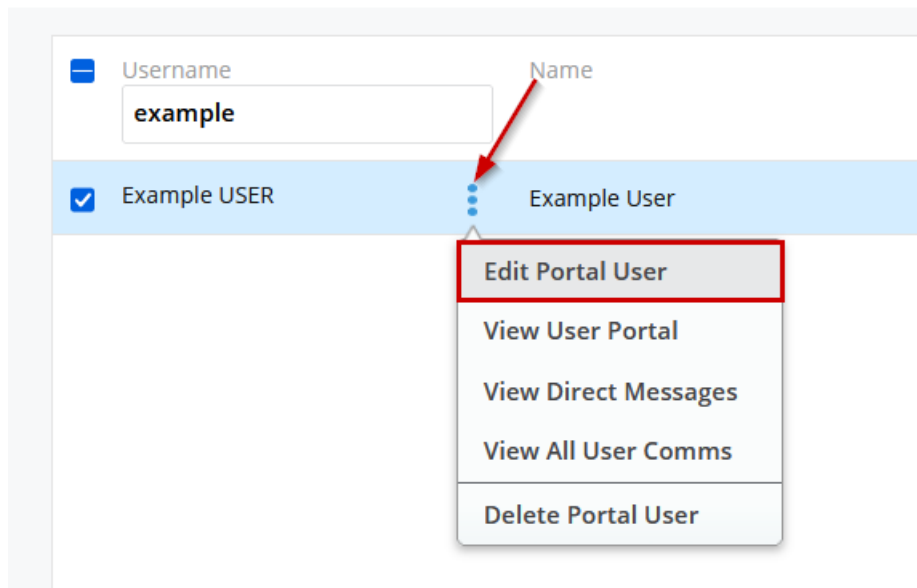
- From the Global Dashboard
- From the Plan-Level Dashboard
- During the Portal User Upload Process

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**.



The screenshot shows the 'Portal Users' interface. At the top, there is a search bar labeled 'Username' with the text 'example' entered. Below this is a table with two columns: 'Name' and 'Example User'. The first row of the table is highlighted in blue and contains a checked checkbox, the text 'Example USER', and the text 'Example User'. A red arrow points from the 'Name' column header to the 'Example User' text. A context menu is open over the 'Example User' text, with the 'Edit Portal User' option highlighted by a red box. The menu also includes 'View User Portal', 'View Direct Messages', 'View All User Comms', and 'Delete 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.

Edit Portal User

Select User: Example User (Example USER)

ViewAddAdd ExistingDelete

> User Info

> Messaging

Tabs for Plan:

Select a Plan

Add

Company Filter:

Company Name

Plan Name contains...

32 Results

Add PlansClose

Plan Name

ACNH Residential Services LLC

Air Nomad Profit Sharing Plan

DCG Example Company

Earth Kingdom 401(k) Plan

Example Company 401(k) Plan

Fire Nation 401(k) Plan

Moe's Tavern 401(k)

New Plan

Portal Test

Prior Year Test

Split name

Edit

logged into the

Save Tab

Help

Close

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

- Conv
- Clone
- Delete
- Show
- Docu
- MEP
- Post

Edit Plan

Edit Company

Documents

IRS

5500

1099

ACA

Compliance

Portal

Plan Modules

Module	Plan Documents	IRS Forms	5500 Forms	1099-R	Compliance	Portal	Prop
Resp	Yes	Yes	2024	2024	Yes	Yes	Yes
Admin							

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'. Under 'User Info', there's a 'Tabs for Plan:' dropdown with 'Select a Plan' and 'Add'/'Delete' buttons. A blue link 'Edit Contact Types' is visible. 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 in the modal is also highlighted with a red box. At the bottom of the main window are 'Help', 'Save Tab', 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
☐	Aang	Aang	
☐	AerithG	Aerith Gainsborough	
☐	AndyDwyer	Andy Dwyer	
☐	BarretW	Barret Wallace	
☐	Billy Ocean	Billy Ocean	
☐	Bubblyglasses	bubbly Glasses	
☐	CandaceF	Candace Flynn	
☐	Mr.Burns	Charles Monty Burns	
☐	CidH (Retired)	Cid Highland (Retired)	
☐	ClientPortal	Client Portal Test	

OK

Close

Save Tab

Help

Close

Upload Portal Users

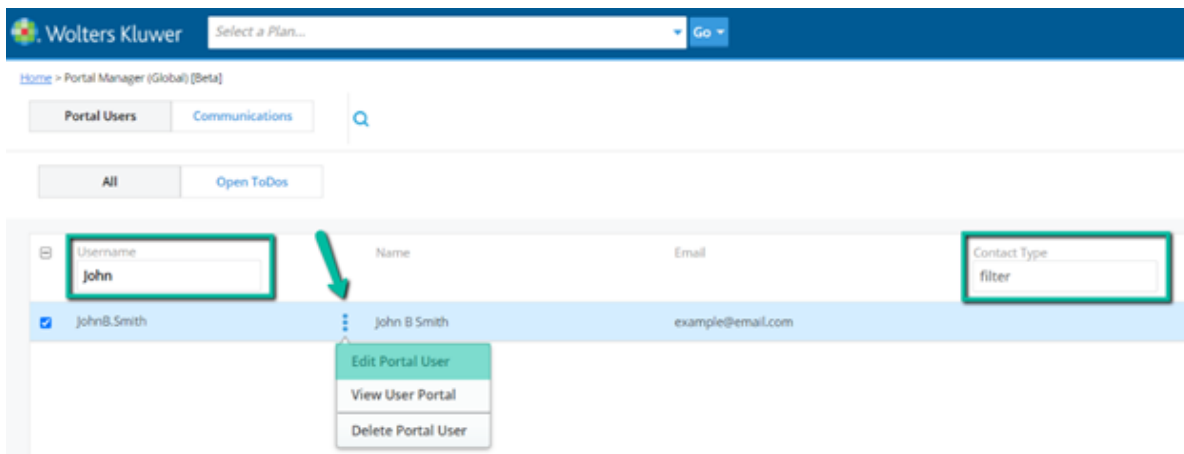
Portal Users can also be assigned to plans during the upload process.
Refer to the article: [How to Upload Portal Users in Bulk](#) for detailed instructions.

Delete Portal User

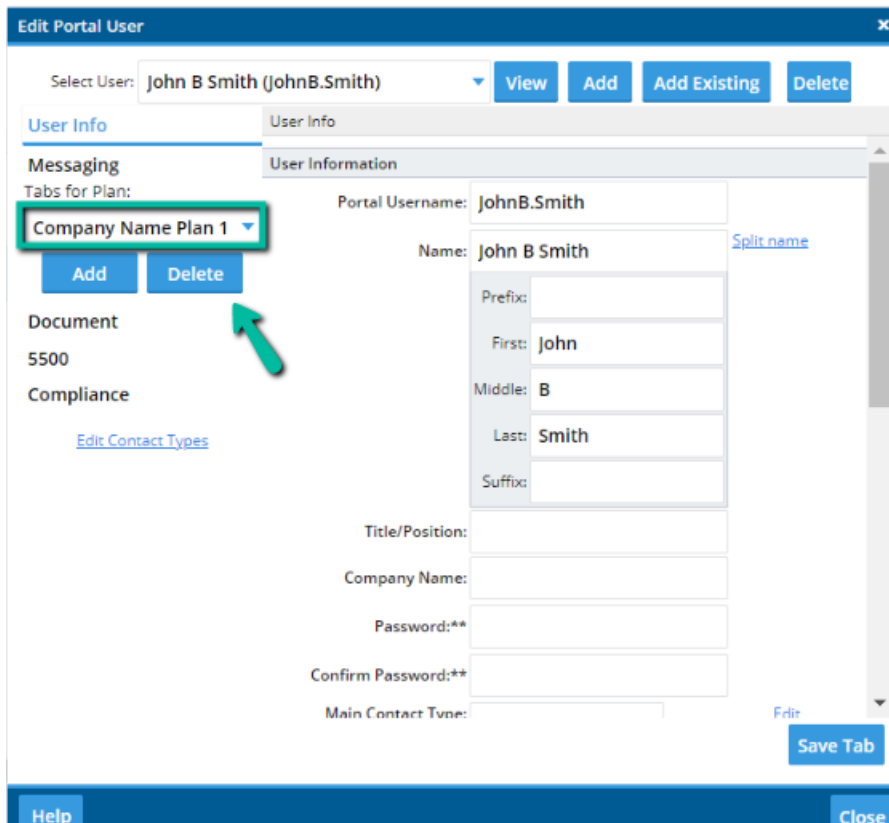
To remove a Portal User from the system, you must first remove them from the plan(s) in which they are associated.

The user may be edited from either a particular plan via the Global Dashboard. Select the tricolon next to their name and click on Edit Portal User will bring up the 'Delete Portal User' option.

You can scroll and find the user or filter by Username or Contact Type:



Once in the 'Edit Portal User' screen, you will need to select each plan you wish to remove them from on the left-hand side under tabs for plans. If you wish to remove them from a single plan you can select that plan and delete. If you wish to remove them from the software completely, you will need to select each plan in the drop-down menu shown below and select 'Delete':



Once removed from all associated plans the software will allow you to select the 'Delete' option in the upper right-hand corner:

Edit Portal User

×

Select User: John B Smith (JohnB.Smith)

View

Add

Add Existing

Delete

User Info

User Information

Messaging

Portal Username: JohnB.Smith

Name: John B Smith

Prefix:

First: John

Middle: B

Last: Smith

Suffix:

Split name

Select a Plan

▼

Add

Delete

Edit Contact Types

A window will populate confirming you wish to remove them from the system:

www.ftwilliam.com says

Do you wish to completely delete this portal user from the system?

OK

Cancel

*****If the user is not currently associated with a plan, you are able to select the user from the Global Dashboard, select the tricolon to the right of their name, and 'Delete Portal User':***

Wolters Kluwer

Select a Plan...

Go

Home > Portal Manager (Global) [Beta]

Portal Users

Communications

Q

All

Open ToDos

Username

John

Name

Email

JohnB.Smith

John B Smith

example@email.com

Edit Portal User

View User Portal

Delete Portal User