

Permissions, Contact Types, and Document Classifications

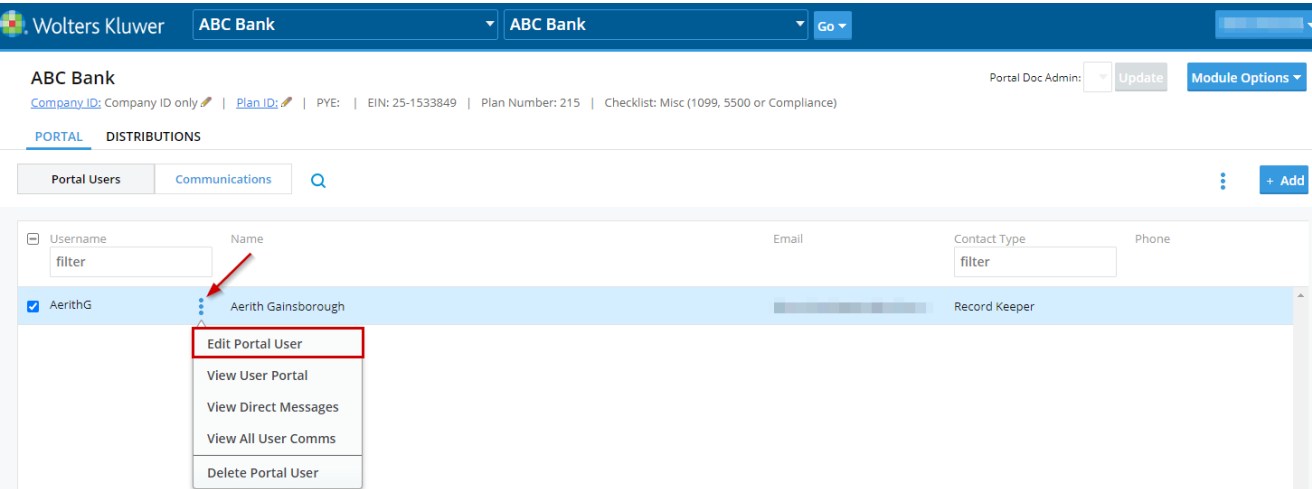
01/21/2026 12:26 pm CST

How to Add Module Permissions to Portal Users

After a Portal User has been assigned to a plan module permissions are enabled. Standard Users with permissions to 'Edit' the Portal module may update Module permissions from the "Edit Portal User" screen.

Note: If portal user were uploaded in bulk, are added with default settings, or the contact types have been updated, permissions may already apply.

To allow module permissions, or to update permissions, select the portal user from either the Global or Plan level dashboards and selecting 'Edit Portal User':



Once the Portal User is selected, permissions may be set by either selecting a contact type from within the 'User Info' tab:

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

View

Add

Add Existing

Delete

> 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:

Split name

Title/Position:

Company Name: Flower Merchant Avalanche

Password:**

Reset Password

Main Contact Type: Record Keeper

Actuary

Attorney

CPA

Financial Advisor

Plan Sponsor

Record Keeper

Trustee

Edit

Addl Contact Types:

**Note: When the Reset Password button is clicked, the portal user has logged into the portal to set up security questions and will not need to click the button again unless your client needs assistance.

Save Tab

Close

Help

Alternatively, permissions may be edited by module. This view may vary based on the a firms module subscription:

Edit Portal User

Select User: Aerith Gainsborough (AerithG)

View

Add

Add Existing

Delete

> User Info

> Messaging

Tabs for Plan:

ABC Bank

Add

Delete

> Document

> 5500

> Compliance

[Edit Contact Types](#)

Document -

Portal Users: Aerith Gainsborough (AerithG)

User Information

Portal Username: AerithG

Signing As: None

Document Classification Access Permissions

Set all document classification permissions:

5500 Document: No

Annual Questionnaire: No

Audit Report: No

Census Report: No

Fee Schedule: No

Final Compliance Package: No

Other: No

Plan Annual Notice: No

Plan Board Consent: No

Plan Document: No

Plan Forms: No

Plan Trust: No

Required Amendment: No

Save Tab

Help

Close

Managing Contact Types

Contact Types are used to define permission groupings for portal users. Each Contact Type contains a set of module-specific permissions that determine what users can view, access, and complete within the portal. Assigning users to a Contact Type helps maintain consistent access across the system and reduces the need to manage permissions individually.

Quick Links:

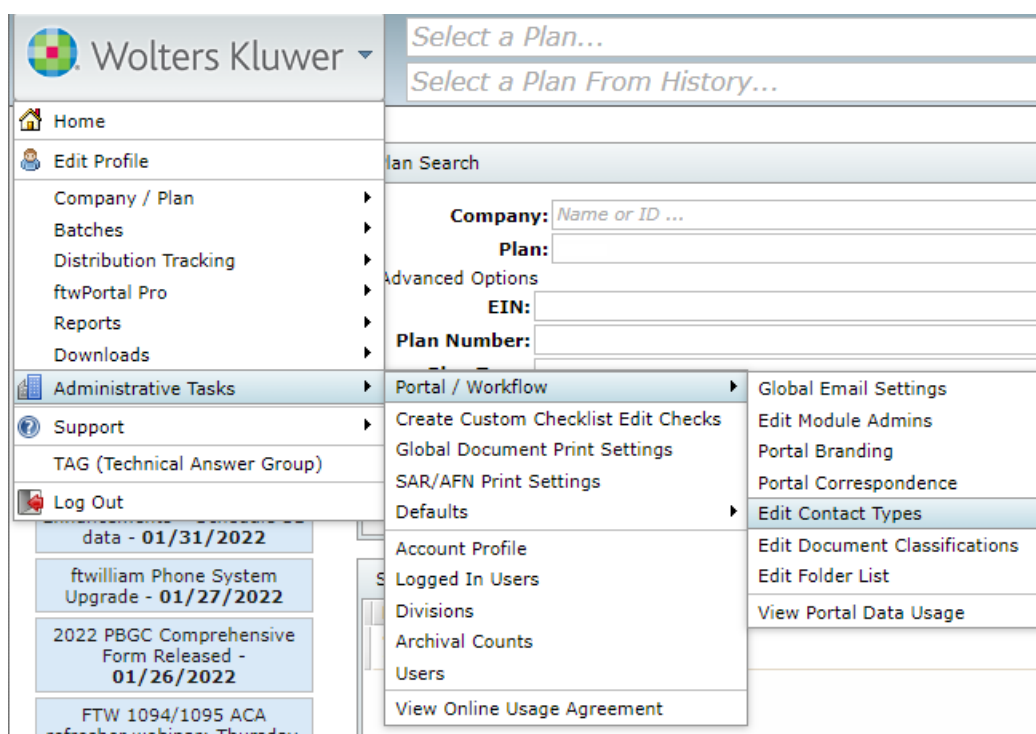
- [Default Contact Type](#)
- [Edit Existing Contact Types](#)
- [Add New Contact Types](#)
- [Delete Existing Contact Types](#)

Accessing Contact Types

To manage Contact Types, the user must be logged in as either the **Master Admin User** or a **Designated Admin**. The **Edit Contact Types** screen can be accessed in either of the following ways:

Wolters Kluwer Logo

Select the **Wolters Kluwer Logo > Administrative Tasks > Portal/Workflow > Edit Contact Types**



Edit Portal User Screen

From within the **Edit Portal User** screen, select **Edit Contact Types**

Edit Portal User

Select User: Aerith Gainsborough (AerithG) View Add Add Existing Delete

> User Info

> Messaging

Tabs for Plan:

ABC Bank Add Delete

> Document

> 5500

> Compliance

Edit Contact Types

User Information

Portal Username: AerithG

Name: Aerith Gainsborough Split name

Prefix:

First: Aerith

Middle:

Last: Gainsborough

Suffix:

Note: The screenshots shown below reflect the newest user interface. When accessing Contact Types from the **Wolters Kluwer logo**, the navigation visuals may appear slightly different; however, the menu options and functionality remain the same.

Default Contact Type (Return to Top)

When the Edit Contact Types screen opens, the ***default*** Contact Type is selected automatically.

The ***default*** Contact Type defines the permissions applied when a portal user is added to the software, if a specific Contact Type is not selected at the time the portal user is created.

The modules available on your account will display on the left-hand side of the screen. Selecting each tab will allow you to make edits to the default settings for that specific module.

NOTE:

- Changes made to Contact Types affect future assignments only.
- Existing users are not updated unless the changes are explicitly applied.

Edit Contact Types

Select Contact Type: *default*

AddDelete

> Messaging

> Document

> 5500

> Compliance

Document

Document Classification Access Permissions

Set all document classification permissions:

5500 Document: No

Annual Questionnaire: No

Audit Report: No

Census Report: No

Fee Schedule: No

Financial Statement: No

☐ Apply to portal users
 Save Tab

Help

Close

View or Select a Contact Type

Use the **drop-down** at the top of the window to view or select an existing Contact Type (including *default*). The existing contact types may be edited or a custom contact type may be created.

Edit Contact Types

Select Contact Type: *default*

AddDelete

Messaging

Document

5500

Compliance

default

Actuary

Attorney

CPA

Financial Advisor

New User

Personal Account

Plan Sponsor

Record Keeper

Trustee

☐ Apply to portal users
 Save Tab

Help

Close

Edit Existing Contact Types [\(Return to Top\)](#)

Editing a Contact Type is used to update permissions for an existing user role. Changes made to a Contact Type affect users who are assigned to that Contact Type going forward. Existing portal user permissions are not updated automatically unless specifically applied. This flexibility allows administrators to adjust access as workflows or business needs change.

Edit an Existing Contact Type

- Select a Contact Type from the drop-down.
- Open a **module tab** and adjust permissions.
- Select **Save Tab** to store changes for that module.

The screenshot shows the 'Edit Contact Types' interface. At the top, there's a header bar with the title 'Edit Contact Types' and a close button. Below the header, there's a section for 'Select Contact Type:' with a dropdown menu showing 'CPA'. To the right of the dropdown are 'Add' and 'Delete' buttons. Below this, there's a list of module tabs: '> Messaging', '> Document' (which is highlighted with a red box), '> 5500', and '> Compliance'. To the right of the tabs, there's a section for 'Document Classification Access Permissions'. It starts with 'Set all document classification permissions:' followed by a dropdown menu. Below this, there's a table with permissions for various document types:

Document Classification Access Permissions	
5500 Document:	No
Annual Questionnaire:	No
Audit Report:	Yes
Census Report:	Yes
Custom:	No

At the bottom of the interface, there's a blue bar with a checkbox labeled 'Apply to portal users' and a 'Save Tab' button (highlighted with a red box). Below this bar, there's a footer bar with 'Help' and 'Close' buttons.

- Repeat for additional modules as needed.

To Apply Changes to Existing Users

- Select the checkbox next to **Apply to portal users** followed by **Save Tab**

Edit Contact Types

Select Contact Type:
CPA

Add
Delete

> Messaging

Document

Document Classification Access Permissions

Set all document classification permissions:

5500 Document:
No

Annual Questionnaire:
No

Audit Report:
Yes

Census Report:
Yes

Custom:
No

☒ Apply to portal users
Save Tab

> Document

> 5500

> Compliance

Help

Close

- Selecting the Save Tab will open a window containing all of the existing users with that Contact Type.
 - Select to update all users by selecting the checkbox in the upper left-hand corner
 - Or select specific users to update by selecting the checkbox next to their name.
 - Users may be selected by either by scrolling through the list or using the filters at the top of the window
- Once selected press **Ok** and the updates will be applied to the users selected

Select Portal Users

Filters:

UserName: *UserName starts with...*

Name: *Name starts with...*

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

☒

UserName

Name

Email

☒

Katara

Katara

allison.bailey@woltersklu

☒

Phineas

Phineas Flynn

allison.bailey@woltersklu

OK

Close

Add a New Contact Type

Adding a Contact Type allows administrators to create a new permission set that can be assigned to portal users. This is useful when a new role, responsibility, or access level is needed that differs from existing Contact Types. Once created, the Contact Type can be reused for multiple users and helps ensure permissions are applied consistently across subscribed modules.

To Add a Contact Type: [\(Return to Top\)](#)

- Select **Add** (to the right of the drop-down list).
- Enter a name for the new Contact Type and select **Create New Contact Type**.

- Once added update the permissions in each applicable **module tab**.
 - Select **Save Tab** after completing each module's settings.
- Once saved, the Contact Type becomes available for assignment on the Edit Portal User screen or via upload.

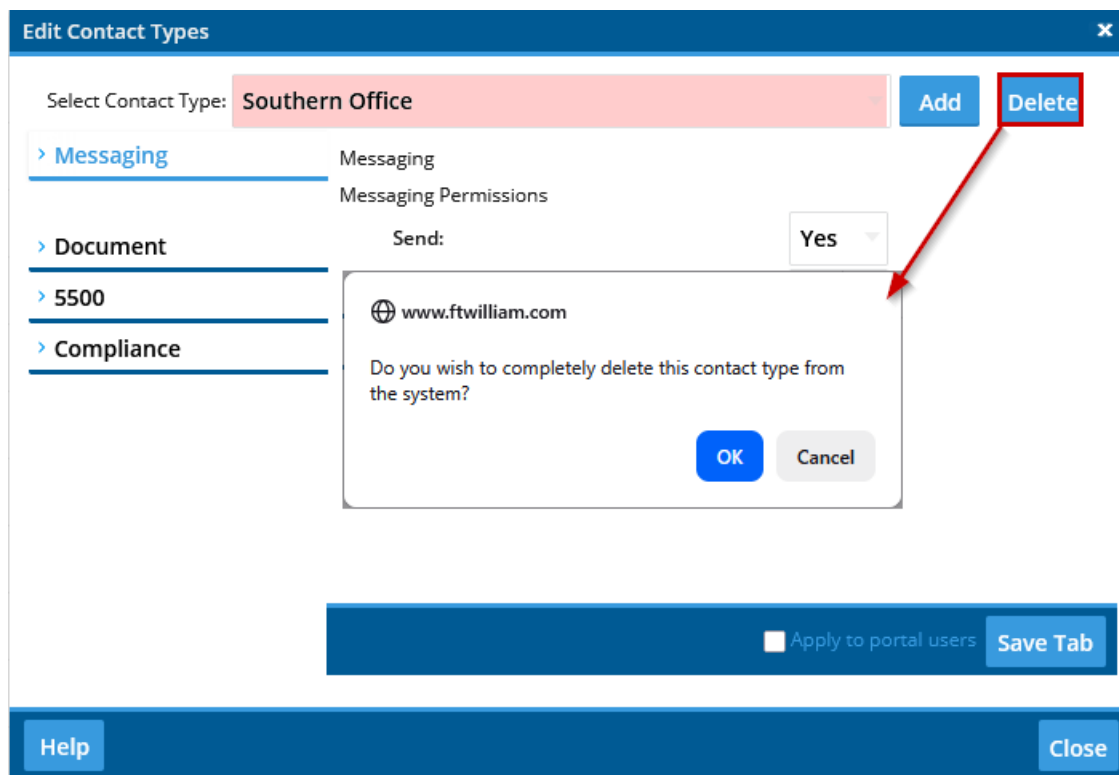
Delete a Contact Type [\(Return to Top\)](#)

Deleting a Contact Type removes an unused or no-longer-relevant permission set from the system. Before deleting, it is important to ensure users assigned to the Contact Type have been reassigned to another option. Once deleted, the Contact Type is permanently removed and cannot be restored without manual recreation.

To Delete a Contact Type:

- In the drop-down, select the Contact Type to be deleted.
- Select **Delete** (to the right of the drop-down).

Confirm deletion when prompted.



How To Edit Document Classifications

Document Classifications allows portal user permissions to access documents based on their classification; if a portal user has access to a document classification, they will be able to view all documents with that classification.

To Edit Document Classifications, you have to be the Master Admin User or a Designated Admin. To access the classifications, select the Wolters Kluwer logo, from the drop-down menu, select Administrative Tasks, then Portal/Workflow, then Edit Document Classifications.

Once on the 'Document Classification' screen, Admin users can override the names given to 'Standard Classifications' that are provided with ftwPortal Pro.

Admin users can also add additional custom classifications at the bottom of this screen and provide classification abbreviations for quicker reference. After updating classifications, you must click Save Changes before you exit the screen for changes to take effect.

Document Classifications

Document Classifications

Standard Classifications

<u>Default</u>	<u>Default Abbr.</u>	<u>Custom Name</u>	<u>Custom Abbr.</u>
5500 Document	5500	<input type="text"/>	<input type="text"/>
Annual Questionnaire	Questionnaire	<input type="text"/>	<input type="text"/>
Audit Report	Audit	<input type="text"/>	<input type="text"/>
Census Report	Census	<input type="text"/>	<input type="text"/>
Final Compliance Package	Final	<input type="text"/>	<input type="text"/>
Other	Other	<input type="text"/>	<input type="text"/>
Plan Annual Notice	Notice	<input type="text"/>	<input type="text"/>
Plan Board Consent	Consent	<input type="text"/>	<input type="text"/>
Plan Document	Plan	<input type="text"/>	<input type="text"/>
Plan Forms	Form	<input type="text"/>	<input type="text"/>
Plan Trust	Trust	<input type="text"/>	<input type="text"/>
Required Amendment	ReqAmendment	<input type="text"/>	<input type="text"/>
Standard Amendment	Amendment	<input type="text"/>	<input type="text"/>
Summary of Benefits and Coverage	SBC	<input type="text"/>	<input type="text"/>
Summary Plan Description	SPD	<input type="text"/>	<input type="text"/>

Custom Classifications

<u>Name</u>	<u>Abbr.</u>	
<input type="text" value="Sample Classification"/>	<input type="text" value="SClass"/>	<input type="button" value="Delete"/>

*Note: removing an existing document classification will remove it from all portal users.