Permissions, Contact Types, and Document Classifications

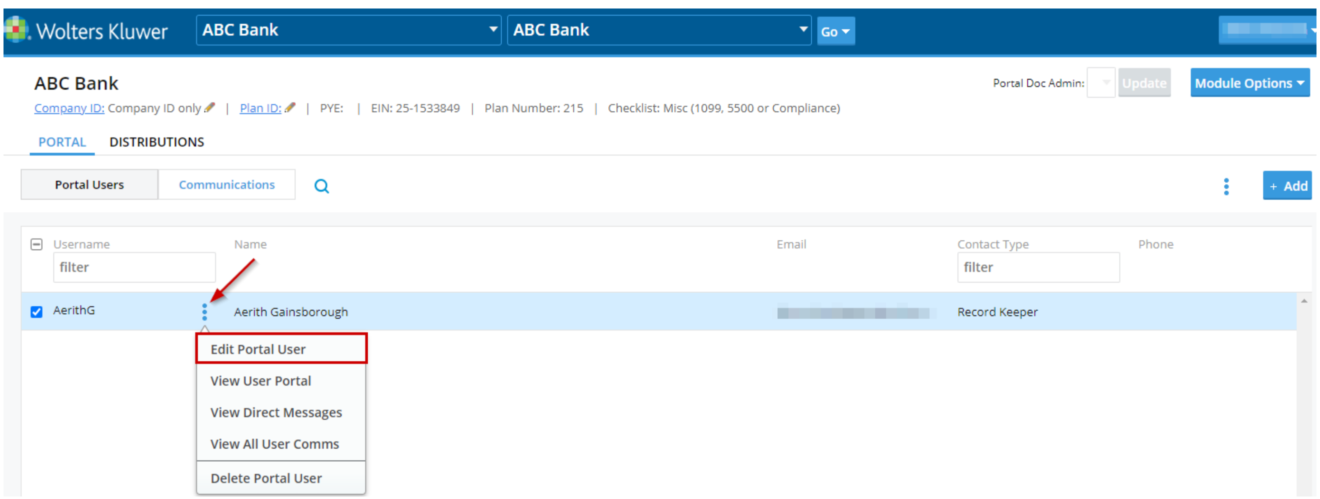
01/21/2026 12:26 pm CST

How to Add Module Permissions to Portal Users

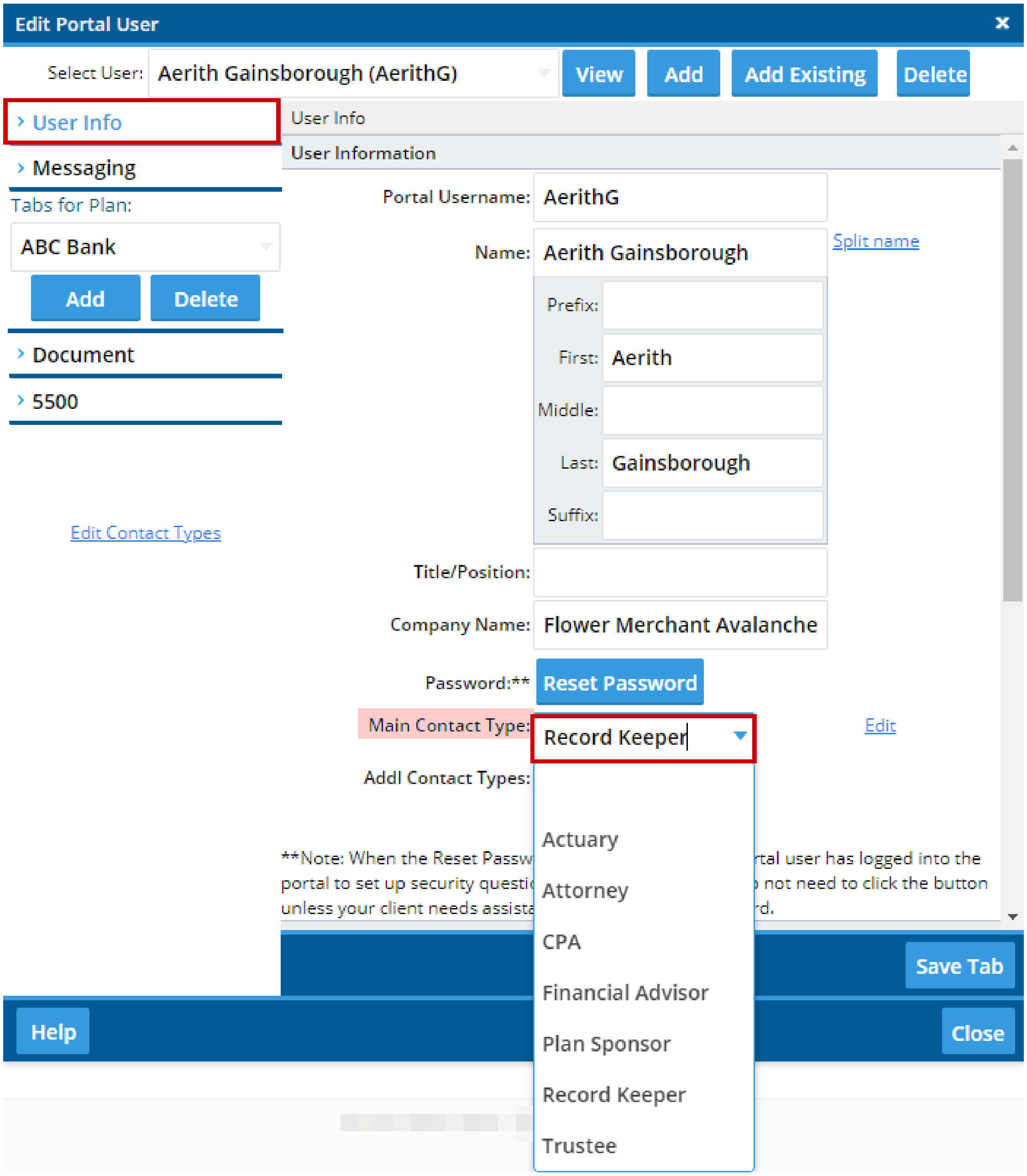
After a Portal User has been assigned to a plan module permissions are enabled. Standard Users with permissions to 'Edit' the Portal module may update Module permissions from the “Edit Portal User” screen.

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

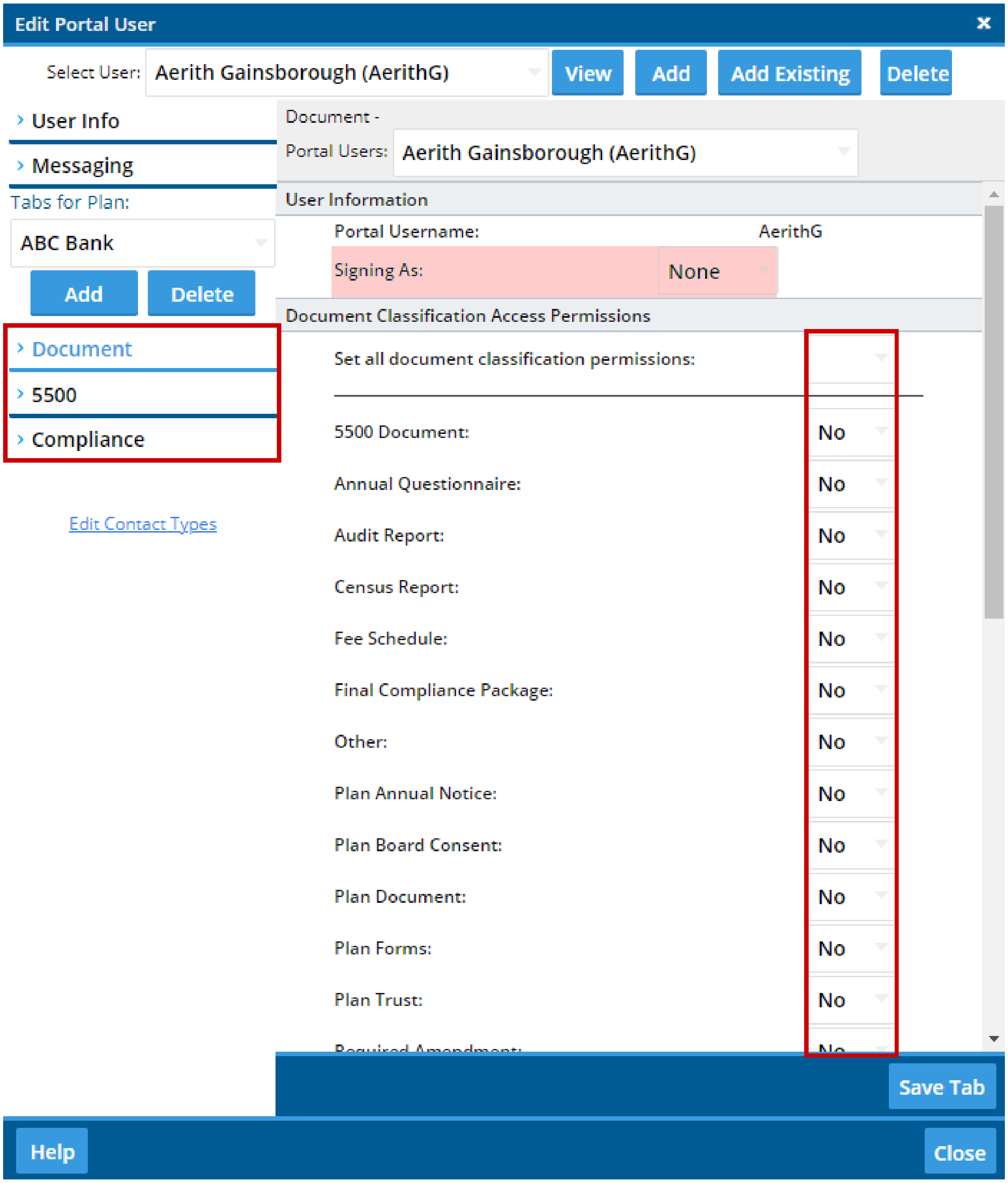
To allow module permissions, or to update permissions, select the portal user from either the Global or Plan level dashboards and selecting ‘Edit Portal User’:



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



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



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:

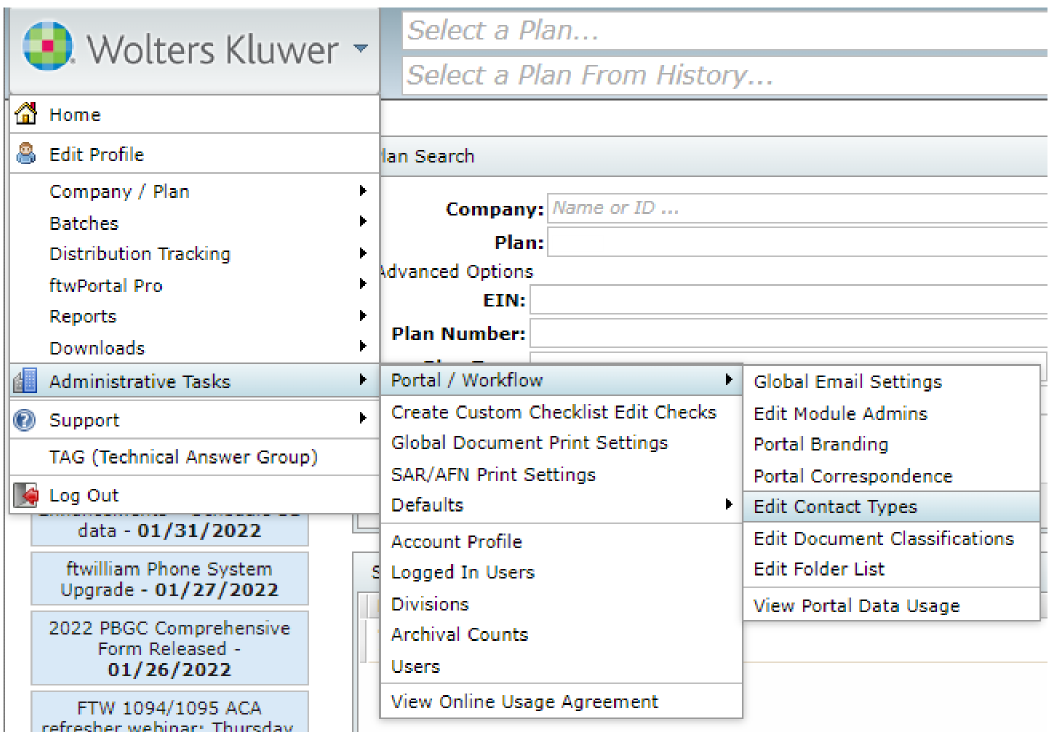
- Default Contact Type
- Edit Existing Contact Types
- Add New Contact Types
- Delete Existing Contact Types

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:

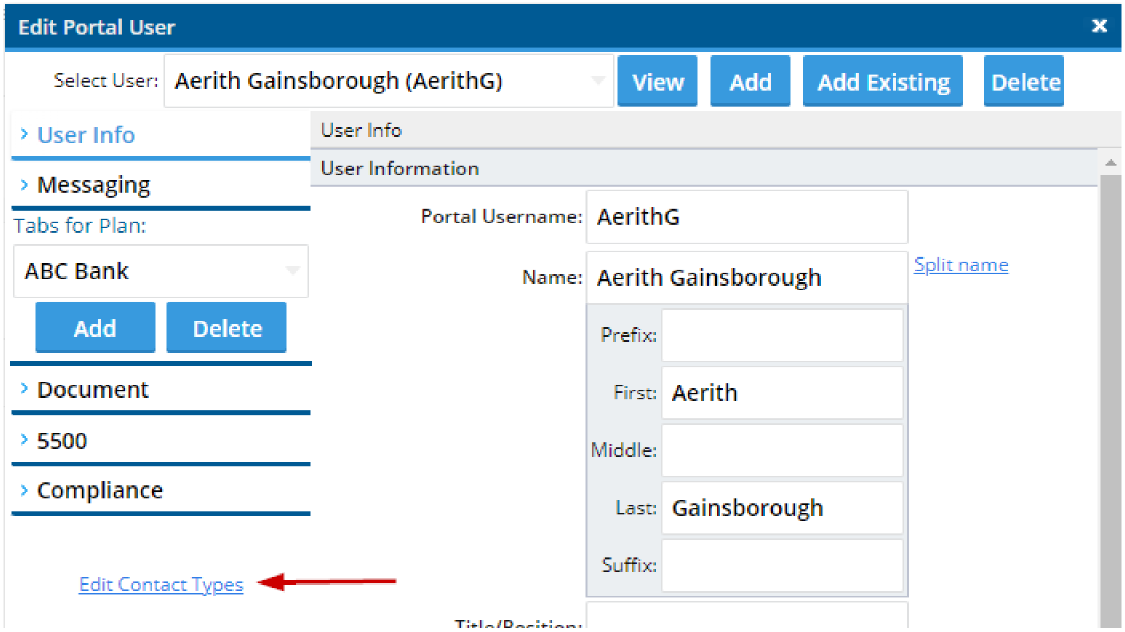
Wolters Kluwer Logo

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**



> **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)

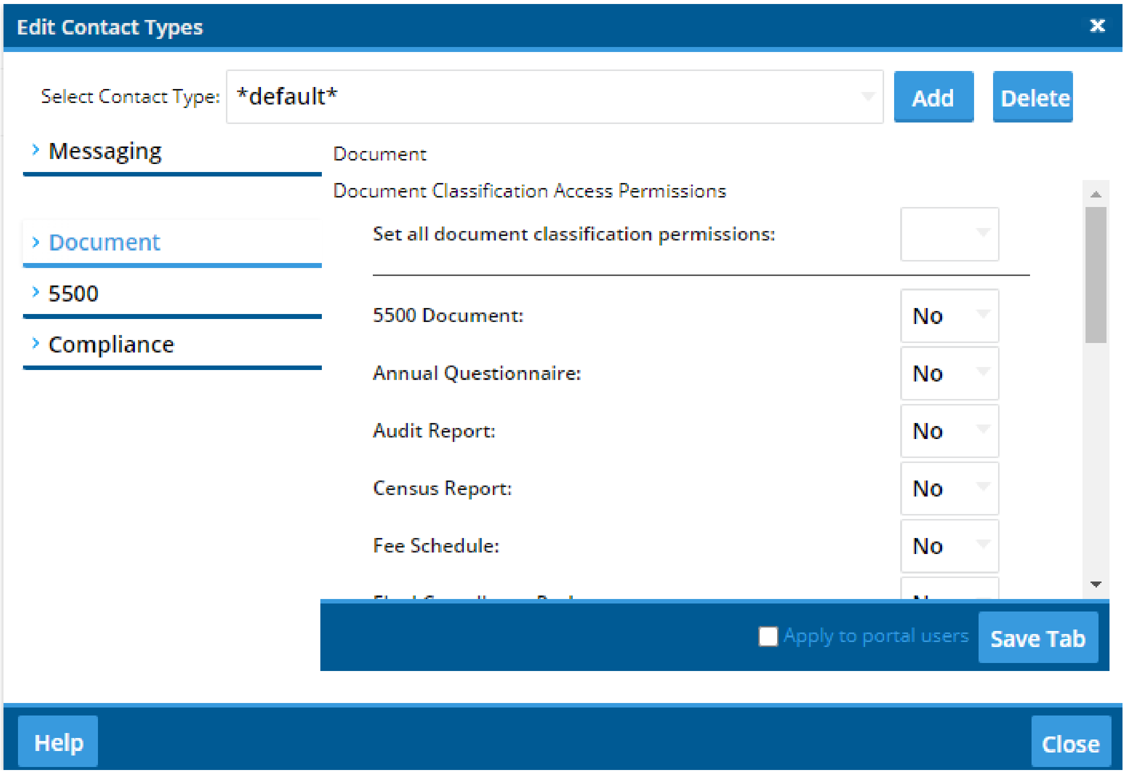
When the Edit Contact Types screen opens, the*default* Contact Type is selected automatically.

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.

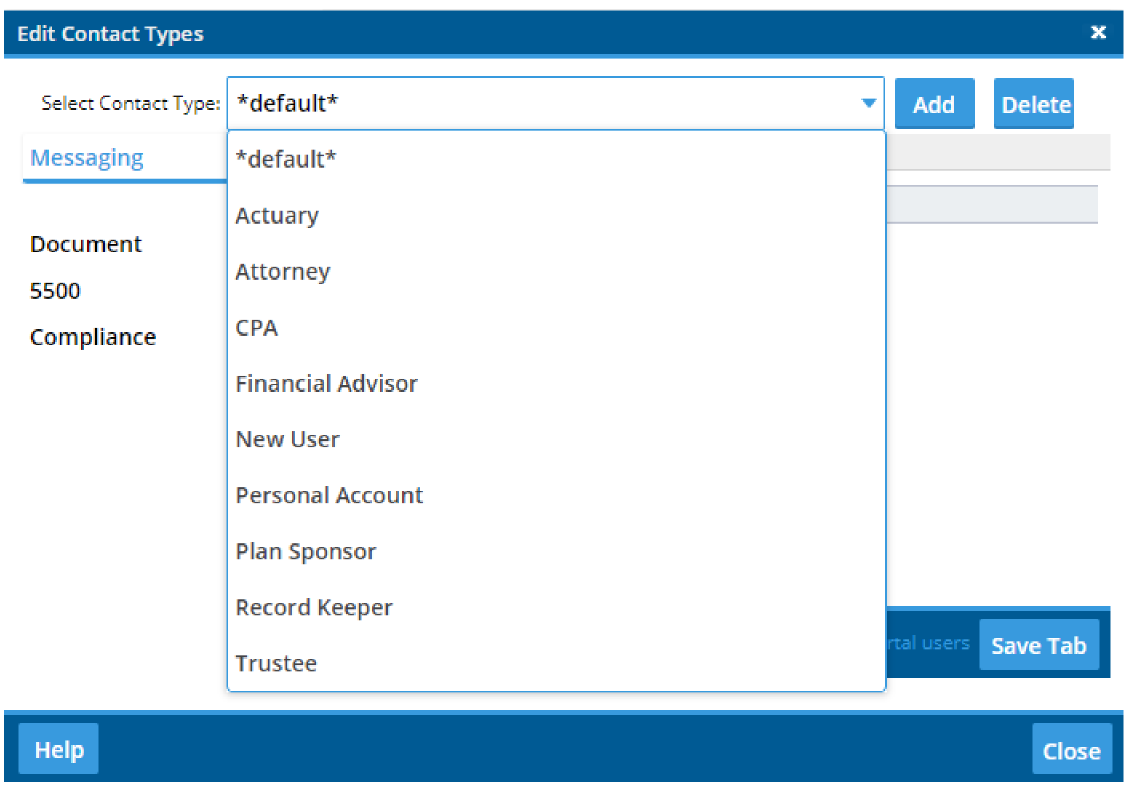
NOTE:

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



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.

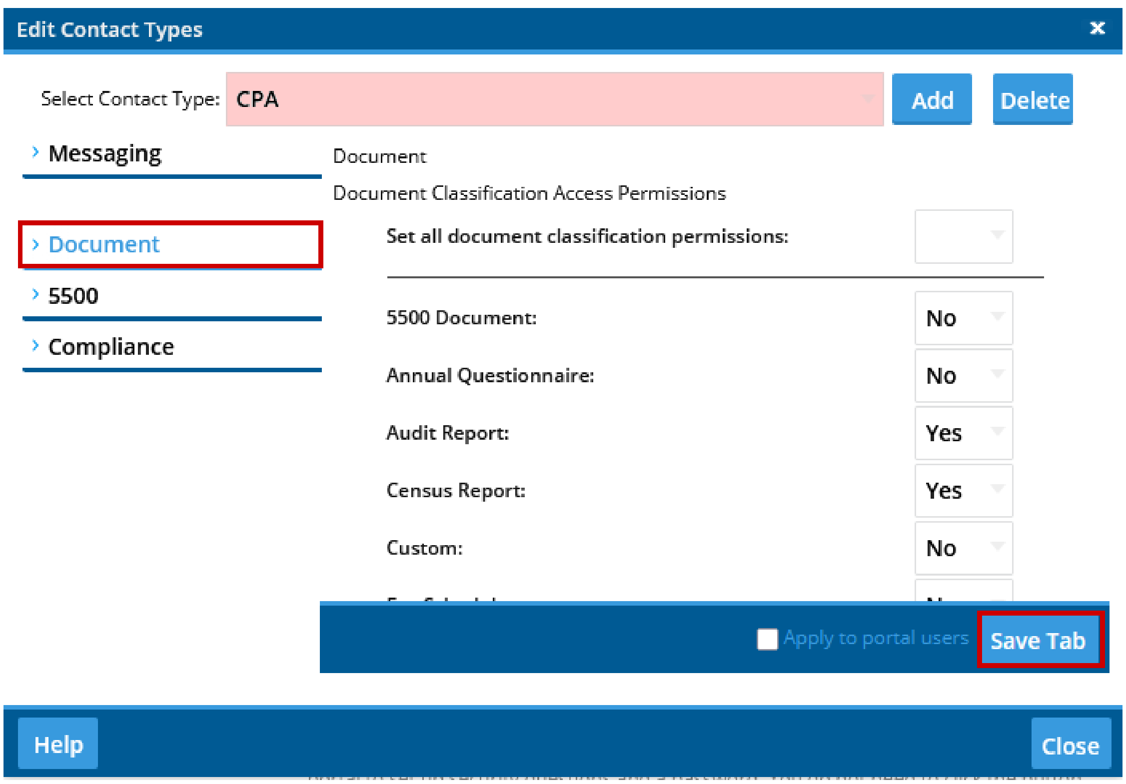


Edit Existing Contact Types (Return to Top)

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

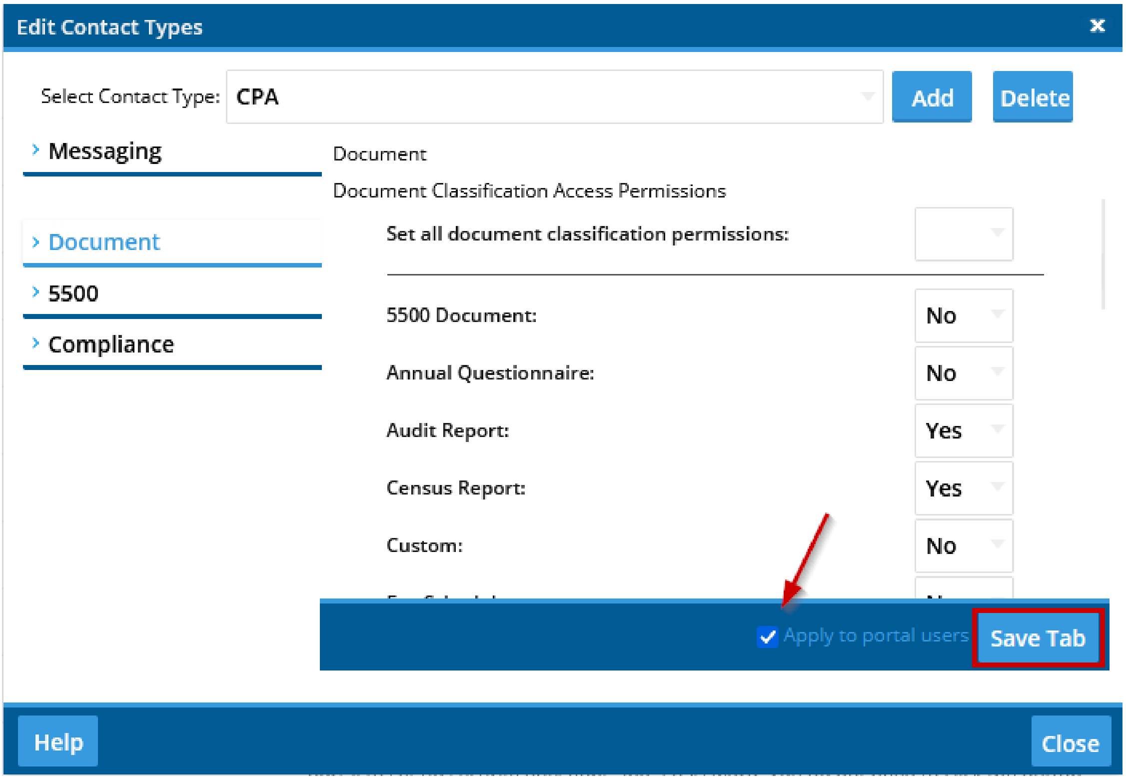
- Select a Contact Type from the drop-down.
- Open a **module tab** and adjust permissions.
- Select **Save Tab** to store changes for that module.



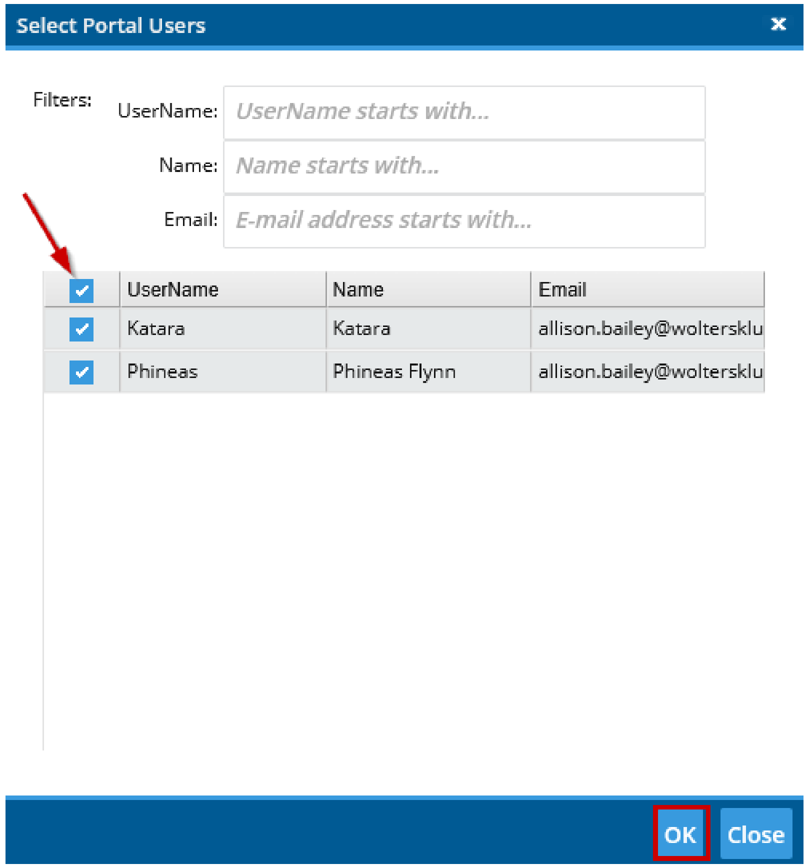
- Repeat for additional modules as needed.

To Apply Changes to Existing Users

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



- 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

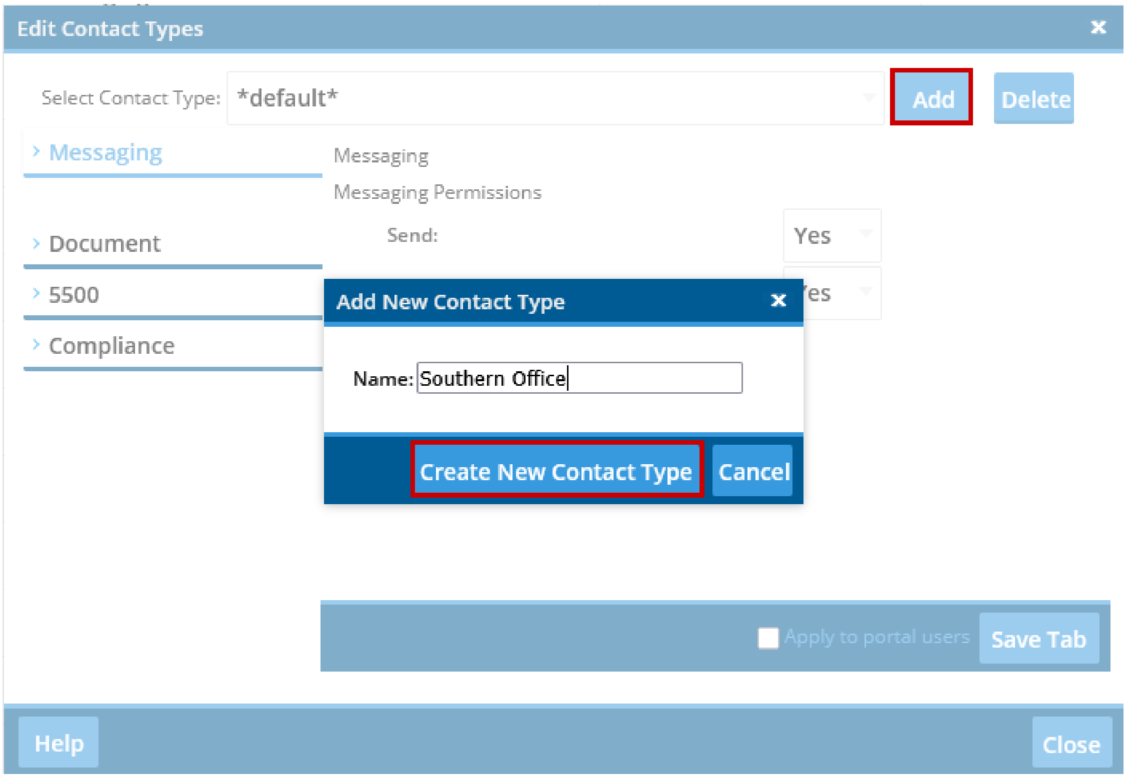


Add a New Contact Type

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.

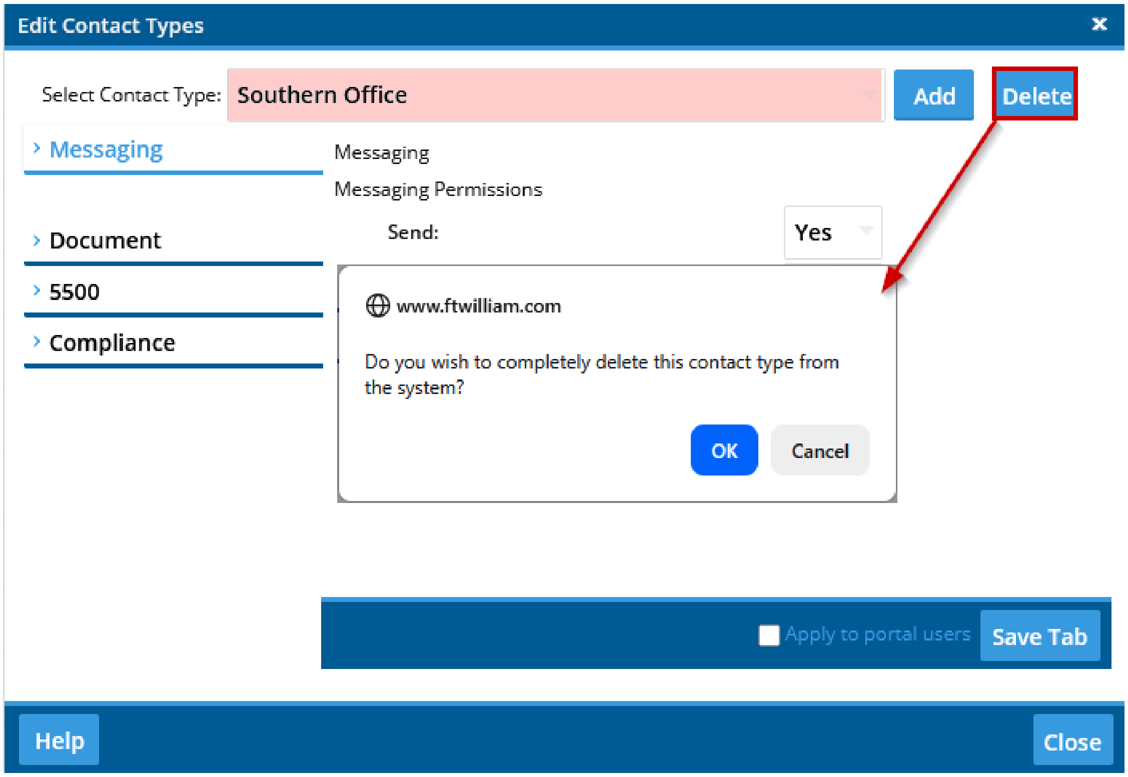
Delete a Contact Type (Return to Top)

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.



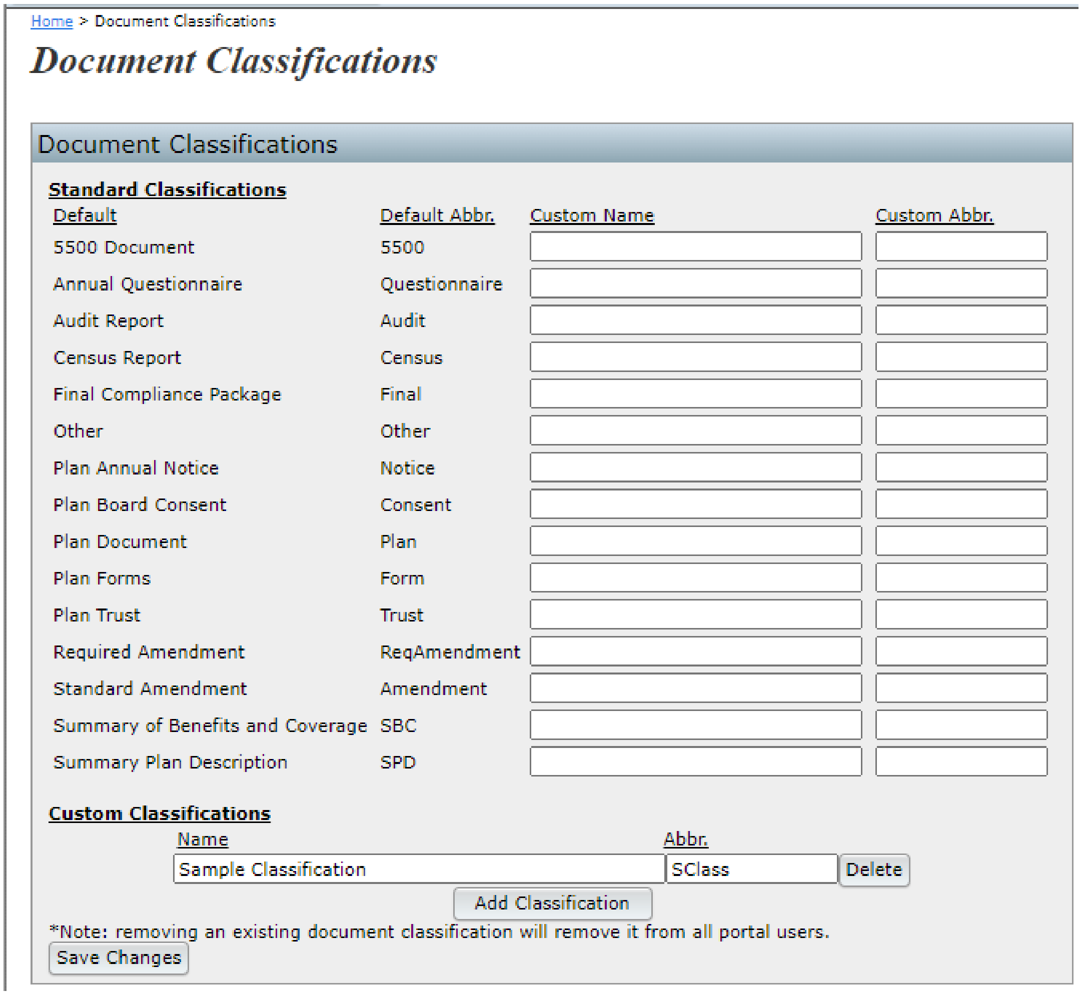
How To Edit Document Classifications

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.



Home > Document Classifications

Document Classifications

Document Classifications

Standard Classifications

Default	Default Abbr.	Custom Name	Custom Abbr.
5500 Document	5500		
Annual Questionnaire	Questionnaire		
Audit Report	Audit		
Census Report	Census		
Final Compliance Package	Final		
Other	Other		
Plan Annual Notice	Notice		
Plan Board Consent	Consent		
Plan Document	Plan		
Plan Forms	Form		
Plan Trust	Trust		
Required Amendment	ReqAmendment		
Standard Amendment	Amendment		
Summary of Benefits and Coverage	SBC		
Summary Plan Description	SPD		

Custom Classifications

Name	Abbr.	
Sample Classification	SClass	Delete

Add Classification

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

Save Changes

Admin