

Permissions, Contact Types, and Document Classifications

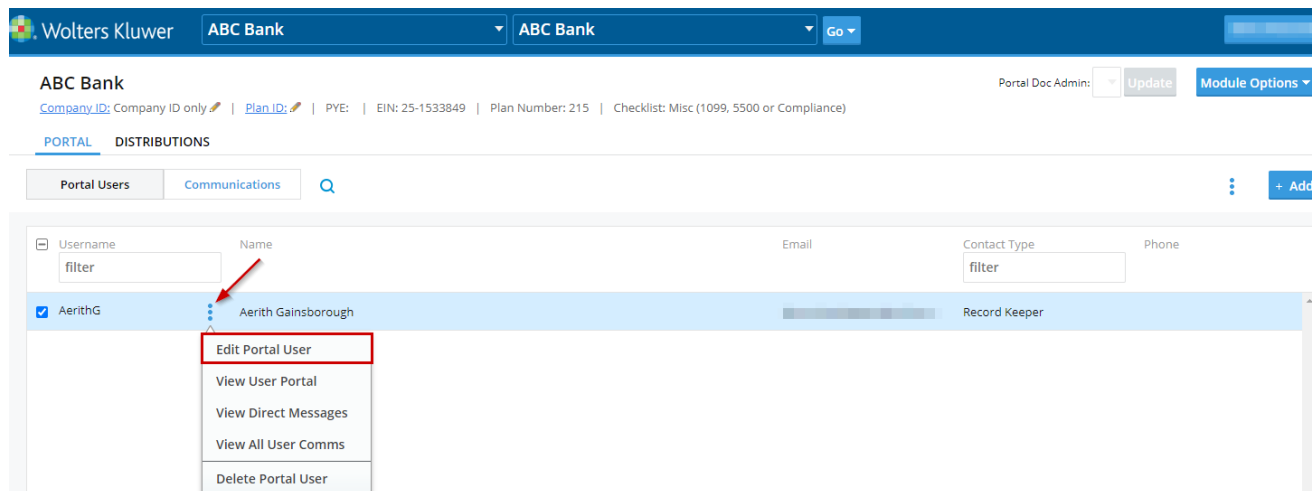
08/25/2025 11:06 am CDT

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 ▼

Add Delete

> Document

> 5500

[Edit Contact Types](#)

User Info

User Information

Portal Username:

Name: [Split name](#)

Prefix:

First:

Middle:

Last:

Suffix:

Title/Position:

Company Name:

Password:** Reset Password

Main Contact Type: Record Keeper [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 answers. If the user does not need to click the button, the user does not need to click the button.

Save Tab

Actuary

Attorney

CPA

Financial Advisor

Plan Sponsor

Record Keeper

Trustee

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: ▼

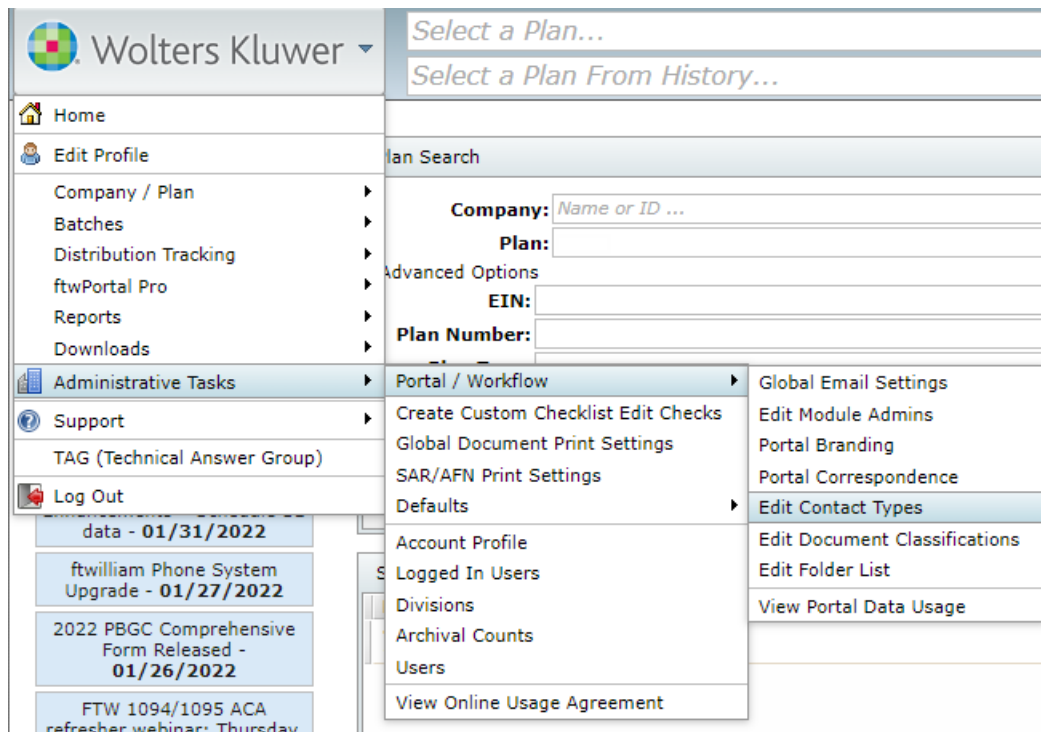
5500 Document:	No ▼
Annual Questionnaire:	No ▼
Audit Report:	No ▼
Census Report:	No ▼
Fee Schedule:	No ▼
Final Compliance Package:	No ▼
Other:	No ▼
Plan Annual Notice:	No ▼
Plan Board Consent:	No ▼
Plan Document:	No ▼
Plan Forms:	No ▼
Plan Trust:	No ▼
Required Amendment:	No ▼

Help
Save Tab
Close

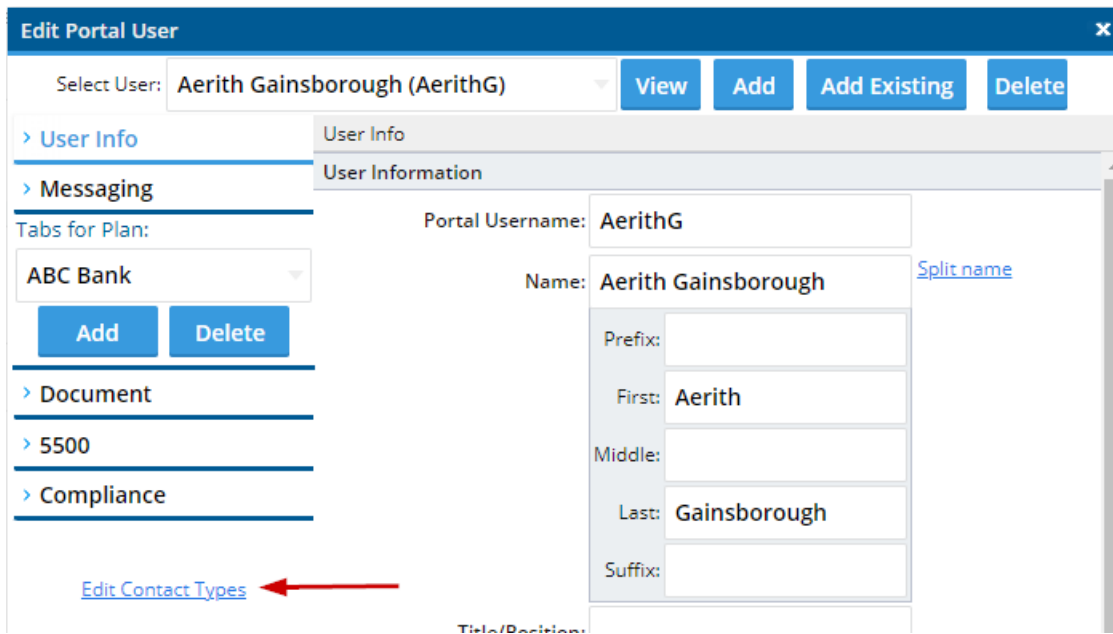
How to Add or Edit Contact Types with ftwPortal Pro

To Edit/Add Contact Types, you do have to be the Master Admin User or a Designated Admin. The “Edit Contact Type” window may be accessed two different ways.

1. Select the Wolters Kluwer Logo>Administrative Tasks>Portal/Workflow>Edit Contact types:



2. Select the link from within the 'Edit Portal User' Screen:



The "Edit Contact Types" link will open to the '*default*' contact type. On the left-hand side of the screen, are the modules the account subscribes to. For example, if the account does not have the Compliance software, the 'Compliance' tab will not populate. The '*default*' permissions are those that each portal user is added with if a contact type is not specified.

Edit Contact Types ✕

Select Contact Type: **Add** **Delete**

- > Messaging Document
- > Document Document Classification Access Permissions
- > 5500
- > Compliance

Set all document classification permissions:

5500 Document:

Annual Questionnaire:

Audit Report:

Census Report:

Fee Schedule:

Financial Statement:

Investment Statement:

Apply to portal users **Save Tab**

Help **Close**

Additional contact types will appear if the drop down is selected. The existing contact types may be edited or a custom contact type may be created.

Edit Contact Types ✕

Select Contact Type: **Add** **Delete**

Messaging *default*

Document Actuary

5500 Attorney

Compliance CPA

Financial Advisor

New User

Personal Account

Plan Sponsor

Record Keeper

Trustee

Apply to portal users **Save Tab**

Help **Close**

Updated permissions to existing contact types may be applied to existing portal users that currently have that contact type listed on the Edit Portal User Screen.

To apply the changes to current portal users in the system, check the “Apply to portal users” box before clicking on “Save Tab”. A window will pop up to select all portal users of that specified type, or select specific users to update.

Document Classification Access Permissions

Set all document classification permissions:

5500 Document: No

Annual Questionnaire: No

Audit Report: No

Census Report: No

Fee Schedule: No

Apply to portal users Save Tab

Contact Types may also be added or deleted by selecting the applicable button to the right of the drop-down list. If deleting a contact type, be sure to select the specific contact type from the drop down prior to selecting the 'Delete' button.

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.

Admin