

Portal FAQs and Supplementals

12/19/2025 11:53 am CST

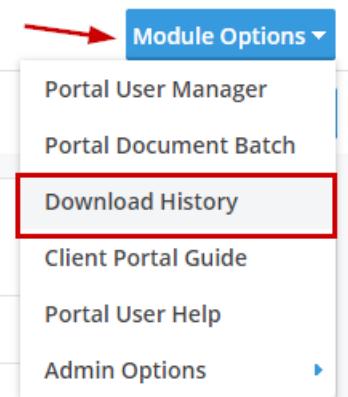
The following articles relate to commonly asked questions pertaining to the ftwPortal Pro Module.

Accessing and Reviewing the Download History Report

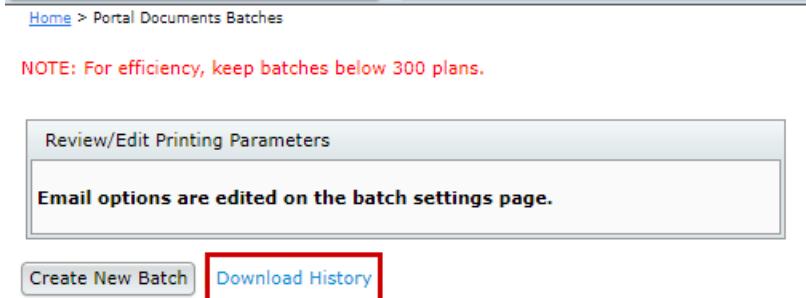
The Download History Report is a way to track what the portal users have downloaded in the portal. It contains dates the admin uploaded documents for the portal user to download; dates the portal user downloaded the documents; which admin uploaded the document; etc.

You may access the Download History link from four different locations.

1. The Global/Plan Level dashboard by selecting the Module Options button in the upper right-hand corner



2. Within the Wolters Kluwer Menu by selecting ftwPortal Pro and clicking on Download History.
3. Under the ftwPortal Pro menu in the upper left-hand corner of the home page
4. Links to this feature are also available in the batch menu of the Annual Questionnaire and Portal Document Batches

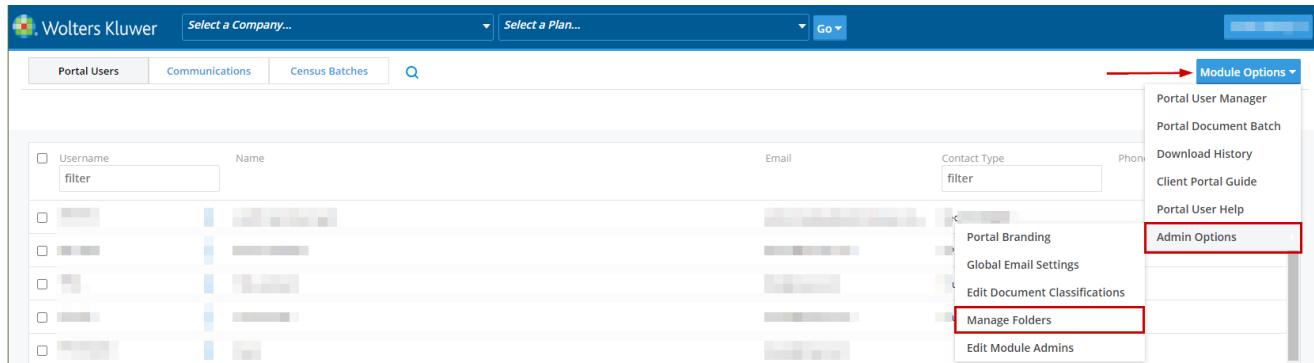


How to Delete Folder Names Associated with Portal Communications

To delete document folders, you must be the Master Admin User or a Designated Admin. With these designations you may access the folder options through the following paths:

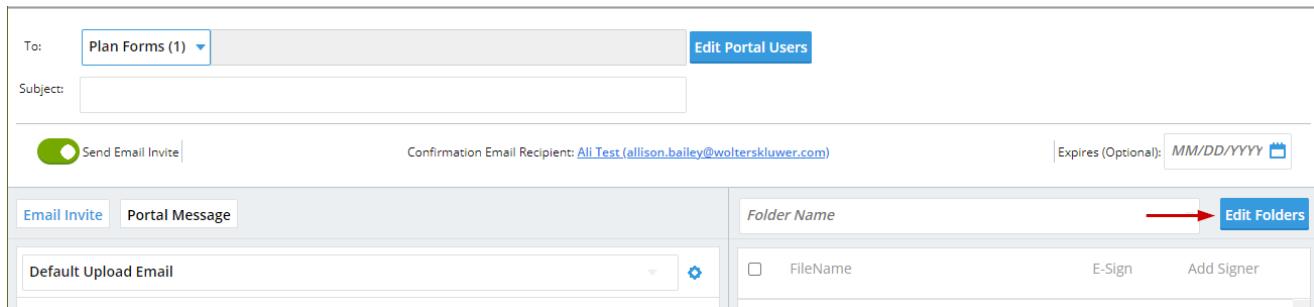
1. From the Global/Plan dashboard select the Module Options button in the upper right-hand corner. The 'Manage

'Folder' option is within the 'Admin Options' dropdown:



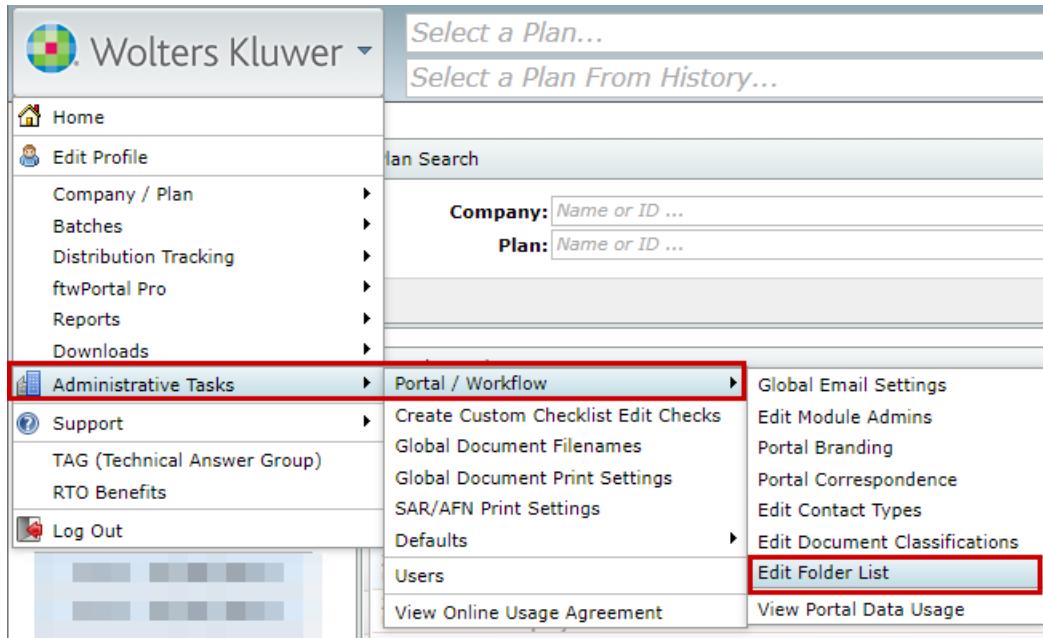
The screenshot shows the Wolters Kluwer portal interface. At the top, there are dropdown menus for 'Select a Company...' and 'Select a Plan...', and a 'Go' button. Below these are tabs for 'Portal Users', 'Communications', and 'Census Batches', with a search bar. On the right side, there is a 'Module Options' dropdown menu. The 'Admin Options' item in this menu is highlighted with a red box. Other options in the menu include 'Portal User Manager', 'Portal Document Batch', 'Download History', 'Client Portal Guide', 'Portal User Help', 'Portal Branding', 'Global Email Settings', 'Edit Document Classifications', 'Manage Folders', and 'Edit Module Admins'.

2. From within a new communication (other than a Direct Message):



The screenshot shows a communication form. At the top, there are fields for 'To:' (set to 'Plan Forms (1)'), 'Subject:', and 'Edit Portal Users' button. Below these are buttons for 'Send Email Invite' and 'Email Invite' (which is selected). The 'Email Invite' section includes fields for 'Confirmation Email Recipient' (set to 'Ali Test (allison.bailey@wolterskluwer.com)'), 'Expires (Optional):' (set to 'MM/DD/YYYY'), and a date picker icon. To the right of the 'Email Invite' section is a 'Folder Name' field and a 'Edit Folders' button, which is highlighted with a red box. Below this are buttons for 'Default Upload Email', 'FileName', 'E-Sign', and 'Add Signer'.

3. From within the Wolters Kluwer Menu, select Administrative Tasks> Portal/Workflow> Edit Folder List:



The screenshot shows the Wolters Kluwer menu. The 'Administrative Tasks' option is highlighted with a red box. Under 'Administrative Tasks', the 'Portal / Workflow' option is also highlighted with a red box. The 'Edit Folder List' option within the 'Portal / Workflow' menu is highlighted with a red box. Other options in the 'Portal / Workflow' menu include 'Create Custom Checklist', 'Edit Checks', 'Global Document Filenames', 'Global Document Print Settings', 'SAR/AFN Print Settings', 'Defaults', 'Users', and 'View Online Usage Agreement'. To the right of the 'Edit Folder List' option is a 'Global Email Settings' section with options like 'Edit Module Admins', 'Portal Branding', 'Portal Correspondence', 'Edit Contact Types', 'Edit Document Classifications', and 'View Portal Data Usage'.

After clicking on "Edit Folders" or "Edit Folder List", a list of folder names will appear in a pop-up. Select the check box for the desired folders to delete and click on "Delete Folders". The pop-up box will update with the text "Changes Saved". *

Please Note- Once removed, a folder can not be restored, any documents within the folders will be moved to display

as a loose documents within the Portal Users view.

Edit Folder List X

Folder Name
<input type="checkbox"/> Annual Notices
<input type="checkbox"/> Compliance Information
<input type="checkbox"/> DB Checklist Tests
<input type="checkbox"/> EXPIRE
<input type="checkbox"/> Plan Document
<input type="checkbox"/> Plan Document/2021
<input type="checkbox"/> Plan Document/2022
<input type="checkbox"/> Plan Documents
<input type="checkbox"/> Required Documentation
<input type="checkbox"/> Trustee
<input type="checkbox"/> WELFARE Tests

Delete Folders Close