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ftwPortal Pro Features

Feature	Description
Full Integration	Automatically deliver plan documents, supporting documents and forms to the portal directly from the plan document generation screen.
Batch Post Annual Notices^	Batch post all annual notices to the portal in just a few clicks
Workflow Grids	Track whether or not amendments and notices have been downloaded/viewed by your clients via the web-portal.
E-Sign Amendments, Documents & Miscellaneous Documents^	E-signatures are available for required amendments, documents and miscellaneous documents. (We are still waiting on final IRS guidance…)
Batch post PPA Restatements^	Once your plans have been restated, batch post them to the web-portal with just a few clicks.
Batch Post Required Amendments^	Batch post all required amendments to the portal in just a few clicks.
Upload Census Worksheet*	Load your annual census to the web-portal for clients to download.
Upload Annual Questionnaire*	Load your annual questionnaires to the web-portal for clients to download.
Upload Census Worksheet in* Batch	Load your census worksheet to the web-portal for all plans at one time.
Upload Annual Questionnaire in Batch *	Load your annual questionnaire to the web-portal for all plans at one time.
Online Annual Questionnaire*^	Allow clients to enter data directly into the online annual questionnaire via the web-portal and submit the data back to you.
Online Annual Questionnaire in Batch *^	Send an online annual questionnaire to all clients at one time.
Folder/Sub-Folder Organization	Organize documents for your clients on the portal by placing them in folders and sub-folders.
Contact Type Customization	Create your own contact types for each of your clients (i.e. Attorney, Plan Sponsor, Actuary etc.)
Document Classification Customization	Create your own classifications for each type of document you load onto the system (i.e. SPD, Compliance Package, Enrollment, Consent, etc .)
Message Manager	You can securely exchange messages with clients including file attachments via the web-portal.
Document Manager	Send documents related to a specific plan to any portal user associated with that plan.
Document Manager in Batch	Upload client communication/documents for all plans/users at one time and batch post to the portal.

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Expiration Dates	Add expiration dates to messages and documents on the portal so you no longer have to manually remove them.
“To Do” List	Add any task for a client to complete to a “To Do” list via the web-portal. Portal users see this “To Do” list immediately upon logging in. Once a task is complete, the “To Do” list is automatically updated.
Optional Data Encryption	For an added layer of security, you may elect to encrypt your data on our secure web-servers.
Unlimited Portal Users/Customizable Access	Clients may have unlimited portal users as well as customize what type of access each user will have (i.e. editing rights, view only permissions, and which module(s) they will have access to).
3rd Party Access	If anyone other than your main contact or signer needs access to a document. You may create additional portal users for this purpose (ex. Lawyer, accountant, financial planner).
View-Only Portal	ftwilliam.com users can view their client’s portal in “view only” mode in order to help their clients navigate the web-portal.
Upload/Download Portal Users for Editing Permissions	Export your portal users and their permissions in a MS Excel spreadsheet. Once exported you can also make changes to their permissions and re-upload the spreadsheet to update ftwilliam.com data.
Request Demographic Change	Send a request to your clients via the web-portal for demographic information (i.e. contact type, name, phone, fax, address and more).

If you have a 5500 subscription, the following ftwPortal Pro features are included automatically (with no additional cost)

Feature/Product	Description
E-Sign 5500s	E-sign 5500s via the web-portal.
Batch Invitations	Once all portal users are prepared, send a batch invitation to everyone with a couple of clicks.
Workflow Grid	Track the status of all of your plans in one place throughout the filing process.
View/Print Draft 5500	Send a DRAFT of your filing to your clients via the web-portal prior to your clients signing.
View/Print SAR	Give your clients access to view and print their SAR via the web-portal.
View/Print AFN	Give your clients access to view and print their AFN via the web-portal.
View/Print 8955-SSA	Give clients the ability to view and print the 8955-SSA via the web-portal
Edit Form 5500	Give your clients access to make changes to their filings via the web-portal prior to signing.
Add 5500 Attachments	Give your clients access to upload any necessary attachments via the web-portal prior to signing.
Branding	Brand the portal with your company colors, logos, text etc.
Automatic Reminders	Send automatic reminders to e-sign 5500s.

* only available with a subscription to the Compliance Module
^ available only with Documents subscription

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