

**Credit &  
Investments  
Ombudsman**

**CIO Consumer  
Advocate Group  
Portal Manual 2017**

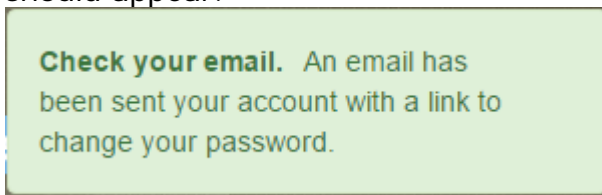
## Who is this manual intended for

This manual is for consumer advocate groups (**CAGs**) representing consumers with an active complaint at CIO.

## Logging In for the First Time

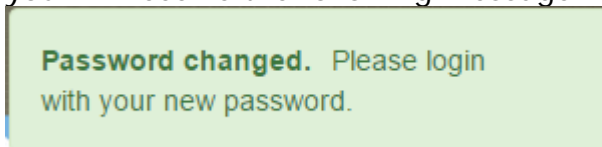
The Portal can be accessed online via <http://portal.cio.org.au/>.

- Visit <https://portal.cio.org.au> and Click the **New User** link and enter your email address so that a link can be sent to you. The following message should appear.



**Check your email.** An email has been sent your account with a link to change your password.

- Once you receive the one time use link, click it to enter your password twice. you will receive the following message.



**Password changed.** Please login with your new password.

- If a user logs in and sees the following message, they will need to contact their administrator so they can be added to the appropriate group giving them permission to view CIO case information.

### ***Error: cannot view case information***

***You are unable to access this page as you currently do not have permission to view case information. Please contact the nominated administrator (Complaint Contact Person) on the membership to request for access.***

## Editing your Contact Details - (User Overview tab)

The only detail external users can edit is the case update notification method. There are 4 options for this

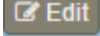

1. None (default for CAGs)
2. Email
3. Mobile (SMS)
4. Both (Email and SMS)

External users **cannot** edit the following fields.

- First name, last name, email, business hours number, mobile number, after hours number, fax number

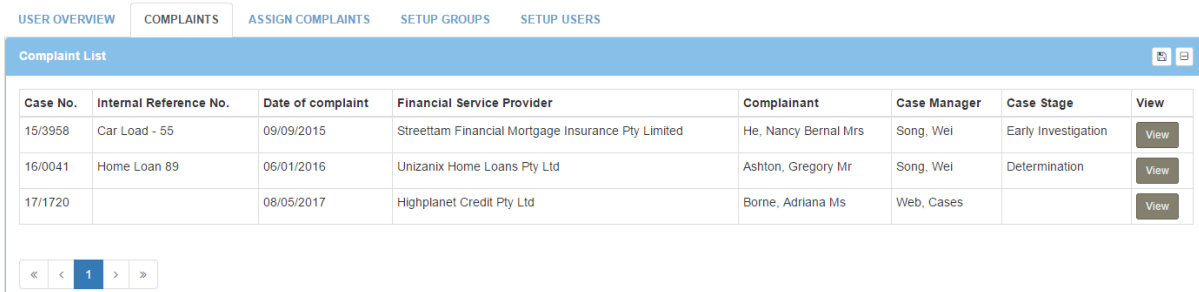
If a user requires this information to be updated, contact an administrator or send a request to [members@cio.org.au](mailto:members@cio.org.au) noting the changes.

### To Edit Your Details

- Click on the User overview tab, and then press the  button. Once finished updating the contact details, press the  button.

## Viewing your Complaints (Complaints tab)

When you click on the complaints tab, you will see the following



The screenshot shows a web interface with a navigation bar containing 'USER OVERVIEW', 'COMPLAINTS', 'ASSIGN COMPLAINTS', 'SETUP GROUPS', and 'SETUP USERS'. The 'COMPLAINTS' tab is active. Below the navigation bar is a 'Complaint List' section with a table of complaint records. The table has columns for Case No., Internal Reference No., Date of complaint, Financial Service Provider, Complainant, Case Manager, Case Stage, and View. There are three rows of data. Below the table is a pagination control showing page 1 of 1.

Case No.	Internal Reference No.	Date of complaint	Financial Service Provider	Complainant	Case Manager	Case Stage	View
15/3958	Car Load - 55	09/09/2015	Streetam Financial Mortgage Insurance Pty Limited	He, Nancy Bernal Mrs	Song, Wei	Early Investigation	<a href="#">View</a>
16/0041	Home Loan 89	06/01/2016	Unizanix Home Loans Pty Ltd	Ashton, Gregory Mr	Song, Wei	Determination	<a href="#">View</a>
17/1720		08/05/2017	Highplanet Credit Pty Ltd	Borne, Adriana Ms	Web, Cases		<a href="#">View</a>

- **Case Number** is the CIO assigned case number
- **Internal reference** is an internal reference the CAG may give the case.
- **Date of complaint** is the date registered
- **Financial Service Provider** is the name of the member that the complaint is registered to
- **Consumer** is the person who has raised the complaint
- **Case manager** is the CIO case manger
- **Cast stage** is the current stage of the case
- **View** shows the detailed case view
- **The disk icon** in the top right allows a user to export the list to an excel file

## Uploading and downloading Documents (Documents tab within the Complaint view)

Users with the appropriate permission are able to download and upload documents (maximum attachment size of 50MB per file).

Documents uploaded to the Portal will be added to the CIO case file immediately and the CIO Case Manager will receive a notification of the upload.

Similarly, if a document is shared with the user by the CIO Case Manager, the nominated contact for the case will receive a notification advising of this.



The screenshot shows a web interface with a navigation bar containing 'REGISTRATION' and 'DOCUMENTS'. The 'DOCUMENTS' tab is active. Below the navigation bar is a document upload area with a 'Upload Documents' button and a message 'Files can be dragged onto this panel to upload'. Below the upload area is a table with columns for Title, Created, Author, and Delivery.

Title	Created	Author	Delivery
-------	---------	--------	----------

## Assign Users to Groups (Setup Users tab)

In order to see the appropriate tabs, the user will need to be a member of a group with the appropriate permissions.

USER OVERVIEW   COMPLAINTS   ASSIGN COMPLAINTS   SETUP GROUPS   **SETUP USERS**

Current User List

	User Name	Member Name	Group
<input type="radio"/>	Caldwell, Christopher	Unizanix Home Loans Pty Ltd	Case Manager
<input type="radio"/>	Caldwell, Christopher	Highplanet Credit Pty Ltd	Case Manager
<input type="radio"/>	Caldwell, Christopher	Itzap Collections PDL (Australia) Pty Ltd	Case Manager
<input type="radio"/>	Crabtree, Maryann	Itzap Collections PDL (Australia) Pty Ltd	Login Only

« < 1 > »

**Courtesy**  **First Name**  **Middle Name**  **Last Name**

**Phone BH**  **Phone MB**

**Fax**  **Email**

**Portal Method**

**Membership Roles**

Member Name	Group Name	
Civil Justice Services	Team Leader	<input type="checkbox"/>

## Editing Users Details (within the Setup Users tab)

If you click on the button to the far left of each user, you will be able to edit the following

- Courtesy, First Name, Middle Name and Last Name
- Company Name, Trading Name, Phone BH, Phone AH, Phone MB, Email, Fax
- Portal notification Method
- Membership roles
  - Set which group the user belongs to on a per CAG basis. Once allocated, you can't change the group a user belongs to, you must add the user to the new desired group (using the plus sign) and delete the old group allocation. Press save changes to ensure that the group changes persist.

**Role Name**



**Read Only**



## Adding a New User (within the Setup Users tab)

Only users that have the appropriate permissions can add new users to the Portal. In order to add a user to multiple CAGs, then the user logging in will need to have appropriate rights on all CAGs they wish to add the user to.

If you try to add an email address which has already been provided to CIO, the following error is shown and the user will not be permitted to be saved. This is done so that duplicate email addresses will not exist in the system.

**Error** Error:  
Email address existed in system.  
Please contact CIO Client team to add this user.

When you add a user, the following fields are mandatory

- First Name
- Last Name
- Email

- Notification Method
- Membership Role

## Change Group Permissions (Setup Groups tab)

The purpose of this tab is to allow administrators to set group permissions for all organisations they are administrators for. To change the permissions of a group click on the CAG, the group and then the permissions you want to apply to that group. The permissions changes will apply to all users within that group for that CAG.

The screenshot displays the 'Setup Groups' configuration page. At the top, there are navigation tabs: 'USER OVERVIEW', 'COMPLAINTS', 'ASSIGN COMPLAINTS', 'SETUP GROUPS' (which is active), and 'SETUP USERS'. Below these are three main panels. The 'Member' panel on the left shows a single member: 'Consumer advocates are us'. The 'Group' panel in the center lists five roles: 'Administrator', 'Team Leader', 'Case Worker', 'Read Only', and 'Login Only'. The 'Permission' panel on the right lists six permissions, all of which are checked: 'View Case Data', 'Setup Users', 'Assign Complaints', 'Download Documents', 'Edit Internal Case Number', and 'Upload Documents'. A 'Save Changes' button is positioned at the bottom center of the main content area.

The permissions that can be set for an entire group are

- **View Case Data**
  - If this is not selected, users in this group will not be able to view any case related data including case lists
- **Setup Users**
  - Allows users in this group to set up new users
- **Assign Complaints**
  - Allows users in this group to see the assign complaints tab and reassign cases within organisations they have the rights to
- **Download Documents**
  - For cases assigned to the user
- **Upload Documents**
  - For cases assigned to the user
- **Edit Internal Case Number**
  - For cases assigned to the user



There are 4 groups administrators can change the permissions for

1. Team Leaders
2. Case Managers
3. Read Only
4. Login Only - this is the default group that all users are added to (apart from administrators)

## Assign Complaints (Assign Complaints tab)

This function is only available to users who have permission to assign complaints. It is designed so that a user is able to reassign cases within organisations that they have the rights to. To reassign a case:

- Within the complaint list click the tickbox next to the complaint
- Within the user list, select the user you wish to reassign the case to.

USER OVERVIEW   COMPLAINTS   **ASSIGN COMPLAINTS**   SETUP GROUPS   SETUP USERS

Once allocated, only the allocated user will be able to view detailed case information

Complaint List								
	Internal Case No.	Date of complaint	Case No.	Complainant	Member Name	Internal Case Manager	CIO Case Manager	Status
<input type="checkbox"/>	Car Load - 55	09/09/2015	15/3958	He, Nancy Bernal Mrs	Streettam Financial Mortgage Insurance Pty Limited	Caldwell, Christopher	Song, Wei	Early Investigation
<input type="checkbox"/>		06/01/2016	16/0038	Callum, Kingsley Mr	Unizanix Home Loans Pty Ltd	Smith, Mike	Song, Wei	Referral
<input type="checkbox"/>	Home Loan 89	06/01/2016	16/0041	Ashton, Gregory Mr	Unizanix Home Loans Pty Ltd	Caldwell, Christopher	Song, Wei	Determination
<input type="checkbox"/>	credit - 071	05/01/2016	16/0010	Mary, Hervey	Highplanet Credit Pty Ltd	Smith, Mike	Song, Wei	Validation

User List			
	User Name	Member Name	Group
<input type="radio"/>	Caldwell, Christopher	Unizanix Home Loans Pty Ltd	Case Manager
<input type="radio"/>	Caldwell, Christopher	Highplanet Credit Pty Ltd	Case Manager
<input type="radio"/>	Caldwell, Christopher	Itzap Collections PDL (Australia) Pty Ltd	Case Manager
<input type="radio"/>	Crabtree, Maryann	Itzap Collections PDL (Australia) Pty Ltd	Login Only