

**Credit &
Investments
Ombudsman**

**CIO Consumer Portal
Manual 2017**

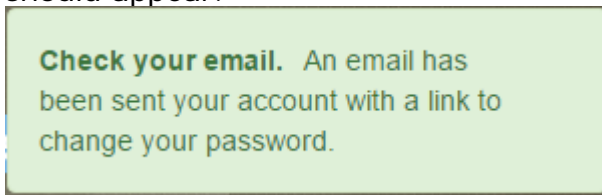
Who is this manual intended for

This manual is for consumers who have an active complaint with CIO.

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

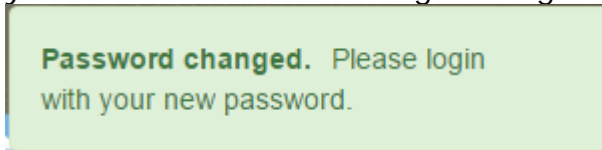
Logging In for the First Time

- 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.

Editing your Contact Details - (User Overview tab)

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

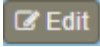

1. None (Default for consumers)
2. Email
3. Mobile (SMS)
4. Both (Email and SMS)

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

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

If you require this information to be updated, contact your CIO Case Manager.

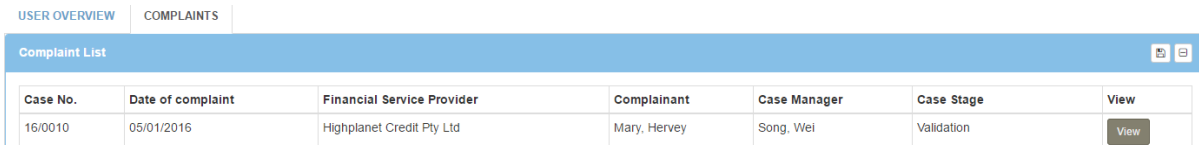
To Edit Your Details

- 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:

- if you only have one complaint open, the complaint will open up in the detailed view
- if you have more than one open complaint with CIO, you will see the following.



The screenshot shows a user interface with two tabs: 'USER OVERVIEW' and 'COMPLAINTS'. The 'COMPLAINTS' tab is active, displaying a 'Complaint List' table. The table has columns for Case No., Date of complaint, Financial Service Provider, Complainant, Case Manager, Case Stage, and View. A single row of data is visible, and a 'View' button is located at the end of the row. In the top right corner of the table area, there are icons for a disk (export) and a list (refresh).

Case No.	Date of complaint	Financial Service Provider	Complainant	Case Manager	Case Stage	View
16/0010	05/01/2016	Highplanet Credit Pty Ltd	Mary, Hervey	Song, Wei	Validation	View

You can get to the detailed view of the case from the image below by clicking the **View** button.

The detailed view will show:

- **Case Number** is the CIO assigned case number
- **Internal reference** is an internal reference you 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)

You 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, you will receive a notification advising of this.

