

**Credit &
Investments
Ombudsman**

**CIO FSP Portal
Manual 2017**

Who is this manual intended for

This manual is for financial service provider (**FSP**) members of CIO in using the CIO self-service Portal.

Logging In

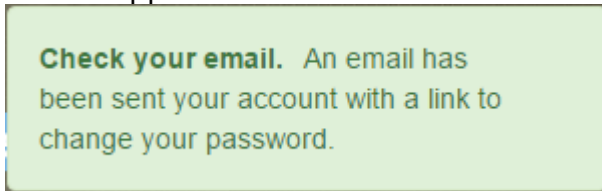
The Portal can be accessed online via <http://portal.cio.org.au/>.

Any user listed as a contact for the FSP can access the Portal but the level of information displayed depends on the permission level set by the FSP's Portal administrator.

The primary complaints contact person nominated for CIO by the FSP is assigned the role of administrator by default.

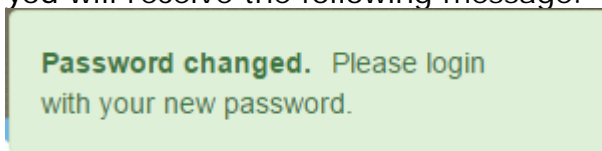
Logging In for the First Time

- 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.

- 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
2. Email (default for FSPs)
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

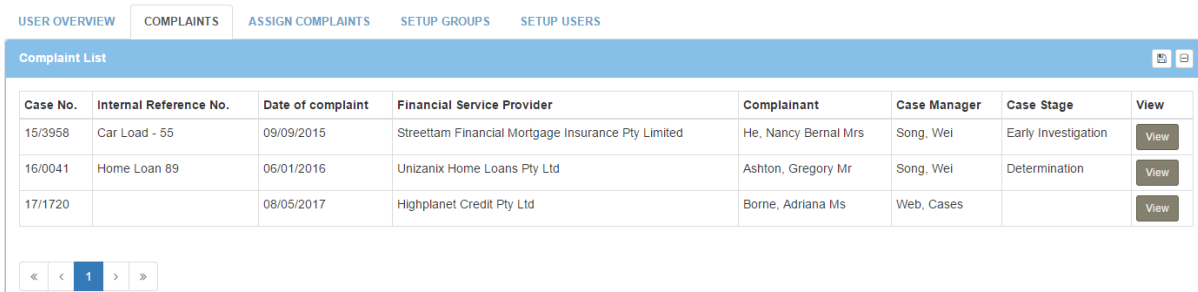
If a user requires this information to be updated, contact an administrator or send a request to members@cio.org.au noting the changes.

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 menu at the top containing 'USER OVERVIEW', 'COMPLAINTS', 'ASSIGN COMPLAINTS', 'SETUP GROUPS', and 'SETUP USERS'. The 'COMPLAINTS' tab is active. Below the menu is a 'Complaint List' header with a blue background and a disk icon on the right. The main content is a table with the following columns: 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 '< < 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	Streettam Financial Mortgage Insurance Pty Limited	He, Nancy Bernal Mrs	Song, Wei	Early Investigation	View
16/0041	Home Loan 89	06/01/2016	Unizanix Home Loans Pty Ltd	Ashton, Gregory Mr	Song, Wei	Determination	View
17/1720		08/05/2017	Highplanet Credit Pty Ltd	Borne, Adriana Ms	Web, Cases		View

- **Case Number** is the CIO assigned case number
- **Internal reference** is an internal reference the FSP 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.

REGISTRATION DOCUMENTS

Files can be dragged onto this panel to upload

Upload Documents

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
Caldwell, Christopher	Unizanix Home Loans Pty Ltd	Case Manager
Caldwell, Christopher	Highplanet Credit Pty Ltd	Case Manager
Caldwell, Christopher	Itzap Collections PDL (Australia) Pty Ltd	Case Manager
Crabtree, Maryann	Itzap Collections PDL (Australia) Pty Ltd	Login Only

« < 1 > »

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

Matilda Middle Name Bosanquet

Phone BH **Phone MB**

Phone BH Phone MB

Fax **Email**

Fax Matilda.Bosanquet@gmail.com

Portal Method **Membership Roles**

Email

Member Name	Group Name
Civil Justice Services	Team Leader

Add Save Changes Delete Reset

FSP user lists (Within the Setup Users tab)

Under the 'Setup Users' tab in the Portal, current Portal users are displayed. This allows you to tailor how you would like to manage cases across multiple memberships.

This list is generated from the existing contacts and representatives listed on a membership. If you have not assigned a user to a permission group, they will by default be part of the Login Only group. The Login Only group will not be able to view any data within the portal and will receive the following error upon logging in:

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 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 FSP 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.



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 FSPs, the user logging in will need to have appropriate rights on all memberships 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.

A screenshot of an error message displayed in a light red box. The text is as follows:

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

You can add a new user and assign them to a permission group if their name does not already appear in the current user list. This functionality is helpful in allowing you to distribute cases to certain people across multiple memberships.

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 member, 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 FSP.

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