

Secure Services User Guide

V2.0 November 2018

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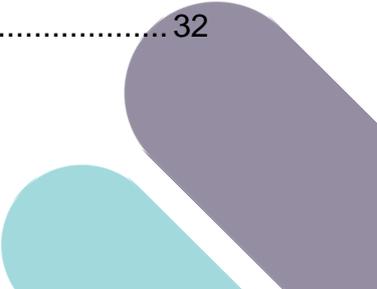
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Introduction

Secure Services is a password protected online member portal accessed from the AFCA website.

- AFCA uses industry standard encryption technologies when transferring and receiving data through our public and member sites. Our systems keep information secure using 128-bit Secure Sockets Layer (SSL) to protect against loss, misuse or alteration.
- Our information systems and technical infrastructure undergo regular security reviews including internal/external penetration testing. Any issues identified are prioritised and addressed internally or through our vendors.
- We follow industry best practices for internal data handling and storage focusing on the OWASP top ten. We ensure that access to data is appropriate, audited and secure.

AFCA members can log in to the portal at any time from any location to view and manage complaints online, run reports, update contact details, view, print and pay invoices, notify AFCA of authorised representative changes, and much more.

Supported web browsers

At the date of this user guide, all services on the AFCA website have been designed and tested to be compatible with the following browsers:

- Internet Explorer versions 10 and 11 (most features also supported in IE9)
- All recent releases of Chrome, Firefox and Safari

We recommend using the latest version of whichever browser you are using. If you are not using one of the supported browsers listed above, features of some services may not display or function properly.

Section 1

Registering for Secure Services

Are you a listed contact?

Before you can register for Secure Services you must be listed as a contact for your organisation in our member database.

You can only be added as a contact by the person listed on our database as the **'MD/CEO/Company Secretary (or equivalent)'** or **'EDR manager'** contact type for your organisation.

They can add you as a contact via Secure Services (refer to ["Add new contact/reallocate contact type"](#) under the "Membership administration functions" section of this guide). If they are not registered for Secure Services, they will need to register before they can add anyone else as a contact.

Contact types

All contacts on our database are allocated a contact type. Your contact type determines your access privileges within Secure Services and how your access is approved.

- MD/CEO/Company Secretary (or equivalent)
- EDR contact
- Finance contact
- Dispute contact
- IDR registration contact
- Systemic issues contact
- Public display contact
- Code contact
- Comparative tables contact
- ACR liaison

Generally, staff members of dispute resolution teams are set up as 'Dispute contact'. This allows access to complaint search, complaint dashboard, case management, member resources and some membership administration functions. Other functions will have restrictions dependant on the user's profile. These are flagged later in this document.

How to register

How you register for Secure Services will depend on the type of contact you are listed as in our member database. If you are multiple contact types then you need to register as the highest contact type to enable maximum access to Secure Services for your profile. Level 1 is the highest, followed by Level 2 EDR manager then Finance contact.

Level 1 contacts

- MD/CEO/Company Secretary (or equivalent) contact

If you are a level 1 contact type you will need a **security key** to register for Secure Services. If you did not receive one in your welcome email when your AFCA membership was approved you can contact the AFCA membership team on 1300 56 55 62 or membership@afca.org.au and request a security key be sent to you by email.

Once you submit your registration, you will receive an email asking you to activate your account before you can access Secure Services.

Account setup

Please type the word below. If required use the buttons to change or listen to the word. [Click here](#) for help. *



VAWTV

Select a profile which describes you ?

I am a contact at a participating financial firm

Select a contact type which describes you ?

MD/CEO/Company Secretary (or equivalent)

Membership number *

First name *

Surname *

Security key * ?

Create a password * ?

Confirm password *

Security question * ?

[Select]

Security answer *

Submit

Level 2 contacts

- EDR contact
- Finance contact
- Comparative tables contact

If you are a level 2 contact type, the listed level 1 contact approves your access. When you register, you will be asked for your 'approver's' (level 1 contact) surname and email address, an email will be sent to them asking them to approve your access.

Account setup

Please type the word below. If required use the buttons to change or listen to the word. [Click here](#) for help. *



Select a profile which describes you [?](#)

Select a contact type which describes you [?](#)

Membership number *

First name *

Surname *

Approver contact type

Approver surname *

Approver email *

Create a password * [?](#)

Confirm password *

Security question * [?](#)

Security answer *

Submit

Level 3 contacts

- Dispute contact
- IDR registration contact
- Systemic issues contact
- Public display contact
- Code contact
- ACR liaison

If you are a level 3 contact type, the listed EDR contact approves your access. When you register, you will be asked for your 'approver's' (EDR contact) surname and email address, an email will be sent to them asking them to approve your access.

Account setup

Please type the word below. If required use the buttons to change or listen to the word. [Click here](#) for help. *



Select a profile which describes you [?](#)

Select a contact type which describes you [?](#)

Membership number *

First name *

Surname *

Approver contact type

Approver surname *

Approver email *

Create a password * [?](#)

Confirm password *

Security question * [?](#)

Security answer *

Submit

The page features two large, overlapping circles. The larger one is teal and occupies the upper left and center. The smaller one is purple and is positioned in the lower left. The text is placed to the right of the teal circle.

Section 2

Welcome to Secure Services

Secure Services landing page

This is the first page you see each time you log in. Use the menu on the left to navigate the portal.



1300 56 55 62 (Members)

Name and member ID

Log Off

Secure Services

Secure services

Secure Services menu

- Log Off
- Case Reporting +
- Systemic Issues +
- Dashboard +
- Case Management
- Member Resources
- Update Contact Details
- Credit Representatives
- Invoices
- Annual Assessment
- Membership Certificate
- Cancel Membership
- Change Password
- User Guide

Welcome to AFCA Secure Services

This portal will be live on 1 November.

The AFCA brand will be applied to this news feed when the new AFCA website is available.

Member news and updates will be published here

Secure Services menu

The Secure Services menu is made up of four sections each serving different functions:

| |
|------------------------|
| Log Off |
| Case Reporting + |
| Systemic Issues + |
| Dashboard + |
| Case Management |
| Member Resources |
| Update Contact Details |
| Credit Representatives |
| Invoices |
| Annual Assessment |
| Membership Certificate |
| Cancel Membership |
| Change Password |
| User Guide |

Case search and report functions

- **Case reporting** provides access to monthly and quarterly complaint reports and a case search function.
- **Systemic issues** provides access to monthly and quarterly systemic issues reports and a search function
- **Dashboard** allows users to view complaint data filtered by a range of options including period of time, complaint age, case management stream and whether the complaint is open or closed.
- Data displayed for the above features is as at the completion of the previous business day.

Case management

- **Case management** allows users to view and update complaint information online, including contact details, case summaries and correspondence received. Users can also send files on cases.

Member resources

- **Member resources** provides members with access to numerous supporting resources, including fee information, EDR response guides, approach documents and fact sheets.

Membership administration functions

- **Update contact** details allows users to update the contact details that we have in our membership database
- **Credit representatives** allows financial firms to notify AFCA when one of their credit representatives are no longer authorised.
- **Invoices** allows users to search, view, print and pay invoices.
- Members can also access **annual assessment** information, **membership certificates**, request a cessation of membership and change their password via this menu



Section 3

Case search and report functions

Case reporting

Monthly and quarterly case reports

The screenshot shows a web interface for case reporting. On the left is a navigation menu with options: 'Return to main menu', 'Case reporting' (with a plus sign), 'Complaints carried forward', 'Complaints received' (highlighted in yellow), 'Complaints closed', and 'Case search'. A callout '1' points to the 'Case reporting' menu item. At the top right, there are two dropdown menus: 'Report type' set to 'Quarterly' (callout '2') and 'Report period' set to 'Quarter ending 31 Dec 2018' (callout '3'). Below these are two buttons: 'Download PDF file' and 'Download CSV file'. The main area displays a table titled 'Complaints received' with columns: Case number, Complainant/entity, Product line*, Issue, Stream, Complaint status at end of period, Date of registration (if applicable), Date progressed from registration (if applicable), Days open, Member reference type, and Member reference no. A callout 'Click on any column heading to sort results' points to the 'Case number' column. Another callout 'Toggle to a full screen view' points to the top right corner of the table. At the bottom, there is a search bar and a pagination control showing '20' items per page, 'Page 1 of 1', and 'No items'. A callout 'Search for a specific complaint in the list' points to the search bar. Another callout 'Select number of results per page' points to the '20' dropdown. A third callout 'Page navigation' points to the pagination controls. A large dark blue box on the right contains the text 'To run a report:' followed by a three-step list: 1. Choose from complaints carried forward, complaints received or complaints closed from the case reporting drop down menu. 2. Select the report type - monthly or quarterly. 3. Select the desired report period.

To run a report:

1. Choose from complaints carried forward, complaints received or complaints closed from the case reporting drop down menu.
2. Select the report type - monthly or quarterly
3. Select the desired report period

Click on any column heading to sort results

Toggle to a full screen view

Search for a specific complaint in the list

Select number of results per page

Page navigation

* Some complaints may involve multiple products and/or multiple issues. We have provided an entry for each one of these.

Case search – Options

2 Run search

4 Load search

3 Save search

5 Clear search

Case number [] to []

Date received [] to []

Date registered [] to []

Date progressed from registration [] to []

Date closed [] to []

Number of days open [] to []

Significant event ***** All *****

Member reference []

AFCA team ***** All *****

AFCA contact ***** All *****

Stream ***** All *****

Status ***** All ***** State ***** All *****

Complainant/entity []

Complainant contacts []

Member contact []

Comparative business category

- *** All *****
- Credit Cards

1

Product Line ***** All *****

Category ***** All *****

- *** All *****
- Acceptance
- Case Management Level 1
- Case Management Level 2
- Closed Acceptance
- Closed Before Review
- Closed Case Management Level 1
- Closed Case Management Level 2
- *** All *****
- Account Based Pensions
- Annuities
- Annuity policy
- Approved Deposit Funds
- ATM
- Australian Equity Funds
- Bank Bills

To conduct a case search:

1. Enter the search criteria into the form (see glossary of terms for more information)
2. Run search
3. You can save your favourite searches
4. You can load a previously saved search
5. To clear the form and start a new search press the clear search button

Case search – Results

[Run search](#)
[Load search](#)
[Save search](#)
[Clear search](#)
[Download PDF file](#)
[Download CSV file](#)

| Case number | Complainant/entity | Member reference | Significant event | Date received | Date registered | Date progressed from registration | Date closed | Number of days opened | Re-opened? | Date re-opened | Stream |
|-------------|--------------------|------------------|-------------------|---------------|-----------------|-----------------------------------|-------------|-----------------------|------------|----------------|--------|
| 103582 | Mr Billy Bob | | | 05/10/18 | 05/10/18 | | 05/10/18 | 0 | N | | |

Click on any column heading to sort results

Click any result row to view detailed case information

Select number of results per page

Page navigation

Case information

Case number 103582
 Member number 10581
 Member name MemBank Limited
 Member contact Andrea Jackson
 Complainant/en tity Mr Billy Bob
 Complainant Billy Bob
 contact
 Contact address 10 Everywhere Avenue
 Lynbrook VIC Australia 3975
 Mobile: 0427654345
 Email dhogben@fos.org.au

Complainant Sally Ann
 contact
 Company Ur Accountant
 Contact address Australia
 Email dhogben@fos.org.au

AFCA team
 AFCA contact Registration Team
 Member reference
 Stream
 Status Closed Registration & Referral
 Outcome
 Outcome type
 Date received 5/10/2018 2:44:10 PM
 Date registered 5/10/2018 3:05:22 PM
 Date progressed from registration
 Date closed 5/10/2018 3:33:38 PM
 Number of days 0

OK

20 Page 1 of 1

Displaying 1 to 1 of 1 results itemised by product and issue.
 Note that there may be less cases as each case can return multiple rows.

Case search - Glossary of terms

| Description | Definition |
|--|--|
| Case number | The unique identifier for the complaint. It will be six numeric digits. If you are searching a single case, enter it in the first field. |
| Date received | The date the complaint was received by AFCA and entered into our case management system, when lodged via our website, or by an AFCA case worker entering the details provided by the complainant via phone, fax, letter, or in person. |
| Date registered | For disputes lodged since 1 July 2015, this is the date we first referred the complaint to you under our Registration & Referral process. |
| Date progressed from registration | The date the complaint progressed to our case management process, having not been resolved at the Registration & Referral stage. |
| Date closed | The last time a complaint was closed by AFCA. Note: If a case has both a Date Received and a Date Closed, it has at some point been reopened. |
| Number of days open | The number of days that a complaint is/was open for. Where a range is not provided the figure entered is considered the minimum number of days open. The search will return all complaints open for more than this number of days. |
| Significant event | Does the complaint relate to a significant event, such as a natural disaster (e.g. Queensland floods) or a LPPI status (Legal Proceedings Previously Issued)? |

| Description | Definition |
|--------------------------------------|---|
| Member reference | Reference number provided to the complainant by the financial firm, such as a case number or claim/policy number. |
| AFCA team | The team at AFCA that is considering the complaint. |
| AFCA contact | The person at AFCA that is considering the complaint. |
| Stream | Fast Track, Standard, Complex, Terms of Reference, No Stream or All. |
| Complainant/entity | The name of the complainant involved in the complaint. |
| Complainant contacts | The person nominated by the complainant as their point of contact for the complaint. |
| Member contact | The contact person provided by the financial firm that AFCA should contact about the complaint. |
| Comparative business category | The category the complaint falls within for comparative reporting purposes. |
| Status: | The current status of the complaint in our case management system. |
| State | Open, Closed or All |

| Description | Definition |
|--|--|
| <p>Product:</p> <p>Line</p> <p>Category</p> | <p>The product the complaint is about</p> <p>These three selection fields work together. Selecting a particular product line for example will filter the product category options available to only those that are applicable.</p> |
| <p>Issue:</p> <p>Type</p> | <p>The issue raised in the complaint</p> <p>These two selection fields work together. Selecting a particular issue type will filter the options available to only those applicable.</p> |
| <p>Outcome</p> | <p>Search on the outcome of a case that has been closed.</p> |

Systemic issues

Systemic issues summary

1

2

3

Return to main menu

Systemic issues +

Systemic issues summary

Systemic issues search

Report type: Monthly

Report period: October 2018

Download PDF file

Download CSV file

| | Possible Systemic Issues or Serious Contraventions | | | Definite Systemic Issues or Serious Contraventions | | |
|---|--|----------|-------|--|----------|-------|
| | No. | Subtotal | Total | No. | Subtotal | Total |
| Carried over from previous period | - | | | - | | |
| New this period | - | | | - | | |
| Total under investigation at end of period | | - | | | - | |
| Total closed and not progressed to definite | | - | | | - | |
| Total closed as definite | | | | | - | |
| Total investigated during period | | | - | | | - |

Systemic Issues

| Case number | Date | Days open | Current status | Closed date | Outcome level* |
|-------------|------|-----------|----------------|-------------|----------------|
|-------------|------|-----------|----------------|-------------|----------------|

Click on column heading to sort results

Toggle to a full screen view

Search for a specific complaint in the list

Select number of results per page

Page navigation

20

Page 1 of 1

No items

To run a report:

1. Select systemic issues summary from the drop down menu
2. Select the report type - monthly or quarterly
3. Select the desired report period

Systemic issues search

The screenshot shows the 'Systemic issues search' interface. On the left is a navigation menu with four items: 'Return to main menu', 'Systemic issues +', 'Systemic issues summary', and 'Systemic issues search' (highlighted in yellow). The main search area contains several input fields: 'Case number' (with 'to' and 'from' sub-fields), 'Date created', 'Date closed', and 'Number of days open' (each with 'to' and 'from' sub-fields). There are also dropdown menus for 'Status' and 'State', both currently set to '*** All ***'. To the right are dropdowns for 'Member contact name' and 'AFCA case owner', both set to '*** All ***'. Below these are two buttons: 'Run search' (callout 2) and 'Clear search' (callout 3). A large callout 1 points to the search area. Below the search area is a list of systemic issues, each with a checkbox. The first item, '*** All ***', is checked. The list includes: Calculation of Fees, Closure of credit card, Consumer Credit Insurance, Deduction from Claim Funds, Default Notice, ePayments Code, Error in Credit Listings, Error in Processing Internet Payment, Home Builder System, Inadequate Claims handling Process, Internal Dispute Resolution Process, Lending Policy, Maladministration in Lending, Misrepresentation: Information about FOS, Mistaken Internet Payment, Mortgage Protection Insurance, Record Keeping, and Requirement to advise of EDR.

To conduct a systemic issues search:

1. Enter the search criteria into the form
2. Run search
3. To clear the form and start a new search press the clear search button

Dashboard

Activity summary

Return to main menu

Dashboard

Complaints registered Yesterday

Reopened Yesterday

Status Closed Yesterday

| Stream | Status | Count | % | Avg. age |
|--------|--------|-------|---|----------|
| | | 0 | | |
| TOTAL | | 0 | | 0 |

Open Cases by Age

Stream: (All)
Case status: (All)
Member contact: (All)

| Age range | Count | % | Avg. age |
|-----------|-------|-----|----------|
| 0-30 | 0 | 0 | |
| 31-60 | 3 | 100 | 37 |
| 61-90 | 0 | 0 | |
| 91-120 | 0 | 0 | |
| 121-150 | 0 | 0 | |
| 151-180 | 0 | 0 | |
| 181-365 | 0 | 0 | |
| 1-2 years | 0 | 0 | |
| 2+ years | 0 | 0 | |
| Total | 3 | 100 | 37 |

Oldest open cases

| Case number | Age | Status |
|------------------------|-----|--------------------------------------|
| 103350 | 39 | IDR Referral |
| 103354 | 38 | Fast Track - Case Management Level 1 |
| 103376 | 38 | Workflow |

View activity by desired time period

Select open or closed cases (and the period if closed)

Click case count to view downloadable list of cases

Filter open cases by stream, case status or member contact

Choose ascending or descending age range

Hover over case numbers to see member contact or click to view case details



Section 4

Case Management

Case list

The screenshot shows a table with the following columns: Case Number, Complainant, Member Contact, Status, and State. A single row is visible with the following data: Case Number 103582, Complainant Mr Billy Bob, Member Contact Ms Andrea Jackson, Status Closed Registration & Referral, and State Closed. Below the table is a pagination control showing page 1 of 1, 10 items per page, and a refresh icon. The text '1 - 4 of 4 items' is also present.

Annotations:

- Click on column heading to sort results (points to Case Number)
- Click filter icon for advanced search (points to filter icon in Complainant)
- Click any result row to view detailed case information (points to the row containing Ms Andrea Jackson)
- Page navigation (points to the page number '1')
- Select number of results per page (points to the '10' dropdown)
- Refresh list (points to the refresh icon)

Case summary

Case Summary

Complainant **Mr Billy Bob**

Fund name **Test again**

Member reference

Member contact

AFCA contact **Registration Team**
1800 367 287

AFCA team manager **Neelan Gopal**

Case status **Closed Registration & Referral**

Case state **Closed**

Joined cases **103583 - .180 Capital Investors Limited**

Received Correspondence ▾

Send New Correspondence ▾

Submission History ▾

Update reference type, reference number and member contact

Click anywhere on the tabs to expand/collapse section

Received correspondence

When we share files with you this is where you can access them.

| Received Correspondence | | | | | |
|--|------------|------------------|-----------------|------------------------|--------------------|
| File name | File type | Provided by | Providing party | Shared with | Added to case |
| Functional Requirements - Joinder.docx | Claim form | Mem Bank Limited | Member | Sally Ann Billy Bob | 05/10/2018 3:10 PM |
| Send New Correspondence | | | | | |
| Submission History | | | | | |

Click on a file to open and/or save a copy

Send new correspondence

| Received Correspondence |
|--|
| Send New Correspondence |
| Action <input type="text" value="Select an action"/> |
| Comment <input type="text"/> |
| 1000 remaining |
| Files <input type="text" value="Select files..."/> |
| Submission History |

To send correspondence:

1. Select case action. Only case actions that apply to the current complaint status will appear
2. Add a comment if applicable. For example "Please refer to page 23"
3. Attach multiple (15 max) files by clicking "Select files". See file guidelines below
4. Submit button will appear when files have been added.

File guidelines

- Maximum of 15 files
- Maximum of 30MB per file
- File names must not exceed 50 characters
- Duplicate file names not allowed
- File names must only contain English alphabet A-Z, numbers 0-9, characters _ () - =.
- Valid file formats are as follows:

| | | | | | | | | | | | | | | | | | |
|-----|-----|-----|------|-----|-----|------|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|------|
| bmp | dat | doc | docx | gif | jpg | jpeg | mp3 | png | pdf | rtf | tif | tiff | txt | wma | wmv | xls | xlsx |
|-----|-----|-----|------|-----|-----|------|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|------|

Submission history

| Received Correspondence | | | | | | | ▼ |
|-------------------------|--------------------|------------------------|-------------------|--------------------|----------|--------------|---|
| Send New Correspondence | | | | | | | ▼ |
| Submission History | | | | | | | ▲ |
| Date/time ▼ | Submitted by ▼ | Case Action ▼ | Comment ▼ | Files ▼ | Status ▼ | Receipt ID ▼ | |
| 2018-10-02 14:05:59 | Mr Robert Slocombe | Correspondence from FF | Y | 15 | Received | 4030 | |

"Y" if there are comments, click to read

Number of attachments, click to view file names

Section 5

Membership administration functions

Update contact details

Update personal details

This function is available to all contact types.

NB. Name and contact type cannot be changed as login is based on them. Please contact the AFCA membership team on 1300 56 55 62 or membership@afca.org.au if you wish to update your name and/or contact type.

Organisation

Member number: **10001**

Name: **123 Bank Limited**

ABN/ACN: **15081596009**

AFSL/ACL/ACR number: **123456**

Licence commencement date:

Personal

Contact type: **MD/CEO/Company Secretary
(or equivalent)**

Title: **Mr**

First name: **Robert**

Middle initial:

Surname: **Slocombe**

Position: **Managing Director**

Address 1: **716 Bourke Street**

Address 2: **Test Test Test**

City: **DOCKLANDS**

State: **VIC**

Postcode: **3008**

Country: **Australia**

Phone toll free:

Phone business: **03 9613 7342**

Phone mobile: **0400 123456**

Fax:

Email: **RSlocombe@123.org.au**

Update personal details

Add new contact/reallocate contact type

This function is only available to **MD/CEO** and **EDR Manager** contacts.

Use this option to notify AFCA of a new contact, or a change of contact roles within your team. Select a contact type and complete the requested details. Submit the form. You will see updates immediately pending in the “Other contacts” table. Allow 2 hours for changes to take effect.

NB. Only the **MD/CEO** can change **Finance**, **EDR Manager** and **Comparative Tables** contacts.

Other contacts

Show 10 entries Search:

| Contact type ▲ | Name ⇅ | Position ⇅ | | |
|--|----------------|-----------------|----------------------|------------------------|
| ACR Liaison | Bernard Sumner | Dispute Contact | More | Remove |
| Code Contact | Hannah Theale | Code Contact | More | Remove |
| Comparative Tables Contact | Terrence So | Comparatives | More | |
| Dispute Contact | Sandra D Jones | Dispute Contact | More | Remove |
| Dispute Contact | Francis Smith | | More | Remove |
| Dispute Contact | Sandra D Jones | test | More | Remove |
| EDR Manager Contact | Andrea Jackson | Dispute Contact | More | |
| Finance Contact | Sandra D Jones | test | More | |
| IDR Registration Contact | Jonathan Alley | Dispute Contact | More | |
| MD/CEO/Company Secretary (or equivalent) | David X Bary | test | More | |

1 2 [First](#) [Previous](#) [Next](#) [Last](#)

Add new contact / reallocate contact type

Credit representative

This service is available to **MD/CEO**, **EDR Manager** and **ACR Liaison** contacts.

Use this option to notify AFCA of revoked representative authorisations.

If the authorisation of a representative is revoked please enter the applicable cessation date (⚠ = update pending).

To add a new representative, please email the representative name, ASIC credit representative number and AFCA member number to membership@afca.org.au.

If a representative's registered details change, the representative must log in and use the Update Contact Details tool.

| No. ▲ | Name ◇ | Commenced ◇ | Ceased ◇ |
|-------|---|-------------|---|
| 15159 | Daren Crawford Industries Pty Ltd | 23/04/2010 |  |
| 15161 | FUSH PTY LTD | 23/04/2010 |  |
| 15162 | MIC Sunnybank Pty Ltd as trustee for Puang & Lin Family Trust | 23/04/2010 |  |
| 15163 | Marshall Bickford & Associates Pty Ltd | 23/04/2010 |  |
| 15164 | Clear Sense Solutions Pty Ltd | 23/04/2010 |  |
| 15166 | Modern Home Loans Pty Ltd | 23/04/2010 |  |
| 15168 | Uni-Lite Pty Ltd | 23/04/2010 |  |
| 15169 | Breathru Home Loans Pty Ltd | 23/04/2010 |  |
| 15170 | Mortgage Answers Australia Pty Limited | 23/04/2010 |  |
| 15171 | Menard Holdings Pty Ltd | 23/04/2010 |  |

Page ◀ ◁ 1 of 7 ▶ ▷

[Download CSV file](#)

Invoices

This service is available to **MD/CEO, Finance** and **EDR manager** contacts.

Use this function to search for and view, print and pay outstanding invoices as well as find information on complaint fees and user charges.

List Invoices

Search Invoices (Invoice Number)

Open Closed Credit

Search

| Invoice # | Status* | Invoice Date | Due Date | Total Amount | Amount Due | View Invoice | Select Invoice(s) To Pay |
|-----------|---------|--------------|-------------|--------------|------------|--------------|--------------------------|
| 21469 | OPEN | 17 May 2017 | 16 Jun 2017 | \$1.00 | \$1.00 | View | <input type="checkbox"/> |

*Status will not be updated for 24 - 48 hours after payment of invoice

How To Pay

1. Tick one or more invoices you would like to pay.
2. Click the "Pay Selected Invoices" link.
3. Pay via Credit Card and you're DONE!

How to find an invoice

1. To find unpaid invoices, select 'Open'
2. To find paid invoices, select 'Closed'
3. To find credit notes, select 'Credit'
4. To view an invoice, click 'view' (see)
5. To pay an invoice, follow the 'How To Pay' instructions
6. Links to information about user charge and complaint fees

Annual assessment

The annual assessment is available to **MD/CEO, EDR Manager, Finance** and **Comparative Tables** contacts.

All participating financial firms are required to complete an annual business size assessment. We use the information captured in the assessment to calculate your membership levy and in compiling comparative reporting tables.

Finance and Comparative Tables contacts will be notified by email when the assessment is available to complete. More information can be found on the [annual assessment section of our website](#).

Membership certificate

This function is available to **MD/CEO, EDR manager** and **Finance** contacts.

Membership certificates for the current financial year are normally available within two business days of a member paying their annual membership levy invoice and remain available until the following year's membership levy invoice is issued.

Cancel membership

This function is only available to **MD/CEO** and **Finance** contacts.

Detailed information about membership cessation is provided on selection of this option, including an online form to request cessation of membership.

Change password

This function is available to all contact types.

Select this option to change your password.
Hover on the blue help icon for tips on creating a secure password and how to keep your password safe.

Current password*

New password* 

Confirm new password*

Submit

Section 6

Troubleshooting

Forgotten your password

If you are having issues with your password, attempt to retrieve it by selecting the 'Forgotten your password' link on the login page

You will be asked to enter the AFCA membership number, your first name and surname and then answer the displayed security question that you completed during the registration process. If this answered correctly, the password will be displayed on screen.

Secure Services won't open

1. Try using another internet browser. For example, if you have been using Google chrome, try accessing Secure Services via internet explorer instead.
2. If you were accessing Secure Services via a link, try accessing it directly instead. Type www.afca.org.au in your URL of your internet browser and when the homepage loads, select the padlock icon on the members button located on the top right-hand corner of our home page.
3. Clear your internet browser cache memory by pressing 'Ctrl' + F5 on your keyboard before accessing Secure Services
4. Try accessing Secure Services from a different PC/laptop or smart device.

Contact us

If you are unable to resolve any issues you have in accessing Secure Services, please contact our membership team on 1300 56 55 62 or membership@afca.org.au.