

How to assign or reassign a member contact to a complaint

This is a guide to assigning a complaint to another membership contact in the member portal.

You may need to perform this action in the case that a complaint has been assigned to an incorrect contact type within your organisation.

Logging in to the member portal

If you are a contact for a member and have a profile, log in to your account.

If you are a contact for a member and do not have a profile, you will need to create one before you can manage complaints or other tasks. You can create a profile by following these steps:

1. Head to the [Members page on our website](#) and click **Create a portal login**.
2. Fill in the required fields.
3. Click **Send invitation**.

You will receive an alert to an existing member account based on a match of the email address you entered. You will then receive a prompt to set your password.

Once you have set your password, you can log in to your account.

Which contacts can assign or reassign complaints

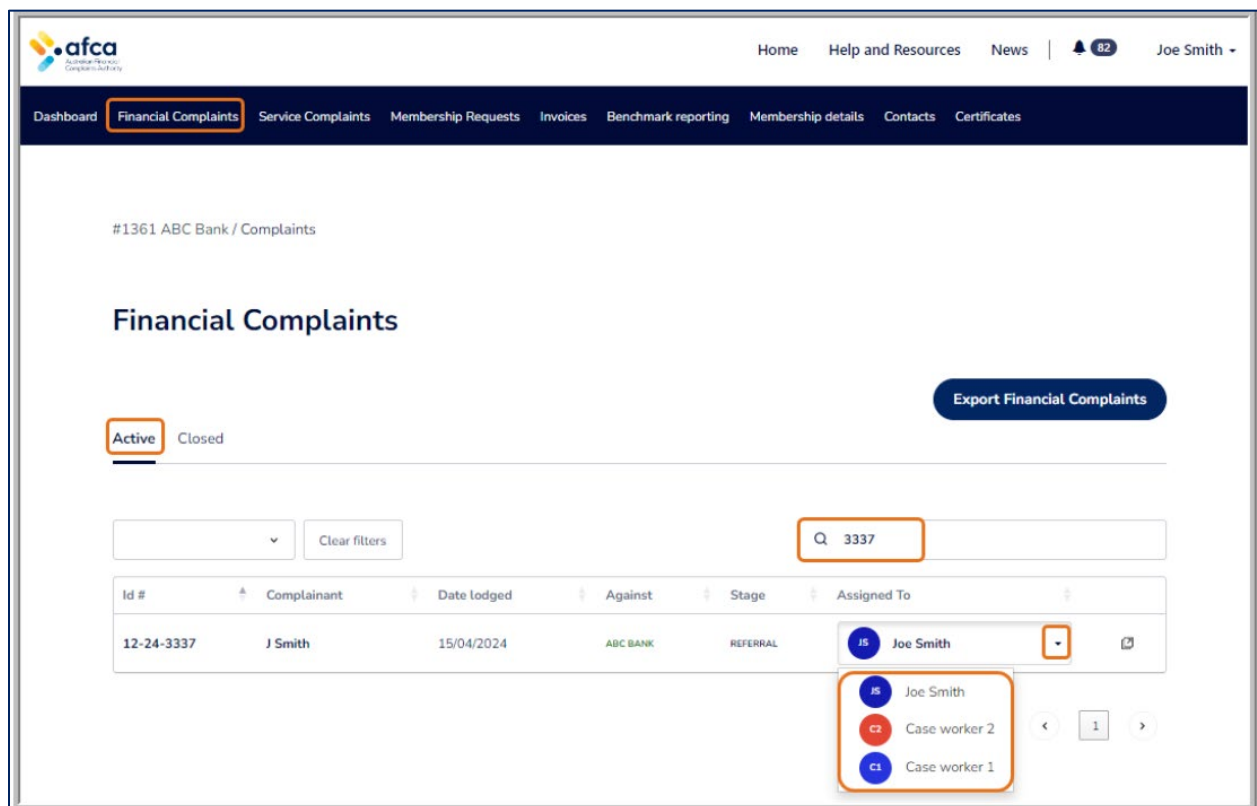
Only the following role types can assign complaints to another membership contact:

- Administrator
- EDR Manager
- Team Manager

Assigning or reassigning complaints

Member logs into their portal and navigates to the Financial Complaints tab.

1. Log in to the member portal.
2. Click on the **Financial Complaints** tab.
3. All open complaints will appear under Active.
4. Click the **down arrow** on the complaint you wish to assign or reassign.
5. Select the contact you wish you assign the complaint to.
6. Click **Save**.



The screenshot displays the AFCA member portal interface. At the top, the AFCA logo is on the left, and navigation links for Home, Help and Resources, News, and a notification bell (82) are on the right. Below the header is a dark blue navigation bar with tabs for Dashboard, Financial Complaints (highlighted), Service Complaints, Membership Requests, Invoices, Benchmark reporting, Membership details, Contacts, and Certificates. The main content area shows the user's profile (Joe Smith) and the title "#1361 ABC Bank / Complaints". Below this is the "Financial Complaints" section with an "Active" filter selected and a "Closed" filter. A search bar contains the number "3337". A table lists the complaint details:

Id #	Complainant	Date lodged	Against	Stage	Assigned To
12-24-3337	J Smith	15/04/2024	ABC BANK	REFERRAL	JS Joe Smith

The "Assigned To" column for the complaint shows a dropdown menu with three options: JS Joe Smith, C2 Case worker 2, and C1 Case worker 1. The dropdown menu is open, and the "Assigned To" cell in the table is highlighted with a red box.

You can also reassign the case from within the complaint itself by clicking the **down arrow**.

- Required actions
- Details
- Notifications
- Appointments
- Requests
- Documents

FINANCIAL COMPLAINT
Complaint 12-24-3337 against ABC Bank

⚠ Action Required: Final Response request sent to Joe Smith [Take Action](#)



This complaint is in referral
The referral stage is where the complaint will be referred back to the financial firm to respond directly. Parties should work together to resolve the complaint. If the parties are unable to agree on an outcome, the complaint moves on to case management.
Over half of complaints resolve at this stage.

Member Contact

Joe Smith