

Find and view SARM cases in the member portal

This is a guide to viewing systemic and reportable matter (SARM) cases in the member portal.

Systemic issues and administration contacts will be able to see SARM cases in the member portal.

See the status and case numbers of SARM matters in the portal.

Finding a SARM case

- 1. Log in to the member portal.
- 2. Click on the **SARM Cases** tab.



3. Go to the **Systemic and Reportable Maters page.**

#1127 ABC Bank / SA	RM Cases		
Systemic and Reportable Matters			
Active Closed			Export SARM Cases
· ·	Clear filters		Q Search for a complaint
ld #	Date lodged	Stage	Assigned To
17-24-1218	15/04/2024	Engagement	PS PETER SMITH
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- 4. Click on the **Active** tab to see all active or open SARM cases that AFCA is considering.
- 5. Click the **Closed** tab to see closed SARM cases.
- 6. Use the search box to search for a SARM case number.
- 7. The **Assigned To** column shows your organisation's contact the case is assigned to. This should be the systemic issues contact used to set up your membership.
- 8. Click **Export SARM Cases** to export a list of SARM cases to Excel.

Actioning a SARM case

AFCA's SARM team will contact your systemic issues contact using existing contact methods such as email and phone. You can view basic information about SARM cases through the portal, however, you cannot use the member portal to make requests for SARM cases at the moment.

Your SARM case worker will discuss how you can manage and receive requests outside the portal.