Comparative Reports – Quick extraction guide



Running secure services reports

- 1 Log into the <u>Secure Services Portal</u>.
- 2 Click the **Plus** icon next to Case Reporting.
- 3 Click Case Search.

Log Off	Welcome
Case Reporting +	Welcome to AFCA Secure Services, your secure online portal to AFCA membership and complaint
Complaints Carried	management.
Forward	You can log into the portal any time from any location to view and manage complaints online, run reports, update contact details, pay invoices, access member resources and more.
Complaints Received	Use the menu to the left to navigate the portal. For more information on how to use Secure Services, refer to the User Guide at the bottom of the menu.
Complaints Closed	If you have any questions or technical differultion, please contact the membership team on
Case Search	membership@afca.org.au or 1300 56 55 62.
Systemic Issues +	News
Dashboard +	

4 Click Load Search

Return to main menu	Run search	Load search	Save search	Clear search
	Case number	to		Complainant/e
Case reporting +	Date received	to		Complainant c
	Date registered	to		Member conta
Complaints carried	Date progressed from	to		Comparative b
forward	registration			🗷 *** All ***

5 Select one of the predefined Comparative Reporting searches.

Predefined search selection									
Select a	Select and click 'Run search'								
Action	Predefined search								
	2022-23 FY Comparative Reporting - Closed at Case Management								
	2022-23 FY Comparative Reporting – Non-response at Registration								
	2022-23 FY Comparative Reporting – Progressed to Case Management								
	2022-23 FY Comparative Reporting – Received								
	Run search Cancel								

- Received This report provides a list of complaints received. The results are based on the date the complaints were received at AFCA.
- Non-Response at Registration This report provides a list of complaints which were automatically progressed from registration due to no response. The results are based on the date the cases progressed.
- **Progressed to Case Management** This report provides a list of complaints which progressed past the registration stage. The results are based on the date the cases progressed past registration.
- **Closed at Case Management** This report provides a list of complaints that have closed. The results are based on the date the cases closed.

6 Click **Run Search**.

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CA team		
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er fund	*** All ***	 Life Insurance

7 The report will load at the bottom of the page.

8 The report can be viewed on screen or downloaded in **PDF** or **CSV** (Excel) formats.

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Run search Load search Save search Clear search Search results 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	Non-response at registration		Stre
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	at Reprint Tall	(* 75 (886))		01/11/18	01/11/18	08/11/18	29/11/18		N		No	Rules	

9 To remove duplicates, select all of **column A** and click **Remove Duplicates**.

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In addition to the raw total, AFCA will show a resolution rate at Registration and Referral and a non-response rate based on the total number of complaints received and count of non-responses respectively.

Important note on the data

Timing differences

Secure service reports may differ from the final comparative report due to timing differences. The search results are an extract from the AFCA complaint database at the time of your search.

Any changes that have been made since the data extraction date will be reflected in the final published comparative data at the end of the reporting period.

Multiple listings

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

Approach to reporting

How this fits into reporting is outlined in a recent update we put up on the member portal, which is as follows:

- For the overall table, the final comparative report will include a distinct count based on the case reference number. This means even if a complaint has been categorised against multiple product and/or issue types, the complaint will only be counted once for both the total complaints received and non-responses at registration.
- For the product-based tables, the reporting will depend on how a complaint has been categorised.
 - If the same product is recorded multiple times against the same reference number, that product and case will only be counted once for comparative reporting purposes.
 - If different products are recorded against the same reference number, the complaint will appear in each of the relevant product-based table.