

# User Manual

## Viewing Case Progress & Managing Tasks

Within this tutorial, we will take a look at how you can...



VIEW YOUR CASE PROGRESS AS AN FI MEMBER

3

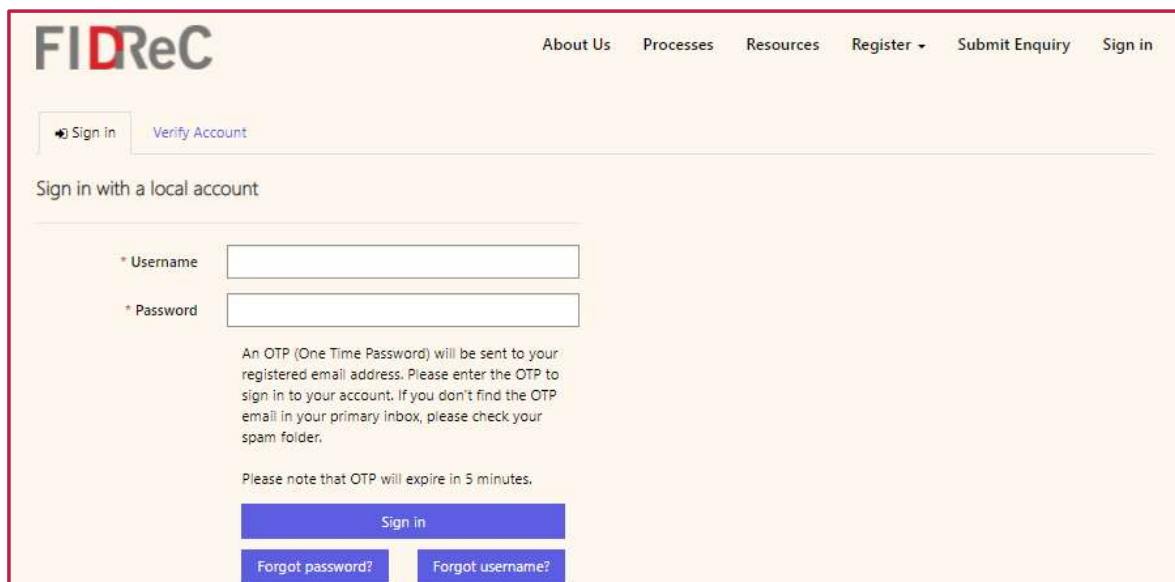


MANAGE TASKS AS AN FI MEMBER

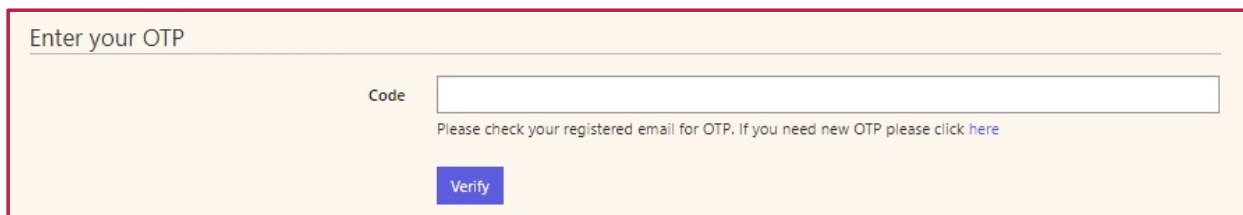
7



## VIEW YOUR CASE PROGRESS AS AN FI MEMBER



The image shows the FIDReC sign-in page. At the top, there is a navigation bar with links: About Us, Processes, Resources, Register, Submit Enquiry, and Sign in. Below the navigation bar, there is a sign-in section with a 'Sign in' button and a 'Verify Account' link. The main heading is 'Sign in with a local account'. There are two input fields: '\* Username' and '\* Password'. Below these fields, there is a note: 'An OTP (One Time Password) will be sent to your registered email address. Please enter the OTP to sign in to your account. If you don't find the OTP email in your primary inbox, please check your spam folder.' Below this note, there is a warning: 'Please note that OTP will expire in 5 minutes.' At the bottom of the sign-in section, there is a 'Sign in' button and two links: 'Forgot password?' and 'Forgot username?'.



The image shows the FIDReC OTP verification page. The heading is 'Enter your OTP'. There is a 'Code' input field. Below the input field, there is a note: 'Please check your registered email for OTP. If you need new OTP please click [here](#)'. At the bottom of the page, there is a 'Verify' button.

FIDReC

To view your case progress please log in to your portal.

1

Visit our website at [www.fidrec.com.sg](http://www.fidrec.com.sg) and sign in.

2

Upon clicking 'Sign in' you will be prompted to input an OTP that will be sent to the email registered to your account.



### Some helpful tips:

Your account will be locked if you input the wrong password 5 times. Use the 'Forgot password?' functionality to help recover your password.



## VIEW YOUR CASE PROGRESS AS AN FI MEMBER

FIDReC

**FIDReC**

DashboardResourcesInvoicesMy Financial Institution0KOK CHEN S

Home > FI Dashboard

Welcome KOK CHEN S

My Cases

All Active Cases

Search

Case Number	Nature of Complaint	Complainant	Financial Institution	Case Manager	Sub Status	Due Date [FI]	Created On
2021/1557		Kok Chen 17	NAPIER AUDITORS	Service User01	Pending IR Review		11/10/2021 4:20 PM
2021/1554		Kok Chen 17	NAPIER AUDITORS	Service User01	Pending IR Review		09/10/2021 12:56 PM
2021/1551		Kok Chen 17	NAPIER AUDITORS	Service User01	Pending FI Acknowledgement of Settlement Agreement	20/10/2021	05/10/2021 12:50 AM
2021/1430		Kok Chen 17	NAPIER INSURANCE	Service User01	Pending Hearing Completion		02/08/2021 11:33 AM

### Sub StatusDue Date [FI]

Pending IR Review

Pending IR Review

Pending FI  
Acknowledgement of  
Settlement Agreement20/10/2021

3

Once you log in successfully, you will be directed to your **Dashboard**. This view contains the **My Cases** section where you will be able to see the cases you are currently involved in.

4

Observe the **Sub Status** column of each case to obtain the current status of each individual case. If action is required of you, a **due date** will be available.



### Some helpful tips:

You can arrange the order of the cases by clicking on the column header **Created On**. The cases will be arranged from the most recently created case to the oldest one.



## VIEW YOUR CASE PROGRESS AS AN FI MEMBER

FIDReC

### My Cases

All Active Cases ▾

Search



Case Number ↑	Nature of Complaint	Complainant	Financial Institution	Case Manager	Sub Status	Due Date [FI]	Created On
<a href="#">2021/1198</a>	Within FIDReC- NIMA Scheme	P	PFI	Service User01	Pending Mediation Outcome		20/05/2021 11:06 AM
<a href="#">2021/1200</a>	Service Standards	P	PFI		Pending IR Review	18/06/2021	21/05/2021 11:50 AM
<a href="#">2021/1244</a>	Financial Institutions' Practice/Policies	P	PFI	Service User01	Pending 1st Submission - FI	18/06/2021	02/06/2021 6:10 PM

5

To view the details of each case, click on the **Case Name**.

Home > 2021/1244

Export

### Section 1 - Case Overview

#### Case Number

2021/1244

#### Case Manager

Service User01

#### Financial Institution

PFI

#### Case Status

Pending 1st Submission - FI ▾

#### Complaint Date

02/06/2021

#### Complainant \*

P

#### Contact for the Case

Pierre ▾

#### Secondary Contact Person 1

▾

#### Secondary Contact Person 2

▾

### Section 2 - Product Information

Please provide the Product Status, Maturity Date and Remarks for each product listed below.

6

You will be directed to the **Case Details view**.



7 Scroll down to the bottom of the **Case Details** page to view the **Case Timeline**. Here you will be able to view and track all the email correspondences between yourself and FIDReC. This may remind you of the deadlines and previous case related interactions.




## MANAGE TASKS AS AN FI MEMBER

FIDReC

### My Tasks



Date Created	Case Name	Subject	Due Date ↓	Activity Status ↓	
25/10/2021 10:16 AM	ONG KOK CHEN UAT v UAT COMPANY 001	FYA task for you	25/10/2021 8:00 AM	Open	

Open

Subject \*

FYA task for you

Case Name \*

ONG KOK CHEN UAT v UAT COMPANY 001

Description \*

This is a FYA task

Mark Complete

1

After logging in, aside from the **My Cases** section, you will be able to view the **My Tasks** section as well. There are two types of tasks on the portal, **For Your Action (FYA) & For Your Information (FYI)**. FYA tasks will be shown in the My Tasks section.

2


To open a task, click on the dropdown arrow and click 'Open'. Doing so will open another window that will show the details of the task.

3

When you have completed the task, click on **Mark complete**. The task will then be removed from the My Tasks view.



4

**FYI tasks** will be shown as notifications in the page header after you log in. Clicking on the  icon will bring you to a list of open FYI tasks.

5

To confirm that you have read a task/notification, fill in the checkbox in the **Read Notifications** column. You may then navigate away from the page and the task will be marked as read.

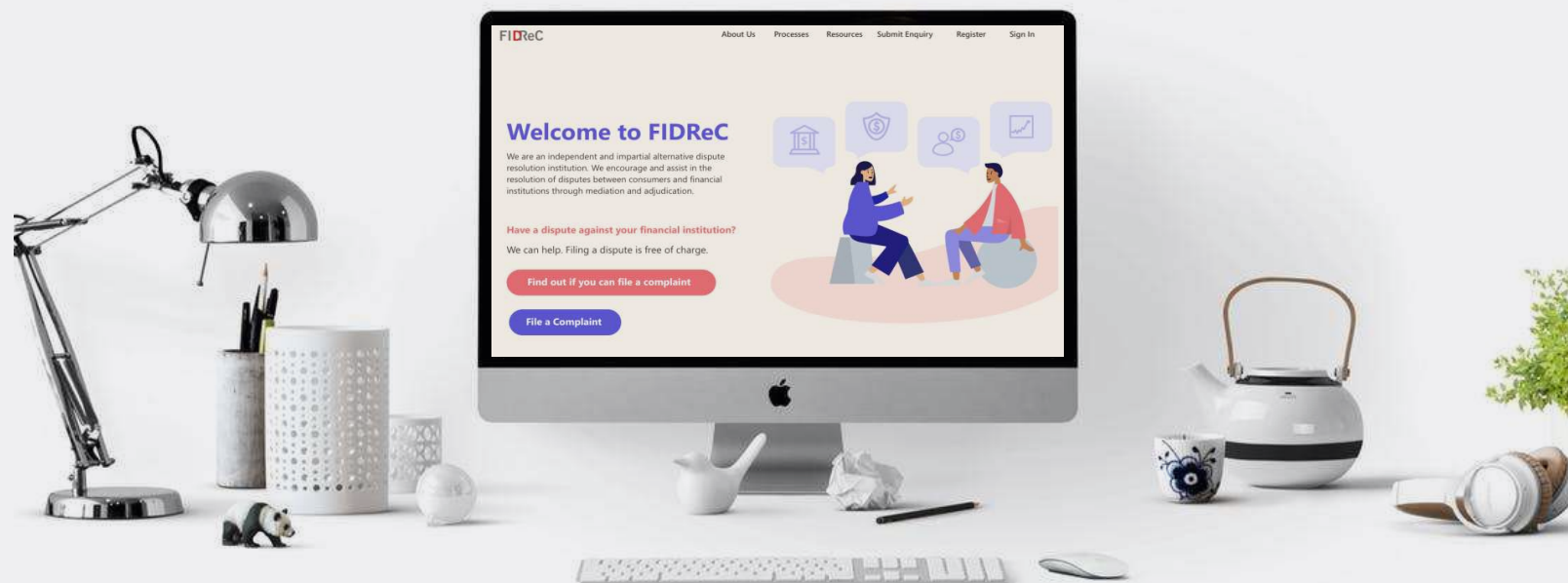
☰ Notifications ▾

Search



Date Created	Case Name	Subject	Action Type	Due Date ↓	Activity Status ↓	Description	Read Notifications
25/10/2021 10:18 AM	ONG KOK CHEN UAT v UAT COMPANY 001	FYI task for you	FYI		Open	FYI task for you	<input checked="" type="checkbox"/>





# Thank you!