

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



FIDReC

About Us Processes Resources Register Submit Enquiry Sign in

Sign in Verify Account

Sign in with a local account

* Username

* Password

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.

Please note that OTP will expire in 5 minutes.

Sign in

Forgot password? Forgot username?

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

1

Visit our website at 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.

Enter your OTP

Code

Please check your registered email for OTP. If you need new OTP please click [here](#)

Verify



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 Status	Due Date [FI]
Pending IR Review	
Pending IR Review	
Pending FI Acknowledgement of Settlement Agreement	20/10/2021

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.



My Cases

☰ All Active Cases ▾ 🔍

Case Number ↑	Nature of Complaint	Complainant	Financial Institution	Case Manager	Sub Status	Due Date [FI]	Created On
2021/1198	Within FIDReC-NIMA Scheme	P	PFI	Service User01	Pending Mediation Outcome		20/05/2021 11:06 AM
2021/1200	Service Standards	P	PFI		Pending IR Review	18/06/2021	21/05/2021 11:50 AM
2021/1244	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 2
Secondary Contact Person 1	

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**.




FIDReC

Dashboard | Invoices | My Financial Institution | 🔔 | Pierre ▾

Timelines

Timeline



about a month ago

Modified on 04/06/2021 9:51 AM

<FIDReC Email sending> → PFI, Pierre

FIDReC Complaint REF2021/1245 - FI 1st Submission CRM:0027897

Dear

Pierre/

,

The
complainant for Case Number #REF2021/1245 has elected to refer their case to adjudication. In this regard, you are required to submit your 1st submission via your FIDReC Portal. Please login and upload your 1st submission documents by 6/16/2021 7:29 PM.


As part of your submission, please ensure that you complete the pre-adjudication declaration form by 6/16/2021 7:29 PM, which may be found in the adjudication section of the case file on the portal.

Should you have further queries, please feel free to contact your case manager: .

Thank you.

Yours Faithfully,

Financial Industry Disputes Resolution Centre Ltd (FIDReC)



about a month ago

Service User01 → P, Pierre

11/06/2021 5:00 PM - 11/06/2021 6:00 PM

Mediation appointment

Teams Meeting URL : [https://teams.microsoft.com/l/meetup-join/19%3ameeting_NDU3NjgzNDltZDk1OS00NTYzLWExNTItYjMxNDYzYmUyNWQx%40thread.v2/0?context={%22Tid%3a%22e0c7936c-c34d-4b72-ac14-4dd6cb5d3976%2c%22Oid%3a%22092fe95e-1a14-4f9e-bc39-06481fec2d81%22](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NDU3NjgzNDltZDk1OS00NTYzLWExNTItYjMxNDYzYmUyNWQx%40thread.v2/0?context={%22Tid%3a%22%3a%22e0c7936c-c34d-4b72-ac14-4dd6cb5d3976%2c%22Oid%3a%22092fe95e-1a14-4f9e-bc39-06481fec2d81%22)

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.

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My Tasks

Search

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.



FIDReC Dashboard Resources Invoices My Financial Institution  ANDREW UAT ▾

4

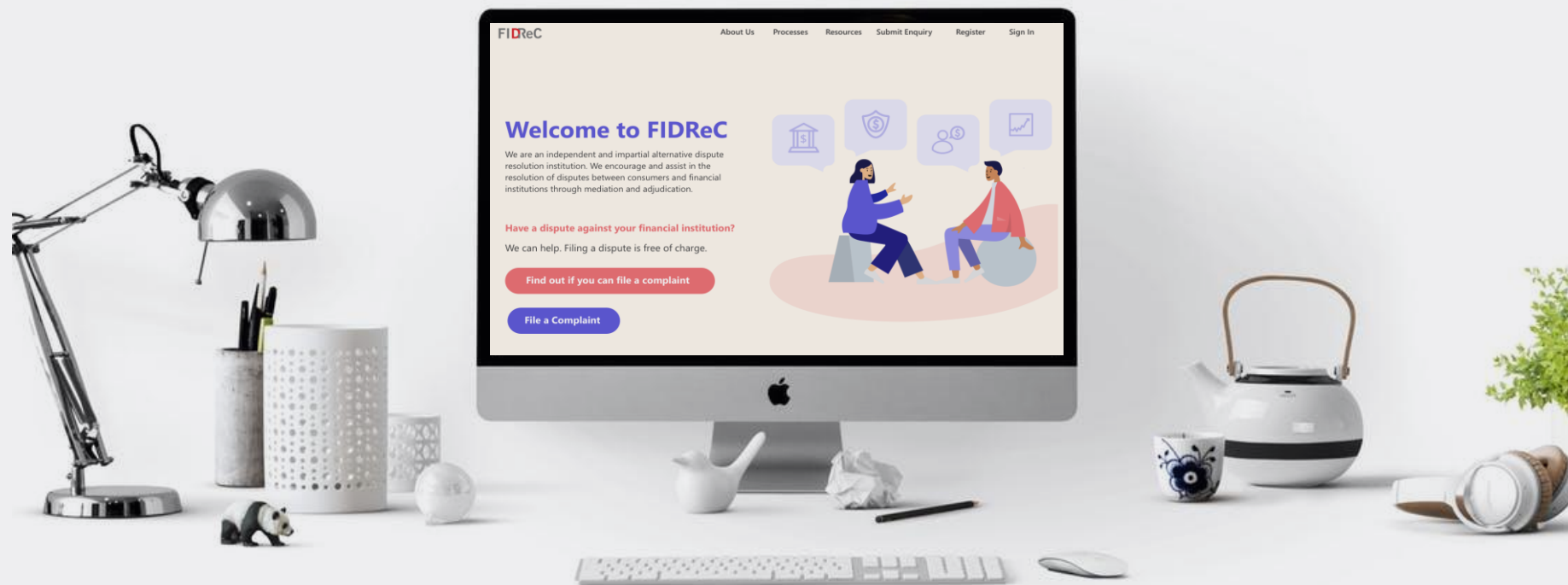
FYI tasks will be shown as notifications in the page header after you log in. Clicking on the  icon will bring you to a list of open FYI tasks.

☰ Notifications ▾ 

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"/>

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.



Thank you!