C*mply*Sight[®]

Complaint Management System User's Guide

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Overview

The Complaint Management System allows credit unions to enter, track, assign, resolve and report on member and nonmember complaints that are submitted to the credit union.

The Complaint Management System is part of ComplySight, but because the Complaint Management System serves a completely different function and purpose than the Compliance Review and Grading system, the dashboard, menus, file manager, notifications and all other functions are separate from the Compliance Review and Grading portion of ComplySight. The only crossover between the Complaint Management System and Compliance Review and Grading system is in the L1 area to manage users.

Once Complaints are created and assigned to a user, email notifications will let the employee assigned (and the employee who made the assignment) know that the assignment has been made. Emails will also notify if a Complaint due date is overdue, if updates or additional information have been added to a Complaint, or if the status of the Complaint has changed. Because of the potentially sensitive nature of the information that a Complaint may contain, the email provided will not contain all the information, documents or comments. The user will need to login to review the full contents of the Complaint, but a link is provided to help users quickly open the Complaint they want to review.

Complaints in the system can be reviewed, edited or closed. Filters, sorting and a search allow users to easily find the specific Complaints they want to review. Comments and files can be added to Complaints to document the situation and any communications between the credit union and the person lodging the Complaint. There is an area to document corrective actions, if any are needed. Comments and documentation can also be added if any additional information arises after the Complaint has been closed.

Reporting is available to provide an overview of the Complaints. Filters will allow you to narrow down the specific list of Complaints you would like to see. The Complaints report can also be exported in Excel or PDF format.

For more information on ComplySight and the Complaint Management System, including complete video training to help you learn to use the system, please visit our website at www.leagueinfosight.com or contact us at info@complysight.com.

Setting up Users for the Complaint Management System

Complaint System Access Levels

CMA– the Complaint Management Administration (CMA) access level provides full and unrestricted access of the Complaint System. A CMA can create, assign, manage and delete Complaints as well as manage Member/Non-Members, Branch locations and Sub Categories. Employees who are provided CMA Access will have significant authority so should be employees who have a high level of trust and manage complaints at the credit union.

CMU– the Complaint Management User (CMU) access level is a very limited level of access within the Complaint System. A CMU will only be able to see information about those Complaints to which they have been assigned. Within an existing Complaint that is assigned to them, a CMU can only add information to the Record of Response fields, which includes adding comments and associating files. A CMU can also mark a Complaint as "Ready for Review" which will notify the CMA who assigned the Complaint that it is ready to be reviewed. A user with CMU access cannot create a Complaint or delete a Complaint. A CMU cannot change any fields on an existing Complaint or add information to a Complaint once it has closed. They cannot manage member/non-members, branch locations and sub-Categories.

Both CMA and CMU access levels can upload files through the File Manager and manage their own files. Users with either access level could be granted File Manager (FM) rights, which would allow those users to manage the files uploaded by other users.

Setting Up Users

You must be logged in as an L1 user to set up users for the Complaint system.

Users can be set up through **Employee Management**, which is used to set up a new user that is not already in the system, or through **Set Permission Levels**, where existing users could be added as a Complaint Management Administrator (CMA) or Complaint Management User (CMU).

Logged in as L1

Use Employee Management to set up new users for the Complaint System

Home	Employee Management @		
Select Area & Compliance Threshold	Linpleyee management		
Select items	Import Employee		
Set Weights			
Area/Item Information	Select File		_
Regulatory Alert List	Browse No file selected.	Employee	mport Template
Employee Management	Upload		
Assign Compliance Review	Add Employee Manually		
Set L2.6 Reviewer Access	*AE Eielde Docuired		
Set Permission Levels	First Name*	lact Name*	
Reports	T BUT THE THE	Luna teatra	
File Manager	Title *	Phone*	_
Search			
Technical Support	The second se	Presidente a such	
Compliance Support	Email *		
Help			
Changes Bassword			Add Employee

Use Set Permission Levels to add access to the Complaint System for existing users

lome	Set Permission Levels	6							
Select Area & Compliance Threshold	50								
Select Items									
et Weights	Select Employee(s)								
rea/Item Information									-
egulatory Alert List									1
mployee Management	Employees			1000	Perm	ission Levels			100000000
ssign Compliance Review		L1 🕜	L2 🕜	L2.5 🕜	L3 🕜	L4 🕜	FM 🚱	CMA 😰	CMU 🕑
	Amy Wargo	\square	N		Ø			Ø	M
t L2.5 Reviewer Access	Barb Boyd								
et Permission Levels	Bradley Willett								
ports	ChromePA TestPA								
e Manager	Eva Koelzer	\square							
arab	Glory LeDu	\square							
narca	Jason Skemp	\square	\square	\square		\square			
chnical Support	Jennifer Walker								
mpliance Support	Mary Ann Koelzer		\checkmark						
alp	Rahul Bhandari								
ange Password	Ray Rodriguez								
	Sue Brown								
	Select All					П			

Creating A Complaint

You must be logged in as a CMA to create a Complaint.

Click on the **Create Complaint** item in the navigation menu and begin filling out the form.

Fields on the Complaint Form

General Complaint Information Fields (those marked with an * are required fields)

Create Complaint	
General Complaint Information	
Complaint Status: Draft	
Complaint Subject*	
Notification Date *	
Category*	
Select Category	~
Sub Category	
Select Sub Category	\sim
Branch Location	
Select Branch	✓ Create Branch
Origin	
Select Origin	\sim
NCUA or Regulator Case Number	
Due to Regulator Date	

- **Complaint Status** This will start as Draft, but once the Complaint is Saved, Previewed and Sent to the employee assigned, this will change to In Progress, then later could be Overdue, Ready for Review or Closed.
- **Complaint Subject*** Add a subject for the Complaint. The subject should be descriptive, but should not include any sensitive information such account numbers or member names, as the subject of the Complaint is included in email notifications.
- Notification Date* this is the date the credit union is notified of the Complaint, which can be backdated if necessary
- **Category*** Choose the category into which this Complaint relates.. The Categories are pre-defined and cover a broad range of areas that might be of concern.
- Sub Category Sub Categories are defined by the credit union and are associated with the selected Category. By default, there are no existing SubCategories, but they can be added at the point the Complaint is being created or can be created at any time using the Manage Sub Categories navigation item. Once a SubCategory is created, it will then be available on the dropdown list for that Category going forward. For more information on creating a Sub Category, see the "Creating Sub Categories" video training.
- Branch Location Branch Locations are defined by the credit union. By default, there are no Branch Locations, but they can be added at the point the Complaint is being created or can be created at any time using the Manage Branch Locations navigation item. Once a Branch Location is defined, it will be available in the dropdown list going forward. For more information on creating a Branch Location, see the "Creating Branch Locations" video training.
- Origin this is information on how the Complaint was received by the credit union
- NCUA or Regulator Case Number If the credit union receives a Complaint directly from the NCUA or a regulatory agency, the credit union should enter the identifying case number in this field for tracking purposes.
- **Due to Regulator Date** If the credit union receives a Complaint directly from the NCUA or a regulatory agency, the credit union should enter the date the Complaint is due back to the regulator in this field.

Assigned To Fields

Assigned To	
*Select employee(s). If editing, selecting employees without using the control-click function will remove the existing assigned employees.	
Amy Wargo(amy.wargo@cusolutionsgroup.com) Barb Boyd(barb.boyd@cusolutionsgroup.com) Bradley Willett(bradley.willett@cusolutionsgroup.com) ChromePA TestPA(mek@mcul.org)	^
Response Due Date*	

- Assigned To choose one or more employees to be assigned to review and resolve the Complaint.
- **Response Due Date*** the date by which the response to the Complaint is due.

Member/Non-Member Information

Member/Non-Member Information	
Select Member/Non-Member * Create Member/Non-Member	Q

Member/Non-Member Information – This is information on who lodged the Complaint. Member/Non-Members are defined by the credit union. By default, there are no Member/Non-Members, but they can be added at the point the Complaint is being created or can be created at any time using the Manage Member/Non-Members navigation item. A search is also available to help determine if the Member/Non-Member is in the system or not. For more information on creating a Member/Non-Member, see the "Member/Non-Member" video training.

Record of Response

Record of Response Comments	Record of Response Documents
No comments	Associate Files Note: In order to associate a file, you must fill in all required fields first. Record of Response Documentation No Supporting Documentation

- **Record of Response Comments** This is information and comments related to the Complaint and any correspondence or information pertaining to the resolution of the Complaint. This field is available until the Complaint is closed.
- **Record of Response Documents** This is documentation uploaded related to the Complaint and pertaining to the resolution of the Complaint. This field is available until the Complaint is closed.

Review Prior to Close

Notes: the Review Prior to Close area is not visible on a Complaint in "Draft" status. Complaints are not required to be set to Ready for Review to close them.

Review Prior to Close	
Ready for Review: No	Mark as Ready

Ready for Review – This indicates if the Complaint is ready to be reviewed by the employee who assigned the Complaint. Clicking on the "Mark as Ready" button will change the status of the Complaint to "Ready for Review" and will generate an email to the assignor. The button in this area will change to "Mark as Not Ready" which will allow the assignor to send the Complaint back to the assignee if additional work needs to be done. Once the Complaint is closed, the Ready for Review status will become "Review Complete" and cannot be changed.

Corrective Action

Corrective Action Comments	Corrective Action Documents
No comments	Associate Files
	Note: In order to associate a file, you must fill in all required fields first.
	Corrective Action Documentation
	No Supporting Documentation
Post	

- **Corrective Action Comments** This is information to document any related Corrective Actions the credit union may need to take in response to the Complaint. This field is available after the Complaint has been Saved/Previewed and Sent to the employee assigned and is available after the Complaint is closed.
- **Corrective Action Documents** This is documentation uploaded related to any Corrective Actions the credit union may need to take in response to the Complaint. This field is available after the Complaint has been Saved/Previewed and Sent to the employee assigned and is available after the Complaint is closed.

Post Close

Post Close Comments	Post Close Documents
No comments	Associate Files Note: In order to associate a file, you must fill in all required fields first.
	Post Close Documentation No Supporting Documentation
Post	1

- **Post Close Comments** This is information to document any information or comments related to the Complaint that may come in after the Complaint has been closed. This field is available after the Complaint has been closed.
- **Post Close Documents** This is documentation uploaded related to the Complaint that may come in after the Complaint has been closed. This field is available after the Complaint has been closed.

Completing the Complaint Assignment

Once the fields on the Complaint form are all filled in, you must **Save** the Complaint Form, which saves your information but keeps the Complaint in DRAFT status.



To deliver the assignment to the appropriate CMU and to move the status to In Progress, you must then PREVIEW the Complaint, which gives you another opportunity to do a quick review.



Review the information and if it is ready to be assigned, click SEND. The Complaint is now created and the employee(s) assigned are notified by email.

Subject: Account	Fees are too	high		
The assignment	will be delive	red to:		
Mary Ann Koelzer (maryann.koelze	er@cusolution	sgroup.com)	
Member/Non-Me	mber Informa	ation:		
Name: Alexander Ha	milton (USA1776	3)		
Account Owner: Co	ntinental Congre	ss 1776		
With the following a	ttachments:			
No supported docu	ments			
Complaint Respons	e Due Date: 9/3	0/2017		

The Complaint will now show on the Dashboard of assignments and in the Complaint list.

Remember that a CMA will see all Complaints, but a CMU will only see those Complaints assigned to them.

Managing Complaints

Click on the **Complaint List** item in the navigation to view and manage Complaints. Remember that a CMA will see all Complaints, but a CMU will only see those Complaints assigned to them.

As long as the Complaint is not closed, **all fields can be edited**. Comments and associated documents will be saved automatically, but all other changes must be Saved, which will put the status of the Complaint back to Draft, then Preview/Send in order to make the Complaint In Progress again.

Finding a Specific Complaint

If the Complaint List is long, you can use the various **filters** to help find a particular Complaint or use the **Search** to find a particular Member/Non-Member.

Complaint List	
Filter By: Select Complaint Sub Category: Select Sub Category Status: All V Sort By	R Notification Date - V Q Search
Subject: Website was difficult to read Complaint ID: 116 Category: Other Sub Category: Website Complaint party name: Ferd Berfel	Status: In-progress Notification Date: 9/21/2017 Response Due Date: 9/30/2017 Closed Date: N/A Assigned To: Mary Ann Koelzer Edit Complaint Close Complaint Delete
Subject: Notary was not available Complaint ID: 117 Category: Services Sub Category: Notary Complaint party name: Alexander Hamilton	Status: Ready-for-review Notification Date: 9/21/2017 Response Due Date: 9/30/2017 Closed Date: N/A Assigned To: Barb Boyd Edit Complaint Close Complaint Delete

Opening a Complaint in Edit Mode

Complaints can be **edited** by clicking the "Edit Complaint" button. A Complaint in any status, including Closed, can be edited, although closed Complaints are limited to editing the Corrective Action or Post Close information fields.

Subject: Website was difficult to read	Status: In-progress	
Complaint ID: 116	Notification Date: 9/21/2017	
Category: Other	Response Due Date: 9/30/2017	
Sub Category: Website	Closed Date: N/A	
Complaint party name: Ferd Berfel	Assigned To: Mary Ann Koelzer	
	Edit Complaint Close Complaint Delete	

Marking a Complaint as Ready for Review

For those Complaints with a status of "In Progress" or "Overdue", the system will allow the user to Mark as Ready,

which will send a notification to the employee who assigned the Complaint so they can begin a review to see if the Complaint can be closed.

Once a Complaint is marked as ready, the button in this area will change to **Mark as Not Ready** which will allow the assignor to send the Complaint back to the assignee if additional work needs to be done.

Once the Complaint is closed, the Ready for Review status will become "Review Complete" and cannot be changed.

It's important to note that the Complaint can be closed by a CMA from the "In Progress" status and does not need to be "Marked as Ready" in order to close the Complaint. In some cases, the employee assigning the Complaint may also be the employee who is assigned to the Complaint, so this step may not be necessary.

Review Prior to Close	
Ready for Review: No	Mark as Ready

Closing a Complaint

To **Close a Complaint**, click the Close Complaint button. This can be done from the Complaint List or within the Complaint itself. You will receive a prompt to confirm that you are closing the Complaint.

Once closed, a Complaint cannot be reopened, however, the Post Close Comments will be available to document any information that may come up after the Complaint is closed. Remember only a CMA can close a Complaint, and this option will not be available to a user with CMU access. Complaints in DRAFT form cannot be closed.

Close from the Complaint List

Subject: Loan was not approved	Status: Ready-for-review
Complaint ID: 114	Notification Date: 9/18/2017
Category: Lending	Response Due Date: 10/14/2017
Sub Category: Loan Denials	Closed Date: N/A
Complaint party name: Jimmy Stewart	Assigned To: Mary Ann Koelzer, Glory LeDu
	Edit Complaint Close Complaint Delete
Or close from within the Co	omplaint
Save Cancel P	Preview Close

Deleting a Complaint

.

To **Delete a Complaint**, click the Delete button. Once deleted, a Complaint cannot be recovered, so be absolutely sure before you delete. Remember only a CMA can delete a Complaint, and this option will not be available to a user with CMU access.

Subject: Loan was not approved	Status: Ready-for-review	
Complaint ID: 114	Notification Date: 9/18/2017	
Category: Lending	Response Due Date: 10/14/2017	
Sub Category: Loan Denials	Closed Date: N/A	
Complaint party name: Jimmy Stewart	Assigned To: Mary Ann Koelzer, Glory LeDu	
	Edit Complaint Close Complaint Delete	

Manage Sub Categories

Creating a New Sub Category

New Sub Categories can be created within the Complaint form or through the Manage Sub Categories navigation item. From either location, first select the Category that you want to add the Sub Category to, then click the Create Sub Category link or the Add New Sub Category button. Remember that the Categories are set by the system and cannot be changed, but you have full control over the Sub Categories.

Cuesta		+	C	1-:+
Create	within	the	Comp	laint

Edit Complaint	
General Complaint Information	
Complaint ID: 114	
Complaint Status: Ready-for-review	
Complaint Subject*	
Loan was not approved	
Notification Date* 9/18/2017	
Category*	
Lending	~
Sub Category	
Loan Denials	✓ Create Sub Category
Branch Location	
Livonia	✓ Create Branch

Create, edit or delete thre	ough the Manage Sub Categories navi	gation item		
Complaints Home Create Complaint	Sub Category Management			
Complaint List				
Reports	Select a Category		Sub Categories	
File Manager	Account Issues		Sub Categories for Account Issues	
Manage Sub Categories	Credit Reporting		1. Account Fees	Rename Delete
Manage Members/Non-members	Debt Collection		2. Closing Account	Rename Delete
Manage Branch Locations	Facilities		3. Identity Theft	Rename Delete
Technical Support	Lending		4. Opening Account	Rename Delete
Help	Member/Consumer Service Issues			
Change Password	Services			
	Other			
		¢.		Add New Sub Category

A pop up form will appear. Enter the name of the new Sub Category and click the SAVE button and your new Sub Category will be added.

Add Sub Category	
Category: Credit Reporting	
Sub Category *	
	Cancel

Editing a Sub Category

Sub Categories can only be edited within the Manage Sub Categories Navigation Item.

Click the **Rename** link next to the Sub Category you want to edit.

Select a Category	Sub Categories	
Account Issues	Sub Categories for Account Issues	
Credit Reporting	1. Account Fees	Rename Delete
Debt Collection	2. Closing Account	Rename Delete
Facilities	3. Identity Theft	Rename Delete
Lending	4. Opening Account	Rename Delete
Member/Consumer Service Issues		
Services		
Other		

A pop up form will appear. Update the Sub Category name and click the **Update Sub Category** button.

Note: Any changes to the name of the Sub Category will update on any Complaint where this Sub Category might already be in use.

Rename Sub Category	
Category: Account Issues	
Sub Category * Account Fees	
Update Sub Category	
	Cancel

Deleting a Sub Category

Sub Categories can only be deleted within the Manage Sub Categories Navigation Item.

Click the **Delete** link next to the Sub Category you want to delete. If the Delete link is greyed out, this means that the Sub Category is already in use on a Complaint and therefore cannot be deleted.

Select a Category	Sub Categories	Sub Categories	
Account Issues	Sub Categories for Account Issues		
Credit Reporting	1. Account Fees	Rename Delete	
Debt Collection	2. Closing Account	Rename Delete	
Facilities	3. Identity Theft	Rename Delete	
Lending	4. Opening Account	Rename Delete	
Member/Consumer Service Issues			
Services			
Other			

Manage Member/Non-Members

Note: The information collected in the Member/Non-Member listing is meant to serve to identify the Member/Non-Member lodging the Complaint, but is not a database with complete contact information. It is assumed that Member contact information would be stored elsewhere. For Non-Members contact information could be stored as part of the Complaint if necessary, but the Member/Non-Member listing is simply meant to provide identification.

Creating a New Member/Non-Member

New Member/Non-Members can be created within the Complaint form or through the Manage Member/Non-Members navigation item. Click the Create Member/Non-Member link or the Add New Member/Non-Member button.

Create a new Member/Non-Member within the Complaint



Complaints Home Member/Non-Member Management @ Create Complaint Complaint List Reports File Manager Manage Member/Non-Members 이 스 근 Manage Sub Categori Complaint Member/Non-Complaint Preferred Zip Total Account Owner(s) Member Contact Action Party First Party Last Code Complaints Manage Branch Location Number Name Name Method Technical Support Edit | Delete 1234 J Jetson Asdasdad 45644 Email 0 Help Change Password KO 2.4-6 Len and Ruth Keolzer 48187 0 Edit | Delete Ruth Koelzer Email

Create, edit or delete through the Member/Non-Member navigation item

A pop up form will appear. Enter the information related to the Member/Non-Members and click Save.

A few things to note:

- The Member/Non-Member Number can be an account number or another number of your own choosing.
- The Member/Non-Members number can be used more than once. For instance, if there is a joint account #1234 where the person complaining is Member A on the account and later a Complaint is lodged by Member B, you could end up with two records for account #1234, one for each person with a Complaint. If you do enter an account number already in use, the system will give you a message alerting you to the duplication and show you all accounts using that number. You can then choose to proceed with creating the account or you can cancel the creation if you realize the Member/Non-Member is already in the system. The system will not allow you to create a Member/Non-Member record with the exact same account number and same first and last name that is already in use.

Add Member/Non-Member	
Member/Non-Member Number *	Complaint Party First Name *
Complaint Party Last Name *	Account Owner(s)
Zip Code	Preferred Contact Method
	Cancel

Editing a Member/Non-Member

Member/Non-Members can only be edited within the Manage Member/Non-Members navigation Item.

Click the **Edit** link next to the Member/Non-Member you want to edit. If your Member/Non-Member list is very long, any of the column headings can be clicked to change the sort order of the column which may be helpful.

Complaints Home Create Complaint	Member/Non-Member Management @							
Complaint List								
Reports	Add Member/Non-Member							
File Manager	Manage Member/Non-Members							
Manage Sub Categories								
Manage Members/Non-members	t - d	Member/Non-	Complaint	Complaint	<u></u>	Zip	Preferred	Total
Manage Branch Locations	Action	V Member Number	V Party First Name	V Party Last Name	 Account Owner(s) 	Code	Contact Method	Complaints
Technical Support								_
Help	Edit	1234	J	Jetson	Asdasdad	45644	Email	0
Change Password	Edit Delete	KO 2.4-6	Ruth	Koelzer	Len and Ruth Keolzer	48187	Email	0

A pop up form will appear. Update the Member/Non-Member information and click the **Update Member/Non-Member** button.

Note: Any changes to the information of the Member/Non-Member will update on any Complaint where this Member/Non-Member might already be in use.

	Complaint Party First Name*
<u>1234</u>	J
Complaint Party Last Name*	Account Owner(s)
Jetson	asdasdad
Zip Code	Preferred Contact Method
45644	Emai 🛩

Deleting a Member/Non-Member

Member/Non-Members can only be deleted within the Manage Member/Non-Members Navigation Item.

Click the **Delete** link next to the Member/Non-Member you want to delete. If the Delete link is greyed out, this means that the Member/Non-Member is already in use on a Complaint and therefore cannot be deleted.

Vember/Non-Member Management @							
Add Membe	r/Non-Member						
Manage N	lember/Non-Mer	nbers				É	a 🎝 C 🕽
Action	Member/Non- Member Number	Complaint Party First Name	Complaint Party Last Name	Account Owner(s)	≎ ^{Zip} Code	Preferred Contact Method	⊖ Total Complaints
Edit Delete	1234	J	Jetson	Asdasdad	45644	Email	0
Edit Delete	KO 2.4-6	Ruth	Koelzer	Len and Ruth Keolzer	48187	Email	0
Edit Delete	1234	Jamie	Stewart	James and Mary Stewa	48823	Email	1

Manage Branch Locations

Creating a Branch Location

New Branch Locations can be created within the Complaint form or through the Branch Locations navigation item. Click the Create Branch Locations link or the Add New Branch Locations button.

Create a new Branch Location within the Complaint

General Complaint Information		
Complaint Status: Draft		
Complaint Subject*		
Notification Date*		
Category* Select Category	~	
Sub Category		
Select Sub Category	~	
Branch Location		
Select Branch	~	Create Branch
Origin		
Select Origin	~	

Create, edit or delete through the Branch Locations navigation item

Branch Management						
Add Branch						
Manage Branches						
Action	🗘 Branch Name	🗘 Zip Code				
Edit Delete	Hollywood	90210				
Edit Delete	Livonia	48154				

A pop up form will appear. Enter the name and zip code of the new Branch Location and click the SAVE button and your new Branch Location will be added.

Add Branch		
Branch Name*	Zip Code *	
	Cancel	

Editing a Branch Location

Branch Locations can only be edited within the Manage Branch Locations Navigation Item.

Click the **Edit** link next to the Branch Locations you want to edit.

Branch Management						
Add Branch						
Manage Branches 📲 🛃 📿						
Action	Sranch Name	Žip Code				
Edit Delete	Hollywood	90210				
Edit Delete	Livonia	48154				

A pop up form will appear. Update the information and click the **Update Branch** button.

Note: Any changes to the name of the Branch Location will update on any Complaint where this Branch Location might already be in use.

Edit Branch		
Branch Name • Hollywood Update Branch	Zip Code* 90210	
		Cancel

Deleting a Branch Location

Branch Locations can only be deleted within the Manage Branch Locations Navigation Item.

Click the **Delete** link next to the Branch Locations you want to delete. If the Delete link is greyed out, this means that the Branch Locations is already in use on a Complaint and therefore cannot be deleted.

Branch Management							
Add Branc	Add Branch						
Manage	Manage Branches 📲 🛃 📿						
Action	Branch Name A	🗘 Zip Code					
Edit Delete	Hollywood	90210					
Edit Delete	Livonia	48154					

Reports

Currently there is only one report in the Complaints System, the Complaints Report, which gives a snapshot overview of the Complaints in the system. Additional reports will be added in the coming months.

Click on the Reports link in the Navigation then on the Complaints Report link.

Complaints Home Create Complaint	All Reports
Complaint List Reports	Complaints Report
File Manager	
Manage Sub Categories	
Manage Members/Non-members	
Manage Branch Locations	
Technical Support	
Help	
Change Password	

There is a hyperlink in the Subject that links directly to the Complaint if you want to see additional detail.

Filters allow you to drill down into the report and view Complaints by a specific Category, Sub Category, Status or employee assigned, and the filters can be used in combination with each other.

The results can be exported in Excel or PDF and if the results of the report are filtered, the export will show only those filtered results.

Complaints Report Select Report							¥	
Category:	Select Category ~	Sub Category:	Select Sub Category	~	Status: All	 Assigned to: 	All	~
Complaint ID	Subject	Notification Date	Status	Branch Location	Category	Sub Category	Member/Non- Member Number	Complaint Party
#100	Teller Mary Ann Koelzer was rude	7/1/2017	Overdue	Main Branch	Member/Consum er Service Issues	Specific Teller Complaint	1234	Janie Jetson
#101	Bad service	7/24/2017	Closed	Flint Michigan Branch	Member/Consum er Service Issues	Computer Issues	041553	Ferd Berfel
#103	Account Fees are too high	7/25/2017	Closed	Flint Michigan Branch	Account Issues	Account Fees	4521	Joanie Plamondon