

How to use the ASIC IDR data reporting template

The template (see the next sheet) is pre-filled with the correct machine-readable headers. Financial firms can use this template to record complaints. It is designed for very small financial firms that do not have their own customer relationship management system or software for recording complaints. It will also be useful for other financial firms who want to ensure that their IDR data is in the correct format to pass ASIC's data validation processes.

If you wish to use this spreadsheet as your firm's starting template for IDR data reporting, you will need to **delete this tab** before saving the file as a CSV. This is because a CSV file cannot have multiple tabs. To do this, right-click on the title 'How to use this template' at the bottom of the screen, and select the 'Delete' option.

ComplaintUniqueID ComplaintProduct ComplainantType ComplainantGender

ComplainantAgeGroup

ComplainantPostcode

ComplaintStatus

ComplaintChannel

DateReceived DateClosed DaysOpen ComplaintAboutRep ProductOrServiceA

ProductOrServiceB

ProductOrServiceC

ComplaintIssueA

ComplaintIssueB

ComplaintIssueC

ComplaintOutcomeA

ComplaintOutcomeB

ComplaintOutcomeC

CompensationAmount