Create Account & Application Sign-Up Instructions

To access the Online Complaint Response System your company must first get the Trusted Source(s) authorized so the Trusted Source can in turn give permission to staff who can respond.

1. Click on https://myportal.dfs.ny.gov/home to go to Portal Login.

2. Follow the instructions under "Secured Applications" to create a Trusted Source account.

3. Sign-up for the Company Complaints Response from the list of ‘Available Applications’.

4. Your request to access the Company Online Complaint Response System will be forwarded to the Department of Financial Services Financial Frauds and Consumer Assistant Division for review. You will be notified by email of acceptance or reason(s) for rejection.

Once the Trusted Source is authorized, additional submitters should follow the instructions to create an account.

1. Click on https://myportal.dfs.ny.gov/home to go to Portal Login.

2. Follow the instructions under "Secured Applications" to create an account.

3. Sign-up for the Company Complaints Response from the list of ‘Available Applications’.

4. Your request to access the Company Online Complaint Response System will be forwarded to the Trusted Source for review. You will be notified by email of acceptance or reason(s) for rejection.

Instructions for the Trusted Source to approve staff who can respond to complaints can be accessed at:

1. Click on https://myportal.dfs.ny.gov/home to go to Portal Login.

2. Follow the instructions under "Secured Applications" to approve your users.
Managing your account (includes screen shots):

1. To access this section of the DFS portal, select **Manage => Control Panel**

2. You can add or change your profile from the **Details** screen. Be sure to include your job title in this section.
3. You can insert or change the address in this section:

![Address form](image)

4. You can update or add telephone or fax numbers in the following section.

![Phone numbers form](image)

**Responding to complaints (includes screen shots):**

The response form will time-out after **one hour** of inactivity.

After logging into the portal, select **Company Complaints Response**
After you log in you will see a listing of the files

If you click on a particular case number, a new window will open that pertains to that complaint file.
For a listing of cases that are closed, select **Switch to Closed**.