Ombudsman Connect for Business Access request form - completion guide

Prepared by the
Financial Ombudsman Service

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Overview

Ombudsman Connect for Business is the Financial Ombudsman Service’s portal for businesses – allowing them to self-serve at their convenience and interact with us more easily.

To have access to Ombudsman Connect for Business, you will need to submit a completed Access request form. Please read this guide before submitting your Access request form.

When completing the form, please ensure all relevant sections are completed. Incomplete documents may be returned. Mandatory questions and sections are marked with an asterisk (*).

Section A: details of the person making the request

This section asks for the name and contact details of the person submitting the application.

Ombudsman Connect for Business access requests will need to be made by an authorised person in your business, such as a Financial Ombudsman Service engagement contact, a complaints manager, compliance manager or director.

We will use the email address and phone number listed in this section to contact you if our onboarding team has any queries about your request.

Section B: details of the business entity you are requesting access for

To onboard a business, we need to know the full registered business name and corresponding Financial Conduct Authority (FCA) reference number. Please include this in Section B1.

If you have voluntary jurisdiction status with the Financial Ombudsman Service, and do not have a FCA reference number, please provide your company number.

If you require access for only one business, move to Section C.

Access to data for multiple business entities

We can provide access to multiple business entities within Ombudsman Connect for Business. This may be useful if you have one team managing complaints for several businesses.

Once linked within Ombudsman Connect for Business, case data for the multiple entities will be available for associated users to view in Ombudsman Connect for Business. Your administrator can assign users to all linked businesses, or a subset of the linked businesses, according to your business need.

For example, an administrator may have access to three business entities – Business A, Business B and Business C. According to their business need, this administrator can provide caseworker and supervisor user access to:

- One business only (Business A or Business B or Business C)
- Any combination of two businesses (Businesses A&B or Businesses A&C or Businesses B&C)
- All three businesses (Business A, Business B and Business C)

Please note, once a user has been permitted access to a businesses' case data, they can see all the featured case data for that business entity. We do not provide partial business access to users.

Further information will be needed to provide you access to multiple businesses. Please complete:

- B2 for access to several individual businesses not linked under a Financial Ombudsman billing group

- B3 for access to businesses already linked under a Financial Ombudsman billing group.

B2. Access to several individual business entities not linked under a Financial Ombudsman billing group

If your business is not part of a Financial Ombudsman billing group – and you want access to more than one entity on Ombudsman Connect for Business – you will need to provide the full name and FCA reference number for each relevant business in section B2.

If you require access to more than five entities, please add rows to the table as required.

We will need valid authority to provide access to multiple businesses.

If the person submitting the application is:

- employed by the entities they are requesting access for, they do not need to provide additional authority – please state 'yes' in the 'do you work for this business' column

- not employed by all the entities they are requesting access for, you will need to submit additional written authority from the authorised business(es). For example if Business A manages all Business B's complaints, Business A can submit an access request for Business B's complaints – and will need to provide valid authority from Business B.

Please ensure relevant authority has been provided on headed paper or in an email sent by the authorised person, and includes:

- the name of the person providing authority

- their email address

- the business they're employed by

- their job title

- the business they are delegating Ombudsman Connect for Business access to.

When processing your Ombudsman Connect for Business access request, we may contact the authority provider for verification.

B3. Access to businesses already linked under a Financial Ombudsman billing group

Businesses that are part of a Financial Ombudsman billing group will be granted access to all the businesses within their billing group, as a default. Please complete question B3 and provide:

- the Financial Ombudsman Service billing group name, as it appears on your invoices, and
- the FCA reference of the main business within the group.

If you have any questions about the businesses in your group, please contact your Financial Ombudsman engagement contact or email us at firmsdatabaseadmin@financial-ombudsman.org.uk.

Section C: details of your appointed administrator(s)

Please provide the name and email address of your appointed administrator(s) in Section C.

Administrators are responsible for:

- enabling and disabling user accounts
- managing user access
- resetting security questions for users, as required (non-federation only).

You will find further information about administrators' roles in the Ombudsman Connect for Business: Key information document.

You will need at least one administrator. We recommend appointing two or more to ensure you always have administrator coverage.

Please give us the names and email addresses for all of your appointed administrator(s). Please do not submit access requests for shared email addresses.

If more than three administrators require access, please use Section E, additional comments, to provide their full names and email addresses.

Please don't send us a list of your caseworkers and supervisors who require access.

Once we have approved access for your organisation, we will send your appointed administrator(s) an email invitation. This will expire if it isn't activated within 48 hours of receipt. Invitations will typically be sent between Mondays and Fridays. If your administrator won't be available – for example, because they only work on certain days – use the 'comments' row to tell us when to send invitations.

If your invitation expires, follow the instructions in your invitation email to have it resent.

Section D: technical information

Please read this section before completing Section D of the form, and share it with the relevant technical and security teams of the business, as required.

You'll find a separate Onboarding technical information document with more detail about configuring the federation and technical FAQs on our Ombudsman Connect for Business webpage.

Section D1: your email domain name(s)

To prevent invitations being sent to people outside of your organisation who should not have access to Ombudsman Connect for Business, we need to know the email domains of all your expected users – for example, @domain1.com and @domain2.co.uk.

Please provide all the domains you want permission for. After your access has been granted, your appointed administrator user can request any updates to domain requirements by contacting our Technical Helpdesk during operating hours, or by using the enquiry form.

Section D2: your identity provider (IdP)

We need to know the identity provider (IdP) you use to authenticate your users. Examples include, Microsoft, Google Workspace, Ping, Okta, etc.

If you use multiple IdPs, please give us the name of the primary IdP you use to authenticate your users.

Section D3: your chosen authentication method

Choose from three options to connect to Ombudsman Connect for Business:

- OpenID Connect (OIDC) federation
- Security Assertion Markup Language (SAML) federation
- No federation – users will be required to use multi-factor authentication (MFA)

Options 1 and 2 enable federated single sign-on. User authentication will occur within your business's identity provider. You will need to configure an OIDC or SAML federation. And you need to give us additional information to complete the federation setup (further information below).

Option 3 does not require an established federation. Users will be directed to create a username and password, using MFA, once they have received their user invitation.

All options are available regardless of IdP.

When completing the Access request form, please confirm which connection option you are choosing in Section D3. Please select only one option.

Further information will be needed for OIDC an SAML federation options. Please complete:

- D4 for OIDC federation, or
- D5 for SAML federation.

If you have chosen not to federate, please skip sections D4 and D5 and proceed to Section E.

Section D4: OIDC federation

Only complete this section if you have chosen OIDC federation. If you have chosen another authentication method, go to Section D5 for SAML federation or Section E for no federation.

To set up an OIDC federation, you will need to use either of the Redirect / Sign In URIs below:

https://login-portal.financial-ombudsman.org.uk/ombportalrespb2c.onmicrosoft.com/oauth2/authresp

or

https://login-portal.financial-ombudsman.org.uk/1f3a9ee5-b4cd-41ec-bd0b-9035fafd6605/oauth2/authresp

Please note: if you're using OKTA IdP, under 'general settings', choose 'grant type' as your 'authorisation code'.

Once the federation configuration is complete, please confirm by ticking the relevant box in Section D4. And use the relevant sections to give us:

1. your domain name(s)
2. your application/client ID – as generated in the IdP when federation set-up is complete
3. your client secret – as generated in the IdP when federation set-up is complete
4. your OpenID configuration endpoint – as available in the IdP

Once you have completed section D4, go straight to Section E.

Section D5: SAML federation

Only complete this section if you have chosen SAML federation. If you have chosen another authentication method, go to Section D4 for OIDC federation or Section E for no federation.

To set up a SAML federation, you will need to use the data below:

ACS (Assertion Consumer Service) / SSO (Single Sign On) URL:
https://login-portal.financial-ombudsman.org.uk/ombportalrespb2c.onmicrosoft.com/B2C_1A_TrustFrameworkBase_fosresp_dp/samlp/sso/assertionconsumer

Entity ID / Audience ID / Audience Restriction:
https://login-portal.financial-ombudsman.org.uk/ombportalrespb2c.onmicrosoft.com/B2C_1A_TrustFrameworkBase_fosresp_dp

Mandatory claims to be set up
Subject NameID Format
Persistent /
urn:oasis:names tc SAML 2.0:nameid-format: Persistent

Once the federation configuration is complete, please confirm by ticking the relevant box in Section D5. And use the relevant sections to give us:

1. your domain name(s)
2. your idp federation metadata URL – as generated in the IdP when federation set-up is complete. Metadata URL to contain the information below:
   - tenant end points
   - tenant entity ID
   - redirection URL
   - certificate
   - domain name

Please ensure the federation metadata URL is submitted, not the XML document.

Additional technical/security notes

1. To address any network/security restrictions at your domain level, speak to your security team.
2. If you follow security group-based access to see your application, you will need to add the required users to a security group specific to Ombudsman Connect for Business access.
3. Remember to update your secure sockets layer (SSL) in the Ombudsman Connect for Business federation. Please ensure that you share any metadata updated after a federated relationship is established.

Section E: additional information

Please use this optional section to provide:

- additional administrator details, if required, and
- any other information relating to your Ombudsman Connect for Business access request.

Section F: once you have completed the access request form

1. Tick the relevant box to show you have read this document and completed all required sections
2. Check that you have provided additional authority to access multiple business entities, if required
3. Send your completed Access request form, along with additional valid authorisation, to firmsdatabaseadmin@financial-ombudsman.org.uk.

Our website offers more information about Ombudsman Connect for Business.

For any queries about completing the access request form, please contact firmsdatabaseadmin@financial-ombudsman.org.uk.