

## Accessing Case Data in Ombudsman Connect for Business

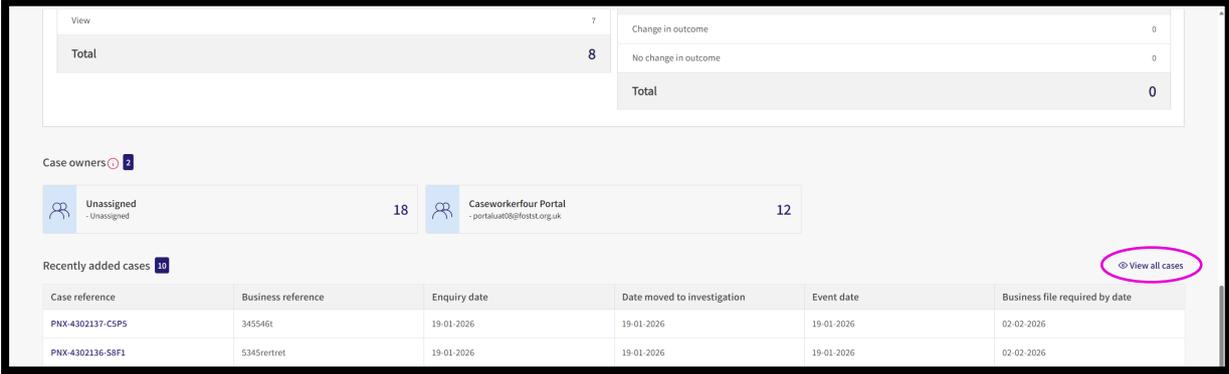
You can now access your case data in real time through Ombudsman Connect for Business. This allows you to immediately challenge anything you think we may have recorded incorrectly, rather than waiting until data publication.

This guide will help you access and review your firm's case data through Ombudsman Connect for Business. It covers:

- how to view and download case data
- how to challenge case data
- a glossary of data points.

### How to view and download case data

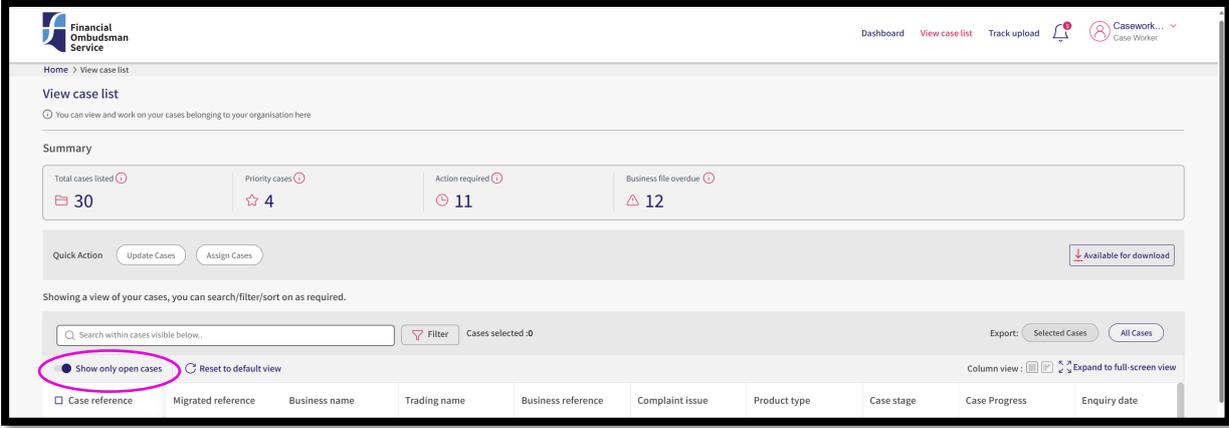
1. Log in to Ombudsman Connect for Business.
2. From the Dashboard page, select 'View all cases'.



The screenshot shows a dashboard with several sections:

- Summary:** A table with columns 'View' and 'Total'. The 'View' column has a value of 7, and the 'Total' column has a value of 8.
- Case owners:** Two cards are shown: 'Unassigned' with 18 cases and 'Caseworkerfour Portal' with 12 cases.
- Recently added cases:** A table with columns: Case reference, Business reference, Enquiry date, Date moved to investigation, Event date, and Business file required by date. Two rows of data are visible, both starting with 'PNX-4302137-'. A pink circle highlights a 'View all cases' link in the top right corner of this section.

3. To only download open cases, select 'Show only open cases'. If you want to see open and closed case information, move this toggle to the left.

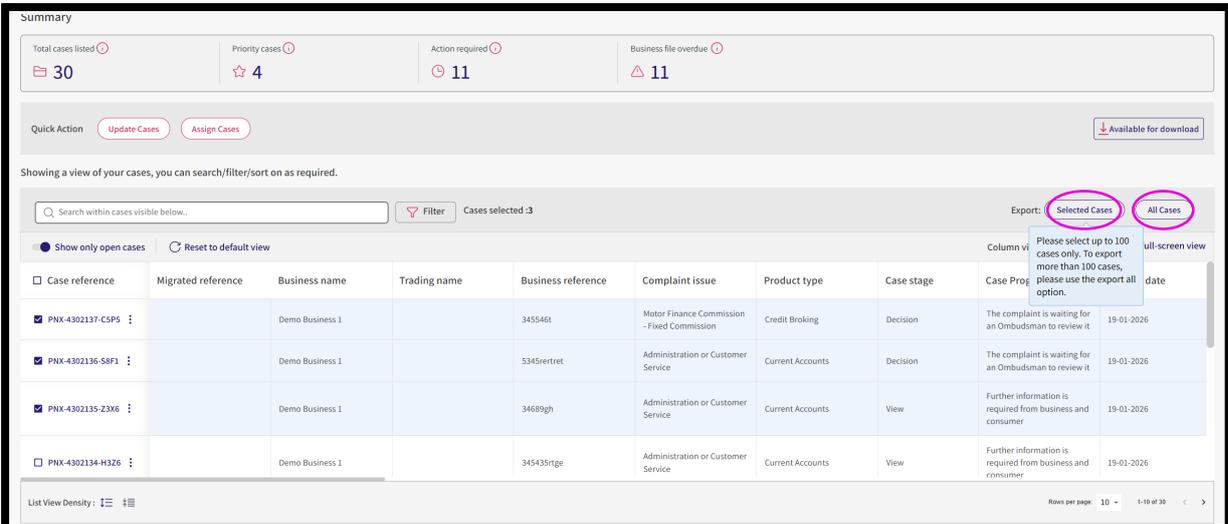


The screenshot shows the 'View case list' page with the following elements:

- Summary:** Four cards showing: 'Total cases listed' (30), 'Priority cases' (4), 'Action required' (11), and 'Business file overdue' (12).
- Quick Action:** Buttons for 'Update Cases', 'Assign Cases', and 'Available for download'.
- Search and Filter:** A search bar and a 'Filter' button.
- View Options:** A radio button labeled 'Show only open cases' is selected and circled in pink. Next to it is a 'Reset to default view' link.
- Export:** Buttons for 'Selected Cases' and 'All Cases'.
- Table Headers:** A row of checkboxes for columns: Case reference, Migrated reference, Business name, Trading name, Business reference, Complaint issue, Product type, Case stage, Case Progress, and Enquiry date.

4. To export all cases, select 'All Cases'.
5. To download a selection of cases, tick the boxes next to the PNX numbers in the far

left column for each of the cases you require. Then go to 'Selected Cases' in the top right. You can only select 100 cases for each download.



Summary

Total cases listed 30 Priority cases 4 Action required 11 Business file overdue 11

Quick Action [Update Cases](#) [Assign Cases](#) [Available for download](#)

Showing a view of your cases, you can search/filter/sort on as required.

Search within cases visible below. [Filter](#) Cases selected: 3

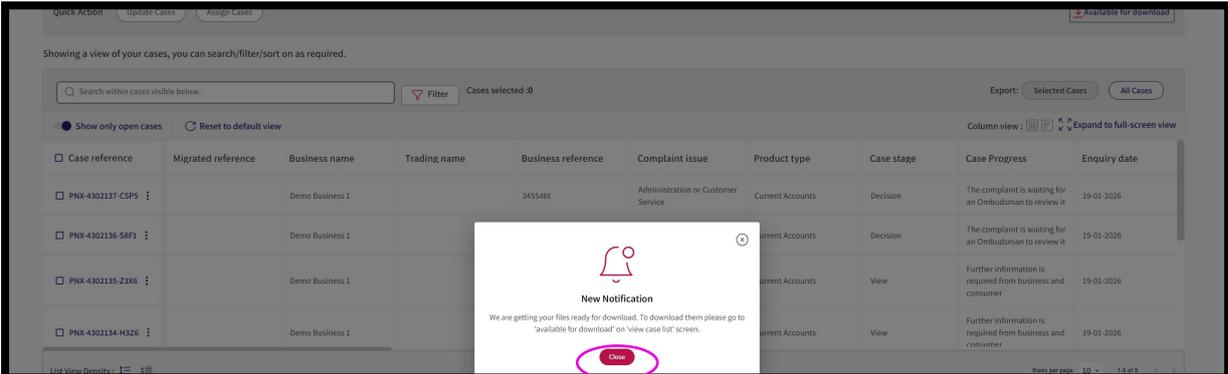
Export: [Selected Cases](#) [All Cases](#)

Column view: [Expand to full-screen view](#)

Case reference	Migrated reference	Business name	Trading name	Business reference	Complaint issue	Product type	Case stage	Case Progress	Enquiry date
<input checked="" type="checkbox"/> PNX-4302137-CSP5		Demo Business 1		345546f	Motor Finance Commission - Fixed Commission	Credit Broking	Decision	The complaint is waiting for an Ombudsman to review it	19-01-2026
<input checked="" type="checkbox"/> PNX-4302136-S8F1		Demo Business 1		5345irtret	Administration or Customer Service	Current Accounts	Decision	The complaint is waiting for an Ombudsman to review it	19-01-2026
<input checked="" type="checkbox"/> PNX-4302135-Z3X6		Demo Business 1		34689gh	Administration or Customer Service	Current Accounts	View	Further information is required from business and consumer	19-01-2026
<input type="checkbox"/> PNX-4302134-H3Z6		Demo Business 1		345435rtge	Administration or Customer Service	Current Accounts	View	Further information is required from business and consumer	19-01-2026

List View Density: [List](#) [Grid](#) Rows per page: 10 1-10 of 30

6. A new notification pop-up will confirm that your files are being prepared, and that you should go to the 'View case list' screen to download them.



Showing a view of your cases, you can search/filter/sort on as required.

Search within cases visible below. [Filter](#) Cases selected: 0

Export: [Selected Cases](#) [All Cases](#)

Column view: [Expand to full-screen view](#)

Case reference	Migrated reference	Business name	Trading name	Business reference	Complaint issue	Product type	Case stage	Case Progress	Enquiry date
<input type="checkbox"/> PNX-4302137-CSP5		Demo Business 1		345546f	Administration or Customer Service	Current Accounts	Decision	The complaint is waiting for an Ombudsman to review it	19-01-2026
<input type="checkbox"/> PNX-4302136-S8F1		Demo Business 1				Current Accounts	Decision	The complaint is waiting for an Ombudsman to review it	19-01-2026
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<input type="checkbox"/> PNX-4302134-H3Z6		Demo Business 1				Current Accounts	View	Further information is required from business and consumer	19-01-2026

List View Density: [List](#) [Grid](#) Rows per page: 10 1-8 of 8

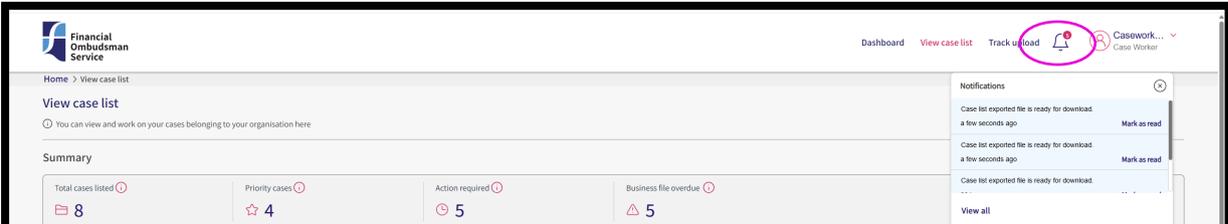


**New Notification**

We are getting your files ready for download. To download them please go to 'available for download' on 'view case list' screens.

[Close](#)

7. On the 'View case list' screen, you will see the bell icon at the top of the page alerting you that you have notifications. Click on this to check notifications that tell you which case list files are ready for you to download.



Financial Ombudsman Service

Dashboard [View case list](#) [Track upload](#) [Case work...](#)

Home > View case list

**View case list**

You can view and work on your cases belonging to your organisation here

Summary

Total cases listed 8 Priority cases 4 Action required 5 Business file overdue 5

**Notifications**

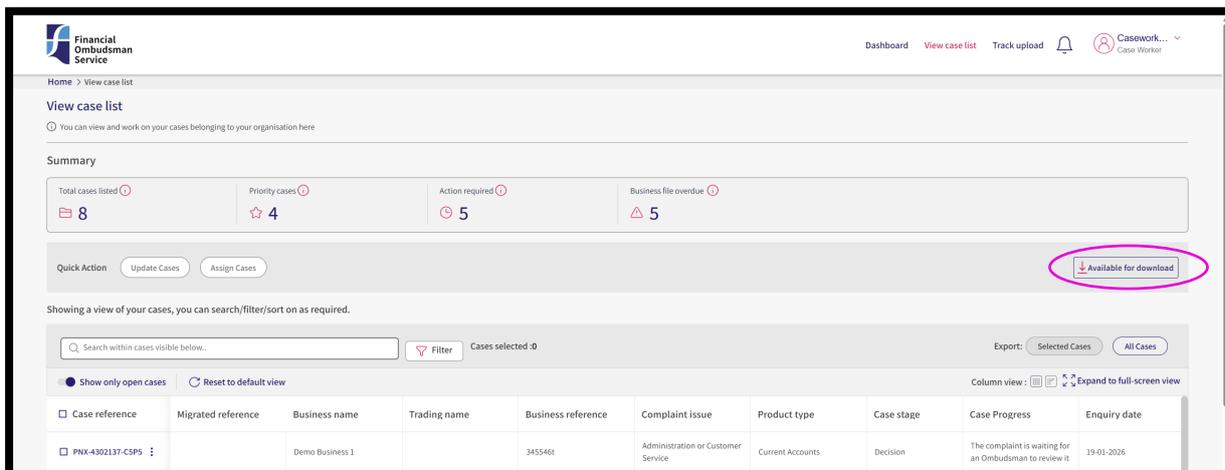
Case list exported file is ready for download a few seconds ago [Mark as read](#)

Case list exported file is ready for download a few seconds ago [Mark as read](#)

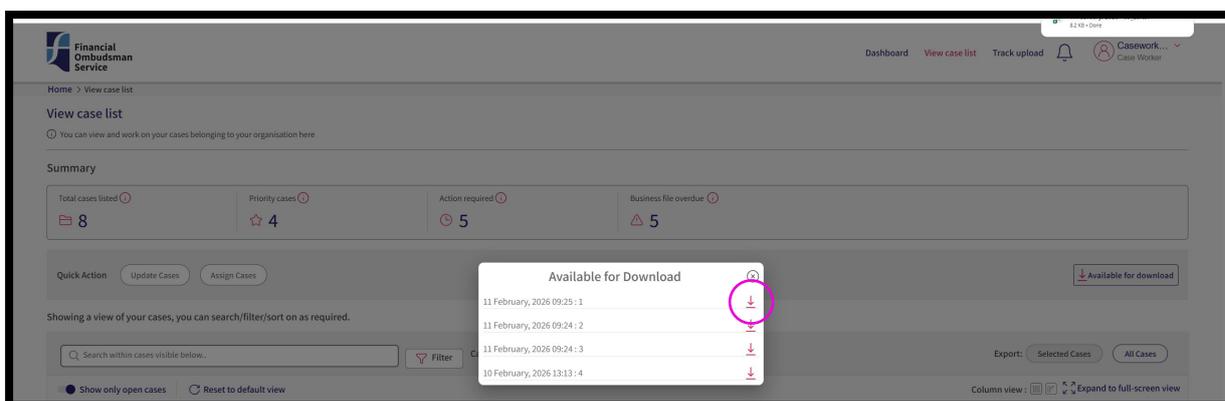
Case list exported file is ready for download a few seconds ago [Mark as read](#)

[View all](#)

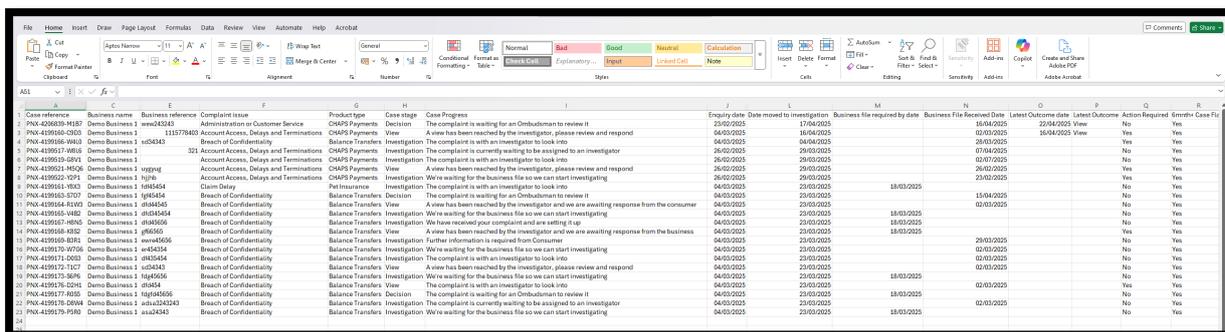
8. Scroll down the page and select 'Available for download'.



9. Select the arrow on the data set you want to download. You will then find the CSV files in your browser's downloads.



10. The data will then be available in CSV format for you to review and filter as you require.



## How to challenge case data

If you identify a case where you think the information has been recorded incorrectly, please contact the relevant investigator by email. They will be able to update the complaint information where necessary.

You have 14 days from the point a complaint becomes chargeable to challenge how we have set it up, for example, if you think we've set the case up against the wrong business.

You will have a second opportunity to challenge case data within 14 days from when we send you the closure correspondence, for example, if you want to query the 'change'/'no change' outcome.

Your firm won't be able to challenge this data later.

## Glossary

This glossary explains each data point in more detail.

Field	Explanation
Case reference	The Financial Ombudsman case reference, which will begin with PNX-
Migrated reference	Our historic case reference (where applicable)
Business name	Your organisation's name
Trading name	Your organisation's trading name (where applicable)
Business reference	Your organisation's complaint reference
Complaint issue	The main complaint issue
Product type	The product the complaint relates to
Case stage	The stage of the complaint – 'investigation', 'view' or 'decision'
Case Progress	The progress of the complaint in our case management system
Enquiry date	The date the complaint was first registered with our service
Professional representative name	The name of the professional representative (where applicable)
Date moved to investigation	The date the complaint moved to investigation and became chargeable
Business file required by date	The deadline for providing your business file
Business File Received Date	The date we received your business file (where applicable)
Latest Outcome date	The date of the most recent outcome
Latest Outcome	The most recent outcome on the complaint
Action Required	If there is an action outstanding on the complaint for you to complete
6mth+ Case Flag	If the case is older than six months in our case management system
Our case owner once allocated	The name of the person handling the complaint at our service
Your Case Owner	The individual handling the case at your firm (where applicable)
Respondent Contact Email Address	The email address for the individual at your firm (where applicable)
Case age	The age of the complaint on our case management system
Event date	The date at which the events of the complaint took place or began
Priority Case flag	Applied where our service feels there's a reason to prioritise the complaint
Final response date	The date of the final response letter (where applicable)
Closure date	The date the complaint closed on our system
Closure outcome	The closure outcome we will publish
No final response progression flag	An alert applied to cases without a final response letter