New South Wales

Personal Injury Commission

Pathway Portal
Legal Representative
User Guide

Contents

User Guide Overview

As a Legal Representative, Pathway Portal is your interface to the Commission's new single digital case management platform called Pathway.

What will the guide cover?

This guide will cover how to:

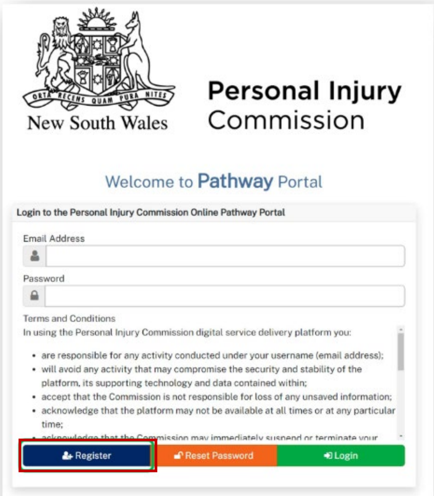
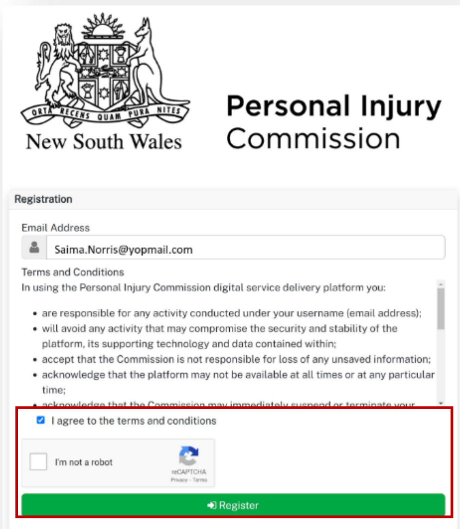
- Get started
- Navigation
- Lodge an application in Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Explain how to lodge a review and further application
- Assign a barrister
- Describe different levels of user access
- Self-Manage Users (Reassign matters, manage contacts and add new contacts)
- Lodge a Legal Representation / Agent Change
- Submissions and other Correspondence
- Lodge an additional document after initiating application or reply

Get started

How to access and register for Pathway Portal

All parties that need to submit, engage with or view matters they are involved in must register to use Pathway Portal.

- If you are a lawyer, you will register as a **Legal Representative**.
- Administrative staff may be added as **Delegates** (see the end of this User Guide for details on how to do this). Delegates do not need to follow the instructions to register as a Legal Representative, but are added by a **Super User** as their Delegate.

Instruction	Page
Access Pathway Portal • You can access Pathway Portal via a browser. • Chrome and Edge are the recommended browsers. • The weblink is found on the Personal Injury Commission website and in the first step below. 1. Click the following link: https://pathwayportal.pi.nsw.gov.au 2. Click **Register**.	
Register your email address 1. Follow the prompts to register your email address. 3. Tick to **agree to the terms and conditions**. 4. Tick **I'm not a robot** and complete the visual **reCAPTCHA** test. 5. Click **Register**. ➢ You will then receive an email to validate your email address.	

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Click Pathway Portal link in email

You will receive an email with a link to validate the email address.

2. Click the **Link** in the email.

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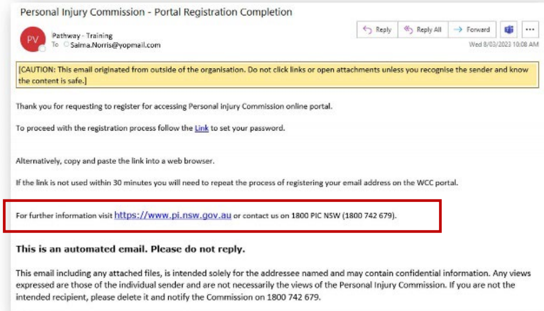

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Update Mobile Number

3. Populate **New Mobile Number** to receive the code and click **Send**.

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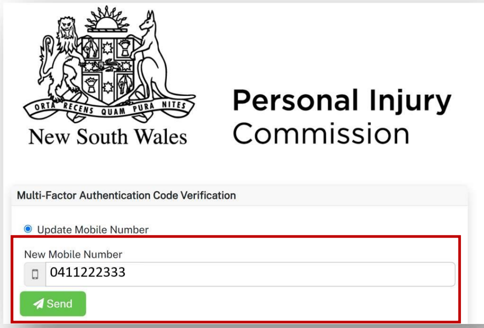

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Type code

4. Type the **code** sent to your mobile and click **Submit**.

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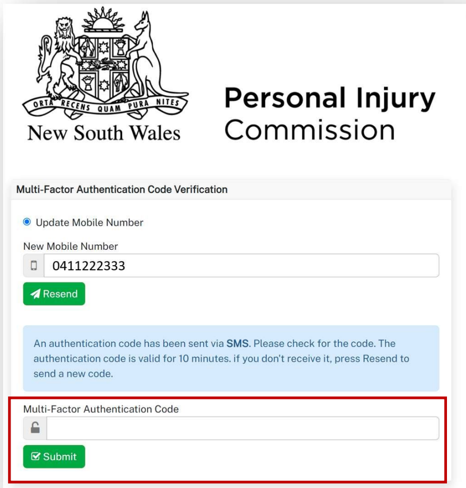

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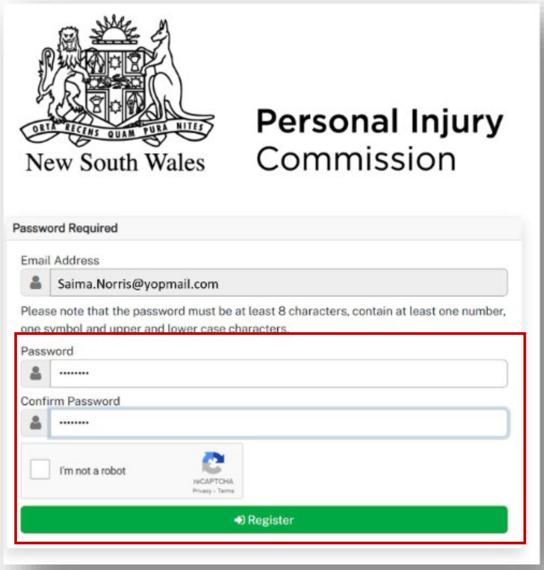
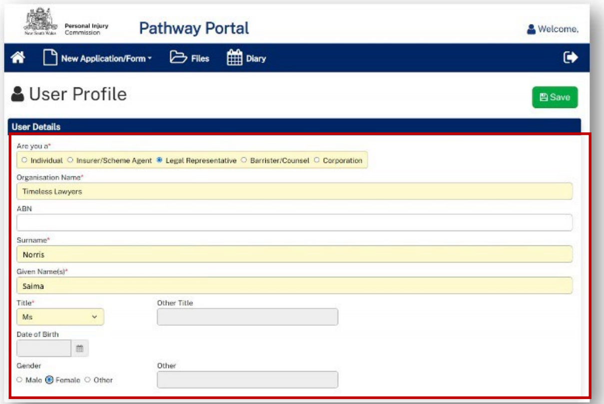
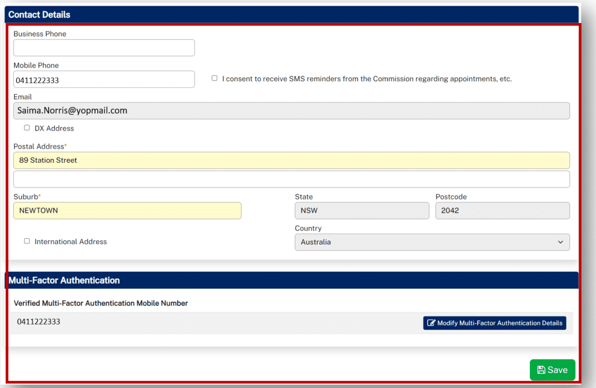
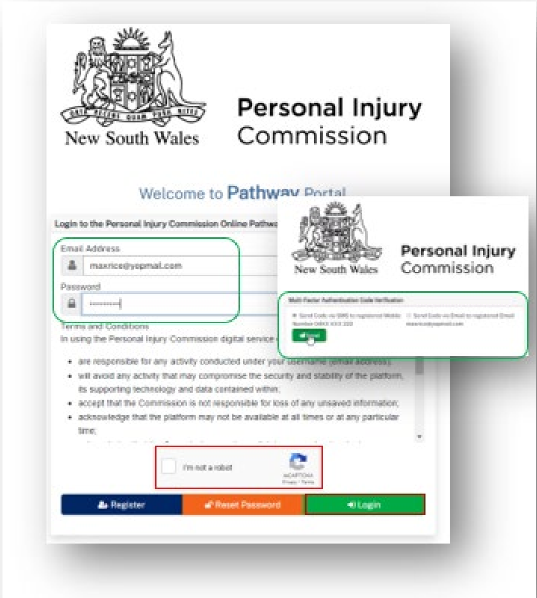
Instruction	Page
Create new Password 5. Enter Password and Confirm Password. 6. Tick **I'm not a robot** and complete the visual **reCAPTCHA** test. 7. Click Register.	
Populate User Profile (top of page) 8. Populate the **User Profile**. 9. Select Legal Representative as user type. **Note**: All yellow fields are mandatory.	
Populate User Profile (bottom of page) 10. Populate **User Profile** (bottom of page). 11. Click **Save.**	

How to Login to Pathway Portal

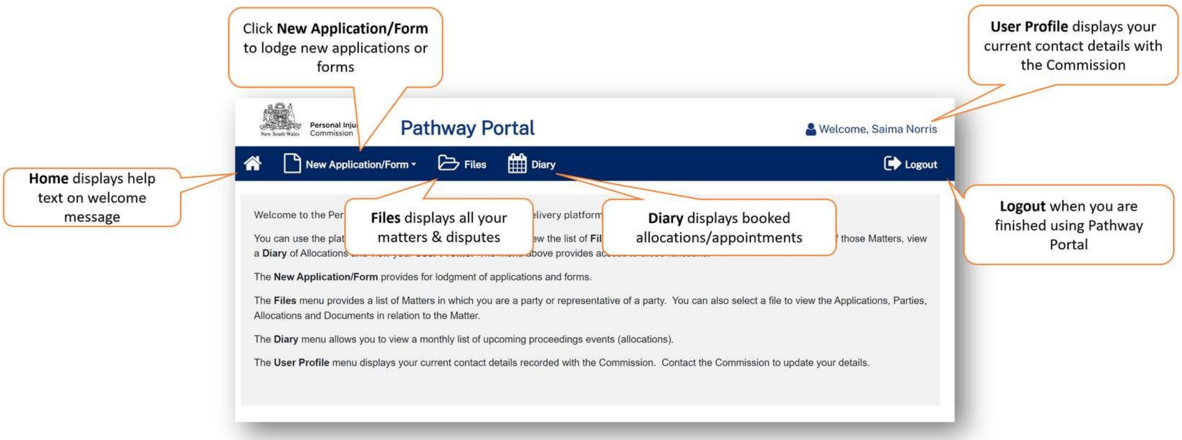
Instruction	Page
12. Click the **Pathway Portal link** on the Personal Injury Commission website. 13. Populate the Email Address and Password. 14. Click **Login**. 15. Tick **I'm not a robot** and complete the visual **reCAPTCHA** test. 16. Select where you would like the **Multi Factor Authentication Code (MFA)** sent (either your mobile or email). 17. Click **Send**.	
18. Populate the **Multi-Factor Authentication Code** from the SMS/email you were sent. 19. Click **Submit**.	

Navigation

Home page

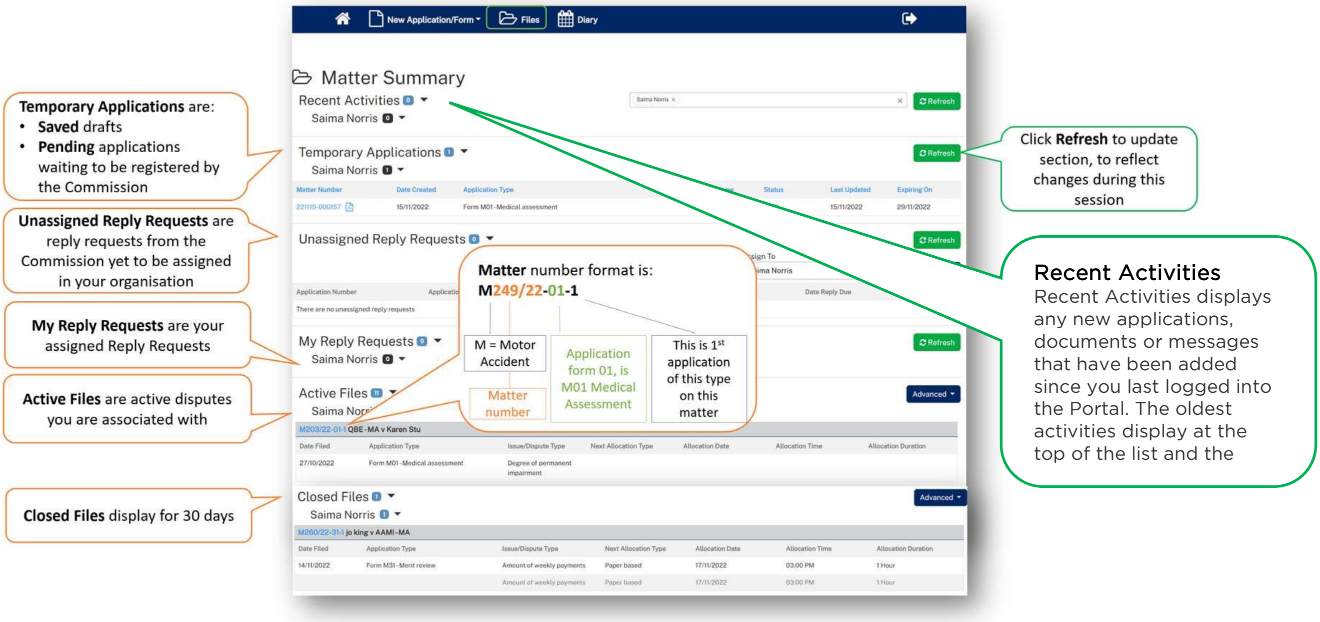
After you login to Pathway Portal the **Home page** displays:

- The **grey information box** in the centre describes what you'll find in each tab in the toolbar along the top.
- The **tabs** always display along the top whatever page you're in, so you can find your way back using the tabs at the top.



Files page

When you click the **Files** tab, the **Files** page displays **all** the matters where you are the party.



Filter Active Files

If you have a high volume of **Active Files**, to search for specific matters you can either:

- use Ctrl+F
- or use **Advanced** button.

<table>
<tr><th>Instruction</th><th>Screen</th></tr>
<tr><td>

Use Ctrl+F

Ctrl+F allows you to search for any text (ie letters or numbers) on the page, eg part of a party name or matter number.

While on the **Files** page:

1. Hold down the **Ctrl** key and press the **F** key on your keyboard simultaneously.

   ➢ A search box displays.

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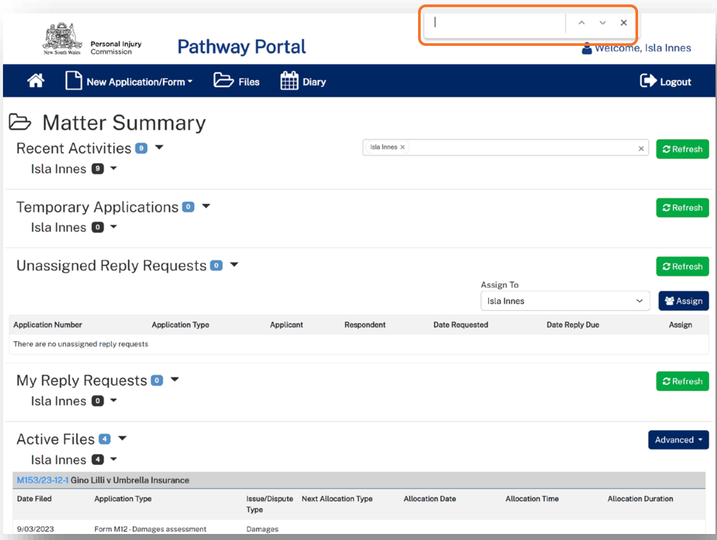

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<tr><td>

2. Type partial party name or matter number you need to search for.
3. System jumps to first occurrence of what you're searching for (if found on the page):
   - ➢ The occurrence jumped to, is highlighted orange
   - ➢ The rest of the occurrences (if any) are highlighted yellow
4. Click the down arrow in the search box to jump to next occurrence (if/as needed).

Party name example

- ➢ In this example, we typed part of the surname of the party, which is **prac** (upper/ lower case doesn't matter with **Ctrl+F**).
- ➢ Can search for a partial name (eg type **poulos** to search for **Theofanopoulos**)

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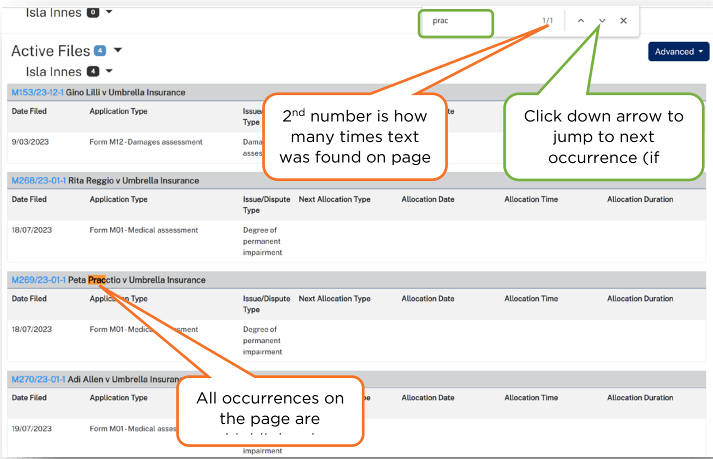

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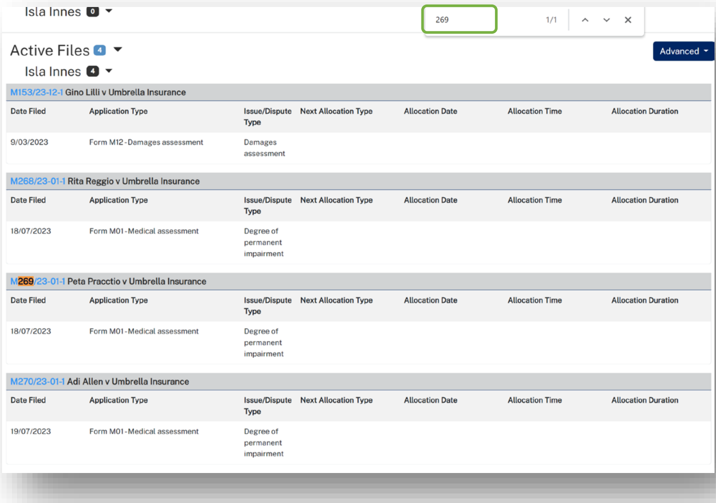
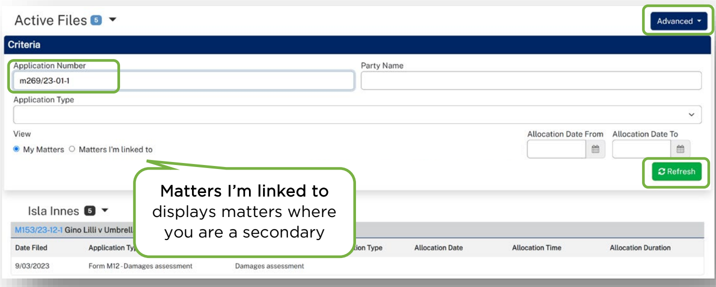
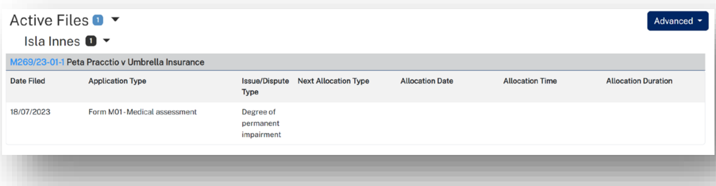
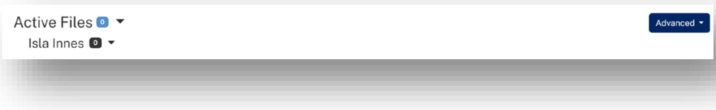
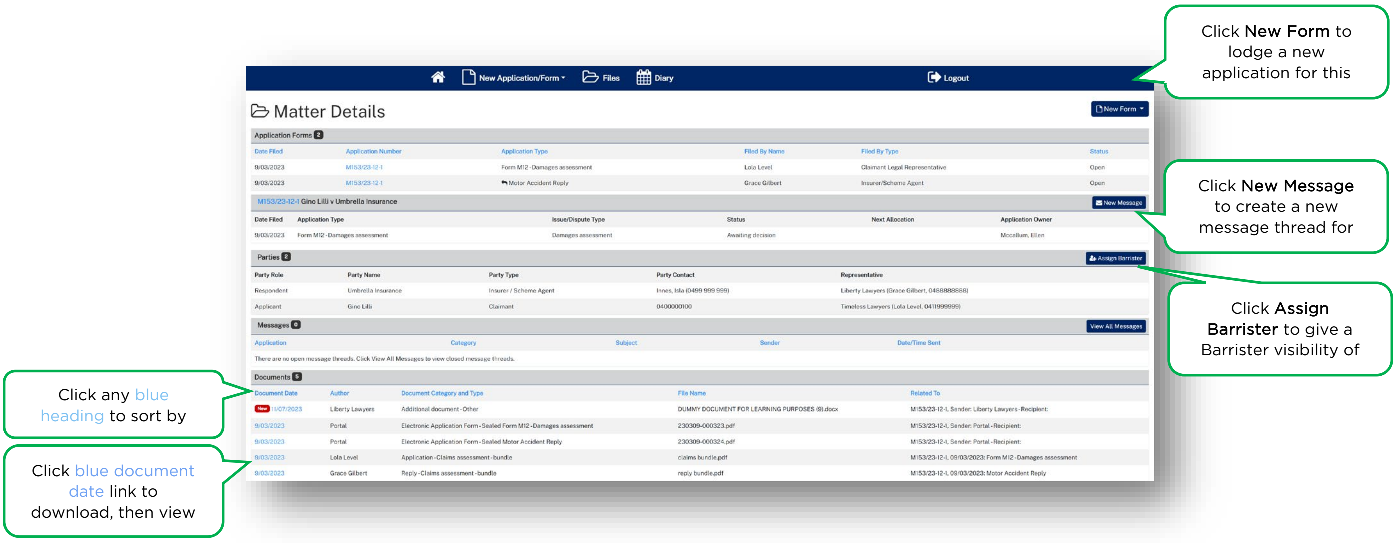
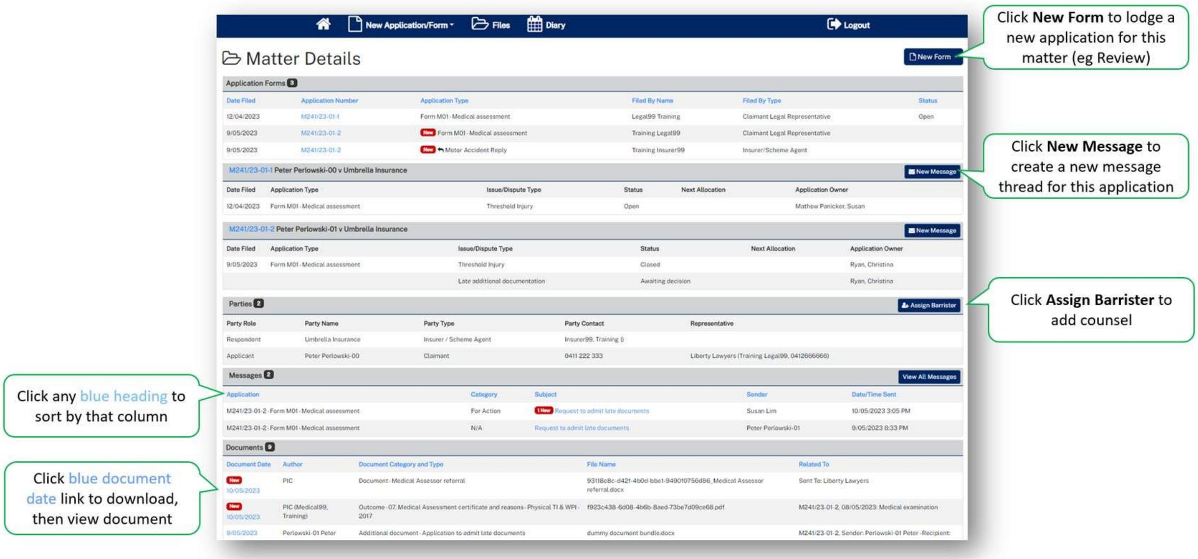
Instruction	Screen
Matter number example ➢ In this example, we typed part of the matter number, ie **269**.	
Use Advanced button The **Advanced** button on the **Files** page allows you to filter the list of Active Files. To filter **Active Files**: 1. Click **Advanced**. 2. Type search text: ➢ For **Application Number**, you must type the <u>full application number</u>, eg m269/23-01-1 ➢ For **Party Name**, you type as: • Firstname (or part of the firstname) • Lastname (or part of the lastname) • Lastname, Firstname (ie Smith, Tom not Tom Smith). 3. Click Refresh.	
➢ The files that match your criteria display.	

Instruction	Screen
No files listed after Advanced search If nothing matched your search criteria, the **Active Files** displays as 0. ***To see <u>all</u> your Active Files:*** 1. Click Advanced. 2. Delete the criteria you entered. 3. Click **Refresh**.	

Matter Details

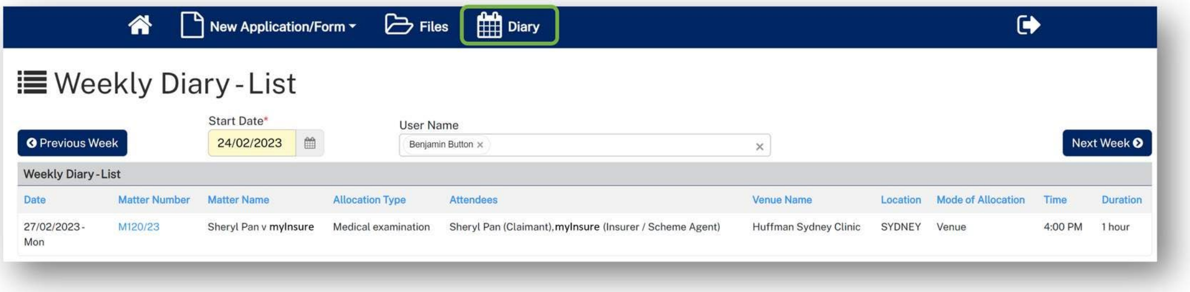
When you click on a blue matter number link anywhere in the **Files** page the **Matter Details** display.





Diary

When you click the **Diary** tab, the **Diary** page lists all upcoming allocations/appointments.



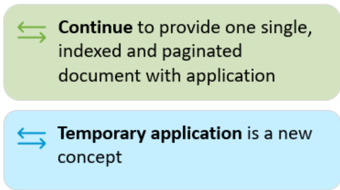
Lodge a new application

Overview

This section will walk through how to lodge a new application in Pathway Portal.

Pathway Portal guides you through the information you are required to enter based on the form and dispute types. The online application forms have a series of pages to complete and common pages are:

- Notice to parties
- Claim Details
- Claimant Details and Legal Representative details
- Insurer Details and Legal Representative details
- Supporting Documents (help text varies per applicat
- Certification and Signature.



There will also be a page to capture details of the dispute/injury/treatment. The questions on this page will vary depending on the form and disputes selected. There will be multiple pages if multiple disputes have been selected.

Lodging other forms will follow the same basic steps as above. The pages and questions will prompt you to provide the necessary information.

Any fields that are yellow are mandatory and must be completed.

If you read the page carefully and provide what is being asked, you will be able to navigate easily through any application form.

What application forms can be submitted?

Forms and schemes

- Forms M01 – M41 are for 2017 Scheme
- Forms M51- M64 are for the 1999 Scheme.

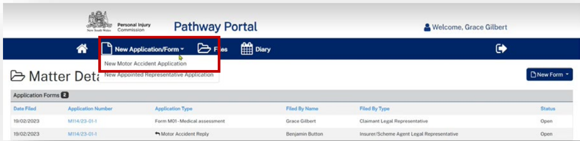
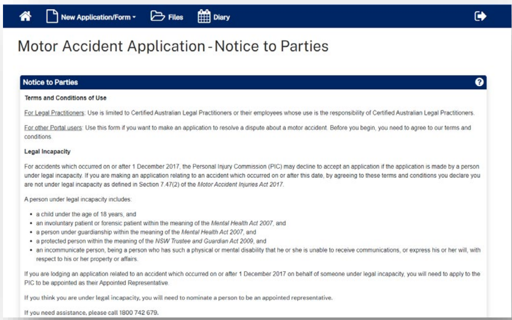
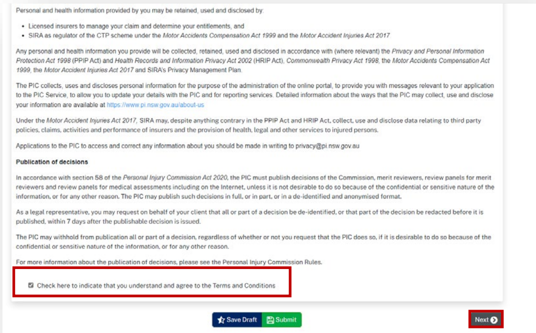
Application forms that can be submitted by parties via Pathway Portal are:

Code	Form name	Scheme
M01	Medical assessment	2017
M02	Review of a medical assessment	2017
M03	Further medical assessment	2017
M11	Exemption	2017
M12	Damages assessment	2017
M13	Further Damages assessment	2017
M14	Damages settlement approval	2017
M41	Application for appointed representative	2017
M21	Miscellaneous claims assessment	2017
M31	Merit review	2017
M32	Review of a Merit review	2017
M51	Medical assessment	1999
M52	Review of a medical assessment	1999
M53	Further medical assessment	1999
M61	Exemption	1999
M62	General Assessment	1999
M63	Further General Assessment	1999
M64	Special Assessment	1999
P01	Application to Lodge Additional Documents	
P02	Notice of Ceasing to Act	
P03	Notice of Change of Legal Representatives	
P04	Notice of Representation	
P05	Direction for Production	
P06	Notice of Discontinuance	

Note: The Motor Accident Reply form is also submitted via Pathway Portal.

How to lodge a new application

In the following example Grace Gilbert who is the Legal Representative for the Claimant is lodging a New Motor Accident Application on behalf of the Claimant.

Instruction	Page
New Application Form 20. Click on the New Application Form and select New Motor Accident Application. ➢ The Motor Accident Application – Notice to Parties page displays.	
Motor Accident Application – Notice to Parties 21. Click the **check box** to indicate that you understand and agree to the **Terms and Conditions**. 22. Click **Next**. ➢ The Motor Accident Application - Claim Details page displays.	 

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Motor Accident Application - Claim Details

23. Complete the details as follows:

- **Date of Accident** – Type in the date or select the date from the calendar.

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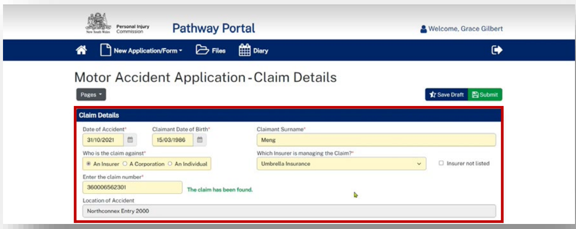

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Note: The Date of Accident determines the Scheme and the application forms available for selection.

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- **Claimant Date of Birth** – Type in the date or select the date from the calendar.
- **Claimant Surname** – Type in the last name of the Claimant.
- **Who is the claim against?** - Select either: An Insurer, A Corporation or An Individual.

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Note: Depending on who the claim is against will determine the additional fields that you are required to complete.

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- **Which Insurer is managing the Claim?** – Select the Insurer from the drop-down menu. (If Insurer has been selected in previous question).
- **Insurer not listed** - If the Insurer is not listed, tick this box and enter the Insurer's details on the subsequent page.
- **Enter the claim number** – Type in the claim number.
- **Location of Accident** – If it is a valid claim number the accident location will automatically be populated. If there is no match, you can manually type in the location.

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Matching the claim number to the Universal Claims Database

- The claim number is checked against the **Universal Claims Database (UCD)** and confirms if it is a valid claim number, it will show The claim has been found in green.
- If the Claim has not been found, it will display in red. You should check the Claim number again and make sure that it is correct.
- If you are satisfied that it is correct, there will be another check box that you can tick **Proceed without matched claim**.

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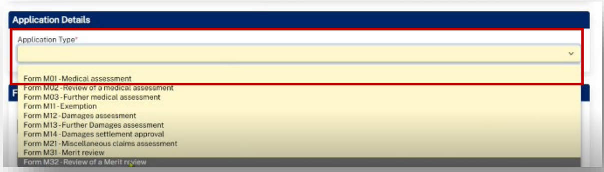
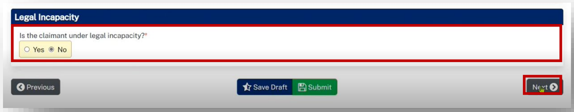
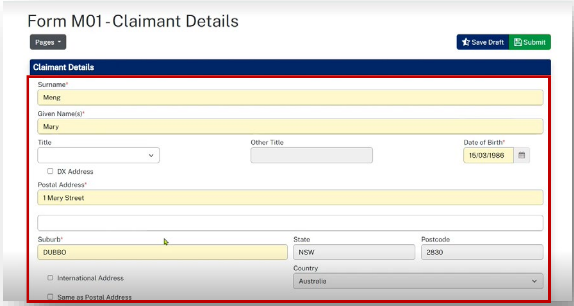
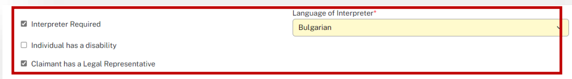
Instruction	Page
Application Details 24. Complete the following: • **Application Type – Select** from the drop-down menu. ➢ The **Matters in Dispute** page displays.	
Matters in Dispute 25. Select the relevant disputes.	
Filed By 26. **Filed by Name –** Type in your name/name of the Legal Representative. 27. **Filed by Party –** Select Claimant Legal Representative.	
Legal Incapacity 28. Is the claimant under legal incapacity? – Select No to continue. 29. Click **Next**. ➢ The **Claimant Details** page displays.	
Note: If you selected Yes to the first question - Is the Claimant under legal incapacity? and then selected No to – Has the Commission appointed to an Appointed Representative previously? You won't be able to continue with the application because you need to lodge an Appointed Representative application first.	

Instruction	Page
Claimant Details 30. Complete the **Claimant Details** as follows: • **Surname** – Type in the Claimant's last name. • **Given Name(s)** – Type in the Claimant's first and second names. • **Title** – Select the Title from the drop-down menu. • **Date of Birth** – Type in the Claimant's Date of Birth or select the date from the calendar. • **DX Address** – Check the box if the address is a DX address. • **Address** – Type in the relevant fields. • **International Address** – Tick if applicable. • **Same as Postal Address** - Tick if the Residential address is the same as the Postal Address. • **Teleconference Phone Number** – Type in the Claimant's contact phone number. • **Mobile Phone** – Type in the Claimant's contact mobile phone number. • **SMS Tick box** – Untick if the Claimant does not want to receive SMS reminders of appointments. • **Email** – Type in the Claimant's email address.	
Interpreter 31. Complete the details as follows: • **Interpreter Required** – Select if the Claimant requires an Interpreter. • **Language of Interpreter** – Select the language from the drop-down menu. • Individual has a disability – Select if applicable and add notes. • Claimant has a Legal Representative – Select if applicable	

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Claimant Legal Representative Details

32. Complete the details as follows:

- **Existing Representative** – Select from the drop-down menu if available.
- **Firm or Organisation** – If you are representing the Claimant, these details should auto populate. Otherwise populate if required.
- Correspondence and documents to be sent to or served at address of representative – Select if applicable.
- **DX Address** – Select if applicable.
- **Postal Address** – Select if the same as the Postal address.

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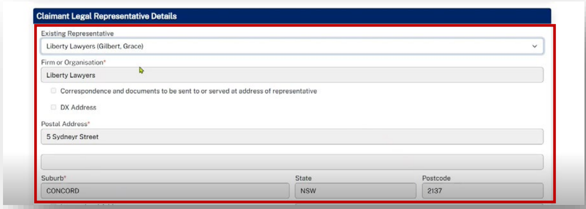

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- Check the **Contact Name** that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.

- If you are completing this application on behalf of the lawyer who is managing the application, you will need to enter their name as the Contact Name.

Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.

- **Contact Surname** – Populate the Primary contact's surname.
- **Contact Given Name (s)** – Populate the Primary contact's given name
- **Contact Teleconference Number** – Type in the best contact number for Teleconference.
- **Contact Phone** – Type in any other contact numbers.

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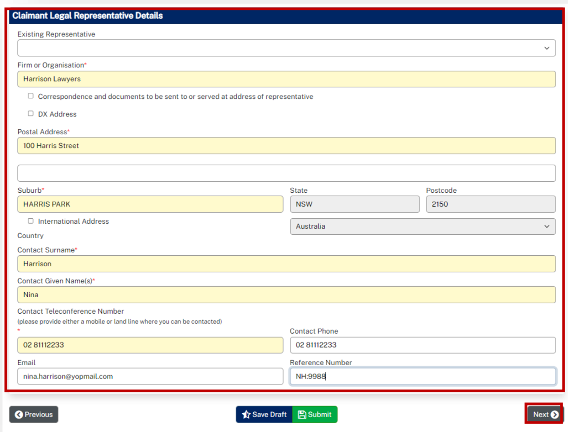

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- **Email –** Populate the Primary contact's email address.
- **Reference Number –** Populate as required.

33. Click **Next**.

➢ The **Insurer Details** page displays.

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Form M01- Insurer Details

34. These details will auto populate because the Insurer was selected on the first page.

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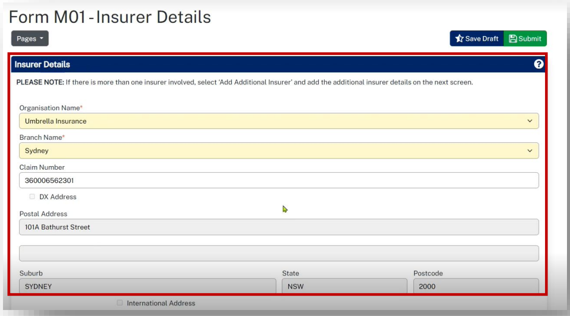

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Insurer Details continued

35. Complete the details as follows:

- Scroll down to add the **Contact details** if there is a particular contact for this Insurer and claim.
- **Tick the box** if the Insurer has a Legal Representative.

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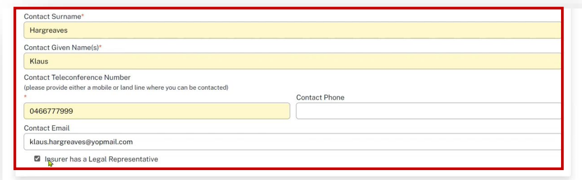

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- Add in the **Insurer Legal Representative Details** name and address details.

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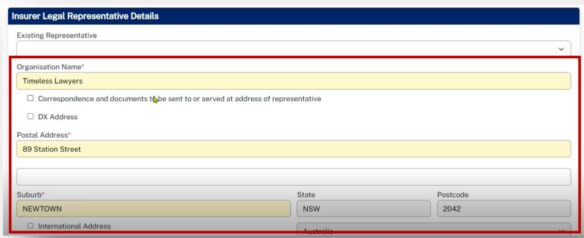

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- Add in the Insurer Legal Representative contact details.

Note: You can **Add Additional Insurer** if there is more than one Insurer involved in this Matter.

36. Click **Next**.

➢ The **Degree of Permanent Impairment** page displays in this example. The content and questions

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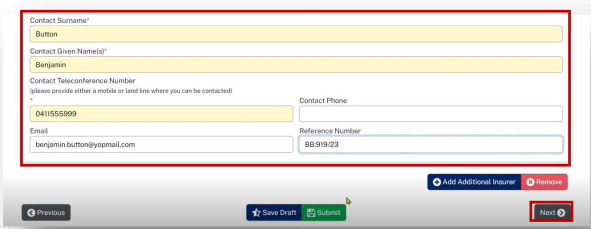

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on the next page will vary depending on the application type and the dispute (s) selected earlier.	

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Degree of Permanent Impairment

Dispute Referral

37. Select **Yes/No** to the questions.

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Injury 1

38. Complete the details as follows:

- Add the details of **Injury 1**.
- Click **Add Injury** to add another injury.
- Click **Remove injury** to remove an injury from the page.

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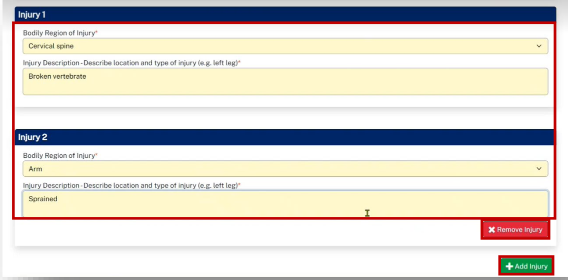

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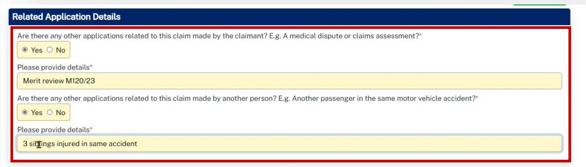
Related Application Details

39. Add in any Related Application Details if applicable.

</td><td>



</td></tr>
<tr><td>

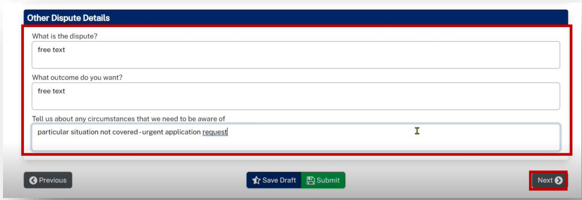
Other Dispute Details

40. Add in any **Other Dispute Details** we need to be aware of.

41. Click **Next**.

➢ The **Supporting Documents** page displays.

</td><td>



</td></tr>
</table>

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

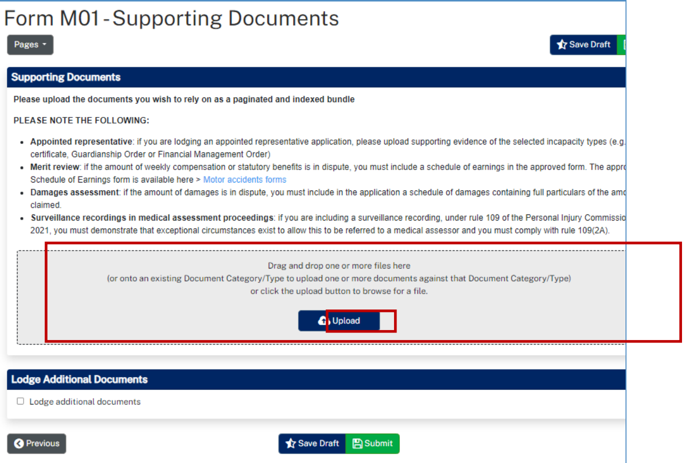
Supporting Documents

The **Supporting Documents** page provides information about what you need to lodge for certain application types.

Note: Supporting evidence is to be submitted as a single indexed and paginated bundle & should not exceed 500 pages on certain initiating applications. (Refer to PIC Rule 67)

42. Click **Upload** or drag and drop the documents onto the page.

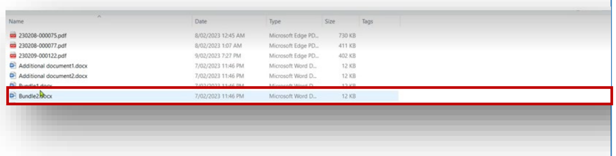
</td><td>



</td></tr>
<tr><td>

43. Select the **document** and click **Open**.

</td><td>



</td></tr>
<tr><td>

Note: If the supporting document exceeds 500 pages a warning message will be displayed.

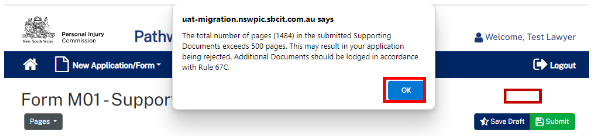
Continuing to submit may result in the application being rejected by the Commission.

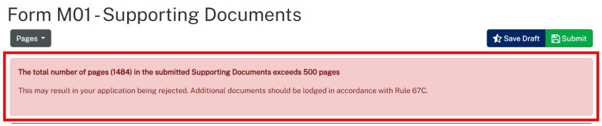
To correct, re-upload supporting document under 500 pages.

Dispute types excluded from the 500-page limit are:

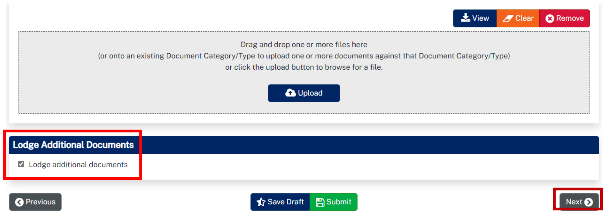
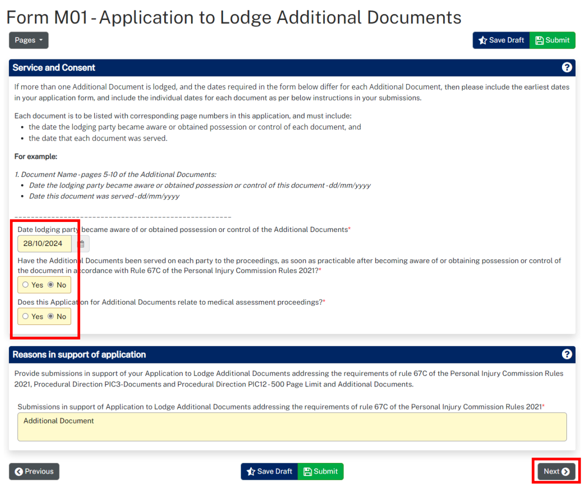
- Medical reviews and appeals
- Merit reviews and merit review panels
- Settlement approvals
- Presidential appeals
- Expedited assessments
- Certain work injury damages disputes

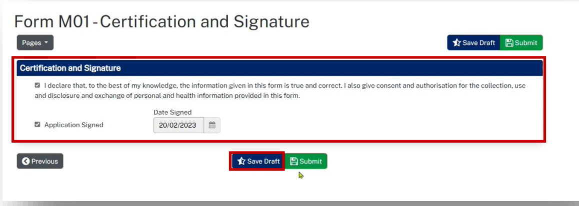
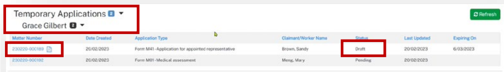
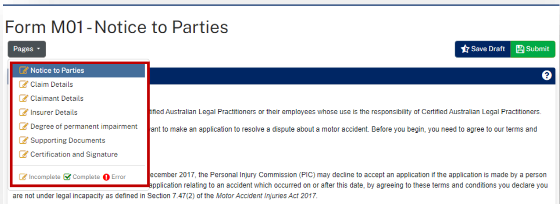
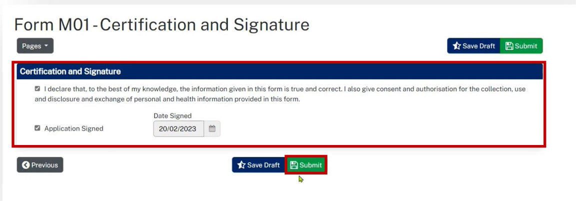
</td><td>



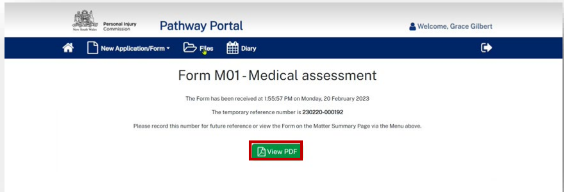


</td></tr>
</table>

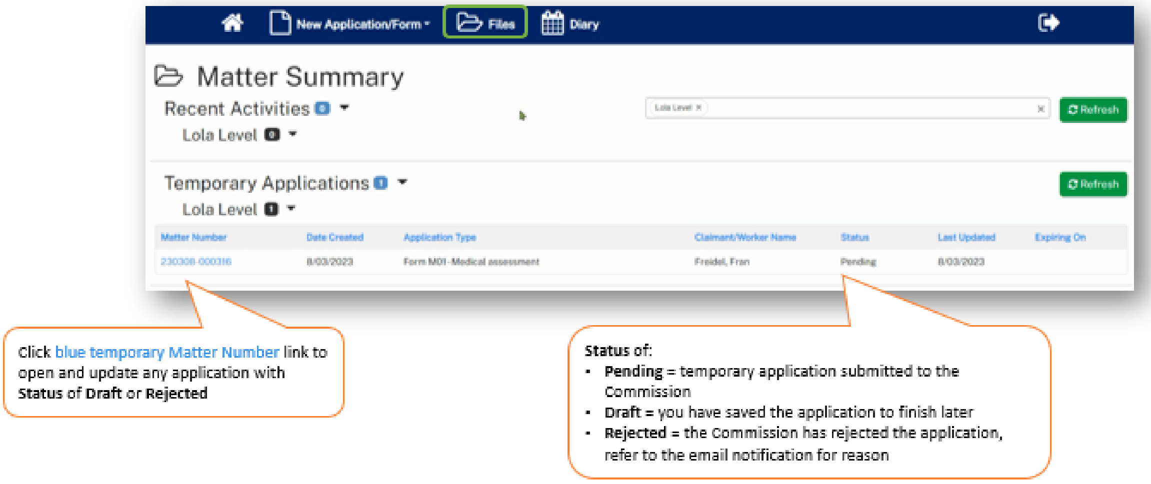
What are the document requirements?	See Appendix A – Document requirements for information on the acceptable file types and document requirements.
44. Add in the Document Details: • **Document Type** – Select from the drop-down menu. If a bundle is uploaded, select the application type – bundle as the document type, e.g., Medical dispute - bundle. • **Author** – Type in your name. • **Date of Document** – Type in the date of upload or select the date from the calendar.	
When you need to add more than 500 pages of supporting documents to your initiating application 45. Tick Lodge Additional Documents 46. Click **Next**. The Service and Consent page displays.	
Lodge Additional Documents 47. Provide answers to the Service and Consent questions. **Note**: Refer to the help text on the screen if your bundle contains multiple documents with varying dates. **Note**: If the additional documents relate to medical proceedings, evidence of consent should be attached on the supporting documents page. 48. Click **Next**. ➢ The Supporting Documents page displays 49. Upload your additional documents. 50. Add in the Document Details. 51. Click **Next**.	

Instruction	Page
Form M01 – Certification and Signature You can now either **Save Draft** – see **Save Draft** below or **Submit** if the application is good to go see Submit below. ***Save Draft*** 52. You can **Save Draft** so that the application can be reviewed before it is signed and submitted. • The draft application can be viewed in **Temporary Applications** with a status of **Draft.** • Click the **PDF icon** to view the draft. • Once the draft has been updated, you can submit the application by clicking on the **Matter Number** in **Temporary Applications**.	 
• **Check/update** any details by navigating to the **relevant page**. • Once you are ready to submit the document, navigate to the **Certification and Signature page** and submit the document as shown below.	
Submit 53. Confirm your declaration, signature and date and click **Submit**.	

Once you have submitted the application, it will go to the **Commission Registry** as a **Temporary Application**, and it will appear on your **Temporary Applications List**.

Instruction	Page
Form M01 - Medical Assessment 54. Click **View PDF** to view and download the application.	
Temporary Applications 55. Go to **Files** and **Temporary Applications** to see the temporary application. You can download the PDF by clicking the blue temporary application link. **Note:** that the status is now **Pending**. If you are unable to see the application, click **Refresh**. You will receive an email to advise that a temporary application has been submitted.	

Temporary Applications

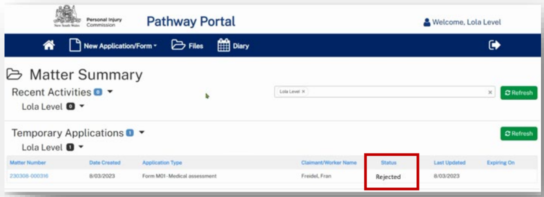
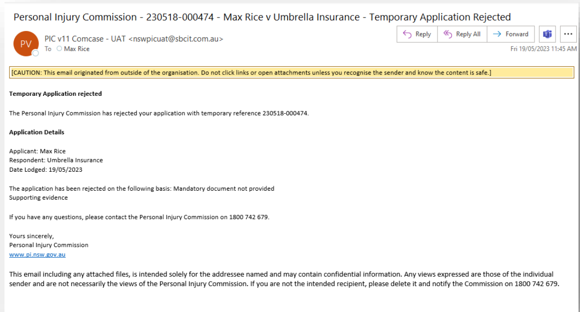
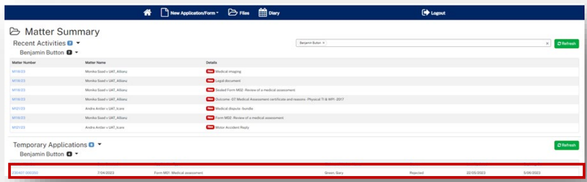
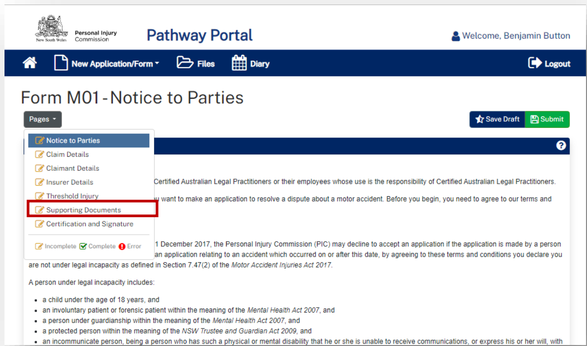


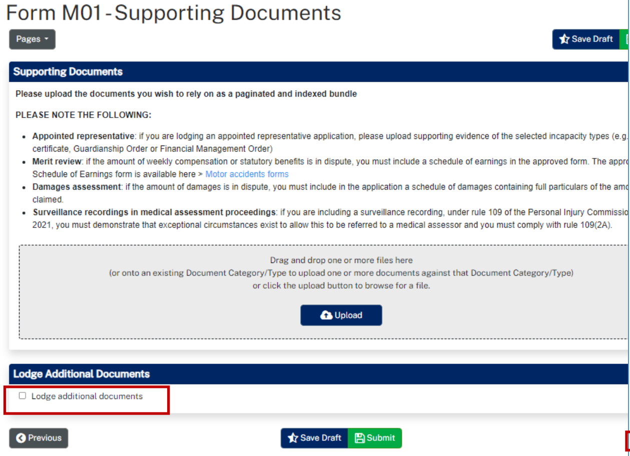
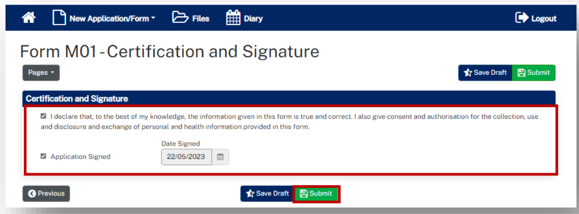
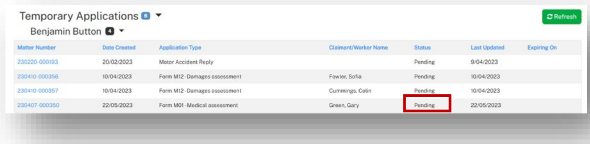
- Only the filing party will be able to see the temporary application in Pathway Portal.
- When the application has been registered by the Commission it will then be shared with the respondent who needs to lodge a reply.

What happens next?

- The next step of the process is that the Commission will review and check the application and register it.
- The application is no longer temporary, it has now been converted to a full matter with a full matter number
- The Registry team will send you an email
- The application will now display in the **Recent Activities** section and **Active Files**.

How to resubmit a rejected temporary application

Instruction	Page
Notification of rejected temporary application 56. If the Commission rejects a temporary application, you will receive an email notification with the reason. • In the **Files** tab the **Temporary Application** will have a **Status** of **Rejected**	
To resubmit rejected application: 57. Complete the following: 58. Refer to the email notification to understand the rejection reason.	
59. In the **Files** tab, click the blue temporary Matter Number link of the rejected matter. This reopens the application.	
60. Navigate to **Supporting Documents** and make the required changes to the form (if this was the reason for rejection).	

Instruction	Page
61. Click **Upload** to upload the supporting document bundle (if this was the reason for rejection) and click **Next**. **Note**: If your application was rejected for having supporting documents over 500 pages, 62. Remove the document 63. Split the document offline 64. Re-upload the first bundle (up to 500 pages) 65. Select the 'Lodge Additional Documents' checkbox	
66. Once changes are made, sign and date the application on the last page and click **Submit**.	
➢ The **Status** updates to **Pending** in the Temporary Application list). **Note:** If the Commission accepts and registers the resubmitted application, the **Filed** date will be the date the application was resubmitted.	

Replies

How to complete a Reply – Respondent

A reply request arrives as **Unassigned** in Pathway Portal and must be assigned to a person (to ensure only one person is completing the reply).

Once a **Reply Request** is assigned, it is only visible by that person in their **My Reply Requests** to action.

When a reply is completed, it starts as a temporary application which:

- Displays in the **Temporary Applications** section of Pathway Portal
- Has a temporary number.

Assigning a reply request to someone is a new concept

Reply is a **Temporary application** until reviewed then registered by the Commission

Reply Request Notification

When a reply has been requested the respondent (or their legal representative) receives an email notification to advise that an application has been received by the Commission, the date the reply is due and to access the Pathway Portal to view the application and submit the reply.

Personal Injury Commission - F-M166/23-03-1 - Betty Kish v Umbrella Insurance - Request Reply

PV

PIC v11 Comcase - Training <nswpictraining@sbcit.com.au>

To Ingram, Ian

[CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.]

Dear Umbrella Insurance,

Claimant name: Betty Kish

Application Number: F-M166/23-03-1

Insurer claim number: BK123

Insurer Representative Reference:

Claimant Representative Reference:

The Personal Injury Commission received an application from Betty Kish on 08/04/2023

Your Reply is due by 29 April 2023

Please access the application via the Personal Injury Commission online portal. For further information about the online portal, please see the Commission website.

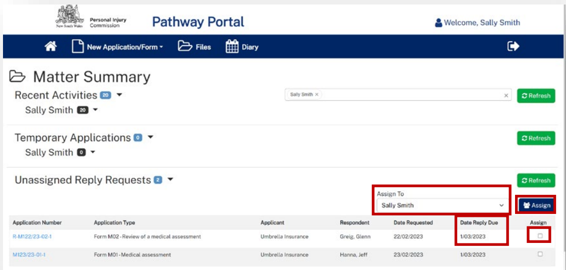
For privacy and security reasons, the Commission does not include links in email communications.

Yours sincerely,

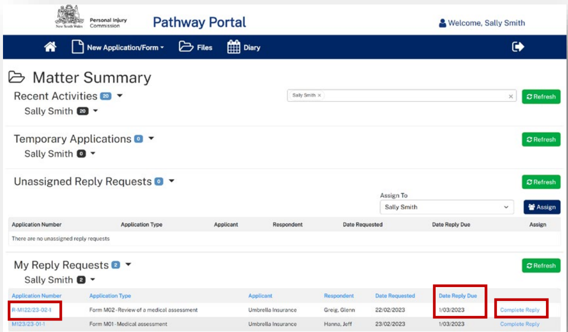
Personal Injury Commission

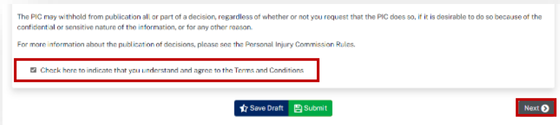
www.pi.nsw.gov.au

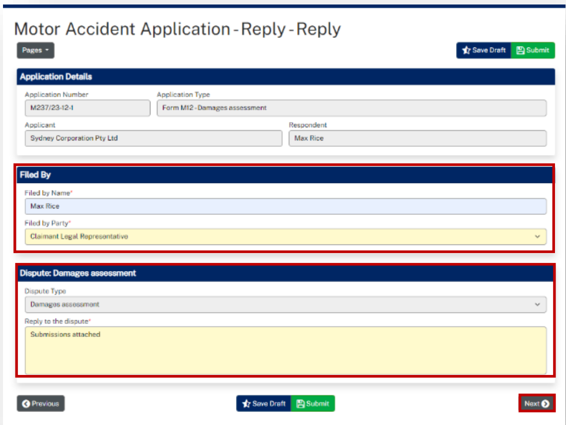
How to Assign the Reply Request

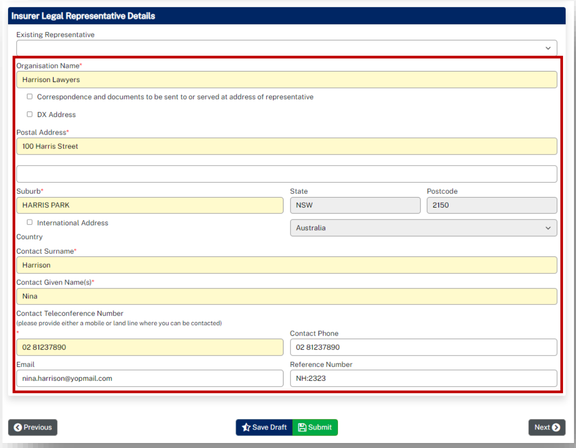
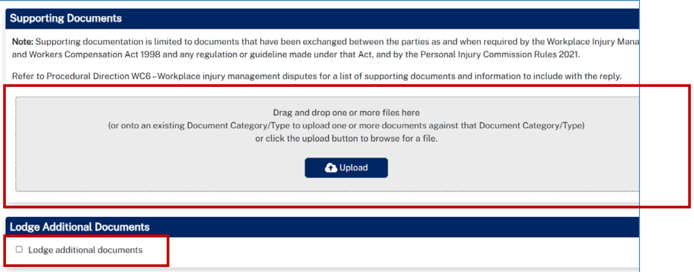
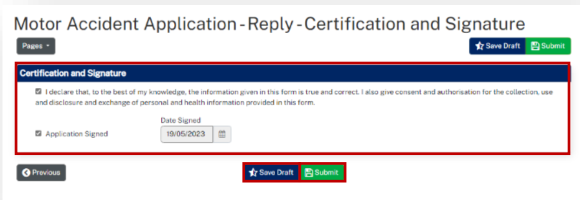
Instruction	Page
Unassigned Reply Requests must be assigned to someone in your firm. 1. To assign a **Reply Request**, complete the following: • Tick **Assign** box • Select a **User's name** from the **Assign To** drop down menu • Click **Assign**. **Note:** Be mindful of the **Date Reply Due.**	

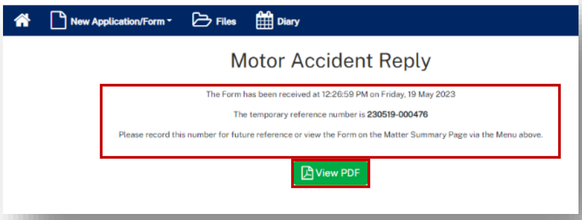
How to complete a Reply

Instruction	Page
My Reply Requests are your assigned **Reply Requests** 67. To respond to the reply request, complete the following: • Click the blue application number link and review the Matter Details, including the parties, application form and supporting documents. • When ready, click **Complete Reply** to reply from either the **Matter Summary** page or the **Matter Details** page. 68. This will generate the **Motor Accident Application – Reply** form which you need to complete and submit. **Note:** Be mindful of the **Date Reply Due**	

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>69. Complete the Notice to Parties – check that you understand and agree to the terms and conditions and click Next.</td><td>
</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>70. Enter the Filed by Name, Filed by Party, and the reply to the dispute. If more than one dispute is listed, enter a reply to each dispute.

71. Click Next.</td><td>
</td></tr>
</table>

Instruction	Page
72. Complete the **Claimant Details** page and **Legal Representative** page / Insurer Details page and Legal Representative page. 73. Check the **Contact Name** that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details. If you are completing the Reply on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name. **Note:** This is essential, so that the correct person from your firm is added as the Primary contact for this matter.	
74. Upload **supporting documents** for the Reply, complete the **Document Details** and click **Next**. **Note:** Supporting documents must be submitted as a single indexed and paginated bundle and should not exceed 500 pages	
75. **Sign and date** the application – **Submit** if ready or **Save Draft** and have someone else review the reply before it is submitted.	

76. Here you can see confirmation that the Reply has been submitted.	

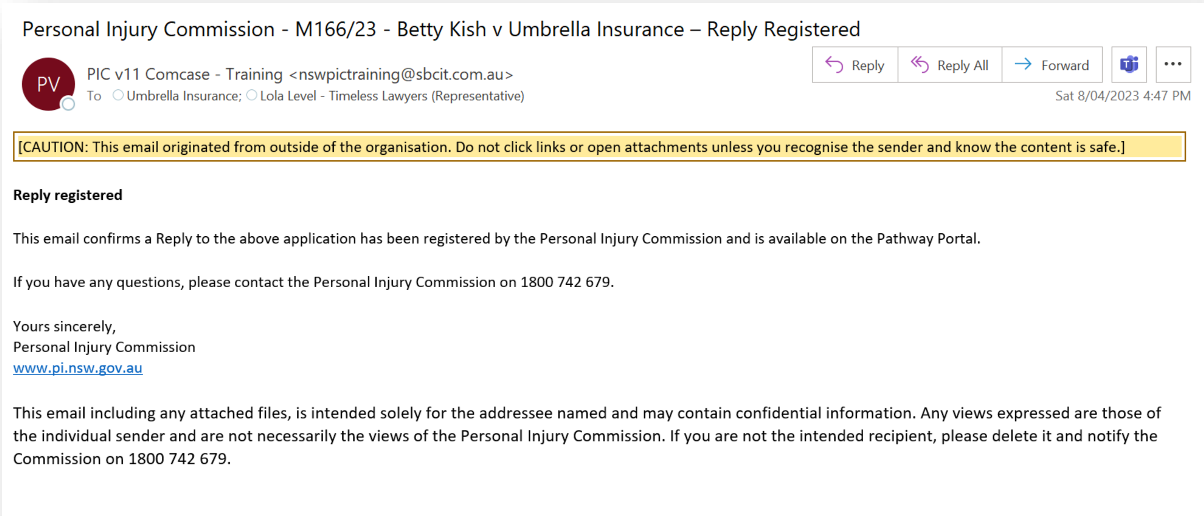
How to view the Reply

Reply registered email notification

When a reply is submitted, it will be reviewed and registered or rejected if it not compliant.

When a reply has been registered the Commission Registry team send an acceptance email to the:

- Applicant's Legal Representative
- Respondent's Legal Representative or
- Unrepresented parties.



Personal Injury Commission - M166/23 - Betty Kish v Umbrella Insurance – Reply Registered

PV PIC v11 Comcase - Training <nswpictraining@sbcit.com.au>

To Umbrella Insurance; Lola Level - Timeless Lawyers (Representative)

Reply Reply All Forward

Sat 8/04/2023 4:47 PM

[CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.]

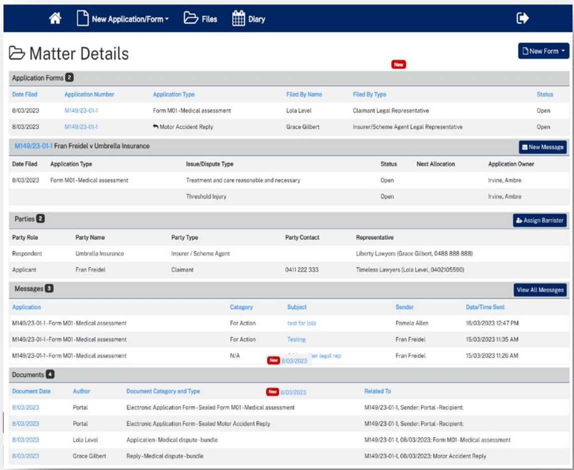
Reply registered

This email confirms a Reply to the above application has been registered by the Personal Injury Commission and is available on the Pathway Portal.

If you have any questions, please contact the Personal Injury Commission on 1800 742 679.

Yours sincerely,
Personal Injury Commission
www.pi.nsw.gov.au

This email including any attached files, is intended solely for the addressee named and may contain confidential information. Any views expressed are those of the individual sender and are not necessarily the views of the Personal Injury Commission. If you are not the intended recipient, please delete it and notify the Commission on 1800 742 679.

Instruction	Page
View the Reply The **Documents** section lists the: • Sealed reply form • Reply document bundle 1. Click the blue document date link to download and view the document.	

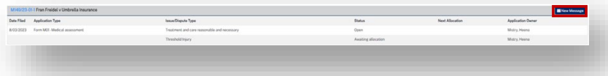
Messages

How to send a message

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>You can use the message function to communicate with the other party and the Personal Injury Commission.

From the Matter Details page:

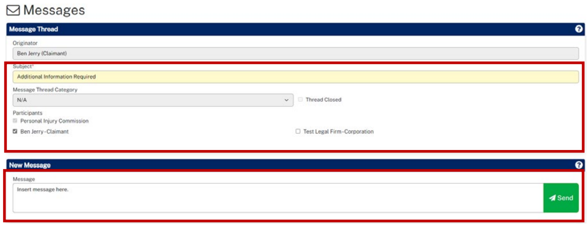
1. Click New Message on the top right corner of the application.

Note: The Application Owner will always be copied automatically on the message.</td><td></td></tr>
<tr><td>2. Type the Subject.

3. Select the Participants.

• Legal representative (or self-represented party) receives email notification of new Portal message

• Claimant/insurer can see messages but not respond if they have Legal Representative.

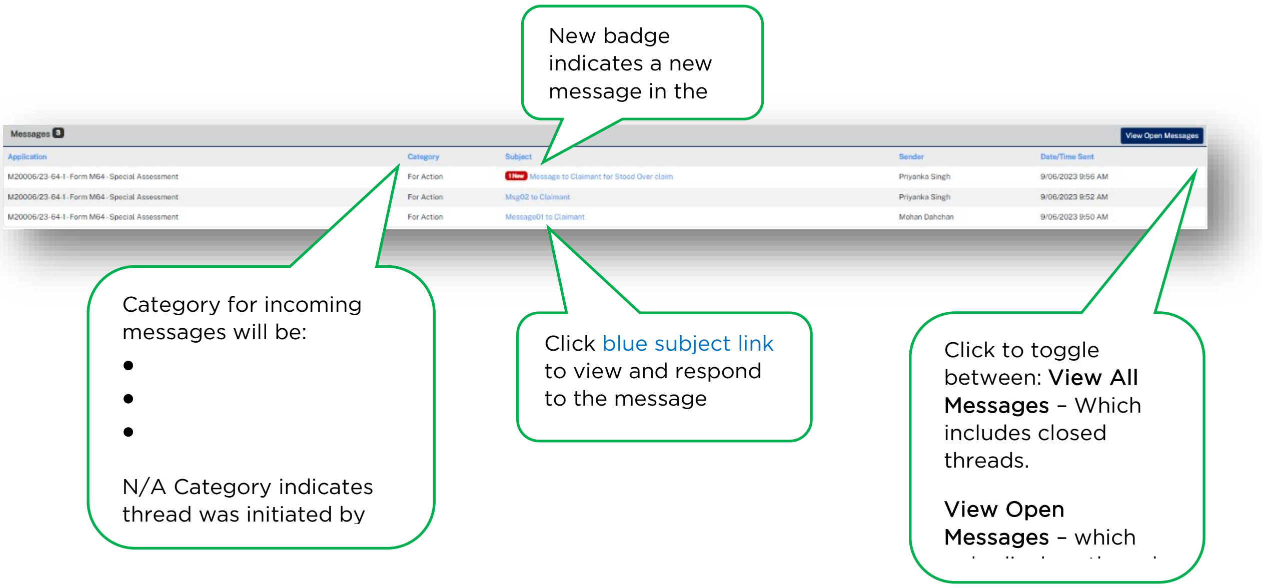
4. Type the Message body.</td><td>
</td></tr>
</table>

How to view messages

You may receive new messages from the other party or the Commission.

You will also get an **email notification** which contains the message subject line only (for cyber security reasons), you need to view message within Portal.

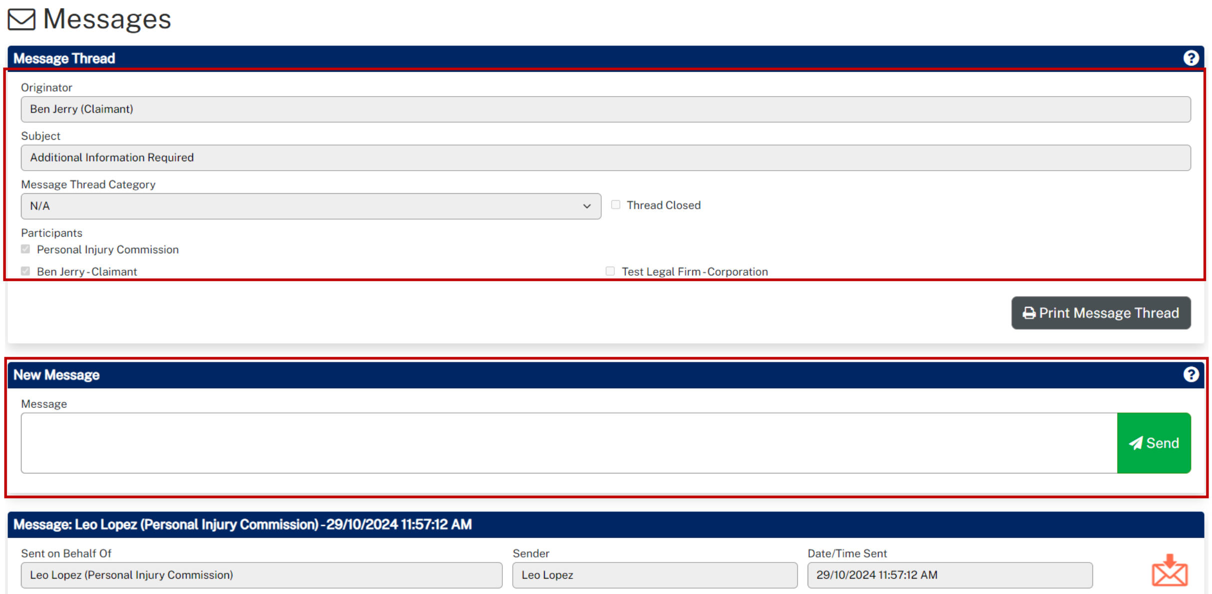
A list of message threads displays in **Messages** section of the **Matter Details**.



How to respond to messages

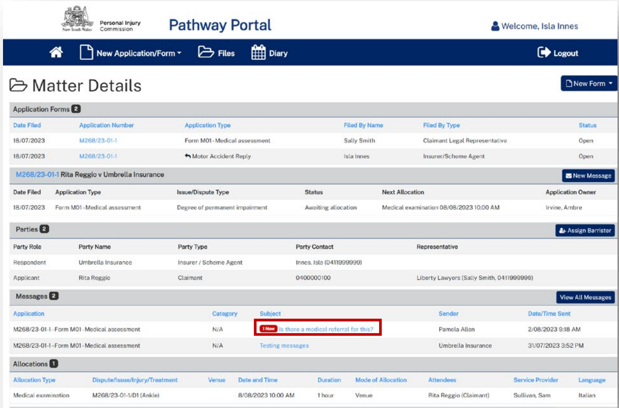
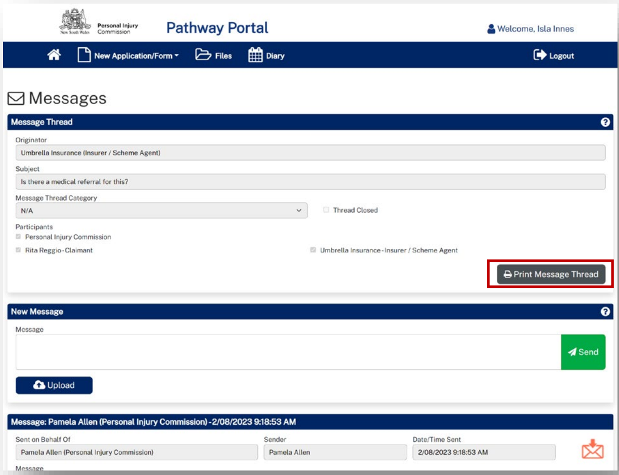
The most recent messages display at the top of the thread.

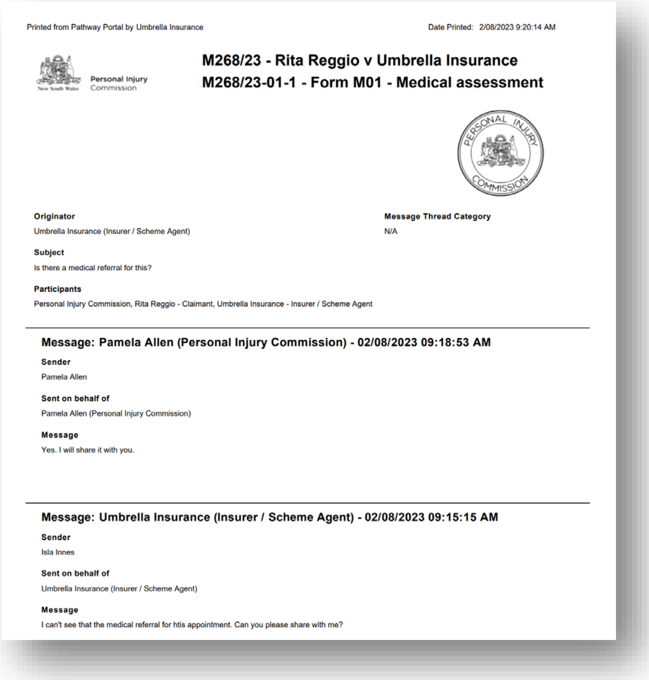
1. Type response to **Message** and click **Send.**



How to download a message thread

You can download message threads from Pathway Portal.

Instruction	Page
1. From the **Matter Details** page click the blue subject link to view message thread.	
2. Click the Print Message Thread button.	

Instruction	Page
➢ A sealed PDF document with the entire message thread is generated and can be found in your Downloads folder.	 Printed from Pathway Portal by Umbrella Insurance Date Printed: 2/08/2023 9:20:14 AM **M268/23 - Rita Reggio v Umbrella Insurance** **M268/23-01-1 - Form M01 - Medical assessment** **Originator** Umbrella Insurance (Insurer / Scheme Agent) **Message Thread Category** N/A **Subject** Is there a medical referral for this? **Participants** Personal Injury Commission, Rita Reggio - Claimant, Umbrella Insurance - Insurer / Scheme Agent **Message: Pamela Allen (Personal Injury Commission) - 02/08/2023 09:18:53 AM** **Sender** Pamela Allen **Sent on behalf of** Pamela Allen (Personal Injury Commission) **Message** Yes. I will share it with you. **Message: Umbrella Insurance (Insurer / Scheme Agent) - 02/08/2023 09:15:15 AM** **Sender** Isla Innes **Sent on behalf of** Umbrella Insurance (Insurer / Scheme Agent) **Message** I can't see that the medical referral for htis appointment. Can you please share with me?

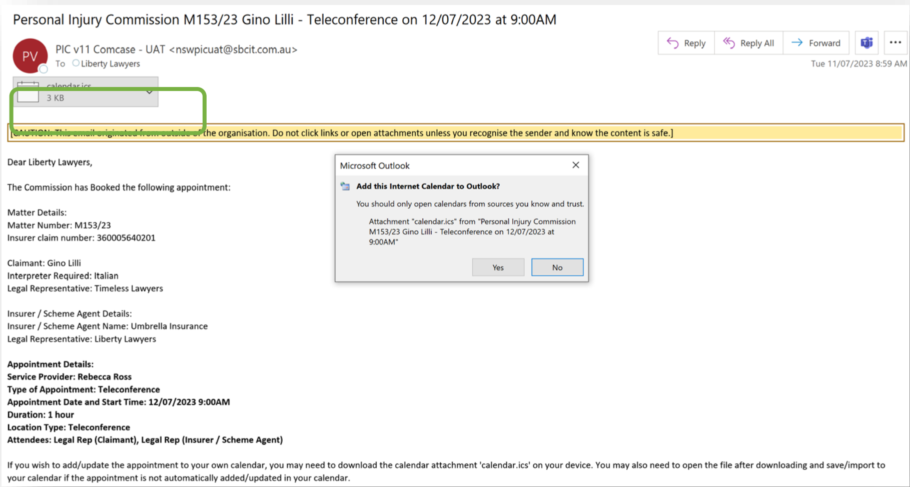
Case Management

When the Commission allocates the dispute to a decision maker an email notification with date, time, venue, address and required attendees for the allocation is automatically sent to:

- The legal representative for both parties or self-represented party
- The decision maker
- The claimant, for allocations that the claimant is required to attend
- The case owner will send an email with Teams link if allocation/appointment is to be virtual.

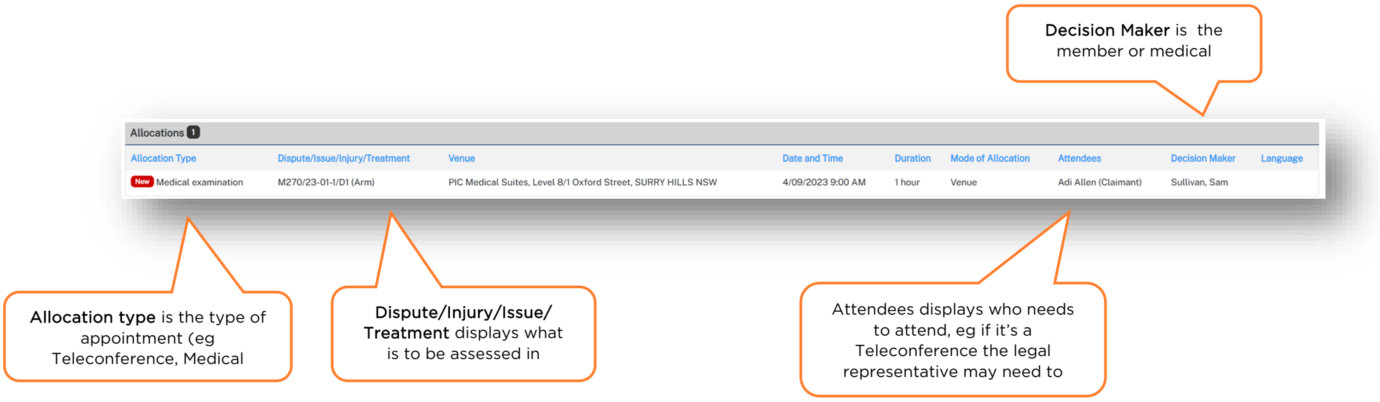
Allocation email notification

- The legal representatives for the parties (or self-represented parties) will receive an email when a new allocation/appointment is made.
- You can add the appointment to your local calendar by double clicking the calendar.ics attachment.
- For dispute resolution events or medical assessments to be conducted virtually via Teams, the case owner will send an email with the Teams link for the event/assessment.



How to view allocation details

In the **Matter Details** page, the **Allocations** section displays all the allocations/ appointments for the matter.

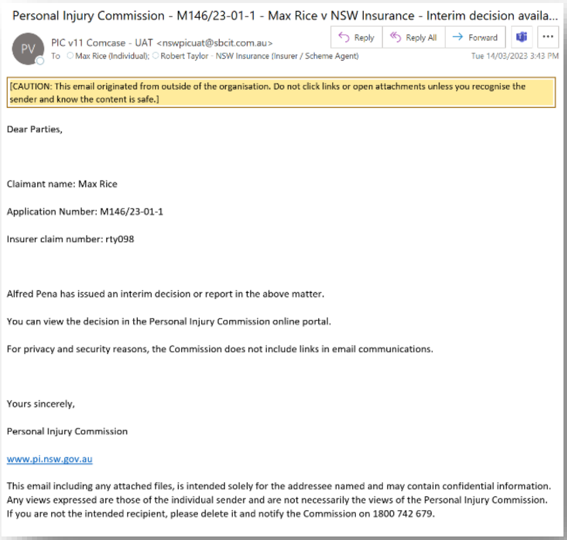


Assess and Decide

After the decision maker uploads the outcome document (interim or final) the Commission case owner:

- Seals the outcome document
- Sends the Legal Representative(s) and Unrepresented parties an email notification that the decision is available on Pathway Portal.

Decision available email notification



Personal Injury Commission - M146/23-01-1 - Max Rice v NSW Insurance - Interim decision availa...

PIC v11 Comcase - UAT <nswpicuat@sbcit.com.au>
To Max Rice (Individual); Robert Taylor - NSW Insurance (Insurer / Scheme Agent)
Tue 14/03/2023 3:43 PM

[CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.]

Dear Parties,

Claimant name: Max Rice

Application Number: M146/23-01-1

Insurer claim number: rty098

Alfred Pena has issued an interim decision or report in the above matter.

You can view the decision in the Personal Injury Commission online portal.

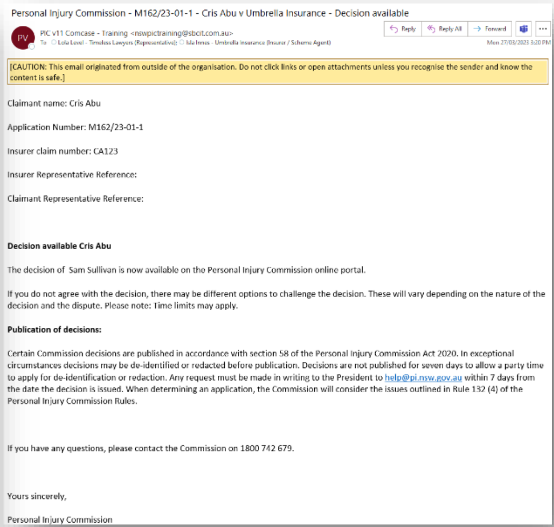
For privacy and security reasons, the Commission does not include links in email communications.

Yours sincerely,

Personal Injury Commission

www.pi.nsw.gov.au

This email including any attached files, is intended solely for the addressee named and may contain confidential information. Any views expressed are those of the individual sender and are not necessarily the views of the Personal Injury Commission. If you are not the intended recipient, please delete it and notify the Commission on 1800 742 679.



Personal Injury Commission - M162/23-01-1 - Cris Abu v Umbrella Insurance - Decision available

PIC v11 Comcase - Training <nswpictraining@sbcit.com.au>
To Lola Level - Timeless Lawyers (Representative); Isla Innes - Umbrella Insurance (Insurer / Scheme Agent)
Mon 27/03/2023 3:20 PM

[CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe.]

Claimant name: Cris Abu

Application Number: M162/23-01-1

Insurer claim number: CA123

Insurer Representative Reference:

Claimant Representative Reference:

Decision available Cris Abu

The decision of Sam Sullivan is now available on the Personal Injury Commission online portal.

If you do not agree with the decision, there may be different options to challenge the decision. These will vary depending on the nature of the decision and the dispute. Please note: Time limits may apply.

Publication of decisions:

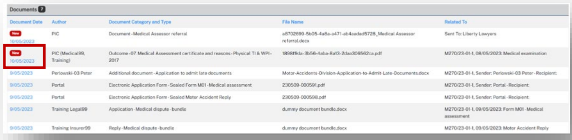
Certain Commission decisions are published in accordance with section 58 of the Personal Injury Commission Act 2020. In exceptional circumstances decisions may be de-identified or redacted before publication. Decisions are not published for seven days to allow a party time to apply for de-identification or redaction. Any request must be made in writing to the President to help@pi.nsw.gov.au within 7 days from the date the decision is issued. When determining an application, the Commission will consider the issues outlined in Rule 132 (4) of the Personal Injury Commission Rules.

If you have any questions, please contact the Commission on 1800 742 679.

Yours sincerely,

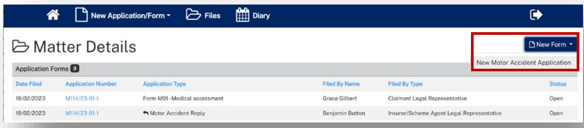
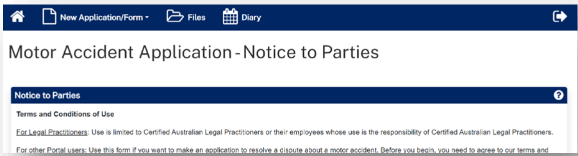
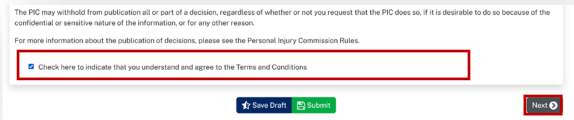
Personal Injury Commission

How to view the Outcome Document

Instruction	Page
From the **Matter Details** page, scroll down to **Documents** 1. Click the blue Document Date link to download the document. 2. Click the **downloaded document** to view.	

How to lodge an application for a Review

If you need to apply for a review of a decision in Pathway Portal, complete the following:

Instruction	Page
To lodge a review, complete the following: 1. From the original **Matter Details,** click **New Form** in top right corner and select **New Motor Accidents Application.** This allows the claimant, insurer and legal representative details to auto-populate if you select their names from drop-down list.	
Notice to Parties 2. **Read** the **Terms and Conditions** and scroll to the bottom and tick to agree to Terms and Conditions. 3. Click **Next** 77. The Form **Claim Details** displays.	
	

Claim Details

4. Complete the **Claim Details** as follows:

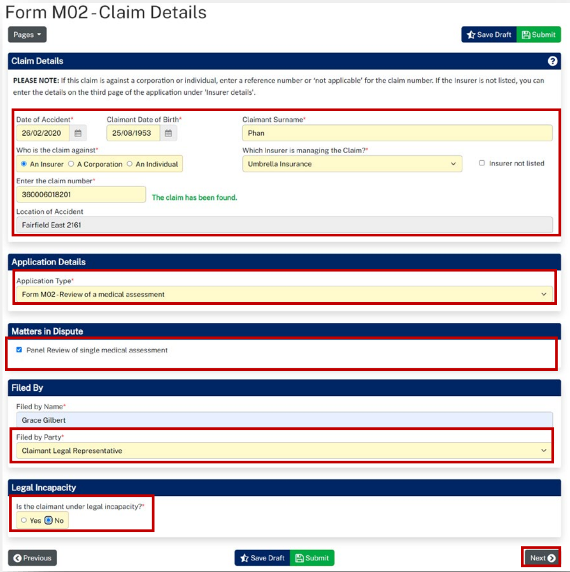
- Populate the **Claim Details**
- Select the Application Type

This example selects M02 – Review of medical assessment

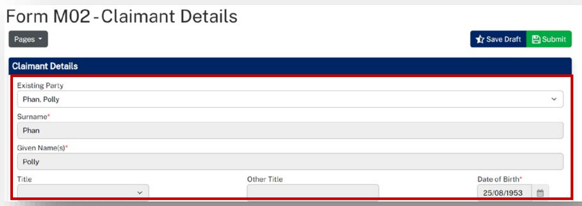
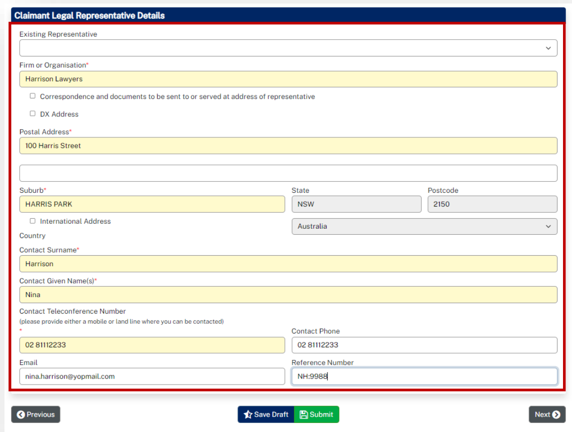
- Tick relevant Matters in Dispute
- **Filed by Party** – Select as appropriate.
- **Legal Incapacity** – Select as appropriate.

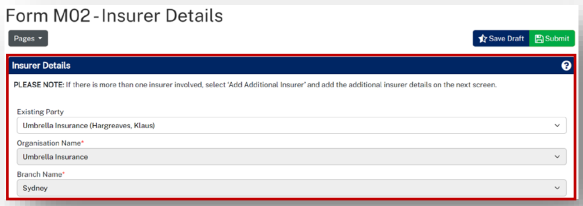
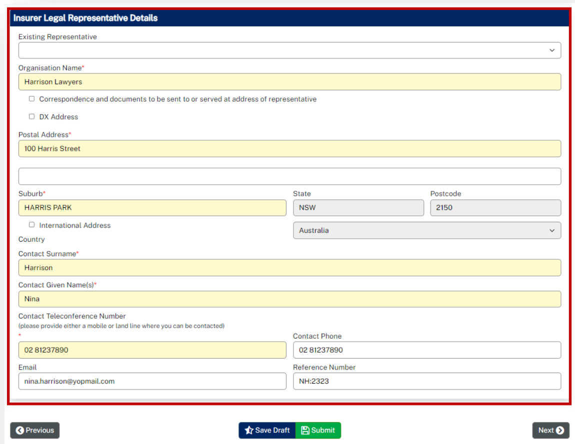
5. Click **Next**.

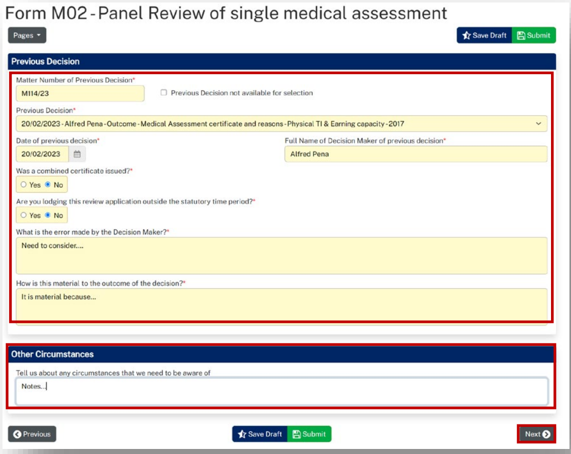
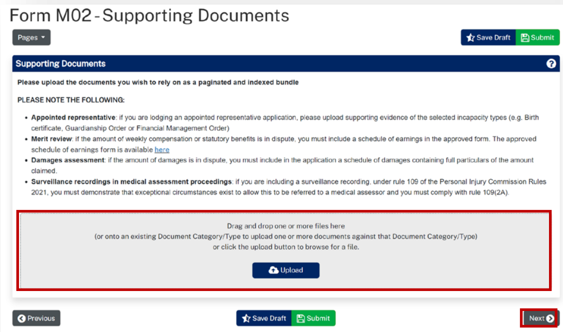
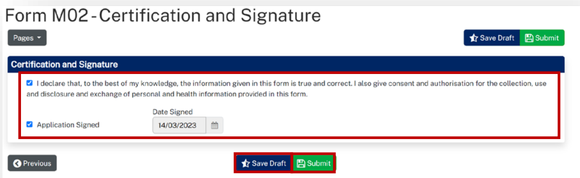
78. The **Claimant Details** page displays.

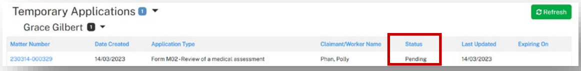
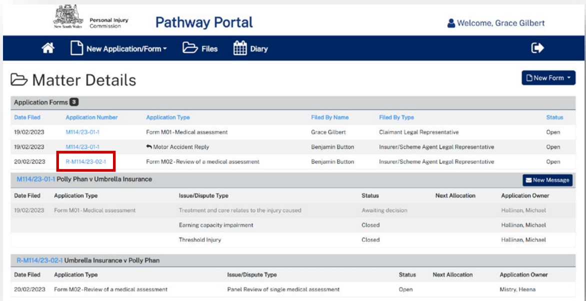


How to lodge an application for a Review continued

Instruction	Page
Claimant Details 6. Populate the **Claimant Details** page. 7. When done click **Next**.	
Selecting **Existing Party** and **Existing Representative** auto-populates their details which speeds up data entry 8. Check the **Contact Name** that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details. 9. If you are completing the application on behalf of the lawyer who is managing the matter, you will need	

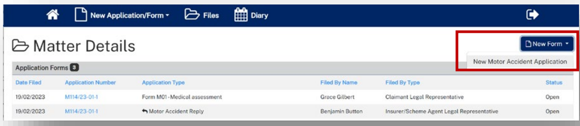
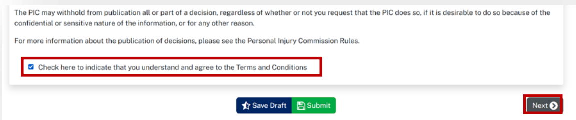
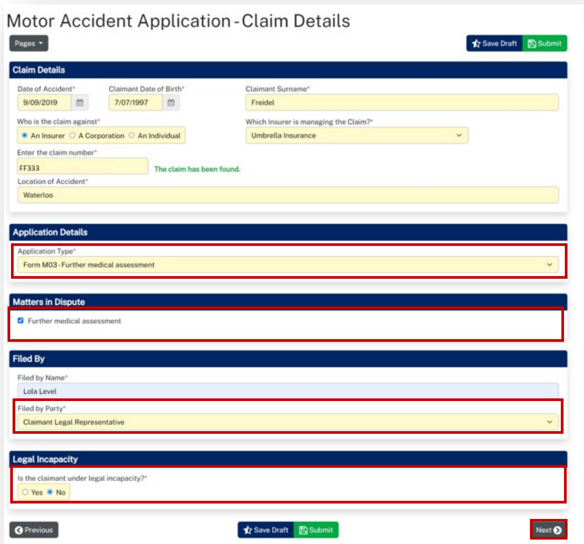
to enter their name as the Contact Name. **Note:** This is essential, so that the correct person from your firm is added as the Primary contact for this matter. 79. The **Insurer Details** page displays.	
Instruction	**Page**
Insurer Details 10. Populate the **Insurer Details** page, including the **Contact Name** details. 11. Click **Next**.	
Selecting **Existing Party** and **Existing Representative** auto-populates their details which speeds up data entry 12. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details. 13. If you are completing the application on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name. **Note:** This is essential, so that the correct person from your firm is added as the Primary contact for this matter. 80. The **Form M02 – Panel Review of single medical assessment** page displays if this is the application that was selected.	

Instruction	Page
Form M02 – Panel Review of single medical assessment 14. Complete the details as follows: • The Matter number should pre-populate based on the matter you were in when you selected **New Form.** • Select the relevant **Previous Decision.** • If the decision is not available, tick **Previous Decision not available for selection** and type in the details. • **The Date of the previous decision** and **Full Name of Decision Maker of previous decision** auto-populate based on decision selected above, otherwise manually populate. • Complete the required fields on the page. 15. Click **Next.** 81. The **Supporting Documents** page displays.	
Supporting Documents 82. Upload the relevant supporting document as a single indexed and paginated bundle. **Note:** The 500 page limit does not apply to Review applications 16. Click **Next** 83. The Certification and Signature page displays.	
Certification and Signature 17. **Read** and **tick** the acknowledgments. 18. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission. 19. Click **Submit.**	

Instruction	Page
What happens after Submit? The Review **Temporary Application** displays with a **Status** of **Pending** until it is registered by the Commission.	
Once the application is registered it displays within the matter details for the originating dispute and has matter number prefixed with **R**.	

Lodge an application for a Further Assessment

How to lodge an Application for a Further Assessment

Instruction	Page
If you need to apply for a further assessment for a matter in Pathway Portal, complete the following: 1. In the **Matter Details**, click **New Form** in the top right corner and select **New Motor Accidents Application**.	
Notice to Parties 2. Read the Terms and Conditions. 3. Scroll to the bottom and **tick** to agree to **Terms and Conditions** and click **Next**. 84. The Motor Accident Application – Claim Details page displays.	 
Motor Accident Application – Claim Details 4. Complete the **Claim Details** as follows: • Application Type • Matters in Dispute • Filed by Party • Is the claimant under legal capacity? This example selects M03 – Further medical assessment 5. Click **Next**. 85. The **Claimant Details** page displays.	

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

Claimant Details

6. Populate the Claimant Details page.

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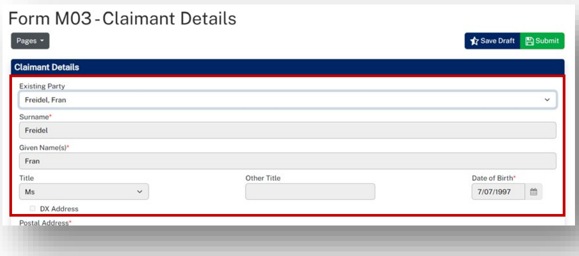

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<tr><td>

Note: You can select the Existing Party and the Existing Representative from drop down to quickly populate.

7. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.

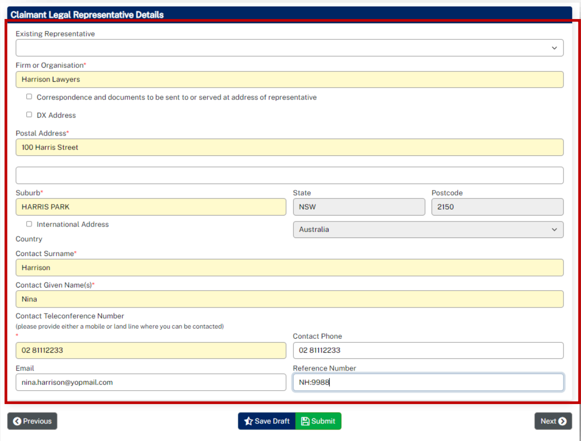
8. If you are completing the application on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name.

Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.

9. Click Next.

86. The Insurer Details page displays.

</td><td>



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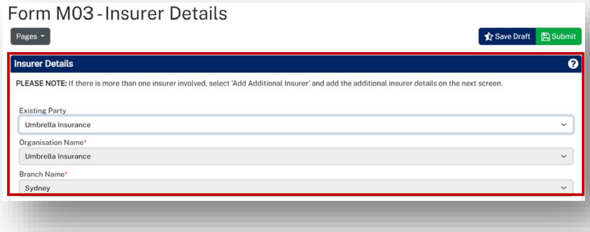
Instruction	Page

Insurer Details

10. Populate the **Insurer Details** page, including the **Contact Name** details.



Note: You can select the Existing Party and the Existing Representative from the drop down to quickly populate.

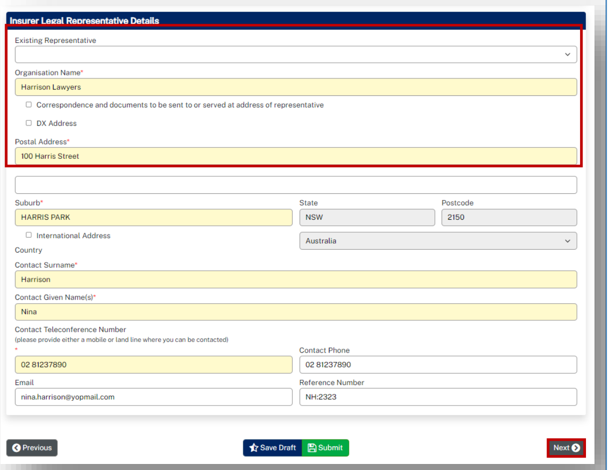
11. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.

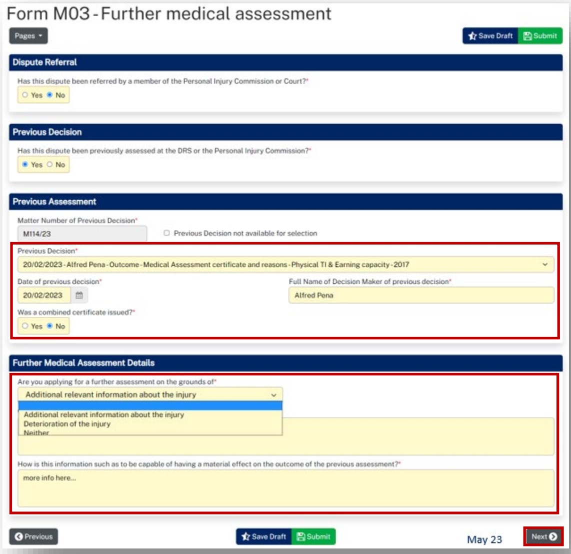
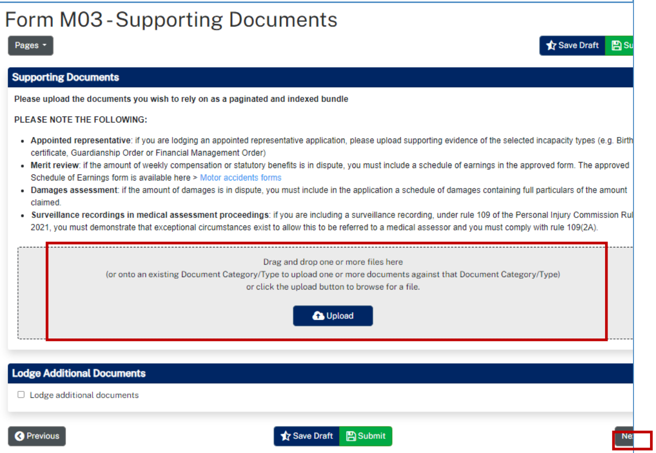
12. If you are completing the application on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name.

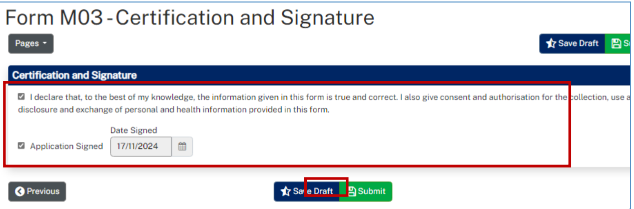
Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.

13. Click **Next**.

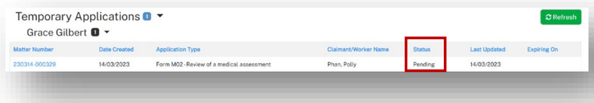
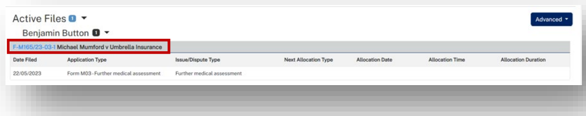
87. **The Form M03 – Further medical assessment** page displays if this is the application that was selected.



Instruction	Page
Further medical assessment 14. Complete the details as follows: • The **Matter number** should pre-populate based on the matter you were in when you selected the **New Form**. • Select the Previous Decision. • If the decision is not available, tick **Previous Decision not available for selection** and type in details. • The **Date of previous decision** and **Full Name of Decision Maker of previous decision** auto-populate based on decision selected above, otherwise manually populate. • Are you selecting for a further assessment on the grounds of? – Select as appropriate. • Complete the rest of the page. 15. Click **Next**. 88. The **Supporting Documents** page displays.	
Supporting Documents 89. **Upload** relevant supporting documents as a single indexed and paginated bundle that does not exceed 500 pages. 16. Click **Next**. 90. The Certification and Signature page displays. **Note:**If you have more than 500 pages of supporting documents, you should upload the first 500 pages on this page and also lodge an Application to Lodge Additional Documents by selecting the Lodge Additional Documents checkbox	

Certification and Signature 17. **Read** and **tick** the acknowledgments. Then either: 18. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission. 19. Click **Submit**.	

What happens after the Further Assessment application has been submitted?

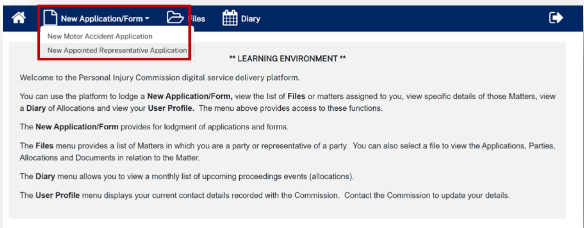
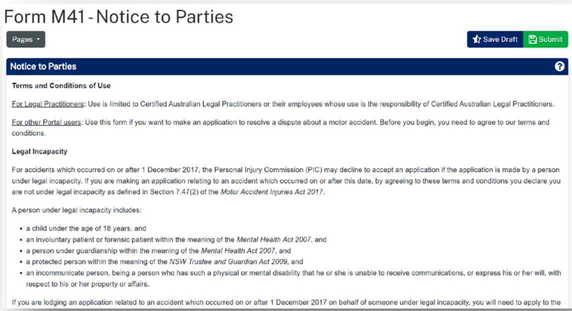
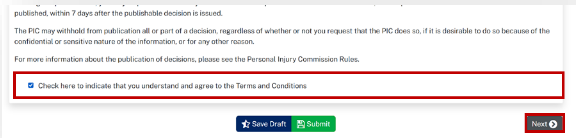
Instruction	Page
The **Further Assessment Temporary Application** displays with **Status** of **Pending** until it is registered by the Commission.	
Once the application is registered it displays within the **Matter Details** for the originating dispute and has matter number prefixed with **F**.	

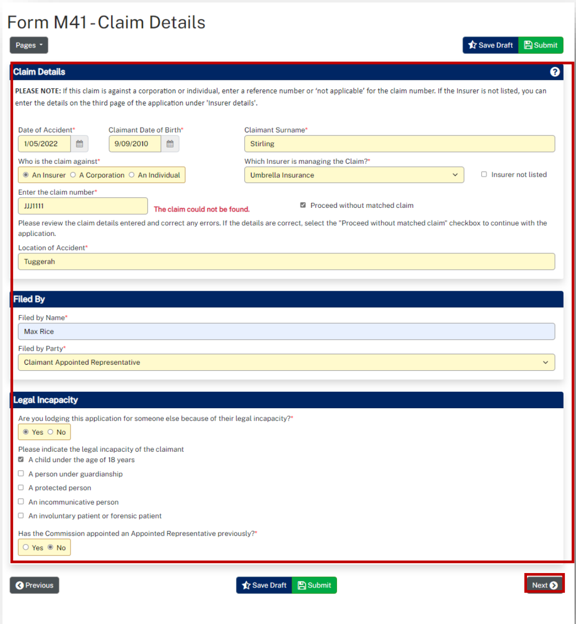
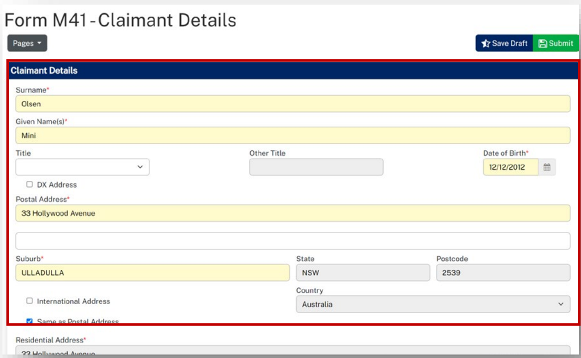
Lodge Appointed Representative Application

How to lodge an Appointed Representative Application

For any 2017 Scheme applications, a claimant who is under a legal incapacity (such as a child) must have an appointed representative.

The **New Appointed Representative Application** must be lodged and processed first.

Instruction	Page
To lodge an **Appointed Representative Application**, complete the following: 1. Select the New Appointed Representative Application from the New Application/Form menu. ➢ The Form 41 – Notice to Parties page displays.	
Form 41 – Notice to Parties 2. Read the Terms and Conditions. 3. Scroll to the bottom and **tick** to agree to **Terms and Conditions** and click **Next**. ➢ The Form M41 – Claim Details page displays.	
	

Instruction	Page
Form M41 – Claim Details 4. Populate the **Claim Details**, specifically the **Legal Incapacity** section. 5. Select Yes to the question is the Claimant under Legal Incapacity and indicate the type of legal incapacity. 6. Click **Next**. ➢ The **Form M41 – Claimant Details** page displays.	
Form M41 – Claimant Details 7. Populate the **Claimant Details** page. 8. Populate **Claimant Legal Representative Details**.	

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<tr><td>

Claimant Legal Representative Details

9. Complete the details as follows:

- **Existing Representative** – Select from the drop-down menu if available.
- **Firm or Organisation** – If you are representing the Claimant, these details should auto populate. Otherwise populate if required.
- Correspondence and documents to be sent to or served at address of representative – Select if applicable.
- **DX Address** – Select if applicable.
- **Postal Address** – Select if the same as the Postal address.

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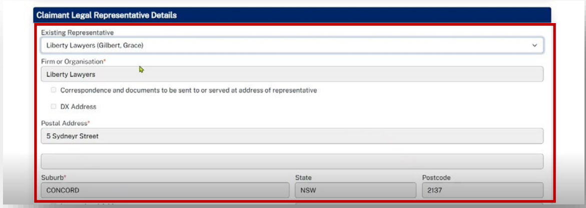

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10. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.

11. If you are completing this application on behalf of the lawyer who is managing the application, you will need to enter their name as the Contact Name.

Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.

- **Contact Surname** – Populate the Primary contact's surname.
- **Contact Given Name (s)** – Populate the Primary contact's given name
- **Contact Teleconference Number** – Type in the best contact number for Teleconference.
- **Contact Phone** – Type in any other contact numbers.
- **Email** – Populate the Primary contact's email address.

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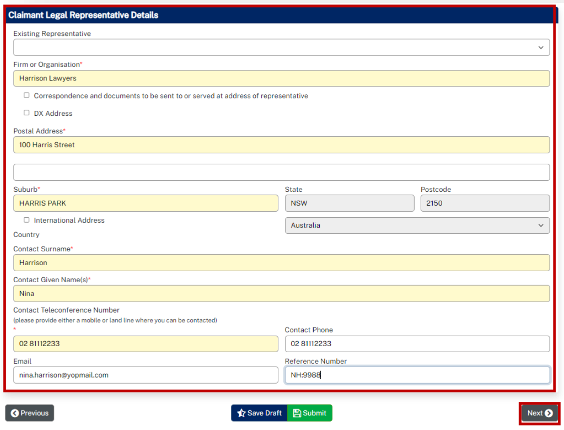

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• **Reference Number** – Populate as required. 12. Click **Next**. ➢ The **Form M41 – Appointed Representative Details** page displays.	

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<tr><td>

Form M41 – Appointed Representative Details

13. Populate the Appointed Representative Details.

14. Click **Next**.

➢ The **Form M41 – Insurer Details** page displays.

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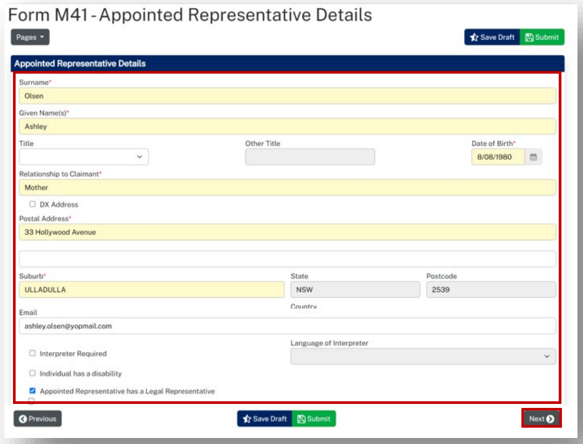

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Form M41 – Insurer Details

15. Populate the **Insurer Details** page.

16. Populate the Insurer Legal Representative Details (as needed).

17. Click **Next**.

➢ The **Form M41 – Supporting Documents** page displays.

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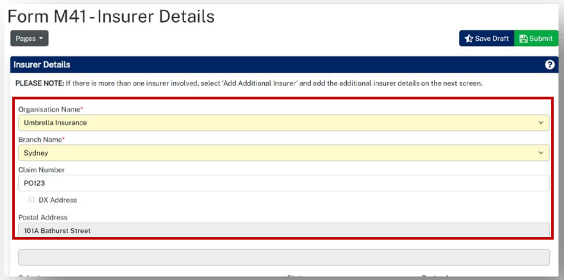

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Form M41 – Supporting Documents

18. Click the **Link** to download the form for the appointed representative to sign.

19. **Drag** the completed form and evidence of legal incapacity e.g., birth certificate into **Supporting Documents** area (or use **Upload**).

20. Click **Next**.

Include **Appointed representative form** and incapacity evidence in single indexed and paginated bundle

➢ The **Form M41 – Certification and Signature** page displays.

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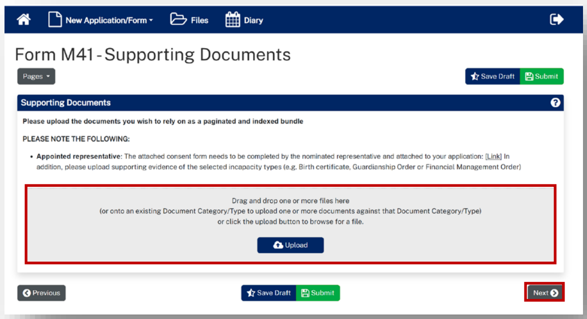

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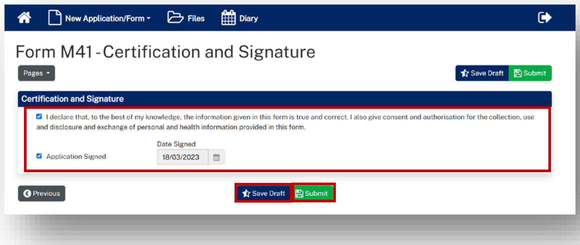
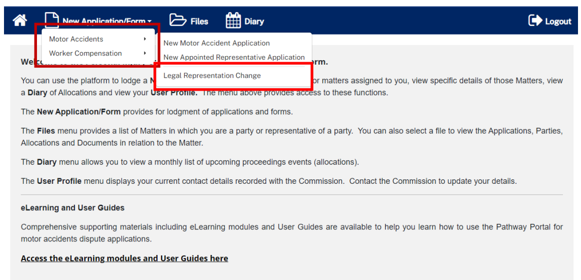
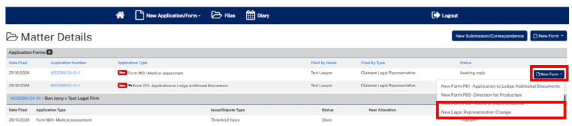
Instruction	Page
Form M41 – Certification and Signature 21. **Read** and **tick** the acknowledgments. Then either: 22. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission. 23. Click **Submit**.	
What happens after the M41 Application has been submitted? The Application displays in **Temporary Application** section of **Files** with **Status** of **Pending** until reviewed and registered by the Commission. You will be advised when a decision has been made regarding the Appointed Representative application.	

Lodge Legal Representation / Agent Change

How to lodge a Legal Representation / Agent Change

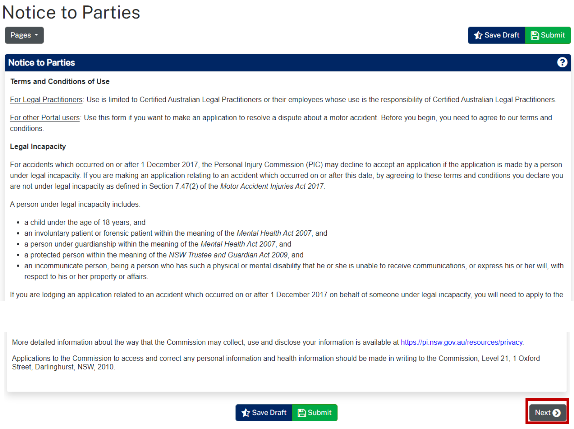
Instruction	Page
To lodge a **Legal Representation / Agent Change**, complete the following: 1. Select the **Legal Representation Change** from the New Application/Form menu. ➢ The **Notice to Parties** page displays.	
Note: To lodge a **Form P02 - Notice of Ceasing to Act,** you must lodge the form within the **Matter Details** page.	

Notice to Parties

2. Read the Terms and Conditions.

3. Scroll to the bottom and click **Next**.

➢ The Application Details page displays.



Application Details

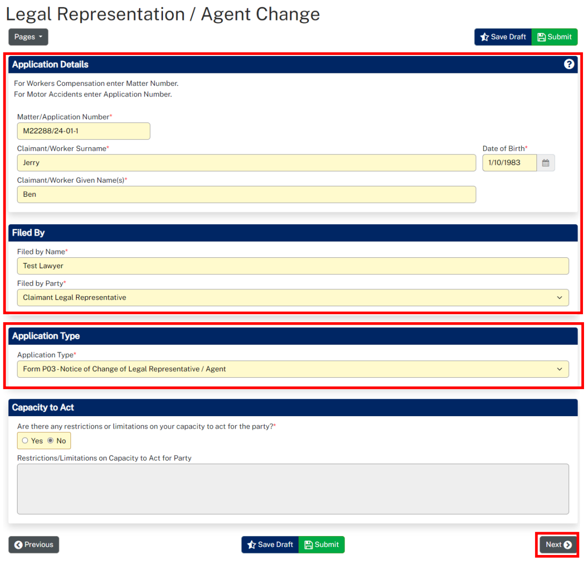
4. Populate the Application Details.

5. Select the Application Type:

   - **Form P03 –** Notice of Change of Legal Representative / Agent
   - **Form P04 –** Notice of Representation

6. Click **Next**.

➢ The **Party Represented** page displays.



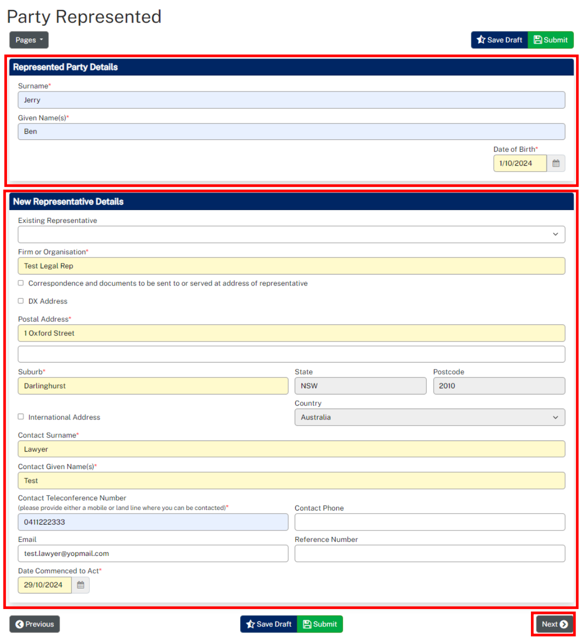
Application Details

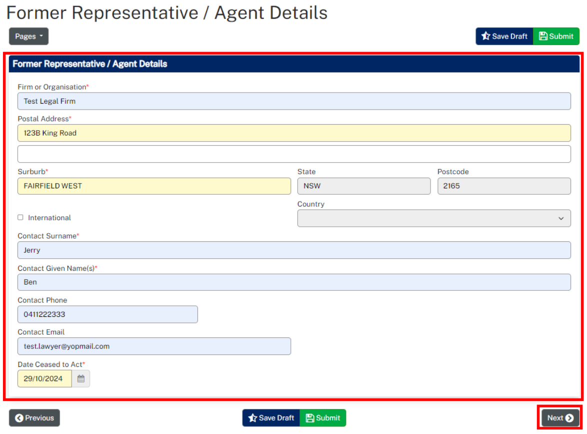
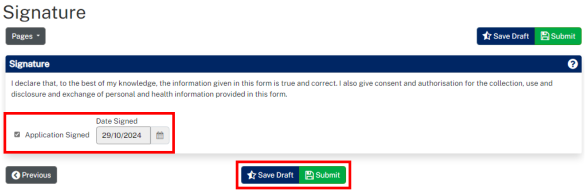
7. Populate the Representative Party Details.

8. Populate the New Representative Details.

9. Click **Next**.

➢ The **Former Representative / Agent Details** page displays.



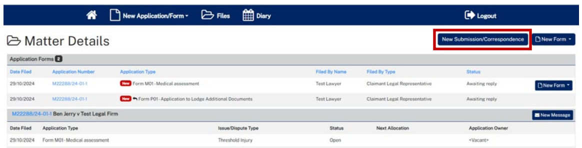
Former Representative Details 10. Populate the Former Representative Details. 11. Populate the New Representative Details. 12. Click **Next**. ➢ The **Former Representative / Agent Details** page displays.	
13. **Read** and **tick** the acknowledgments. Then either: 14. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission. 15. Click **Submit**.	

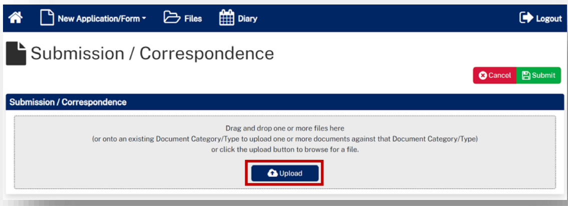
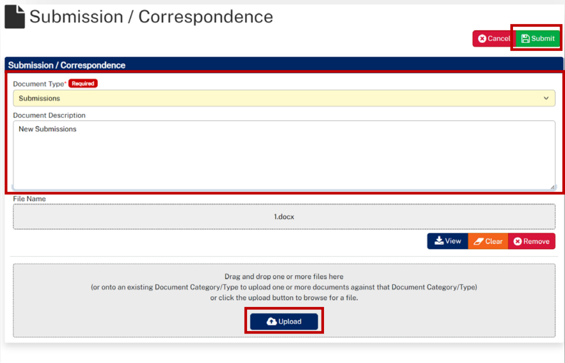
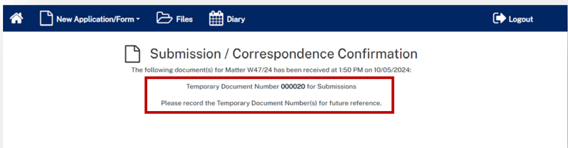
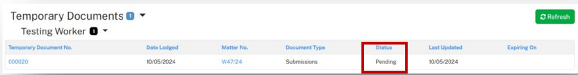
Lodge Submissions and other Correspondence

How to lodge Submissions and other Correspondence

It may be necessary to lodge submissions and other correspondence after you have submitted the application.

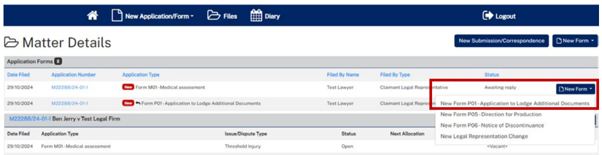
These documents are submitted via the Matter Summary using the **New Submission/Correspondence** tab.

Instruction	Page
To lodge Submissions or other Correspondence: 1. From the Matter Details page, click New Submissions/Correspondence.	

2. Click **Upload** or drag and drop the documents onto the page.	
3. Choose the Document type: **Correspondence** or **Submissions** and add a Description if required. 4. To add new Submissions or Correspondence, use the **Upload** feature again to repeat the process. 5. Click **Submit**.	
6. Submissions/Correspondence Confirmation screen will appear, which will show the Temporary Document Number.	
7. The document will now be visible under the **Temporary Documents** drop down on the **Matter Summary** screen with a status of **Pending.** The case owner will action the submitted correspondence.	

How to lodge an additional document after initiating application or reply

It may be necessary to lodge an additional document after you have submitted the application.

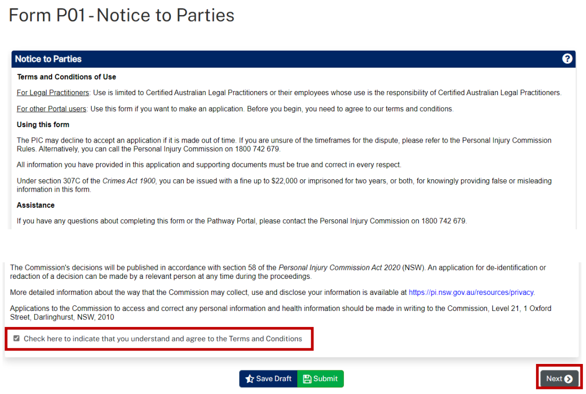
Instruction	Page
To lodge an additional document: From the Matter Details page 1. Click **New Form** and select the required form. 2. Select **New Form P01 – Application to Lodge Additional Documents**.	

Form P01 – Notice to Parties

Read the Terms and Conditions.

3. Scroll to the bottom and **tick** to agree to **Terms and Conditions** and click **Next**.

➢ The Form P01 – Application to Lodge Additional Document page displays.



Form P01 – Application Details

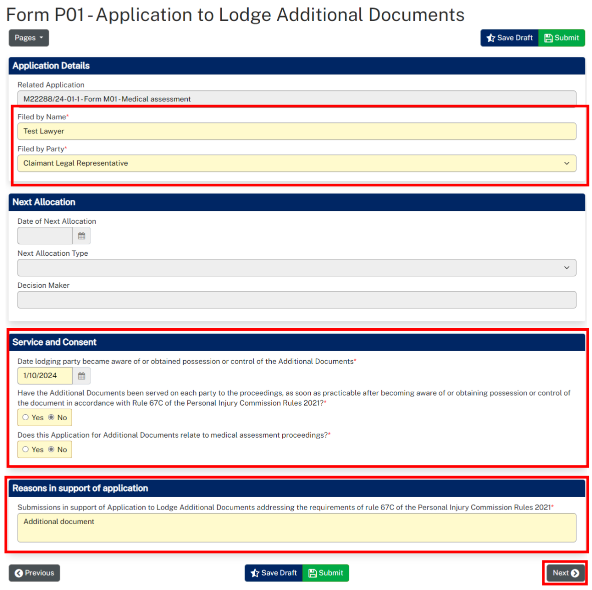
16. Populate the **Application Details** page.

Note: The Next Allocation section will be populated if there is an allocation already booked for this application. Additional Documents should be lodged with the Commission within 14 days for Medical proceedings & 3 working days for all other proceedings.

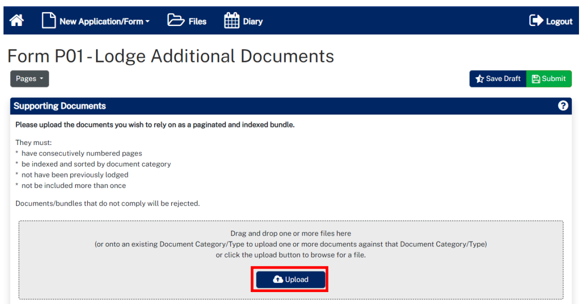
4. Populate **Service and Consent** (as needed).

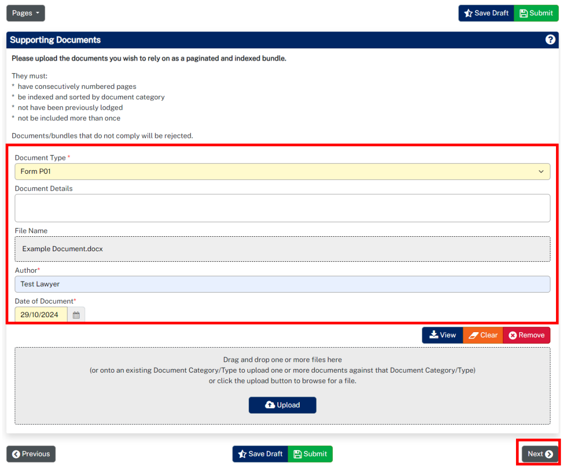
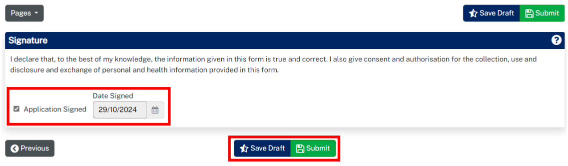
5. Populate Reason in support of application field.

6. Click **Next**.



17. Click Upload or drag and drop the documents onto the page.

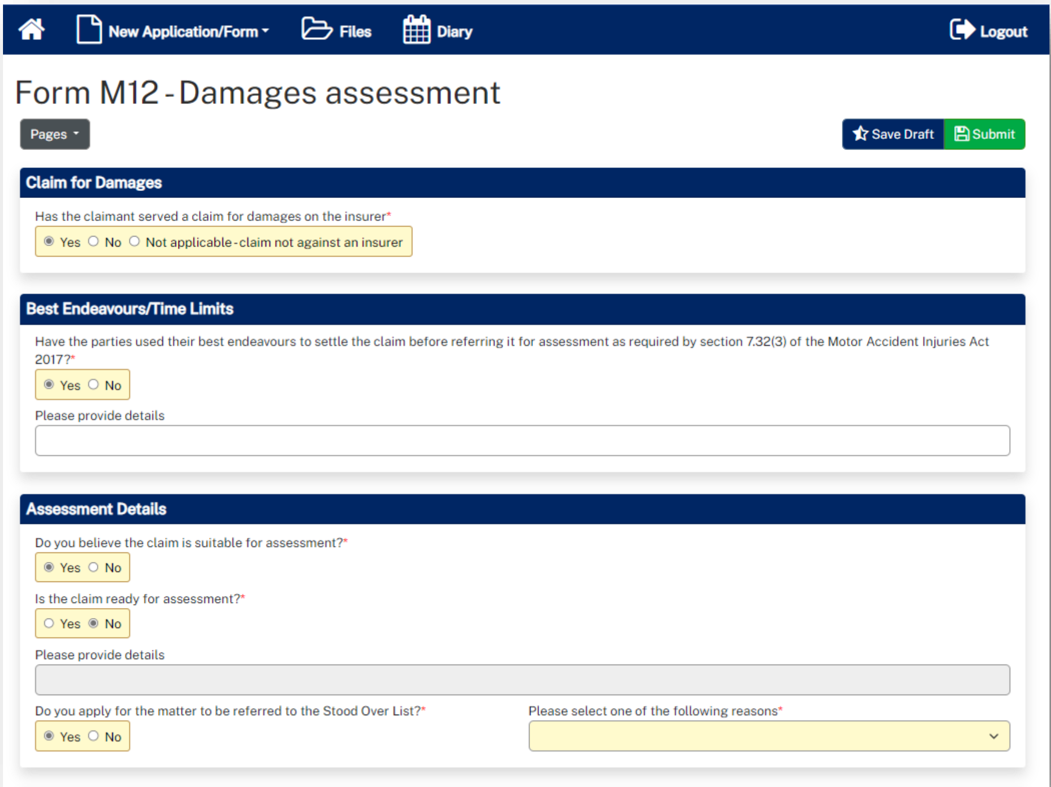


7. Add in the Document Details: • **Document Type** – Select Form P01 from the drop-down menu. • **Author** – Type in your name. • **Date of Document** – Type in the date of upload or select the date from the calendar. 8. Click **Next**	Form P01 - Lodge Additional Documents 
9. **Read** and **tick** the acknowledgments. Then either: 10. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission. 11. Click **Submit**.	Form P01 - Signature 

How to apply for a matter to be referred to the Stood Over list

A party may apply for a matter to be referred to the Stood Over list:

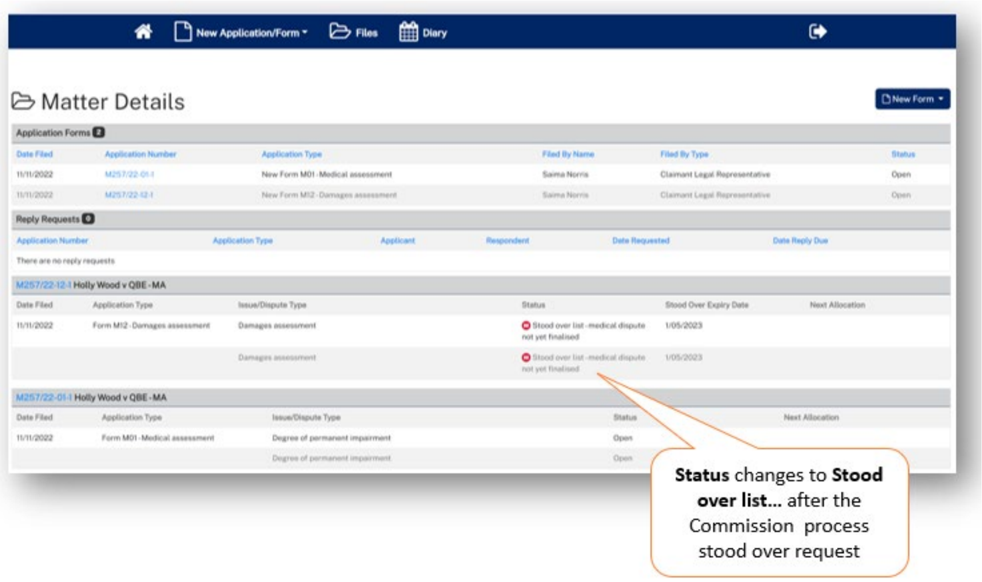
- On particular application forms
- In their reply
- Through a message to the Commission.



What happens next?

If the dispute is referred to Stood Over list:

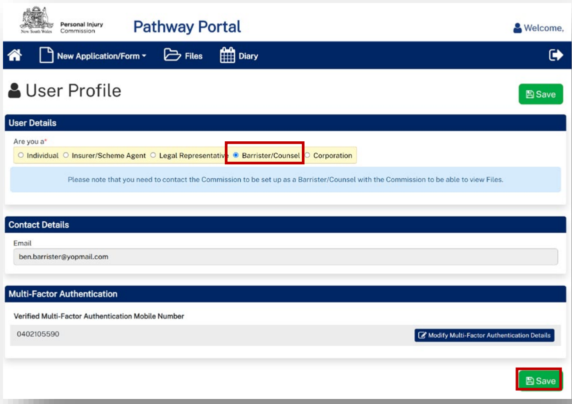
- You will receive an email notification that there is an outcome document in the Portal for this dispute
- The dispute **Status** will reflect the status of **Stood Over list** and the **Stood Over Expiry Date** will display
- The outcome document (Stood Over Certificate) will be listed in **Recent Activities**
- The outcome document (Stood Over Certificate) can be downloaded/viewed from **Documents** section of **Matter Details**.



How to give a Barrister visibility to a dispute

If you brief a barrister in a matter, you can add them to the dispute.

Barrister registers as Pathway Portal user

Instruction	Page
The barrister must first register as a Pathway Portal user. They will only need to do this once. At the end of registration, the **User Profile** displays the barrister would: 1. Select Barrister/ Counsel and click Save. Please log a ticket via the PIC Digital Hub's Online form for the email address to be registered for barrister access. When you first access the form, you will be required to register. You should include as much information as possible to assist the team in actioning your request. More information, including how to register for the PIC Digital Hub's Online form, is available in the PIC Digital Hub User Guide.	

How to assign a Barrister

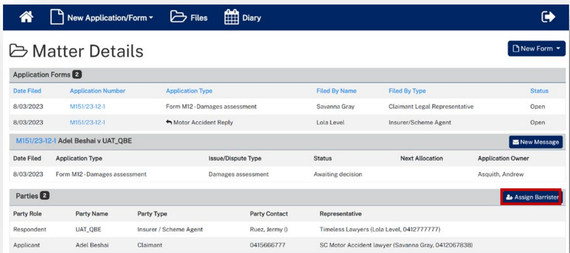
<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

Assign a Barrister

To give a barrister visibility of a dispute:

1. In the Matter Details click Assign Barrister.

</td><td>



</td></tr>
<tr><td>

2. Select the **Barrister** from the drop-down menu.
3. Click **Save**.

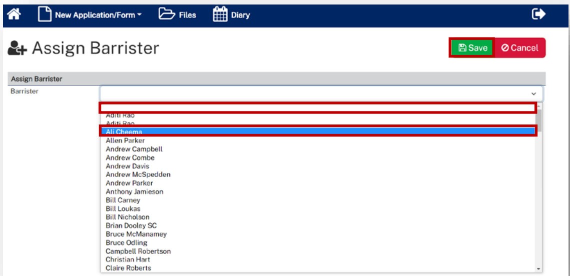
To change the barrister:

Repeat above steps and select the new **Barrister** name.

To remove barrister:

Select the blank line at the top of **Barrister** drop down menu.

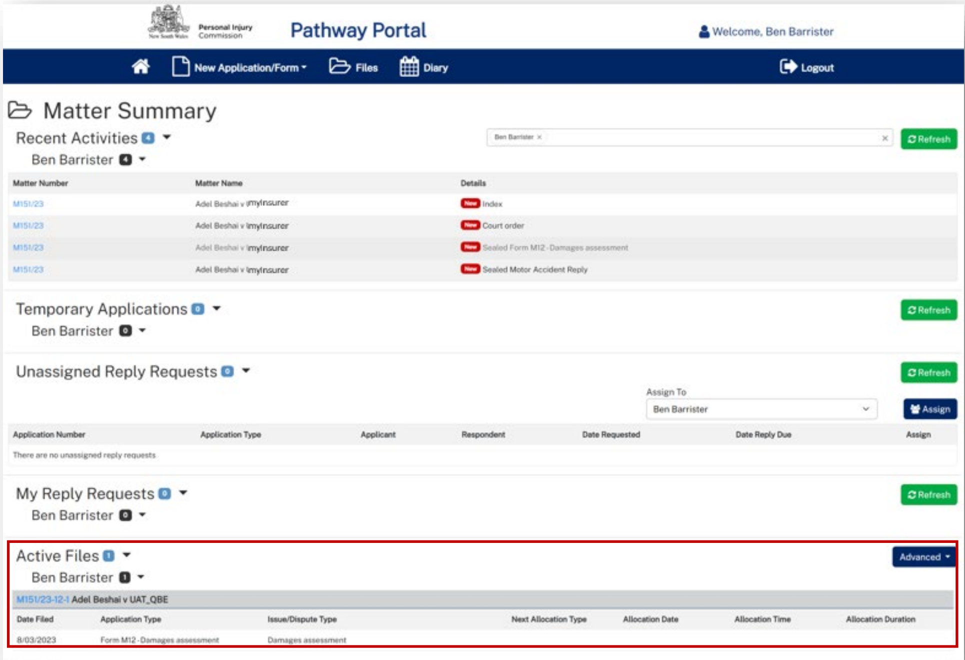
</td><td>



</td></tr>
</table>

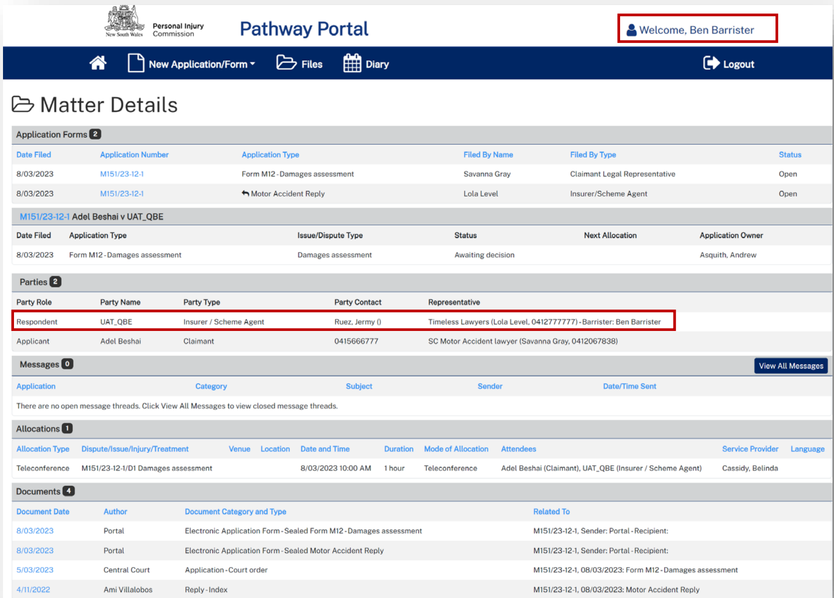
What does the Barrister see?

After a Barrister logs into Pathway Portal they will see the assigned disputes in the **Files** page



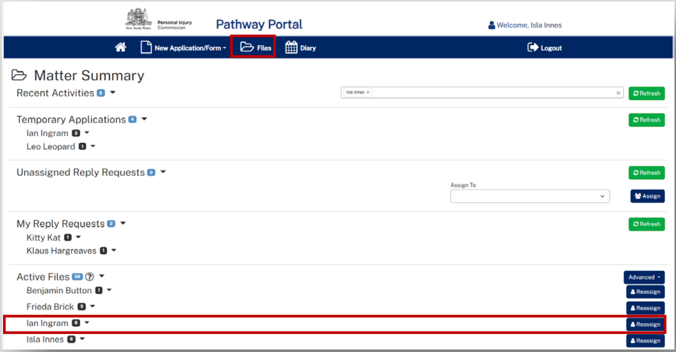
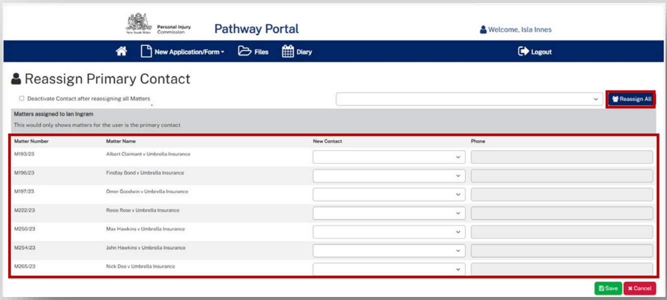
The Barrister:

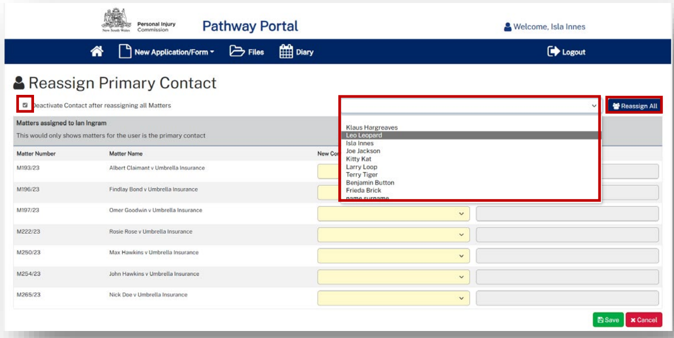
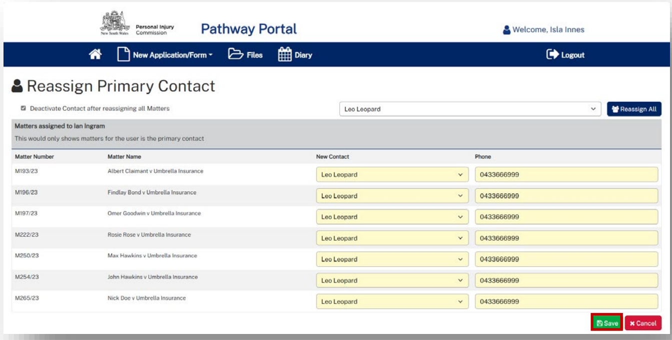
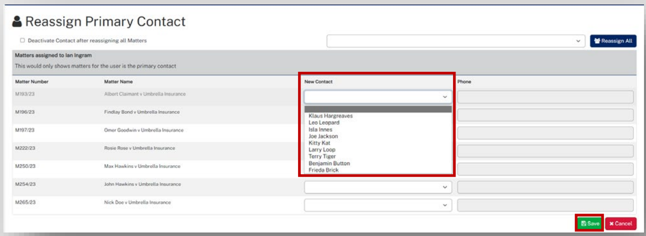
- ✓ Can see the matter details
- ✓ Can view documents
- X Cannot send messages



How to reassign a Matter from one person to one or more others

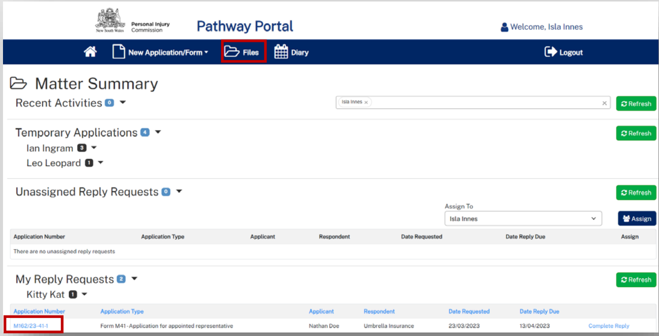
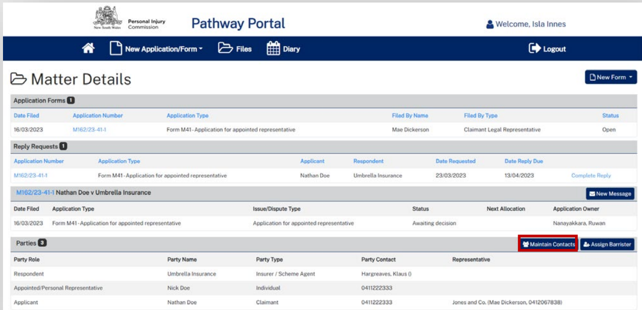
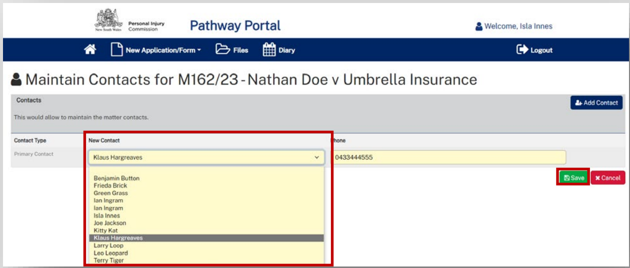
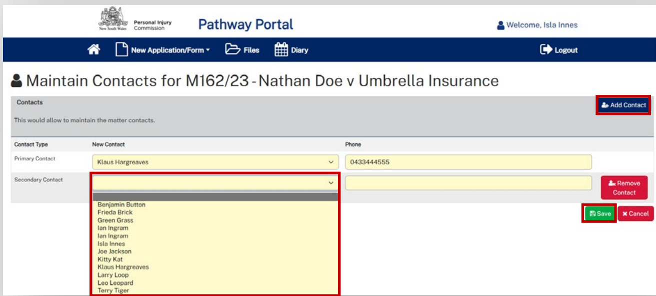
There will be times when you need to reassign Matters from one person to other people in your organisation.

Instruction	Page
To assign one or more Matters, complete the following: 1. Click on the **Files** tab. 2. Find the person you want to reassign Matter/s from. 3. Click the **Reassign** button. **Note:** The Reassign button is only available for Super Users and their delegates.	
➢ All Matters assigned to the selected person display. **There are 2 options:** **Option 1: Reassign All** Consider this option when someone is going away on holidays or has left your organisation and you need to reassign **all** of their Matters to one other person. **Option 2: Reassign some** Consider this option when you only need to reassign **some** of the Matters or you need to assign them to **more than one** person.	

To Reassign All 1. From the drop-down list **select a new person** to assign all Matters to **Note:** Tick **Deactivate Contact** if a person has left the organisation. This will deactivate their profile and they will no longer appear in drop down lists within the Portal. 2. Click Reassign All ➢ New Contact will auto populate for all Matters **Note:** The Phone field is a mandatory field. If it is blank, please add phone number. 3. Click **Save** ➢ All Matters will now be reassigned to the selected person.	 
To Reassign some 1 From the drop-down list **select a person** to assign the Matter to. Continue this step for other Matters as needed. **Note:** The Phone field is a mandatory field. If it is blank, please add phone number. 2 Click **Save** ➢ The selected Matters will now be reassigned to the person selected.	

How to Manage Primary and Secondary Contacts

There will be times when you need to manage contacts on a specific Matter.

Instruction	Page
1. Click on the **Files** tab. 2. Click on the blue Matter Number link.	
➢ Matter Details page displays 3. Go to **Parties** section and Click on **Maintain Contacts**	
➢ **Maintain Contacts** page displays with current contacts. **To update Primary Contact:** 4. In the Primary Contact section, select the new Primary Contact's name from the New Contact drop-down menu. 5. Click **Save**	
If you need to add a Secondary Contact: 1. Click Add Contact 2. In the Secondary Contact section, select name from the New Contact drop down list 3. Click **Save**	

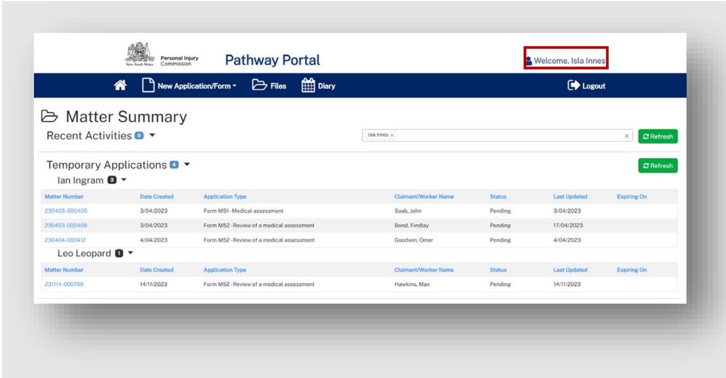
How to Add a new Contact or Deactivate Contact

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

1. Click the **Welcome, name** in the top right corner

Note: Only Super User can add a new contact.

</td><td>



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<tr><td>

➢ **User Profile** page displays with a list of all **active users** for your organisation.

Note: Before creating a new contact. Click on **View All Contacts** to check if there is an existing inactive account.

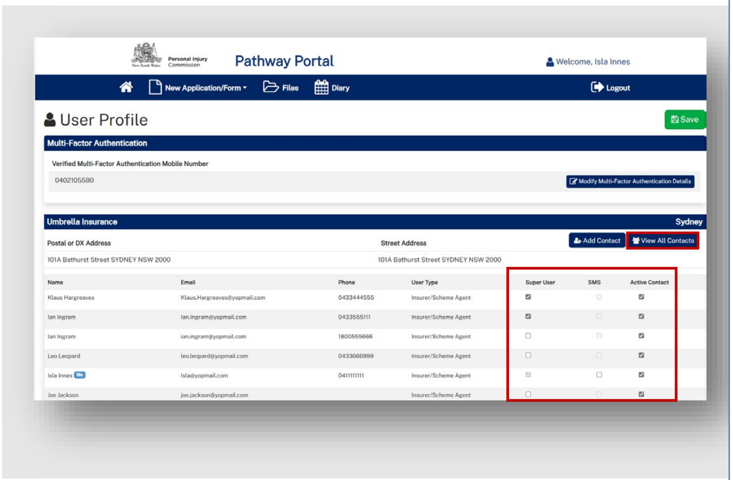
Super User:
Ticked box indicates the person has Super User access.

Active Contact:
Ticked box indicates this user is Active.

To deactivate user:

1. Untick Active Contact check box.
2. Click Save

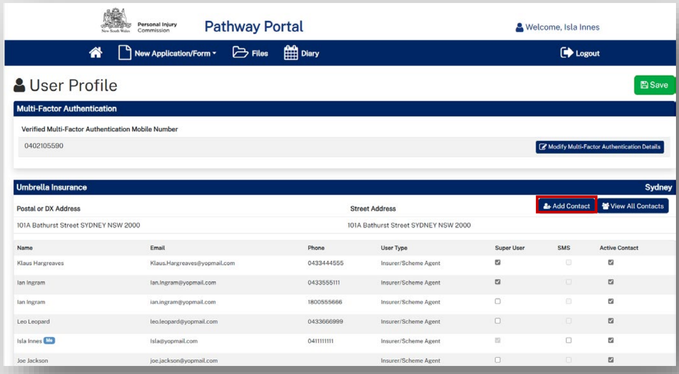
</td><td>



</td></tr>
</table>

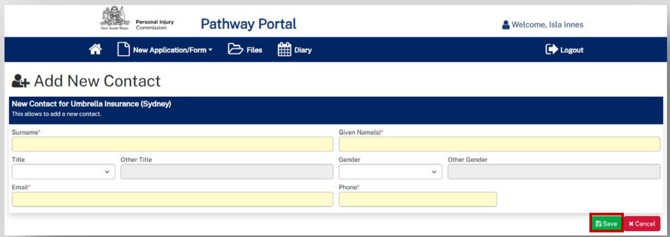
To add a new user:

1. Click Add Contact



2. Fill in all yellow mandatory fields
3. Click **Save**

Note: The system will perform checks for duplication of contact name and valid email address. If there is an error, it will generate a message with instructions.



➢ The new contact will now be added and will be available to assign Matters to. (It may take few minutes to update)

Note: The new user still needs to register to use the Pathway Portal via the Portal's home page and to set up Multi-factor authentication.

Super Users, Delegates and Contacts

Types of user access

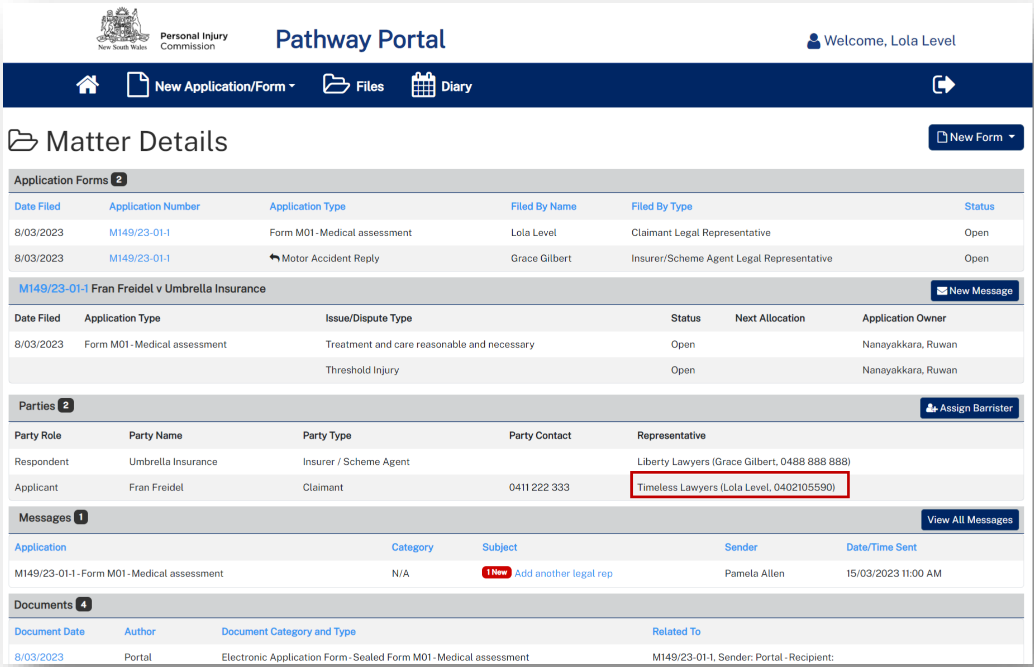
Type of user	How to become this type of user	What user can see/do
Primary contact for a matter	• Be registered as a Legal User on Pathway Portal • Lodge the application or… • One party advises Commission who their legal representative is	• See that matter details and documents • Receive email notifications for the matter • Send messages
Secondary contact for a matter	• Be registered as a Legal User on Pathway Portal, then… • Primary legal representative advises the Commission of secondary contact on a matter	If **filters Active Files** for **Matters I'm linked** to can: • See that matter details, documents and messages • Send messages for that matter
Super user	• Be registered on Pathway Portal as a Legal representative • Another super user can add /remove you as a Super User	• Can see and act on all matters • Can add/remove other Super Users (can't remove self) • Assign any reply request to legal representatives • Add a Delegate • Do NOT receive email notifications • Reassign matters • Manage contacts for the matter • Can add a new contact
Delegate	• A super user can make an administrative assistant (non-Legal User contact) a delegate	Delegate **can**: • See all the firms matters, documents and messages • Reassign matters to existing contacts • Manage contacts for the matter Delegate **can NOT**: • Be added as a Primary contact or Secondary contact on a matter • Delegate to another user • Add/remove super users • Receive email notifications

		(they go to primary contact) • Add a new contact

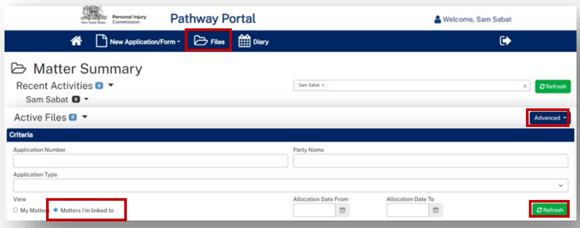
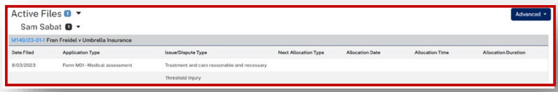
Primary contact and secondary contacts

1. The primary legal contact for a matter is listed as the **Representative** in the **Parties** section of **Matter Details**
2. If you have someone in your firm that will also work on a matter, they can be setup to be a secondary contact which provides visibility to the matter.
3. A Super User in your organisation can manage primary and secondary contacts for a matter

In this example Lola Level is the primary legal contact on this matter



After a Secondary contact is added

Instruction	Page
Secondary contact has been added For a secondary contact to view the matter: • Click the **Files** tab • Click **Advanced** in the **Active Files** section • Tick **Matters I'm linked to** • Click **Refresh**. *In this example Sam Sabat is a secondary contact on this matter*	
Secondary contact visibility The Secondary contact: ✓ Can see Matter Details ✓ Can view all documents ✓ Can view all messages ✓ Can send messages X Cannot see allocations in Diary	

Super Users

How to Add/Remove Super Users

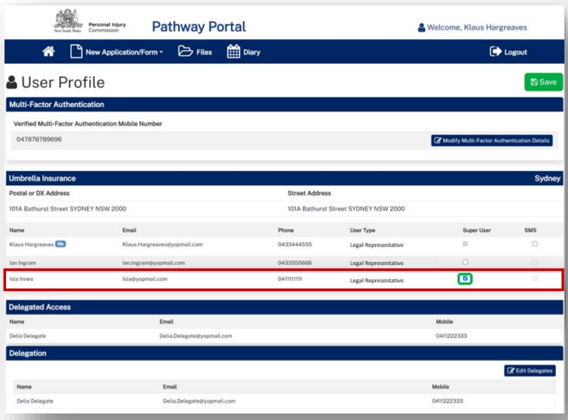
<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

Add/Remove a Super User

A super user can add and remove other super users:

- Click the **name of the Super User** in the top right corner
- Tick or untick the **Super User** box
- Click **Save.**

</td><td rowspan="2">



</td></tr>
<tr><td>

In this example Isla Innes is now a Super User

As a super user Isla Innes can now:

- ✓ Can see and act on all matters
- ✓ Can add/remove other Super Users (can't remove self)
- ✓ Add a Delegate.

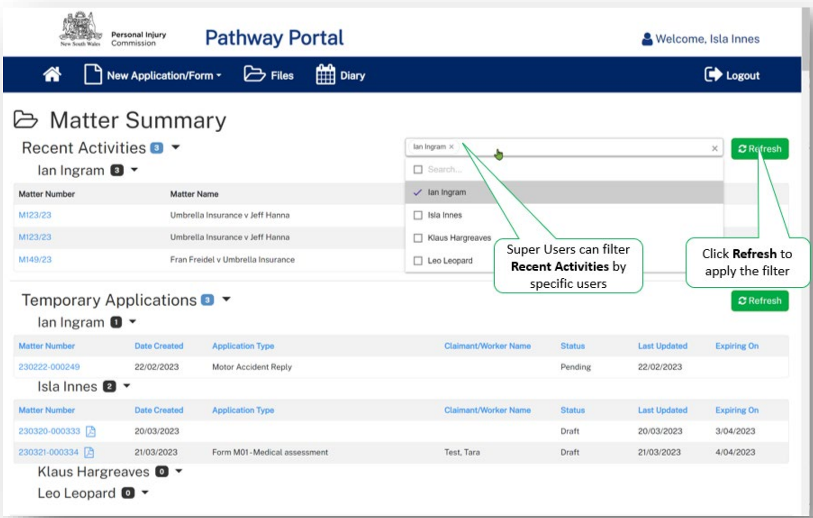
</td></tr>
</table>

What can Super Users see – Files – Recent Activities

Super Users can see all matters in the **Files** page.

To view **Recent Activities** for specific users:

- Select the users in the drop-down menu.
- Click **Refresh**.



How to add/remove Delegate for a Super User

A Super User can make an administrative assistant a Delegate.

A delegate should only be a user that will **never be named as a primary or secondary contact** on a matter – as their email address will have a delegate user access only.

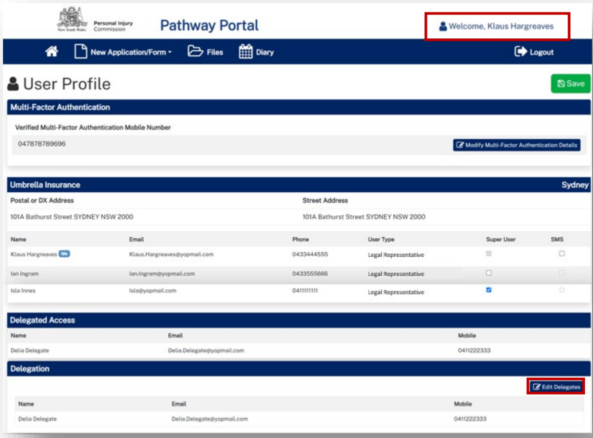
<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

Add/Remove Delegate for a Super User

To add a super user delegate, the super user will:

- Click the **Welcome, name** in the top right corner
- Click **Edit Delegates**.

</td><td>



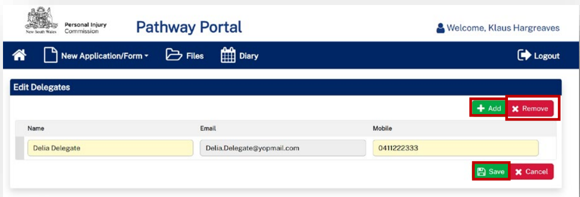
</td></tr>
<tr><td>

Edit Delegates

- Click **+Add**
- Populate **delegate details**
- Click **Save**.

The delegate will get an email invitation to register as delegate user in Pathway Portal.

</td><td rowspan="2">



</td></tr>
<tr><td>

To remove a delegate

- Select the **delegate** line by clicking at the beginning of the line (far Left)
- Click **X Remove**
- Click **Save**.

</td></tr>
</table>

Delegate Super User

<table>
<tr><th>Instruction</th><th>Page</th></tr>
<tr><td>

What can the Delegate Super User do?

The delegate **can**:

- See all the firms matters, documents and messages
- See the diary for each legal user in the firm
- Can do everything on matters, including sending messages
- Assign unassigned reply requests
- Draft and submit applications and replies

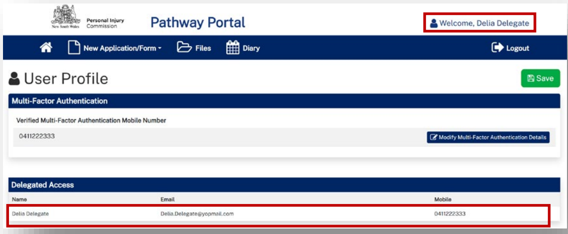
Delegate **can't**:

- Delegate to another user
- Add/remove super users
- Receive email notifications (they go to primary contact)
- Be the Primary contact or a Secondary contact on a matter
- Add a new contact

Note: When drafting an Application or Reply, the Delegate needs to record the name of the person who will be the Primary contact in the Legal Representative contact name field.

The named Legal Representative can then review and submit the Application or Reply, or the Delegate can submit it on their behalf.

</td><td>



</td></tr>
</table>

Appendix A – Document requirements

Document requirements to submit with the application are:

Document type	Requirements
Appointed Representative	The consent form needs to be completed by the nominated appointed representative and attached to the application together with supporting evidence of the selected incapacity types (e.g., Birth certificate, Guardianship Order or Financial Management Order.
Merit Review	If the amount of weekly compensation or statutory benefits is in the dispute, you must indicate a schedule of earnings in the approved form.
Damages assessment	If the amount of damages is in dispute, you must include in the application a schedule of damages containing full particulars of the amount claimed.
Surveillance recordings in medical assessment proceedings	If you are including a surveillance recording under rule 109 of the Personal Injury Commission Rules 2021, you must demonstrate that exceptional circumstances exist to allow this to be referred to a medical assessor and you must comply with rule 109 (2A).

Note: The document should be a single paginated, indexed bundle and must not exceed 500 pages.

What is the maximum document size?

Permitted file types: Size = 2GB (each file)				
.avi	.gif	.mp4	.pptx	.wma
.csv	.jpeg	.mpg	.rtf	.wmv
.dicm	.jpg	.msg	.tif	.xls
.doc	.mkv	.pdf	.tiff	.xlsx
.docx	.mov	.png	.txt	
.eml	.mp3	.ppt	.wav	

What should I do if the document is bigger than the maximum size?

Contact the Commission and follow advice.

Appendix B – Glossary of Terms

Term	Definition
Case Owner	The person responsible at the Commission for managing the case.
Multi Factor Authentication (MFA)	When logging into Pathway Portal a code is sent to your email/mobile. The code needs to be entered in the MFA field before you can login. This code ensures that your access is protected and guards against cyber security attacks.
Related matters	Matters or applications that are related, for example the same Claimant but a different accident date or a different Claimant for the same accident.
Temporary Application	The state of an application before it becomes registered or a full matter.
Registered Application	When a temporary application has been reviewed and registered by the Commission Registry it becomes a full matter.
Yellow field	Indicates that data is mandatory.
Blue link	Click to be taken to the Matter/Document/Task etc
Allocation	An appointment or event that has been scheduled with a Medical Assessor, Member or Merit Reviewer.

Appendix C – Email Notifications – When and what happens

When	What happens
An application is lodged in Pathway Portal	The applicant gets an email that temporary application received
An application is registered / rejected by the Commission	The applicant gets an email notification
A reply is requested	The respondent gets email notification
A reply submitted	The respondent gets email notification that reply temporary application received
Reply is registered / rejected by the Commission	The respondent and applicant get an email notification
Allocation is booked / cancelled / rescheduled	The legal representative (or self-represented party) gets email notification
Outcomes are available	The legal representative (or self-represented party) gets email notification
Documents have been shared with you	The legal representative (or self-represented party) gets email notification
You receive a message from the other party or the Commission	The legal representative (or self-represented party) gets email notification
Application closed	The legal representative (or self-represented party) gets email notification

Appendix D – Version Control

Version	Date	Author	Major changes	Approved by
1.0	6 June 2023	Jacqueline Mead	Initial version	Sophie Jones – Pathway Product Owner
1.1	1 August 2023	Pamela Allen	Added Print Message Thread button Added Venue address to Allocations section of Matter Summary	Tina Kavadas – Pathway Project Manager
1.2	1 Sept 2023	Pamela Allen	Updated most prominent screenshots: Service Provider now called Decision Maker	
1.3	16 January 2024	Oksana Eremina	Added new functions: How to assign Matter to someone else, add a new contact and manage contacts	Tina Kavadas – Pathway Project Manager
1.4	6 September 2024	Nathan Johnson	Updated login procedure	Melissa Golfes – Product Owner

1.5	November 2024	Leo Lopez	• Added reference to Rule 67 • Lodge a Legal Representation / Agent Change • Submissions and other Correspondence Lodge an additional document after initiating application or reply	
1.6	March 2025	Shilpashree Hassan	• Replace MASupport@pi.nsw.gov.au with PIC Digital Hub link and Link to PIC Digital hub user guide.	