



**Personal Injury
Commission**

Pathway Portal Legal Representative User Guide

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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:

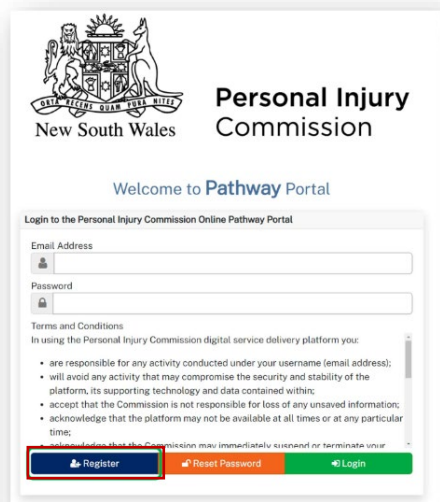
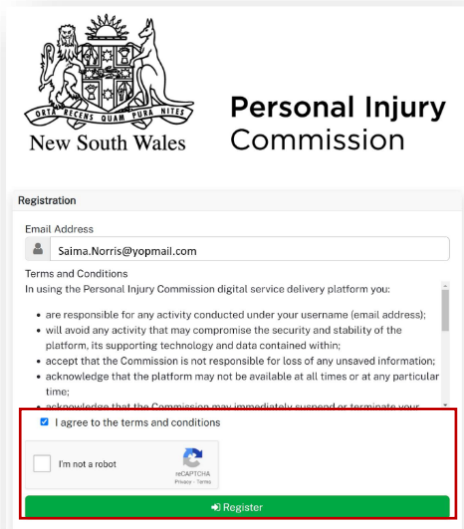
- Get started
- Navigation
- Lodge an application in Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Explain how to lodge a review and further application
- Assign a 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

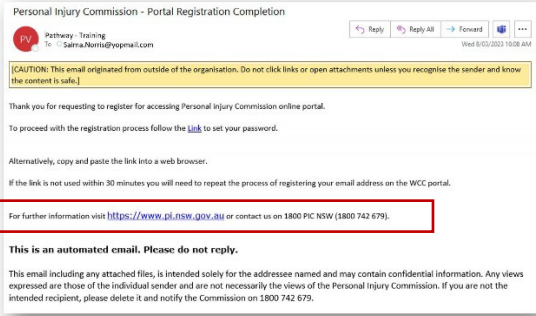
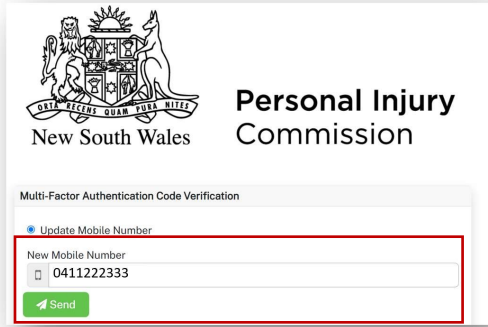
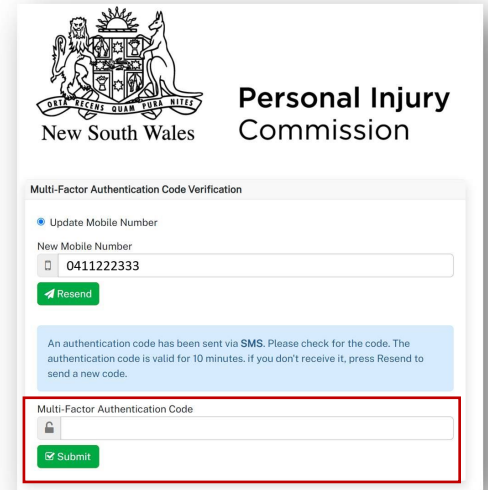
Get started

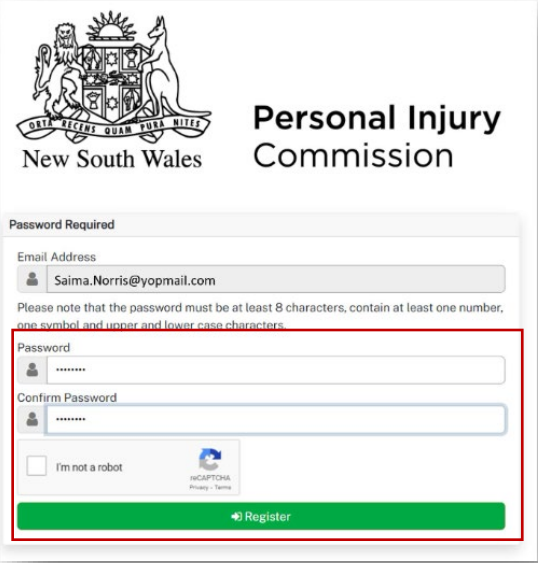
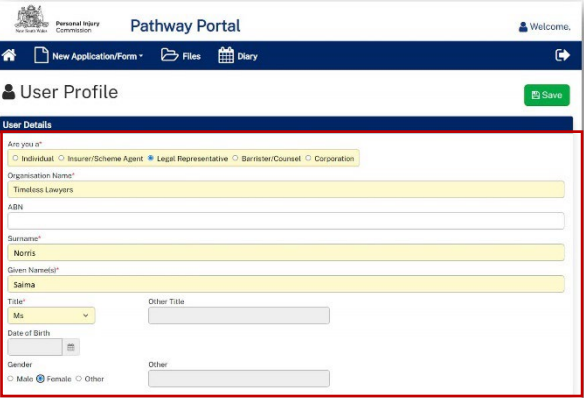
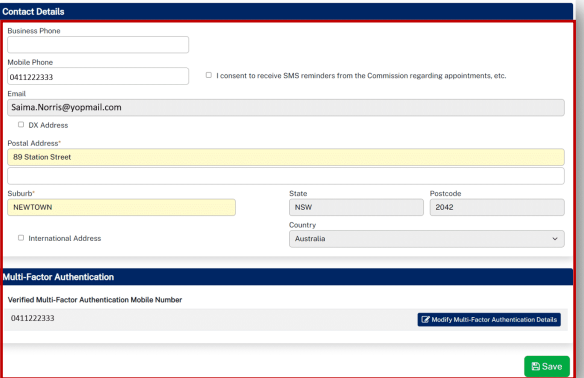
How to access and register for Pathway Portal

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

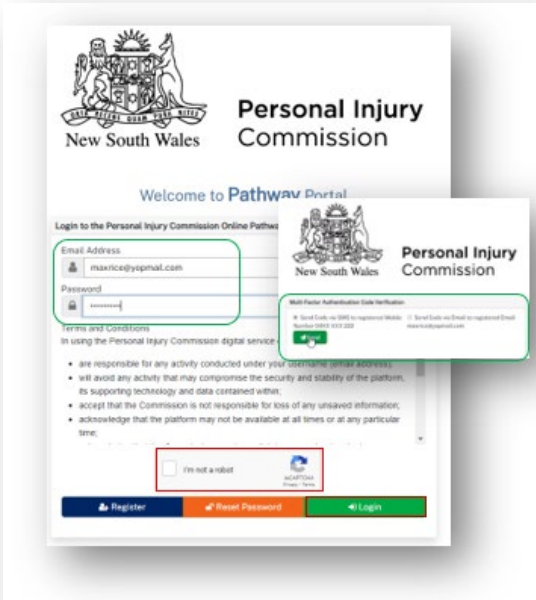
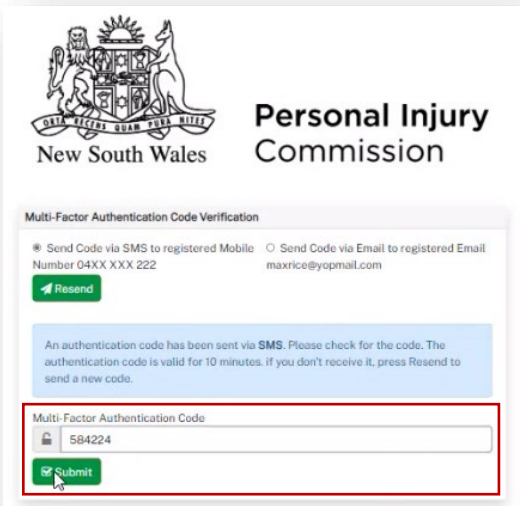
- If you are a lawyer, you will register as a **Legal Representative**.
- Administrative staff may be added as **Delegates** (see the end of this User Guide for details on how to do this). Delegates do not need to follow the instructions to register as a Legal Representative, but are added by a **Super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

Instruction	Page
<p>Access Pathway Portal</p> <ul style="list-style-type: none">• 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. <ol style="list-style-type: none">1. Click the following link: https://pathwayportal.pi.nsw.gov.au2. Click Register.	
<p>Register your email address</p> <ol style="list-style-type: none">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. <p>➤ You will then receive an email to validate your email address.</p>	

Instruction	Page
<p>Click Pathway Portal link in email</p> <p>You will receive an email with a link to validate the email address.</p> <p>2. Click the Link in the email.</p>	
<p>Update Mobile Number</p> <p>3. Populate New Mobile Number to receive the code and click Send.</p>	
<p>Type code</p> <p>4. Type the code sent to your mobile and click Submit.</p>	

Instruction	Page
<p>Create new Password</p> <ol style="list-style-type: none"> Enter Password and Confirm Password. Tick I'm not a robot and complete the visual reCAPTCHA test. Click Register. 	
<p>Populate User Profile (top of page)</p> <ol style="list-style-type: none"> Populate the User Profile. Select Legal Representative as user type. <p>Note: All yellow fields are mandatory.</p>	
<p>Populate User Profile (bottom of page)</p> <ol style="list-style-type: none"> Populate User Profile (bottom of page). Click Save. 	

How to Login to Pathway Portal

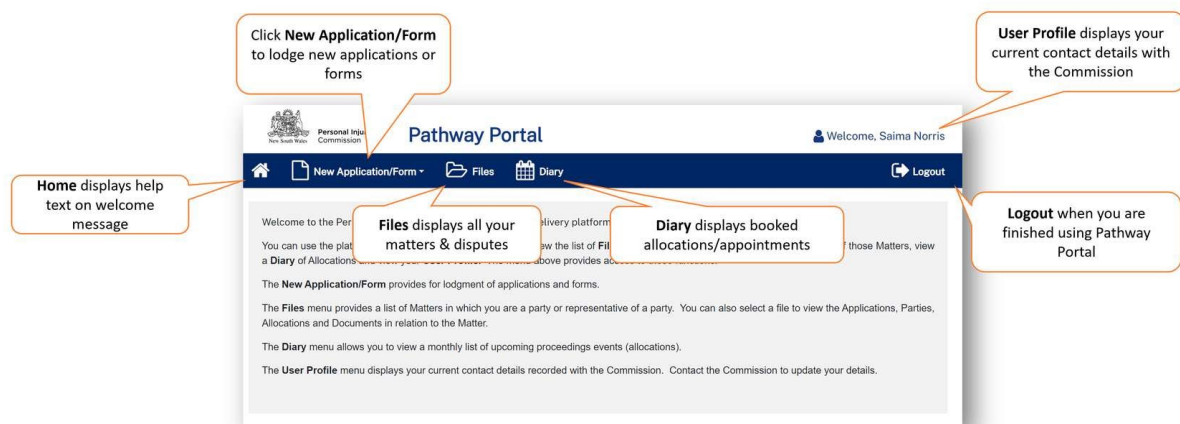
Instruction	Page
<p>12. Click the Pathway Portal link on the Personal Injury Commission website.</p> <p>13. Populate the Email Address and Password.</p> <p>14. Click Login.</p> <p>15. Tick I'm not a robot and complete the visual reCAPTCHA test.</p> <p>16. Select where you would like the Multi Factor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

Navigation

Home page

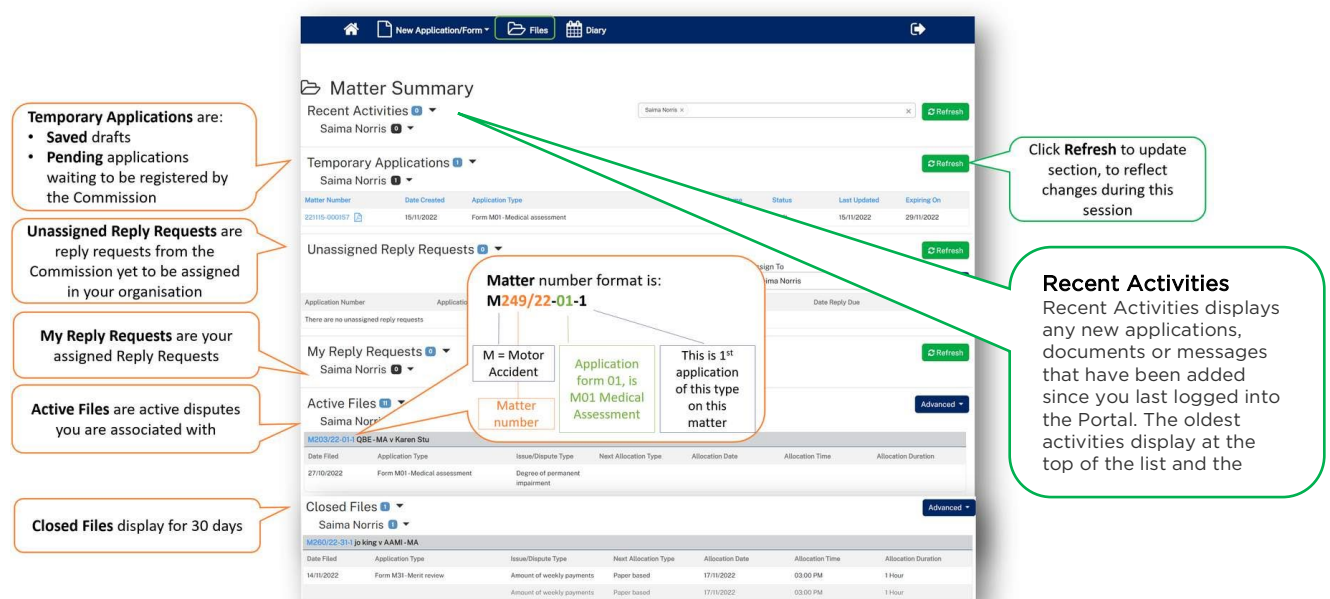
After you login to Pathway Portal the **Home page** displays:

- 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

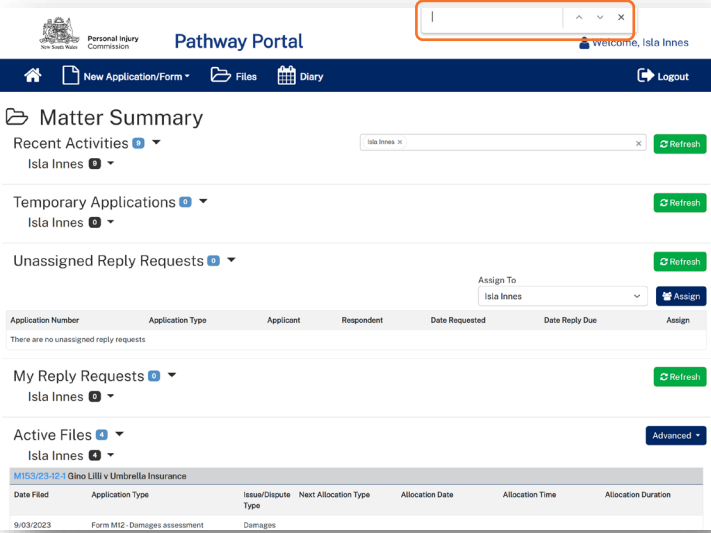
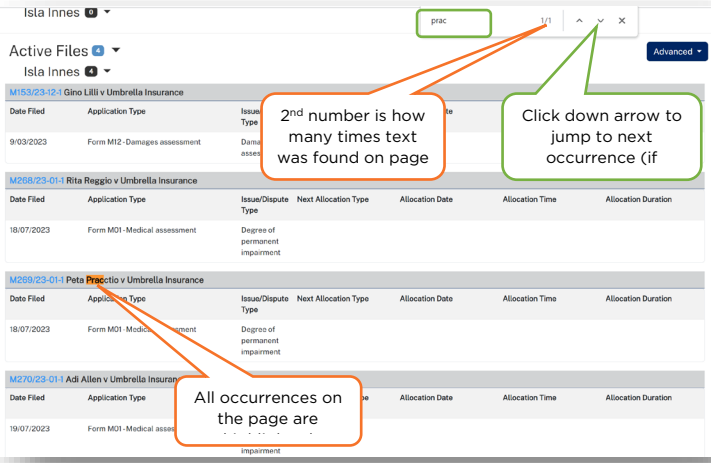
When you click the **Files** tab, the **Files** page displays all the matters where you are the party.



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.

Instruction	Screen
<p>Use Ctrl+F</p> <p>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.</p> <p>While on the Files page:</p> <ol style="list-style-type: none"> 1. Hold down the Ctrl key and press the F key on your keyboard simultaneously. <p>➤ A search box displays.</p>	
<ol style="list-style-type: none"> 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): <ul style="list-style-type: none"> ➤ 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). <p>Party name example</p> <p>➤ In this example, we typed part of the surname of the party, which is prac (upper/lower case doesn't matter with Ctrl+F).</p> <p>➤ Can search for a partial name (eg type poulos to search for Theofanopoulos)</p>	

Instruction

Matter number example

- In this example, we typed part of the matter number, ie 269.

Screen

The screenshot shows the 'Active Files' page for 'Isla Innes'. A search bar at the top right contains the text '269'. Below the search bar, there are three tables of active files. The first table is for 'M153/23-01-1 Gino Lilli v Umbrella Insurance', the second for 'M268/23-01-1 Rita Reggio v Umbrella Insurance', and the third for 'M269/23-01-1 Peta Pracetto v Umbrella Insurance'. The third table is highlighted with a green box. The tables have columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

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 full application number, 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 screenshot shows the 'Advanced' search criteria page. There are two input fields: 'Application Number' and 'Party Name'. The 'Application Number' field contains 'm269/23-01-1'. Below these fields are 'View' and 'Refresh' buttons. A green callout box points to the 'Matters I'm linked to' radio button, with the text 'Matters I'm linked to displays matters where you are a secondary'. The 'Refresh' button is also highlighted with a green box. Below the criteria section, there is a table of active files for 'M269/23-01-1 Peta Pracetto v Umbrella Insurance'.

- The files that match your criteria display.

The screenshot shows the 'Active Files' page for 'Isla Innes' after applying the advanced search criteria. The table displays one result for 'M269/23-01-1 Peta Pracetto v Umbrella Insurance' with columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

Instruction

Screen

No files listed after Advanced search

If nothing matched your search criteria, the **Active Files** displays as 0.

To see all your Active Files:

1. Click Advanced.
2. Delete the criteria you entered.
3. Click **Refresh**.

Active Files 0 ▾
Isla Innes 0 ▾

Advanced ▾

Matter Details

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

Matter Details

Application Forms 2

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
9/09/2023	M153/23-12-1	Form M12 - Damages assessment	Lola Level	Claimant Legal Representative	Open
9/09/2023	M153/23-12-1	Motor Accident Reply	Grace Gilbert	Insurer/Scheme Agent	Open

M153/23-12-1 Gino Lili v Umbrella Insurance

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
9/09/2023	Form M12 - Damages assessment	Damages assessment	Awaiting decision		Miscallum, Elton

Parties 2

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Innes, Isla (0489 909 559)	Liberty Lawyers (Grace Gilbert, 0488880000)
Applicant	Gino Lili	Claimant	0400000100	Timeloss Lawyers (Lola Level, 0419999000)

Messages 3

Application	Category	Subject	Sender	Date/Time Sent
There are no open message threads. Click View All Messages to view closed message threads.				

Documents 3

Document Date	Author	Document Category and Type	File Name	Related To
9/07/2023	Liberty Lawyers	Additional document - Other	DUMMY DOCUMENT FOR LEARNING PURPOSES 98.docx	M153/23-12-1, Sender: Liberty Lawyers - Recipient:
9/09/2023	Portal	Electronic Application Form - Sealed Form M12 - Damages assessment	230309-000323.pdf	M153/23-12-1, Sender: Portal - Recipient:
9/09/2023	Lola Level	Application - Claims assessment - bundle	claims bundle.pdf	M153/23-12-1, 08/03/2023 Form M12 - Damages assessment
9/09/2023	Grace Gilbert	Reply - Claims assessment - bundle	reply bundle.pdf	M153/23-12-1, 08/03/2023 Motor Accident Reply

Click **New Form** to lodge a new application for this

Click **New Message** to create a new message thread for

Click **Assign Barrister** to give a Barrister visibility of

Click any **blue heading** to sort by

Click **blue document date** link to download, then view

Matter Details

Click **New Form** to lodge a new application for this matter (eg Review)

Click **New Message** to create a new message thread for this application

Click **Assign Barrister** to add counsel

Click any **blue heading** to sort by that column

Click **blue document date** link to download, then view document

Application Form					
Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
12/04/2023	M24/23-01-1	Form M24- Medical assessment	Legal99 Training	Claimant Legal Representative	Open
9/05/2023	M24/23-01-2	Form M24- Medical assessment	Training Legal99	Claimant Legal Representative	Open
9/05/2023	M24/23-01-2	Motor Accident Reply	Training Insurer99	Insurer/Scheme Agent	Open

M24/23-01-1 Peter Perlewski-00 v Umbrella Insurance

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
12/04/2023	Form M24- Medical assessment	Threshold injury	Open		Mathew Parnichar, Susan

M24/23-01-2 Peter Perlewski-01 v Umbrella Insurance

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
9/05/2023	Form M24- Medical assessment	Threshold injury	Closed		Ryan, Christina
		Late additional documentation	Awaiting decision		Ryan, Christina

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Insurer99, Training 0	
Applicant	Peter Perlewski-00	Claimant	0411 222 333	Liberty Lawyers (Training Legal99, 0412066666)

Messages

Application	Category	Subject	Sender	Date/Time Sent
M24/23-01-2, Form M24- Medical assessment	For Action	Request to admit late documents	Susan-Lin	10/05/2023 3:05 PM
M24/23-01-2, Form M24- Medical assessment	N/A	Request to admit late documents	Peter Perlewski 01	9/05/2023 8:33 PM

Documents

Document Date	Author	Document Category and Type	File Name	Related To
10/05/2023	PIC	Document- Medical Assessor referral	9318b8c-542f-4b0d-bb11-9490f736b98c_Medical Assessor referral.docx	Sent To Liberty Lawyers
10/05/2023	PIC Medical99, Training	Outcome- 01 Medical Assessment certificates and reasons- Physical T1 & WRI	1923c438-6069-46b0-8ba0-73ba769fc688.pdf	M24/23-01-2, 08/05/2023 Medical examination
9/05/2023	Perlewski 01 Peter	Additional document- Application to admit late documents	dummy document bundle.docx	M24/23-01-2, Sender: Perlewski 01 Peter- Recipient:

Diary

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

Weekly Diary - List

Start Date* 24/02/2023

User Name Benjamin Bluton

Previous Week Next Week

Date	Matter Number	Matter Name	Allocation Type	Attendees	Venue Name	Location	Mode of Allocation	Time	Duration
27/02/2023 - Mon	M120/23	Sheryl Pan v mylnsure	Medical examination	Sheryl Pan (Claimant), mylnsure (Insurer / Scheme Agent)	Huffman Sydney Clinic	SYDNEY	Venue	4:00 PM	1 hour

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 application)
- Certification and Signature.

↔ **Continue** to provide one single, indexed and paginated document with application

↔ **Temporary application** is a new concept

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.

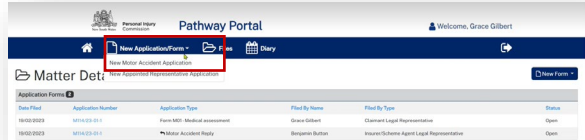
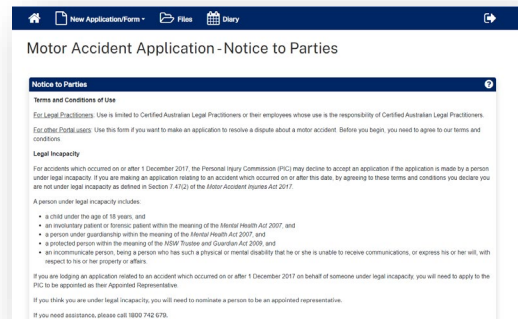
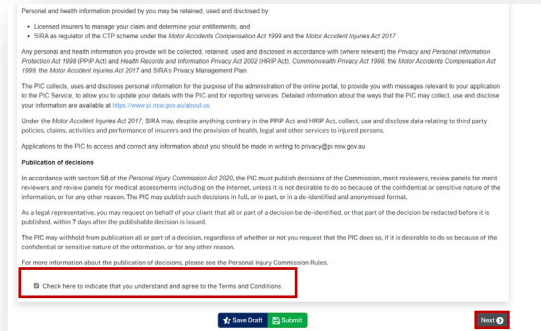
Application forms that can be submitted by parties via Pathway Portal are:

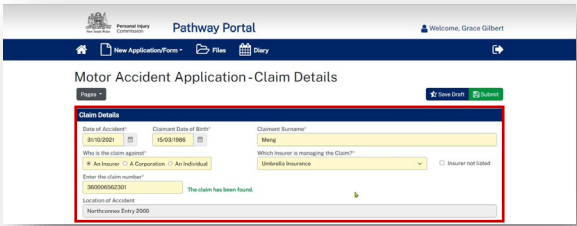
Code	Form name	Scheme
M01	Medical assessment	2017
M02	Review of a medical assessment	2017
M03	Further medical assessment	2017
M11	Exemption	2017
M12	Damages assessment	2017
M13	Further Damages assessment	2017
M14	Damages settlement approval	2017
M41	Application for appointed representative	2017
M21	Miscellaneous 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	

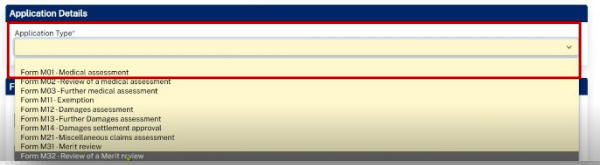


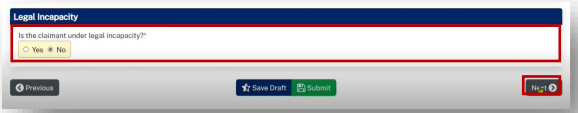
Note: The Motor Accident Reply form is also submitted via Pathway Portal.

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
<p>New Application Form</p> <p>20. Click on the New Application Form and select New Motor Accident Application.</p> <p>➤ The Motor Accident Application – Notice to Parties page displays.</p>	
<p>Motor Accident Application – Notice to Parties</p> <p>21. Click the check box to indicate that you understand and agree to the Terms and Conditions.</p> <p>22. Click Next.</p> <p>➤ The Motor Accident Application – Claim Details page displays.</p>	 

Instruction	Page
<p><i>Motor Accident Application - Claim Details</i></p> <p>23. Complete the details as follows:</p> <ul style="list-style-type: none"> • Date of Accident – Type in the date or select the date from the calendar. <p>Note: The Date of Accident determines the Scheme and the application forms available for selection.</p> <ul style="list-style-type: none"> • 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. <p>Note: Depending on who the claim is against will determine the additional fields that you are required to complete.</p> <ul style="list-style-type: none"> • 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. 	
<p><i>Matching the claim number to the Universal Claims Database</i></p> <ul style="list-style-type: none"> • 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. 	

Instruction	Page
<p>Application Details</p> <p>24. Complete the following:</p> <ul style="list-style-type: none"> • Application Type – Select from the drop-down menu. <p>➤ The Matters in Dispute page displays.</p>	
<p>Matters in Dispute</p> <p>25. Select the relevant disputes.</p>	
<p>Filed By</p> <p>26. Filed by Name – Type in your name/name of the Legal Representative.</p> <p>27. Filed by Party – Select Claimant Legal Representative.</p>	
<p>Legal Incapacity</p> <p>28. Is the claimant under legal incapacity? – Select No to continue.</p> <p>29. Click Next.</p> <p>➤ The Claimant Details page displays.</p>	
<p>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.</p>	

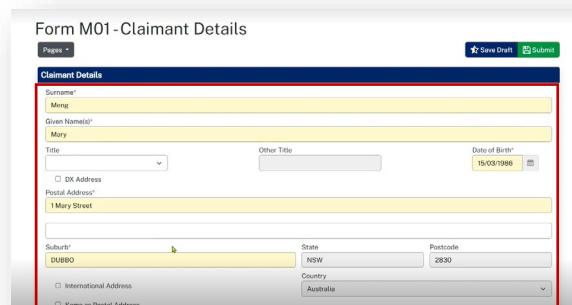
Instruction

Page

Claimant Details

30. Complete the **Claimant Details** as follows:

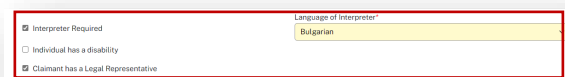
- **Surname** – Type in the Claimant's last name.
- **Given Name(s)** – Type in the Claimant's first and second names.
- **Title** – Select the Title from the drop-down menu.
- **Date of Birth** – Type in the Claimant's Date of Birth or select the date from the calendar.
- **DX Address** – Check the 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



Claimant Legal Representative Details

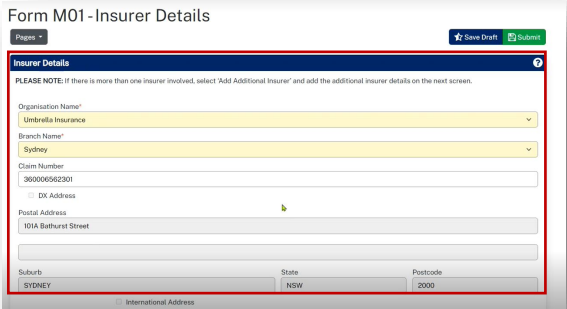
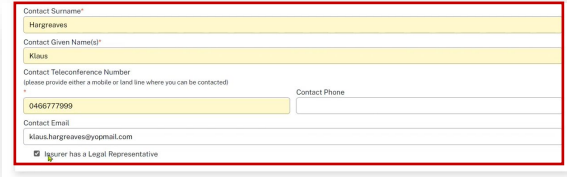
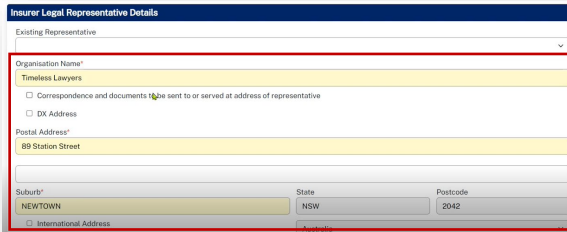
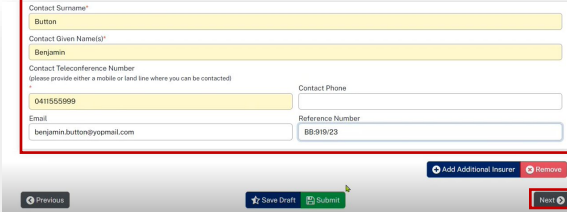
32. Complete the details as follows:

- **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.

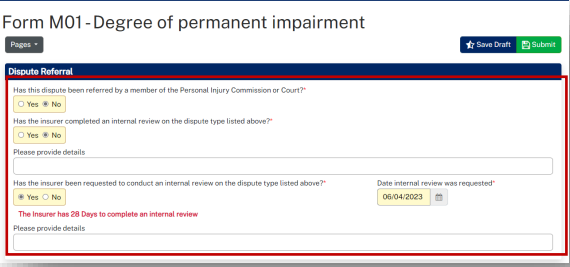
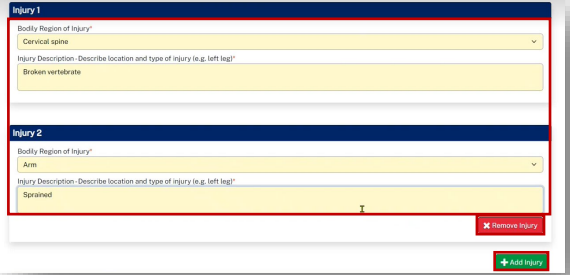
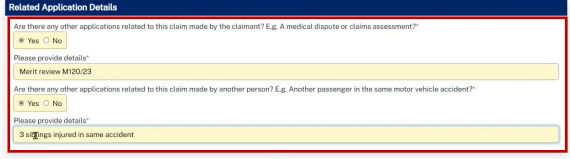
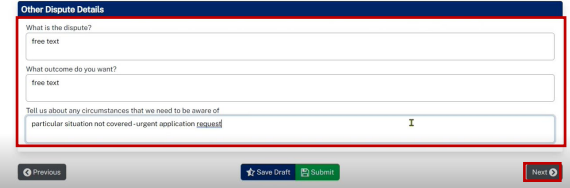
- Check the **Contact Name** that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.
- If you are completing this application on behalf of the lawyer who is managing the application, you will need to enter their name as the Contact Name.

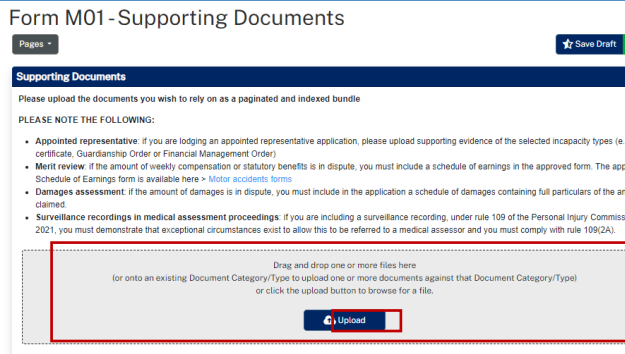
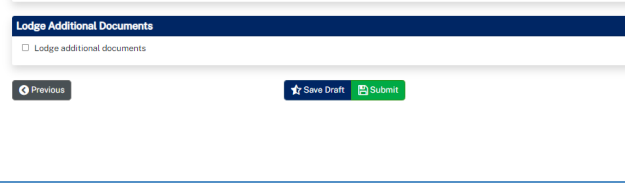
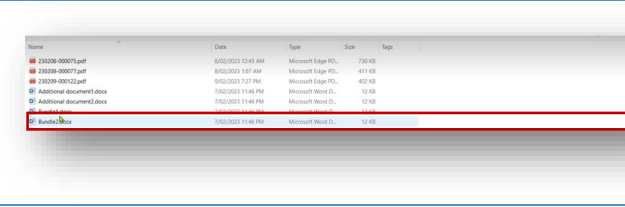
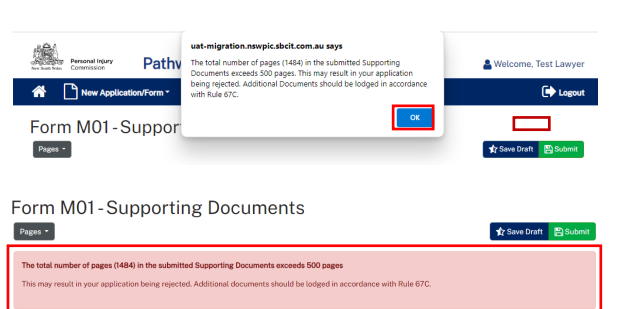
Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.

- **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.

<ul style="list-style-type: none"> • Email – Populate the Primary contact’s email address. • Reference Number – Populate as required. <p>33. Click Next.</p> <p>➤ The Insurer Details page displays.</p>	
Instruction	Page
<p>Form M01- Insurer Details</p> <p>34. These details will auto populate because the Insurer was selected on the first page.</p>	
<p>Insurer Details continued</p> <p>35. Complete the details as follows:</p> <ul style="list-style-type: none"> • 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. 	
<ul style="list-style-type: none"> • Add in the Insurer Legal Representative Details name and address details. 	
<ul style="list-style-type: none"> • Add in the Insurer Legal Representative contact details. <p>Note: You can Add Additional Insurer if there is more than one Insurer involved in this Matter.</p> <p>36. Click Next.</p> <p>➤ The Degree of Permanent Impairment page displays in this example. The content and questions</p>	

on the next page will vary depending on the application type and the dispute (s) selected earlier.	
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Instruction	Page
<p><i>Degree of Permanent Impairment</i></p> <p><i>Dispute Referral</i></p> <p>37. Select Yes/No to the questions.</p>	
<p><i>Injury 1</i></p> <p>38. Complete the details as follows:</p> <ul style="list-style-type: none"> • Add the details of Injury 1. • Click Add Injury to add another injury. • Click Remove injury to remove an injury from the page. 	
<p><i>Related Application Details</i></p> <p>39. Add in any Related Application Details if applicable.</p>	
<p><i>Other Dispute Details</i></p> <p>40. Add in any Other Dispute Details we need to be aware of.</p> <p>41. Click Next.</p> <p>➤ The Supporting Documents page displays.</p>	

Instruction	Page
<p>Supporting Documents</p> <p>The Supporting Documents page provides information about what you need to lodge for certain application types.</p> <p>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)</p>	
<p>42. Click Upload or drag and drop the documents onto the page.</p>	
<p>43. Select the document and click Open.</p>	
<p>Note: If the supporting document exceeds 500 pages a warning message will be displayed.</p> <p>Continuing to submit may result in the application being rejected by the Commission.</p> <p>To correct, re-upload supporting document under 500 pages.</p> <p>Dispute types excluded from the 500-page limit are:</p> <ul style="list-style-type: none"> • Medical reviews and appeals • Merit reviews and merit review panels • Settlement approvals • Presidential appeals • Expedited assessments • Certain work injury damages disputes 	

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:

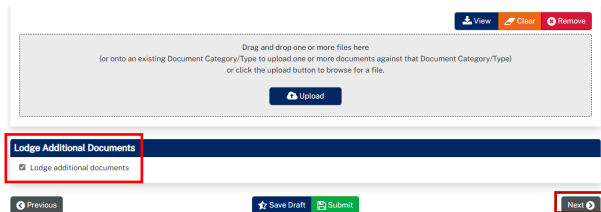
- **Document Type** – Select from the drop-down menu. If a bundle is uploaded, select the application type – bundle as the document type, e.g., Medical dispute - bundle.
- **Author** – Type in your name.
- **Date of Document** – Type in the date of upload or select the date from the calendar.



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**.

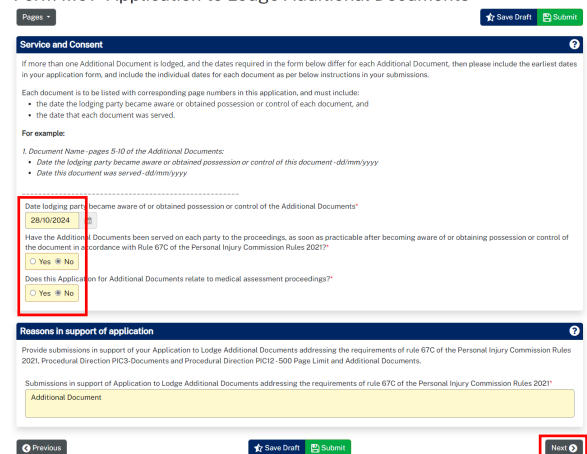
➤ The Supporting Documents page displays

49. Upload your additional documents.

50. Add in the Document Details.

51. Click **Next**.

Form M01-Application to Lodge Additional Documents



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**.

Form M01-Certification and Signature

Temporary Applications						
Grace Gilbert						
Application ID	Applicant	Application Type	Document/Policy Name	Status	Last Updated	Expiry Date
123456789012	Grace Gilbert	From M01 Application for appointment representation	Brown, Sandy	Draft	20/02/2023	6/03/2023
098765432109	Grace Gilbert	From M01 Medical assessment	Meng, Alex	Pending	20/02/2023	

- **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.

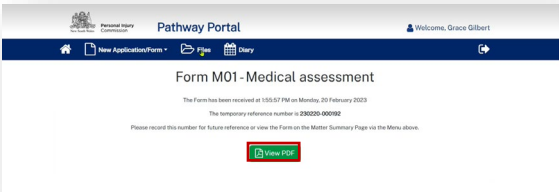

Form M01-Notice to Parties

Submit

53. Confirm your declaration, signature and date and click **Submit**.

Form M01-Certification and Signature

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														
<p>Form M01 - Medical Assessment</p> <p>54. Click View PDF to view and download the application.</p>															
<p>Temporary Applications</p> <p>55. Go to Files and Temporary Applications to see the temporary application. You can download the PDF by clicking the blue temporary application link.</p> <p>Note: that the status is now Pending. If you are unable to see the application, click Refresh.</p> <p>You will receive an email to advise that a temporary application has been submitted.</p>	 <table><tr><th>Matter Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>230220-00092</td><td>20/02/2023</td><td>Form M01 - Medical assessment</td><td>Grace, Emily</td><td>Pending</td><td>20/02/2023</td><td>20/02/2023</td></tr></table>	Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	230220-00092	20/02/2023	Form M01 - Medical assessment	Grace, Emily	Pending	20/02/2023	20/02/2023
Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On									
230220-00092	20/02/2023	Form M01 - Medical assessment	Grace, Emily	Pending	20/02/2023	20/02/2023									

Temporary Applications

The screenshot shows the 'Matter Summary' page in the Pathway Portal. The top navigation bar includes 'New Application/Form', 'Files', and 'Diary'. The main content area is titled 'Matter Summary' and shows 'Recent Activities' and 'Temporary Applications' for user 'Lola Level'. A table lists a single temporary application with the following details:

Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
230308-000316	8/03/2023	Form M01-Medical assessment	Freidol, Fran	Pending	8/03/2023	

Two callout boxes provide additional information:

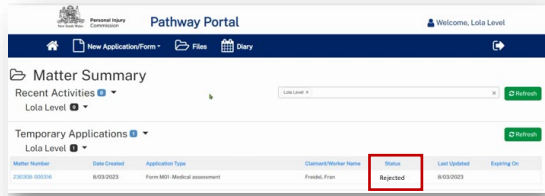
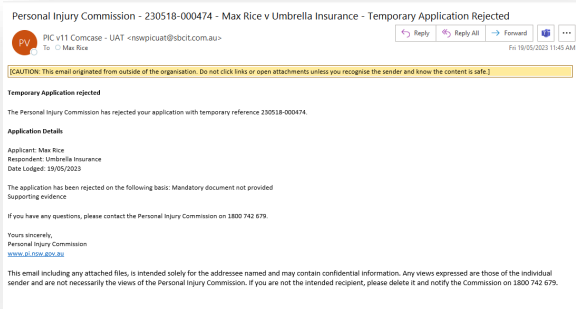
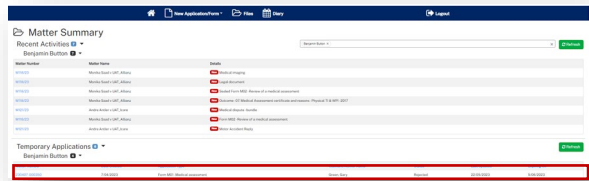
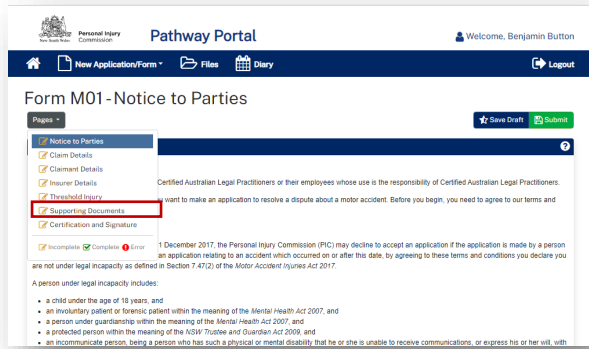
- Click [blue temporary Matter Number](#) link to open and update any application with Status of **Draft** or **Rejected**
- Status of:
 - Pending** = temporary application submitted to the Commission
 - Draft** = you have saved the application to finish later
 - Rejected** = the Commission has rejected the application, refer to the email notification for reason

- 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
<p>Notification of rejected temporary application</p> <p>56. If the Commission rejects a temporary application, you will receive an email notification with the reason.</p> <ul style="list-style-type: none"> In the Files tab the Temporary Application will have a Status of Rejected 	
<p>To resubmit rejected application:</p> <p>57. Complete the following:</p> <p>58. Refer to the email notification to understand the rejection reason.</p>	
<p>59. In the Files tab, click the blue temporary Matter Number link of the rejected matter. This reopens the application.</p>	
<p>60. Navigate to Supporting Documents and make the required changes to the form (if this was the reason for rejection).</p>	

Instruction	Page																																							
<p>61. Click Upload to upload the supporting document bundle (if this was the reason for rejection) and click Next.</p> <p>Note: If your application was rejected for having supporting documents over 500 pages,</p> <p>62. Remove the document</p> <p>63. Split the document offline</p> <p>64. Re-upload the first bundle (up to 500 pages)</p> <p>65. Select the ‘Lodge Additional Documents’ checkbox</p>	<div><h3>Form M01-Supporting Documents</h3><div><div>Pages -</div><div>Save Draft</div></div><div><h4>Supporting Documents</h4><p>Please upload the documents you wish to rely on as a paginated and indexed bundle</p><p>PLEASE NOTE THE FOLLOWING:</p><ul style="list-style-type: none">Appointed representative: If you are lodging an appointed representative application, please upload supporting evidence of the selected incapacity types (e.g. certificate, Guardianship Order or Financial Management Order).Merit review: If the amount of weekly compensation or statutory benefits is in dispute, you must include a schedule of earnings in the approved form. The approved Schedule of Earnings form is available here > Motor accidents formsDamages 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 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).<div><p>Drag and drop one or more files here (or onto an existing Document Category/Type to upload one or more documents against that Document Category/Type) or click the upload button to browse for a file.</p><div>Upload</div></div><div><h4>Lodge Additional Documents</h4><div><input type="checkbox"/> Lodge additional documents</div><div><div>Previous</div><div>Save Draft Submit</div></div></div></div></div> <tr><td><p>66. Once changes are made, sign and date the application on the last page and click Submit.</p></td><td><div><div><div>New ApplicationForm -FilesDiaryLogout</div><div><div>Pages -</div><div>Save DraftSubmit</div></div><div><h3>Form M01-Certification and Signature</h3><div><div>Certification and Signature</div><div><div><input checked="" type="checkbox"/> I declare that, to the best of my knowledge, the information given in this form is true and correct. 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I also give consent and authorisation for the collection, use and disclosure and exchange of personal and health information provided in this form.</div><div><input checked="" type="checkbox"/> Application Signed<div>Date Signed22/05/2023</div></div></div><div><div>Previous</div><div>Save DraftSubmit</div></div></div></div></div></div> <tr><td><p>➤ The Status updates to Pending in the Temporary Application list).</p><p>Note: If the Commission accepts and registers the resubmitted application, the Filed date will be the date the application was resubmitted.</p></td><td><div><div><div>Temporary Applications Benjamin ButtonRefresh</div><table><tr><th>Motor Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>230330-00085</td><td>25/02/2023</td><td>Motor Accident Reply</td><td></td><td>Pending</td><td>9/04/2023</td><td></td></tr><tr><td>230410-000306</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Freder, Sofia</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230410-000387</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Cummings, Colin</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230447-000300</td><td>22/05/2023</td><td>Form M01-Medical assessment</td><td>Green, Gary</td><td>Pending</td><td>22/05/2023</td><td></td></tr></table></div></div></td></tr>	<p>➤ The Status updates to Pending in the Temporary Application list).</p> <p>Note: If the Commission accepts and registers the resubmitted application, the Filed date will be the date the application was resubmitted.</p>	<div><div><div>Temporary Applications Benjamin ButtonRefresh</div><table><tr><th>Motor Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>230330-00085</td><td>25/02/2023</td><td>Motor Accident Reply</td><td></td><td>Pending</td><td>9/04/2023</td><td></td></tr><tr><td>230410-000306</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Freder, Sofia</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230410-000387</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Cummings, Colin</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230447-000300</td><td>22/05/2023</td><td>Form M01-Medical assessment</td><td>Green, Gary</td><td>Pending</td><td>22/05/2023</td><td></td></tr></table></div></div>	Motor Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	230330-00085	25/02/2023	Motor Accident Reply		Pending	9/04/2023		230410-000306	10/04/2023	Form M02-Damages assessment	Freder, Sofia	Pending	10/04/2023		230410-000387	10/04/2023	Form M02-Damages assessment	Cummings, Colin	Pending	10/04/2023		230447-000300	22/05/2023	Form M01-Medical assessment	Green, Gary	Pending	22/05/2023	
<p>66. Once changes are made, sign and date the application on the last page and click Submit.</p>	<div><div><div>New ApplicationForm -FilesDiaryLogout</div><div><div>Pages -</div><div>Save DraftSubmit</div></div><div><h3>Form M01-Certification and Signature</h3><div><div>Certification and Signature</div><div><div><input checked="" type="checkbox"/> I declare that, to the best of my knowledge, the information given in this form is true and correct. I also give consent and authorisation for the collection, use and disclosure and exchange of personal and health information provided in this form.</div><div><input checked="" type="checkbox"/> Application Signed<div>Date Signed22/05/2023</div></div></div><div><div>Previous</div><div>Save DraftSubmit</div></div></div></div></div></div> <tr><td><p>➤ The Status updates to Pending in the Temporary Application list).</p><p>Note: If the Commission accepts and registers the resubmitted application, the Filed date will be the date the application was resubmitted.</p></td><td><div><div><div>Temporary Applications Benjamin ButtonRefresh</div><table><tr><th>Motor Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>230330-00085</td><td>25/02/2023</td><td>Motor Accident Reply</td><td></td><td>Pending</td><td>9/04/2023</td><td></td></tr><tr><td>230410-000306</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Freder, Sofia</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230410-000387</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Cummings, Colin</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230447-000300</td><td>22/05/2023</td><td>Form M01-Medical assessment</td><td>Green, Gary</td><td>Pending</td><td>22/05/2023</td><td></td></tr></table></div></div></td></tr>	<p>➤ The Status updates to Pending in the Temporary Application list).</p> <p>Note: If the Commission accepts and registers the resubmitted application, the Filed date will be the date the application was resubmitted.</p>	<div><div><div>Temporary Applications Benjamin ButtonRefresh</div><table><tr><th>Motor Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>230330-00085</td><td>25/02/2023</td><td>Motor Accident Reply</td><td></td><td>Pending</td><td>9/04/2023</td><td></td></tr><tr><td>230410-000306</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Freder, Sofia</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230410-000387</td><td>10/04/2023</td><td>Form M02-Damages assessment</td><td>Cummings, Colin</td><td>Pending</td><td>10/04/2023</td><td></td></tr><tr><td>230447-000300</td><td>22/05/2023</td><td>Form M01-Medical assessment</td><td>Green, Gary</td><td>Pending</td><td>22/05/2023</td><td></td></tr></table></div></div>	Motor Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	230330-00085	25/02/2023	Motor Accident Reply		Pending	9/04/2023		230410-000306	10/04/2023	Form M02-Damages assessment	Freder, Sofia	Pending	10/04/2023		230410-000387	10/04/2023	Form M02-Damages assessment	Cummings, Colin	Pending	10/04/2023		230447-000300	22/05/2023	Form M01-Medical assessment	Green, Gary	Pending	22/05/2023			
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230447-000300	22/05/2023	Form M01-Medical assessment	Green, Gary	Pending	22/05/2023																																			

Replies

How to complete a Reply – Respondent

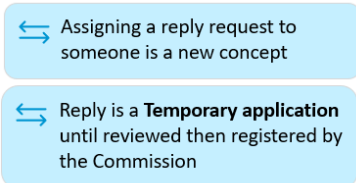


A reply request arrives as **Unassigned** in Pathway Portal and must be assigned to a person (to ensure only one person is completing the reply).

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.



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



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.

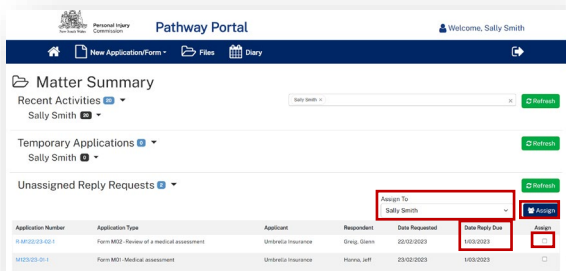
For privacy and security reasons, the Commission does not include links in email communications.

Yours sincerely,

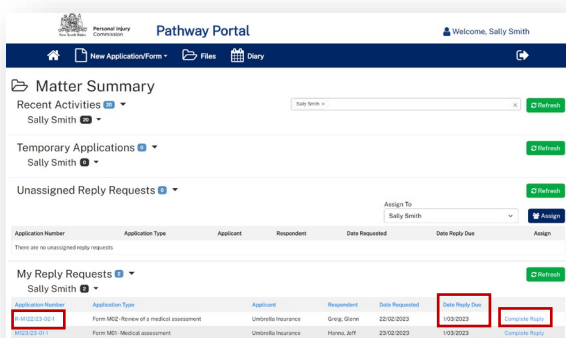
Personal Injury Commission

www.pi.nsw.gov.au

How to Assign the Reply Request

Instruction	Page
<p>Unassigned Reply Requests must be assigned to someone in your firm.</p> <p>1. To assign a Reply Request, complete the following:</p> <ul style="list-style-type: none"> • Tick Assign box • Select a User's name from the Assign To drop down menu • Click Assign. 	
<p>Note: Be mindful of the Date Reply Due.</p>	

How to complete a Reply

Instruction	Page
<p>My Reply Requests are your assigned Reply Requests</p> <p>67. To respond to the reply request, complete the following:</p> <ul style="list-style-type: none"> • 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. <p>68. This will generate the Motor Accident Application – Reply form which you need to complete and submit.</p>	
<p>Note: Be mindful of the Date Reply Due</p>	

Instruction

69. Complete the **Notice to Parties** – check that you understand and agree to the terms and conditions and click **Next**.

Page

Pathway Portal Welcome, Max Rice

[New Application/Form](#) [Files](#) [Diary](#) [Logout](#)

Motor Accident Application - Reply - Notice to Parties

Notice to Parties

Terms and Conditions of Use

For Legal Practitioners: Use is limited to Certified Australian Legal Practitioners or their employees whose use is the responsibility of Certified Australian Legal Practitioners.

For other Users: Use this form if you want to make an application to resolve a dispute about a motor accident. Before you begin, you need to agree to our terms and conditions.

Legal Incapacity

For accidents which occurred on or after 1 December 2017, the Personal Injury Commission (PIC) may decline to accept an application if the application is made by a person under legal incapacity. If you are making an application relating to an accident which occurred on or after this date, by agreeing to these terms and conditions you declare you are not under legal incapacity as defined in Section 7.4(2) of the Motor Accident Injuries Act 2017.

A person under legal incapacity includes:

- a child under the age of 18 years; and
- an involuntary patient or forensic patient within the meaning of the Mental Health Act 2007; and
- a person under guardianship within the meaning of the Mental Health Act 2007; and
- a protected person within the meaning of the NSW Trustee and Guardian Act 2009; and
- an incapacitated person, being a person who has such a physical or mental disability that he or she is unable to receive communications, or express his or her will, with respect to his or her property or affairs.

If you are lodging an application related to an accident which occurred on or after 1 December 2017 on behalf of someone under legal incapacity, you will need to apply to the PIC to be appointed as their Appointed Representative.

[Next](#)

The PIC may withhold from publication all or part of a decision, regardless of whether or not you request that the PIC does so, if it is desirable to do so because of the confidential or sensitive nature of the information, or for any other reason.

For more information about the publication of decisions, please see the Personal Injury Commission Rules.

☒ Check here to indicate that you understand and agree to the Terms and Conditions

[Save Draft](#) [Submit](#) [Next](#)

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**.

Motor Accident Application - Reply - Reply

[Save Draft](#) [Submit](#)

Application Details

Application Number: M201725-124 Application Type: Form M2C - Damages assessment

Applicant: Sydney Corporation Pty Ltd Respondent: Max Rice

Filed By

Filed by Name: Max Rice

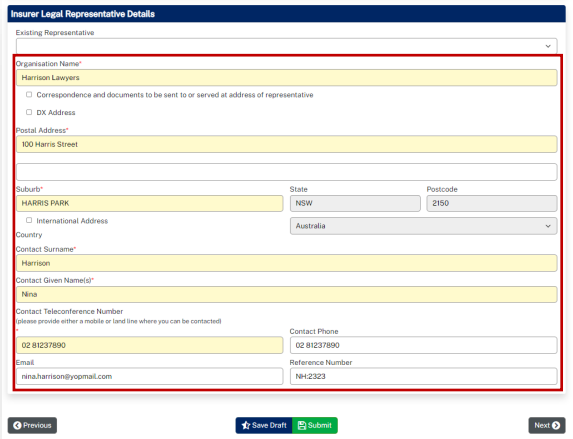
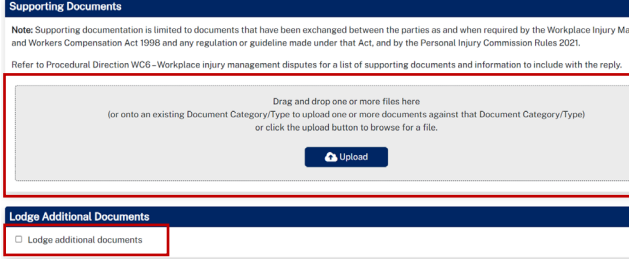
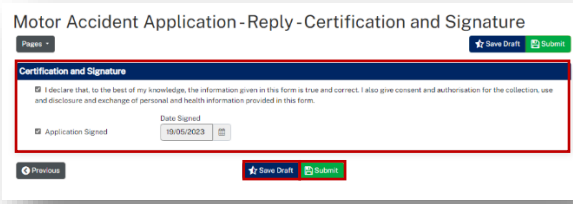
Filed by Party: Cleverland Legal Representative

Dispute: Damages assessment

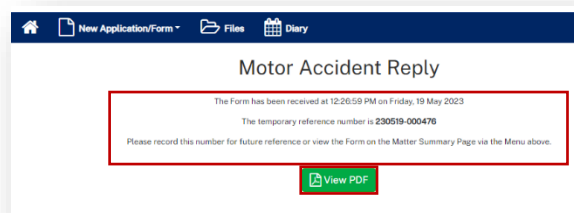
Dispute Type: Damages assessment

Reply to the dispute: Submissions attached

[Previous](#) [Save Draft](#) [Submit](#) [Next](#)

Instruction	Page
<p>72. Complete the Claimant Details page and Legal Representative page / Insurer Details page and Legal Representative page.</p> <p>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.</p> <p>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.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p>	
<p>74. Upload supporting documents for the Reply, complete the Document Details and click Next.</p> <p>Note: Supporting documents must be submitted as a single indexed and paginated bundle and should not exceed 500 pages</p>	
<p>75. Sign and date the application – Submit if ready or Save Draft and have someone else review the reply before it is submitted.</p>	

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



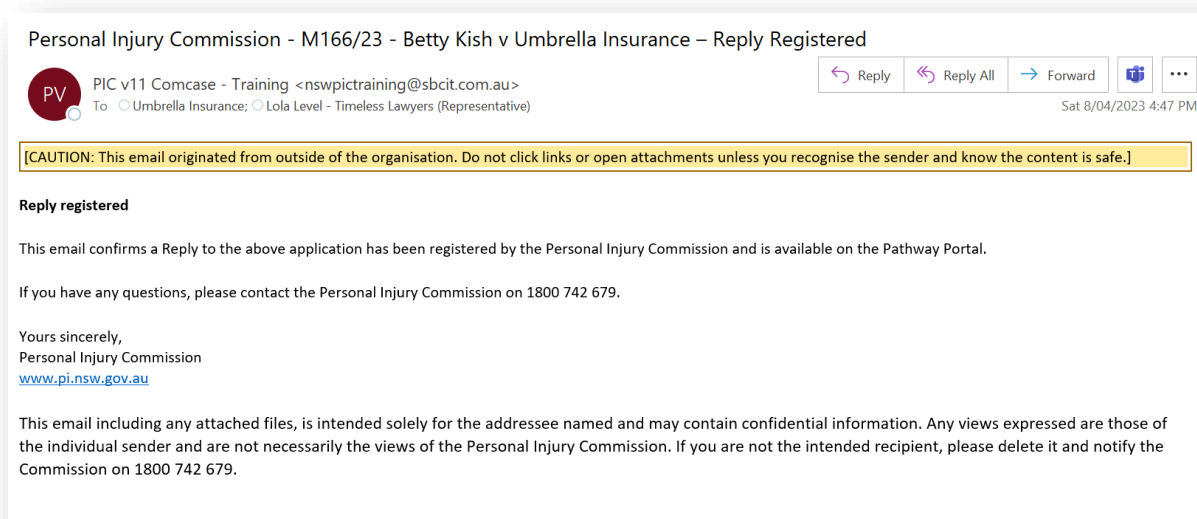
How to view the Reply

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.



Instruction

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.

Page

Matter Details

Application Form

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
8/13/2023	M149/23-01-1	Form MDI-Medical assessment	Labi Level	Clement Legal Representative	Open
8/13/2023	M149/23-01-1	Motor Accident Reply	Grace Gilbert	Insurer/Scheme Agent Legal Representative	Open

M149/23-01-1 Pran Pradell v Umbrella Insurance

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
8/13/2023	Form MDI-Medical assessment	Treatment and care reasonable and necessary	Open	Invoia, Andria	Invoia, Andria
		Threshold Injury	Open		

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent		Liberty Lawyers (Grace Gilbert, 0468 888 888)
Applicant	Pran Pradell	Clement	0411 022 313	Timewell Lawyers (Labi Level, 0402 05590)

Messages

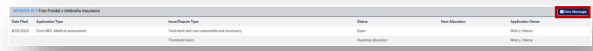
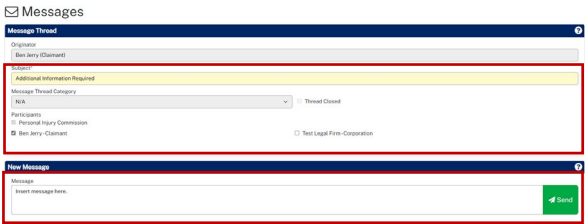
Application	Category	Subject	Sender	Date/Time Sent
M149/23-01-1-Form MDI-Medical assessment	For Action	View for info	Pamela Allen	16/03/2023 12:47 PM
M149/23-01-1-Form MDI-Medical assessment	For Action	Testing	Pran Pradell	15/03/2023 11:35 AM
M149/23-01-1-Form MDI-Medical assessment	N/A	View for info	Pran Pradell	15/03/2023 11:35 AM

Documents

Document Date	Author	Document Category and Type	Related To
8/13/2023	Pran	Electronic Application Form-Sealed Form MDI-Medical assessment	M149/23-01-1, Sender:Pran-Recipient:
8/13/2023	Pran	Electronic Application Form-Sealed Motor Accident Reply	M149/23-01-1, Sender:Pran-Recipient:
8/13/2023	Labi Level	Application Medical dispute bundle	M149/23-01-1, 08/03/2023-Form MDI-Medical assessment
8/13/2023	Grace Gilbert	Reply-Medical dispute bundle	M149/23-01-1, 08/03/2023-Motor Accident Reply

Messages

How to send a message

Instruction	Page
<p>You can use the message function to communicate with the other party and the Personal Injury Commission.</p> <p>From the Matter Details page:</p> <ol style="list-style-type: none">Click New Message on the top right corner of the application.	
<p>Note: The Application Owner will always be copied automatically on the message.</p>	
<ol style="list-style-type: none">Type the Subject.Select the Participants.<ul style="list-style-type: none">Legal representative (or self-represented party) receives email notification of new Portal messageClaimant/insurer can see messages but not respond if they have Legal Representative.Type the Message body.	

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**.

The screenshot shows a table of messages with the following data:

Application	Category	Subject	Sender	Date/Time Sent
M20006/23 64-1 - Form M64 - Special Assessment	For Action	New Message to Claimant for Stood Over claim	Priyanka Singh	9/06/2023 9:56 AM
M20006/23 64-1 - Form M64 - Special Assessment	For Action	Msg02 to Claimant	Priyanka Singh	9/06/2023 9:52 AM
M20006/23 64-1 - Form M64 - Special Assessment	For Action	Message01 to Claimant	Moham Dahchan	9/06/2023 9:50 AM

Callouts from the image:

- New badge indicates a new message in the** (points to the 'New' badge in the subject of the first row)
- Category for incoming messages will be:**
 -
 -
 -**N/A Category indicates thread was initiated by** (points to the 'For Action' category in the first row)
- Click blue subject link to view and respond to the message** (points to the 'New Message to Claimant for Stood Over claim' link)
- Click to toggle between: View All Messages - Which includes closed threads.**
View Open Messages - which (points to the 'View Open Messages' button)

How to respond to messages

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

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

✉ Messages

Message Thread

Originator

Ben Jerry (Claimant)

Subject

Additional Information Required

Message Thread Category

N/A

Thread Closed

Participants

☒ Personal Injury Commission

☒ Ben Jerry - Claimant

☐ Test Legal Firm - Corporation

Print Message Thread

New Message

Message

Send

Message: Leo Lopez (Personal Injury Commission) - 29/10/2024 11:57:12 AM

Sent on Behalf Of

Leo Lopez (Personal Injury Commission)

Sender

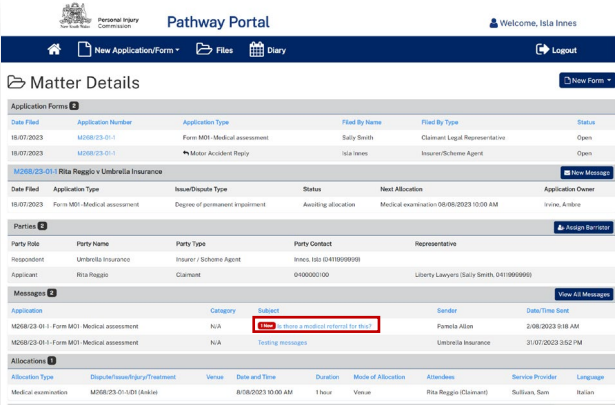
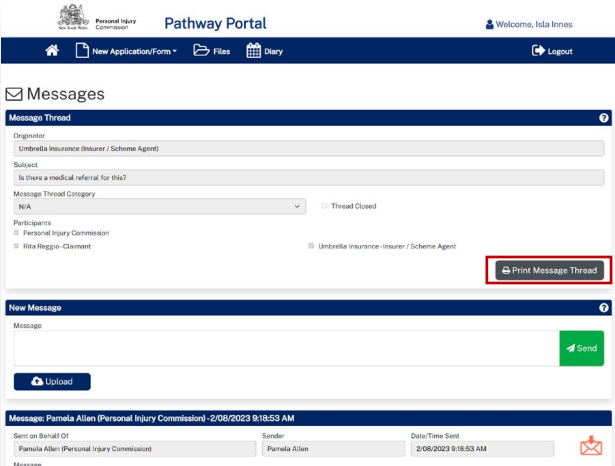
Leo Lopez

Date/Time Sent

29/10/2024 11:57:12 AM

How to download a message thread

You can download message threads from Pathway Portal.


Instruction	Page
<p>1. From the Matter Details page click the blue subject link to view message thread.</p>	 <p>The screenshot shows the 'Matter Details' page in the Pathway Portal. The 'Messages' section at the bottom contains a table with columns: Application, Category, Subject, Sender, and Date/Time Sent. The 'Subject' column has a link that is highlighted with a red box. The link text is 'Click here to view a message thread for this application'.</p>
<p>2. Click the Print Message Thread button.</p>	 <p>The screenshot shows the 'Messages' page in the Pathway Portal. The 'Message Thread' section displays details for a message from 'Umbrella Insurance (Insurer / Scheme Agent)'. At the bottom right of this section, there is a button labeled 'Print Message Thread' which is highlighted with a red box. Below this is a 'New Message' section with a text input field and a 'Send' button.</p>

Instruction


- A sealed PDF document with the entire message thread is generated and can be found in your Downloads folder.

Page

Printed from Pathway Portal by Umbrella Insurance Date Printed: 2/08/2023 9:20:14 AM


New South Wales
**Personal Injury
Commission**

M268/23 - Rita Reggio v Umbrella Insurance
M268/23-01-1 - Form M01 - Medical assessment



Originator
Umbrella Insurance (Insurer / Scheme Agent)

Subject
Is there a medical referral for this?

Participants
Personal Injury Commission, Rita Reggio - Claimant, Umbrella Insurance - Insurer / Scheme Agent

Message Thread Category
N/A

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 this appointment. Can you please share with me?

Case Management

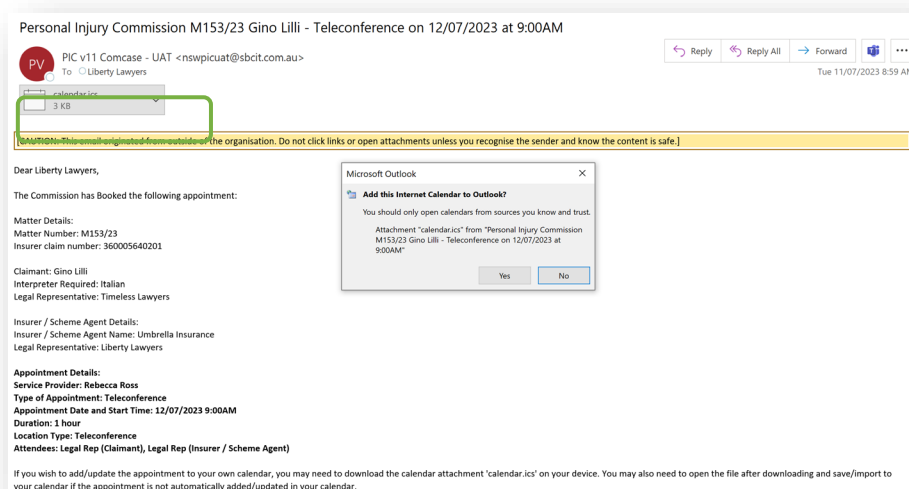


When the Commission allocates the dispute to a decision maker an email notification with date, time, venue, address and required attendees for the allocation is automatically sent to:

- 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.

Decision Maker is the member or medical

Allocations 1								
Allocation Type	Dispute/Issue/Injury/Treatment	Venue	Date and Time	Duration	Mode of Allocation	Attendees	Decision Maker	Language
 Medical examination	M270/23-01-1/D1 (Arm)	PIC Medical Suites, Level 8/1 Oxford Street, SURRY HILLS NSW	4/09/2023 9:00 AM	1 hour	Venue	Adi Allen (Claimant)	Sullivan, Sam	

Allocation type is the type of appointment (eg Teleconference, Medical

Dispute/Injury/Issue/Treatment displays what is to be assessed in

Attendees displays who needs to attend, eg if it's a Teleconference the legal representative may need to

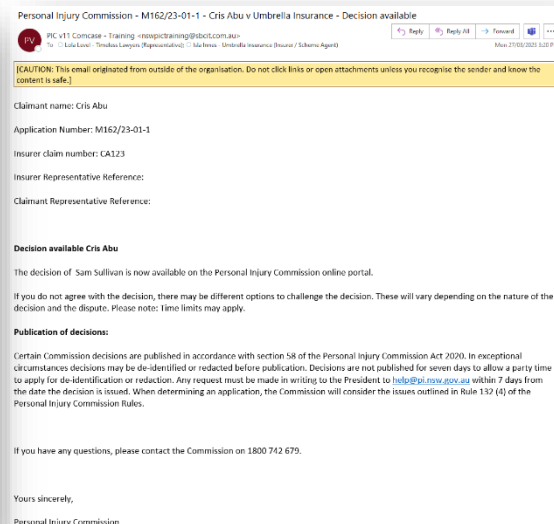
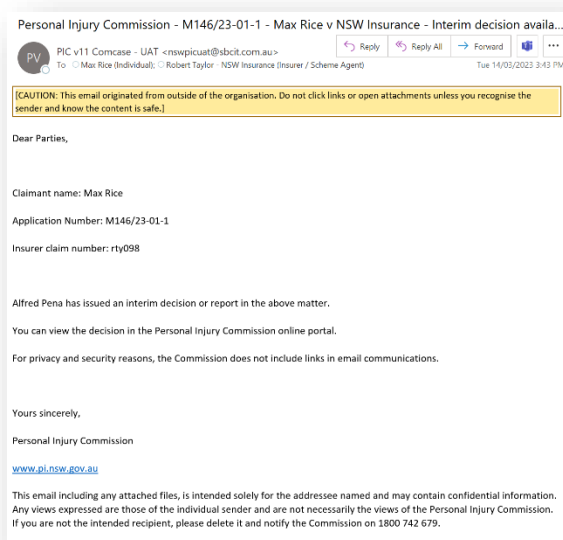
Assess and Decide



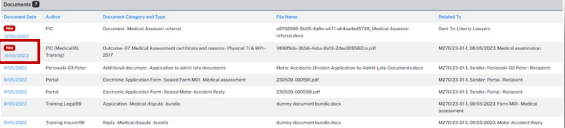
After the decision maker uploads the outcome document (interim or final) the Commission case owner:

- 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

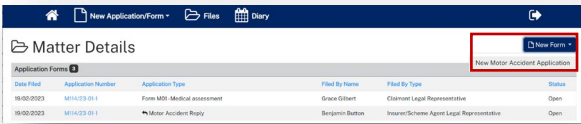
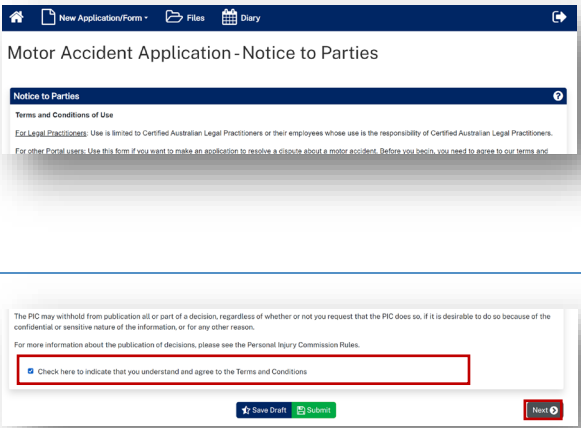


How to view the Outcome Document

Instruction	Page
<p>From the Matter Details page, scroll down to Documents</p> <ol style="list-style-type: none">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
<p>To lodge a review, complete the following:</p> <ol style="list-style-type: none"> From the original Matter Details, click New Form in top right corner and select New Motor Accidents Application. <p>This allows the claimant, insurer and legal representative details to auto-populate if you select their names from drop-down list.</p>	
<p>Notice to Parties</p> <ol style="list-style-type: none"> Read the Terms and Conditions and scroll to the bottom and tick to agree to Terms and Conditions. Click Next <p>77. The Form Claim Details displays.</p>	

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.

Form M02 - Claim Details

How to lodge an application for a Review continued

Instruction

Claimant Details

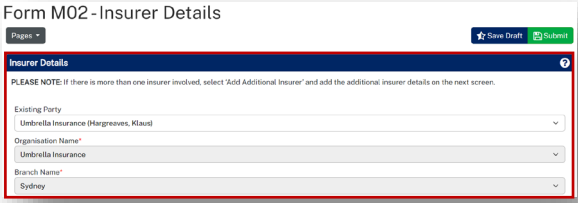
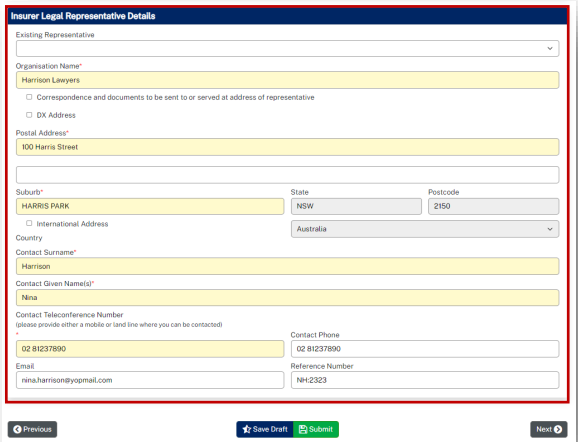
6. Populate the **Claimant Details** page.
7. When done click **Next**.

Page

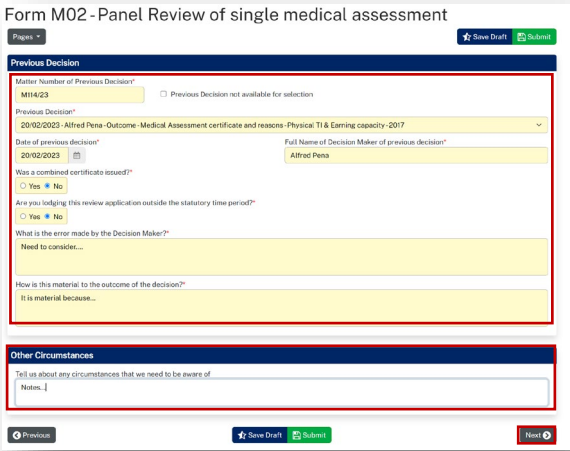
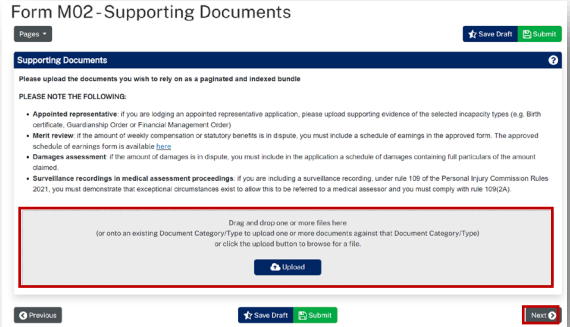
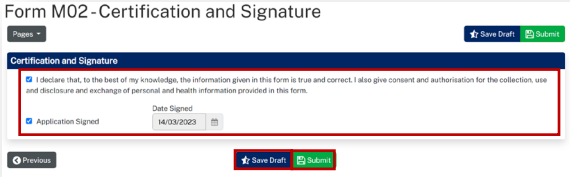
Form M02 - Claimant Details

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

<p>to enter their name as the Contact Name.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <p>79. The Insurer Details page displays.</p>	
Instruction	Page
<p>Insurer Details</p> <p>10. Populate the Insurer Details page, including the Contact Name details.</p> <p>11. Click Next.</p>	
<div data-bbox="231 1048 754 1176" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-bottom: 10px;"> <p>Selecting Existing Party and Existing Representative auto-populates their details which speeds up data entry ⇄</p> </div> <p>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.</p> <p>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.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <p>80. The Form M02 - Panel Review of single medical assessment page displays if this is the application that was selected.</p>	

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Instruction	Page
<p>Form M02 – Panel Review of single medical assessment</p> <p>14. Complete the details as follows:</p> <ul style="list-style-type: none"> 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. <p>15. Click Next.</p> <p>81. The Supporting Documents page displays.</p>	
<p>Supporting Documents</p> <p>82. Upload the relevant supporting document as a single indexed and paginated bundle.</p> <p>Note: The 500 page limit does not apply to Review applications</p> <p>16. Click Next</p> <p>83. The Certification and Signature page displays.</p>	
<p>Certification and Signature</p> <p>17. Read and tick the acknowledgments.</p> <p>18. Click Save Draft if application needs to be reviewed internally before being submitted to the Commission.</p> <p>19. Click Submit.</p>	

Instruction

What happens after Submit?

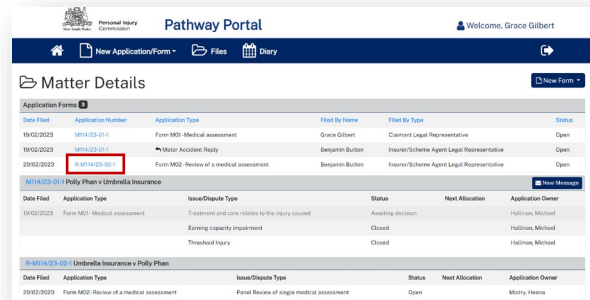
The Review **Temporary Application** displays with a **Status** of **Pending** until it is registered by the Commission.

Page



Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
230214-000229	14/03/2023	Form M02 - Review of a medical assessment	Phan, Polly	Pending	14/03/2023	

Once the application is registered it displays within the matter details for the originating dispute and has matter number prefixed with **R**.



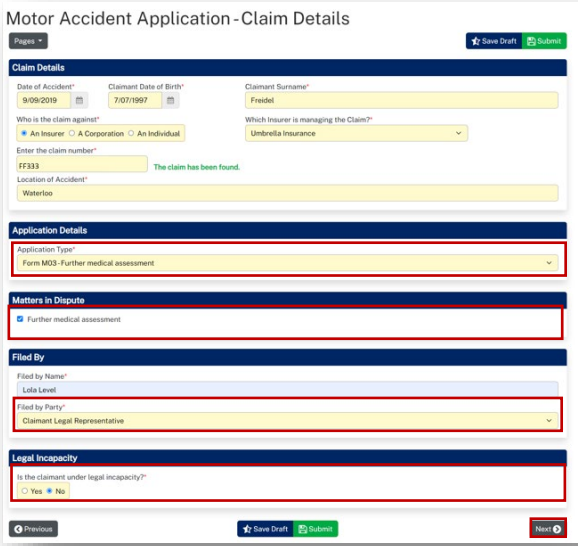
Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
19/02/2023	MTH4225-01-1	Form M01 - Medical assessment	Grace Gilbert	Current Legal Representative	Open
19/02/2023	R-MTH4225-02-1	Form M02 - Review of a medical assessment	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open
20/02/2023	R-MTH4225-03-1	Form M02 - Review of a medical assessment	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open

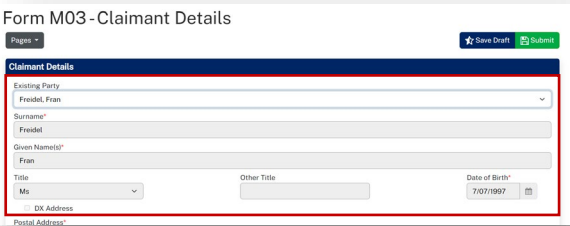
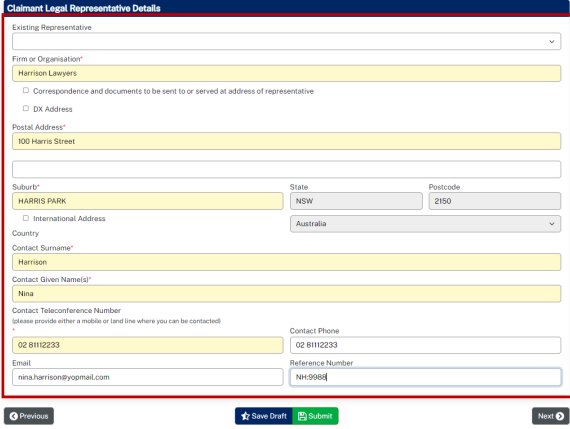
Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
19/02/2023	Form M01 - Medical assessment	Transient and acute injuries to the injury caused	Awaiting Decision		Hallinan, Michael
		Earning capacity impairment	Closed		Hallinan, Michael
		Threshold injury	Closed		Hallinan, Michael

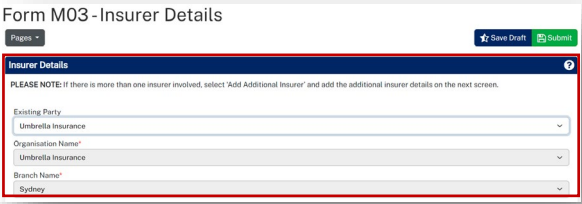
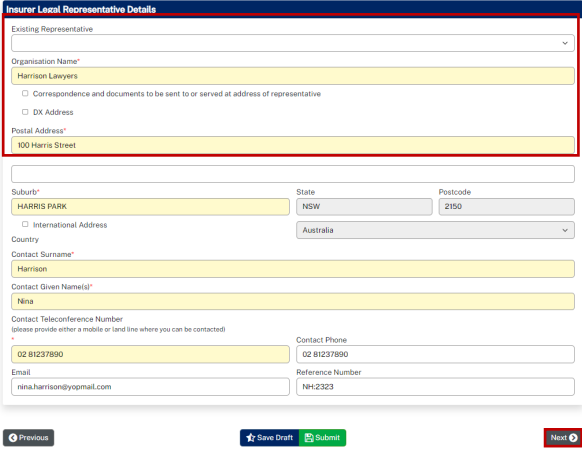
Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
20/02/2023	Form M02 - Review of a medical assessment	Panel Review of single medical assessment	Open		Milroy, Heine

Lodge an application for a Further Assessment

How to lodge an Application for a Further Assessment

Instruction	Page
<p>If you need to apply for a further assessment for a matter in Pathway Portal, complete the following:</p> <ol style="list-style-type: none"> 1. In the Matter Details, click New Form in the top right corner and select New Motor Accidents Application. 	
<p>Notice to Parties</p> <ol style="list-style-type: none"> 2. Read the Terms and Conditions. 3. Scroll to the bottom and tick to agree to Terms and Conditions and click Next. <p>84. The Motor Accident Application – Claim Details page displays.</p>	
<p>Motor Accident Application – Claim Details</p> <ol style="list-style-type: none"> 4. Complete the Claim Details as follows: <ul style="list-style-type: none"> • Application Type • Matters in Dispute • Filed by Party • Is the claimant under legal capacity? <p>This example selects M03 – Further medical assessment</p> <ol style="list-style-type: none"> 5. Click Next. <p>85. The Claimant Details page displays.</p>	

Instruction	Page
<p>Claimant Details</p> <p>6. Populate the Claimant Details page.</p>	
<p>Note: You can select the Existing Party and the Existing Representative from drop down to quickly populate.</p> <p>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.</p> <p>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.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <p>9. Click Next.</p> <p>86. The Insurer Details page displays.</p>	

Instruction	Page
<p>Insurer Details</p> <p>10. Populate the Insurer Details page, including the Contact Name details.</p>	
<p>Note: You can select the Existing Party and the Existing Representative from the drop down to quickly populate.</p> <p>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.</p> <p>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.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p>	
<p>13. Click Next.</p> <p>87. The Form M03 – Further medical assessment page displays if this is the application that was selected.</p>	

Instruction	Page
<p>Further medical assessment</p> <p>14. Complete the details as follows:</p> <ul style="list-style-type: none"> 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. <p>15. Click Next.</p> <p>88. The Supporting Documents page displays.</p>	
<p>Supporting Documents</p> <p>89. Upload relevant supporting documents as a single indexed and paginated bundle that does not exceed 500 pages.</p> <p>16. Click Next.</p> <p>90. The Certification and Signature page displays.</p> <p>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</p>	

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**.

Form M03 - Certification and Signature

Pages 1

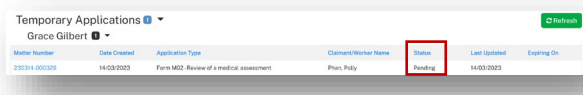
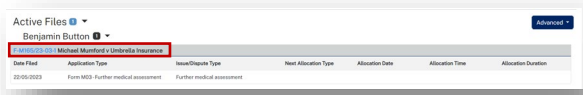
Certification and Signature

☒ I declare that, to the best of my knowledge, the information given in this form is true and correct. I also give consent and authorisation for the collection, use and disclosure and exchange of personal and health information provided in this form.

Date Signed
☒ Application Signed 17/11/2024

Previous Save Draft Submit

What happens after the Further Assessment application has been submitted?

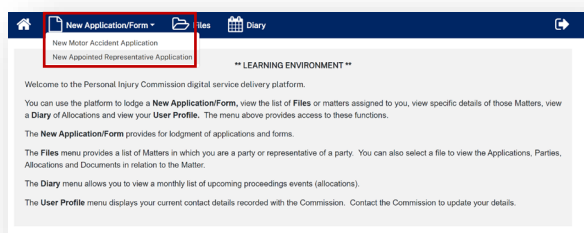

Instruction	Page																																			
<p>The Further Assessment Temporary Application displays with Status of Pending until it is registered by the Commission.</p>	 <table><tr><th colspan="7">Temporary Applications</th></tr><tr><th colspan="7">Grace Gilbert</th></tr><tr><th>Matter Number</th><th>Date Created</th><th>Application Type</th><th>Claimant/Worker Name</th><th>Status</th><th>Last Updated</th><th>Expiring On</th></tr><tr><td>250314-000028</td><td>14/03/2023</td><td>Form M02- Review of a medical assessment</td><td>Phon, Polly</td><td>Pending</td><td>14/03/2023</td><td></td></tr></table>	Temporary Applications							Grace Gilbert							Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	250314-000028	14/03/2023	Form M02- Review of a medical assessment	Phon, Polly	Pending	14/03/2023								
Temporary Applications																																				
Grace Gilbert																																				
Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On																														
250314-000028	14/03/2023	Form M02- Review of a medical assessment	Phon, Polly	Pending	14/03/2023																															
<p>Once the application is registered it displays within the Matter Details for the originating dispute and has matter number prefixed with F.</p>	 <table><tr><th colspan="7">Active Files</th></tr><tr><th colspan="7">Benjamin Button</th></tr><tr><th colspan="7">Michael Mumford v Umbrella Insurance</th></tr><tr><th>Date Filed</th><th>Application Type</th><th>Issue/Dispute Type</th><th>Next Allocation Type</th><th>Allocation Date</th><th>Allocation Time</th><th>Allocation Duration</th></tr><tr><td>22/05/2023</td><td>Form M03- Further medical assessment</td><td>Further medical assessment</td><td></td><td></td><td></td><td></td></tr></table>	Active Files							Benjamin Button							Michael Mumford v Umbrella Insurance							Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration	22/05/2023	Form M03- Further medical assessment	Further medical assessment				
Active Files																																				
Benjamin Button																																				
Michael Mumford v Umbrella Insurance																																				
Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration																														
22/05/2023	Form M03- Further medical assessment	Further medical assessment																																		

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
<p>To lodge an Appointed Representative Application, complete the following:</p> <ol style="list-style-type: none">1. Select the New Appointed Representative Application from the New Application/Form menu. <p>➤ The Form 41 – Notice to Parties page displays.</p>	
<p>Form 41 – Notice to Parties</p> <ol style="list-style-type: none">2. Read the Terms and Conditions.3. Scroll to the bottom and tick to agree to Terms and Conditions and click Next. <p>➤ The Form M41 – Claim Details page displays.</p>	

Instruction

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.

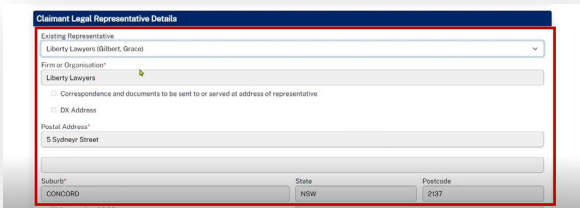
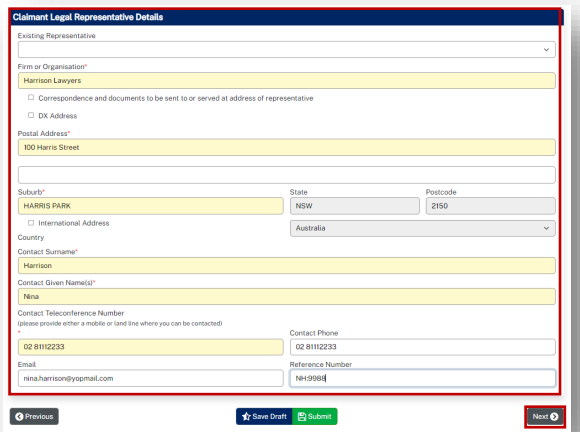
Page

Form M41 - Claim Details

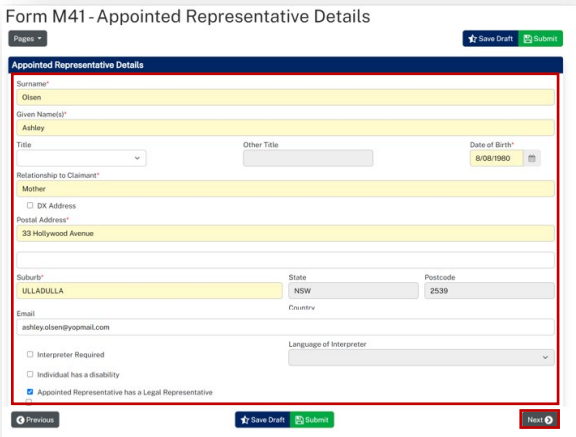
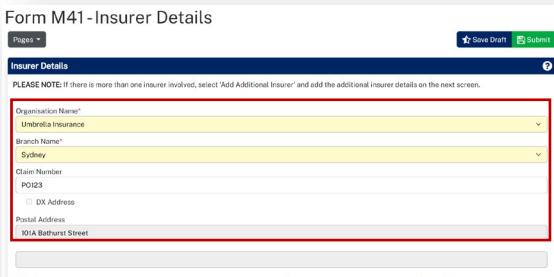
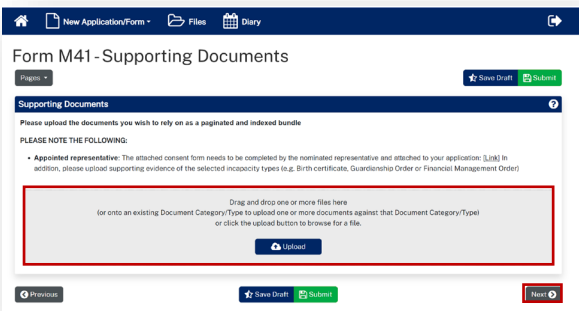
Form M41 – Claimant Details


7. Populate the **Claimant Details** page.
8. Populate **Claimant Legal Representative Details**.

Form M41 - Claimant Details

Instruction	Page
<p><i>Claimant Legal Representative Details</i></p> <p>9. Complete the details as follows:</p> <ul style="list-style-type: none"> • 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. 	
<p>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.</p> <p>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.</p>	
<p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <ul style="list-style-type: none"> • 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. 	

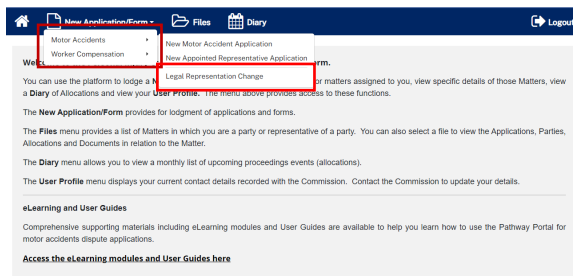
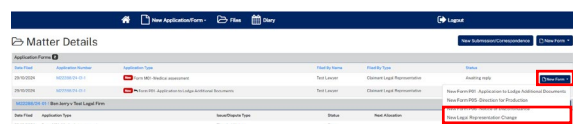
<ul style="list-style-type: none"> • Reference Number - Populate as required. <p>12. Click Next.</p> <p>➤ The Form M41 – Appointed Representative Details page displays.</p>	
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Instruction	Page
<p>Form M41 – Appointed Representative Details</p> <p>13. Populate the Appointed Representative Details.</p> <p>14. Click Next.</p> <p>➤ The Form M41 – Insurer Details page displays.</p>	
<p>Form M41 – Insurer Details</p> <p>15. Populate the Insurer Details page.</p> <p>16. Populate the Insurer Legal Representative Details (as needed).</p> <p>17. Click Next.</p> <p>➤ The Form M41 – Supporting Documents page displays.</p>	
<p>Form M41 – Supporting Documents</p> <p>18. Click the Link to download the form for the appointed representative to sign.</p> <p>19. Drag the completed form and evidence of legal incapacity e.g., birth certificate into Supporting Documents area (or use Upload).</p> <p>20. Click Next.</p> <div data-bbox="236 1563 746 1720" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin: 10px 0;"> <p>Include Appointed representative form and incapacity evidence in single indexed and paginated bundle ➡</p> </div> <p>➤ The Form M41 – Certification and Signature page displays.</p>	

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

Lodge Legal Representation / Agent Change

How to lodge a Legal Representation / Agent Change

Instruction	Page
<p>To lodge a Legal Representation / Agent Change, complete the following:</p> <ol style="list-style-type: none"> Select the Legal Representation Change from the New Application/Form menu. <p>➤ The Notice to Parties page displays.</p>	
<p>Note: To lodge a Form P02 - Notice of Ceasing to Act, you must lodge the form within the Matter Details page.</p>	

Notice to Parties

2. Read the Terms and Conditions.
 3. Scroll to the bottom and click **Next**.
- The Application Details page displays.

Notice to Parties

Pages - Save Draft Submit

Notice to Parties

Terms and Conditions of Use

For Legal Practitioners: Use is limited to Certified Australian Legal Practitioners or their employees whose use is the responsibility of Certified Australian Legal Practitioners.

For other Portal users: Use this form if you want to make an application to resolve a dispute about a motor accident. Before you begin, you need to agree to our terms and conditions.

Legal Incapacity

For accidents which occurred on or after 1 December 2017, the Personal Injury Commission (PIC) may decline to accept an application if the application is made by a person under legal incapacity if you are making an application relating to an accident which occurred on or after this date, by agreeing to these terms and conditions you declare you are not under legal incapacity as defined in Section 7.4(1)(2) of the Motor Accident Injuries Act 2017.

A person under legal incapacity includes:

- a child under the age of 18 years, and
- an involuntary patient or forensic patient within the meaning of the Mental Health Act 2007, and
- a person under guardianship within the meaning of the Mental Health Act 2007, and
- a protected person within the meaning of the NSW Trustee and Guardian Act 2009, and
- an incapacitated person, being a person who has such a physical or mental disability that he or she is unable to receive communications, or express his or her will, with respect to his or her property or affairs.

If you are lodging an application related to an accident which occurred on or after 1 December 2017 on behalf of someone under legal incapacity, you will need to apply to the

More detailed information about the way that the Commission may collect, use and disclose your information is available at <https://pic.nsw.gov.au/resources/privacy>

Applications to the Commission to access and correct any personal information and health information should be made in writing to the Commission, Level 21, 1 Oxford Street, Darlinghurst, NSW, 2010.

Save Draft Submit Next

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.

Legal Representation / Agent Change

Pages - Save Draft Submit

Application Details

For Workers Compensation enter Matter Number.
For Motor Accidents enter Application Number.

Matter/Application Number*
M22288/24-01-1

Claimant/Worker Surname*
Jerry

Date of Birth*
1/10/1983

Claimant/Worker Given Name(s)*
Ben

Filed By

Filed by Name*
Test Lawyer

Filed by Party*
Claimant Legal Representative

Application Type

Application Type*
Form P03 - Notice of Change of Legal Representative / Agent

Capacity to Act

Are there any restrictions or limitations on your capacity to act for the party?*

☐ Yes ☒ No

Restrictions/Limitations on Capacity to Act for Party

Previous Save Draft Submit Next

Application Details

7. Populate the Representative Party Details.
 8. Populate the New Representative Details.
 9. Click **Next**.
- The **Former Representative / Agent Details** page displays.

Party Represented

Pages - Save Draft Submit

Represented Party Details

Surname*
Jerry

Given Name(s)*
Ben

Date of Birth*
1/10/2024

New Representative Details

Existing Representative
Test Legal Rep

Firm or Organisation*
Test Legal Rep

☐ Correspondence and documents to be sent to or served at address of representative

☐ DX Address

Postal Address*
1 Oxford Street

Suburb*
Darlinghurst

State
NSW

Postcode
2010

Country
Australia

☐ International Address

Contact Surname*
Lawyer

Contact Given Name(s)*
Test

Contact Teleconference Number
(please provide either a mobile or land line where you can be contacted)*
0412223333

Contact Phone

Email
testlawyer@yopmail.com

Reference Number

Date Commenced to Act*
29/10/2024

Previous Save Draft Submit Next

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.

Former Representative / Agent Details

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**.

Signature

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
<p>To lodge Submissions or other Correspondence:</p> <ol style="list-style-type: none"> From the Matter Details page, click New Submissions/Correspondence. 	

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

- Choose the Document type: **Correspondence** or **Submissions** and add a Description if required.
- To add new Submissions or Correspondence, use the **Upload** feature again to repeat the process.
- Click **Submit**.

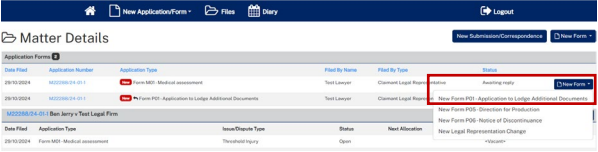
- Submissions/Correspondence Confirmation screen will appear, which will show the Temporary Document Number.

- 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.

Temporary Document No.	Date Lodged	Matter No.	Document Type	Status	Last Updated	Expiring On
000000	10/05/2024	W47/24	Submissions	Pending	10/05/2024	Expiring On

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
<p>To lodge an additional document:</p> <p>From the Matter Details page</p> <ol style="list-style-type: none">Click New Form and select the required form.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 -Notice to Parties

Notice to Parties

Terms and Conditions of Use

For Legal Practitioners: Use is limited to Certified Australian Legal Practitioners or their employees whose use is the responsibility of Certified Australian Legal Practitioners.

For other Portal users: Use this form if you want to make an application. Before you begin, you need to agree to our terms and conditions.

Using this form

The PIC may decline to accept an application if it is made out of time. If you are unsure of the timeframes for the dispute, please refer to the Personal Injury Commission Rules. Alternatively, you can call the Personal Injury Commission on 1800 742 679.

All information you have provided in this application and supporting documents must be true and correct in every respect.

Under section 367C of the Crimes Act 1900, you can be issued with a fine up to \$22,000 or imprisoned for two years, or both, for knowingly providing false or misleading information in this form.

Assistance

If you have any questions about completing this form or the Pathway Portal, please contact the Personal Injury Commission on 1800 742 679.

The Commission's decisions will be published in accordance with section 58 of the Personal Injury Commission Act 2020 (NSW). An application for de-identification or redaction of a decision can be made by a relevant person at any time during the proceedings.

More detailed information about the way that the Commission may collect, use and disclose your information is available at <https://pi.new.gov.au/resources/privacy>.

Applications to the Commission to access and correct any personal information and health information should be made in writing to the Commission, Level 21, 1 Oxford Street, Darlinghurst, NSW, 2010.

☒ Check here to indicate that you understand and agree to the Terms and Conditions

Save Draft **Submit** **Next**

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**.

Form P01 -Application to Lodge Additional Documents

Pages **Save Draft** **Submit**

Application Details

Related Application
M2228B/24-01-1-Form M01-Medical assessment

Filed by Name*
Test Lawyer

Filed by Party*
Claimant Legal Representative

Next Allocation

Date of Next Allocation
Next Allocation Type
Decision Maker

Service and Consent

Date lodging party became aware of or obtained possession or control of the Additional Documents*
1/10/2024

Have the Additional Documents been served on each party to the proceedings, as soon as practicable after becoming aware of or obtaining possession or control of the document in accordance with Rule 67C of the Personal Injury Commission Rules 2021?
☐ Yes ☒ No

Does this Application for Additional Documents relate to medical assessment proceedings?
☐ Yes ☒ No

Reasons in support of application

Submissions in support of Application to Lodge Additional Documents addressing the requirements of rule 67C of the Personal Injury Commission Rules 2021*

Additional document

Previous **Save Draft** **Submit** **Next**

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

New Application/Form **Files** **Diary** **Logout**

Pages **Save Draft** **Submit**

Supporting Documents

Please upload the documents you wish to rely on as a paginated and indexed bundle.

They must:

- * have consecutively numbered pages
- * be indexed and sorted by document category
- * not have been previously lodged
- * not be included more than once

Documents/bundles that do not comply will be rejected.

Drag and drop one or more files here
(or onto an existing Document Category>Type to upload one or more documents against that Document Category>Type)
or click the upload button to browse for a file.

Upload

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

Pages: 1 Save Draft Submit

Supporting Documents

Please upload the documents you wish to rely on as a paginated and indexed bundle.

They must:

- * have consecutively numbered pages
- * be indexed and sorted by document category
- * not have been previously lodged
- * not be included more than once

Documents/bundles that do not comply will be rejected.

Document Type: Form P01

Document Details

File Name
Example Document.docx

Author
Test Lawyer

Date of Document
29/10/2024

View Clear Remove

Drag and drop one or more files here
(or onto an existing Document Category Type to upload one or more documents against that Document Category Type)
or click the upload button to browse for a file.

Upload

Previous Save Draft Submit Next

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

Pages: 1 Save Draft Submit

Signature

I declare that, to the best of my knowledge, the information given in this form is true and correct. I also give consent and authorisation for the collection, use and disclosure and exchange of personal and health information provided in this form.

Application Signed ☒ Date Signed 29/10/2024

Previous Save Draft Submit

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.

The screenshot shows the 'Form M12 - Damages assessment' interface. At the top is a dark blue navigation bar with icons for Home, New Application/Form, Files, Diary, and a Logout button. Below the navigation bar, the form title 'Form M12 - Damages assessment' is displayed. To the right of the title are 'Save Draft' and 'Submit' buttons. The form is divided into three main sections: 'Claim for Damages', 'Best Endeavours/Time Limits', and 'Assessment Details'. The 'Claim for Damages' section asks 'Has the claimant served a claim for damages on the insurer?' with radio buttons for 'Yes' (selected), 'No', and 'Not applicable - claim not against an insurer'. The 'Best Endeavours/Time Limits' section asks 'Have the parties used their best endeavours to settle the claim before referring it for assessment as required by section 7.32(3) of the Motor Accident Injuries Act 2017?' with radio buttons for 'Yes' (selected) and 'No', followed by a text box for details. The 'Assessment Details' section contains two questions: 'Do you believe the claim is suitable for assessment?' with 'Yes' (selected) and 'No' radio buttons, and 'Is the claim ready for assessment?' with 'Yes' and 'No' (selected) radio buttons. Both have associated text boxes for details. At the bottom, there is a question 'Do you apply for the matter to be referred to the Stood Over List?' with 'Yes' (selected) and 'No' radio buttons, and a dropdown menu for 'Please select one of the following reasons'.

Form M12 - Damages assessment

Pages

Save Draft Submit

Claim for Damages

Has the claimant served a claim for damages on the insurer*

☒ Yes ☐ No ☐ Not applicable - claim not against an insurer

Best Endeavours/Time Limits

Have the parties used their best endeavours to settle the claim before referring it for assessment as required by section 7.32(3) of the Motor Accident Injuries Act 2017?*

☒ Yes ☐ No

Please provide details

Assessment Details

Do you believe the claim is suitable for assessment?*

☒ Yes ☐ No

Is the claim ready for assessment?*

☐ Yes ☒ No

Please provide details

Do you apply for the matter to be referred to the Stood Over List?*

☒ Yes ☐ No

Please select one of the following reasons*

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**.

The screenshot displays the 'Matter Details' page in the Pathway Portal. The page has a dark blue header with navigation icons for Home, New Application/Form, Files, and Diary. Below the header, the 'Matter Details' section is visible, including a 'New Form' button. The main content area contains two tables: 'Application Forms' and 'Reply Requests'.

Application Forms Table:

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
11/11/2022	M25/22-01-1	New Form M01- Medical assessment	Saima Norris	Claimant Legal Representative	Open
11/11/2022	M25/22-12-1	New Form M12- Damages assessment	Saima Norris	Claimant Legal Representative	Open

Reply Requests Table:

Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due
There are no reply requests					

Below the 'Reply Requests' table, there are two sections for 'Holly Wood v QBE -MA'.

M25/22-12-1 Holly Wood v QBE -MA

Date Filed	Application Type	Issue/Dispute Type	Status	Stood Over Expiry Date	Next Allocation
11/11/2022	Form M12- Damages assessment	Damages assessment	Stood over list - medical dispute not yet finalised	1/05/2023	
		Damages assessment	Stood over list - medical dispute not yet finalised	1/05/2023	

M25/22-01-1 Holly Wood v QBE -MA

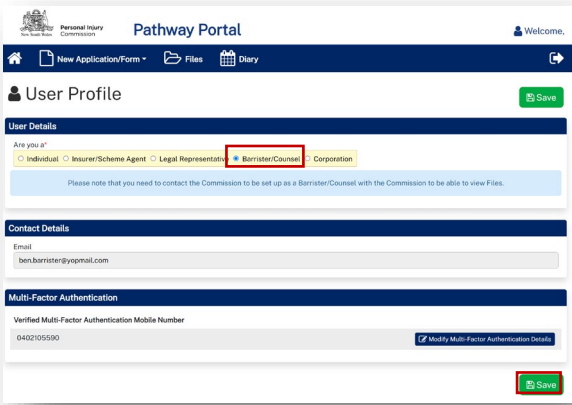
Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation
11/11/2022	Form M01- Medical assessment	Degree of permanent impairment	Open	
		Degree of permanent impairment	Open	

An orange callout box points to the 'Stood over list - medical dispute not yet finalised' status in the 'M25/22-12-1' section, containing the text: 'Status changes to **Stood over list...** after the Commission process stood over request'.

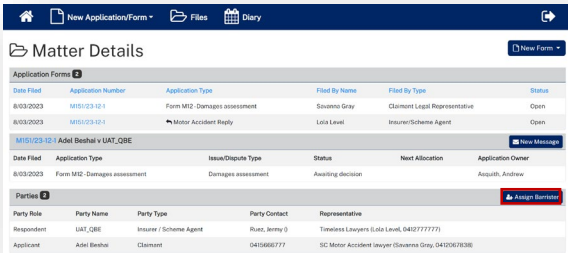
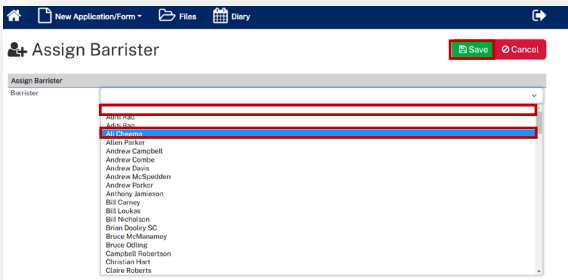
How to give a Barrister visibility to a dispute

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

Barrister registers as Pathway Portal user

Instruction	Page
<p>The barrister must first register as a Pathway Portal user. They will only need to do this once.</p> <p>At the end of registration, the User Profile displays the barrister would:</p> <ol style="list-style-type: none">1. Select Barrister/ Counsel and click Save. <p>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.</p> <p>More information, including how to register for the PIC Digital Hub's Online form, is available in the PIC Digital Hub User Guide.</p>	

How to assign a Barrister

Instruction	Page
<p>Assign a Barrister</p> <p>To give a barrister visibility of a dispute:</p> <ol style="list-style-type: none"> 1. In the Matter Details click Assign Barrister. 	
<ol style="list-style-type: none"> 2. Select the Barrister from the drop-down menu. 3. Click Save. <p>To change the barrister:</p> <p>Repeat above steps and select the new Barrister name.</p> <p>To remove barrister:</p> <p>Select the blank line at the top of Barrister drop down menu.</p>	

What does the Barrister see?

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

Pathway Portal Welcome, Ben Barrister

Matter Summary

Recent Activities 4 Ben Barrister 4 Refresh

Matter Number	Matter Name	Details
M151/23	Adel Beshai v imy/insurer	New Index
M151/23	Adel Beshai v imy/insurer	New Court order
M151/23	Adel Beshai v imy/insurer	New Sealed Form M12 - Damages assessment
M151/23	Adel Beshai v imy/insurer	New Sealed Motor Accident Reply

Temporary Applications 2 Ben Barrister 2 Refresh

Unassigned Reply Requests 2 Ben Barrister 2 Refresh

Assign To: Ben Barrister Assign

Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Assign
There are no unassigned reply requests						

My Reply Requests 2 Ben Barrister 2 Refresh

Active Files 1 Ben Barrister 1 Advanced

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
8/03/2023	Form M12 - Damages assessment	Damages assessment				

The Barrister:

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

Pathway Portal Welcome, Ben Barrister

Matter Details

Application Forms 2

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
8/03/2023	M151/23-12-1	Form M12 - Damages assessment	Savanna Gray	Claimant Legal Representative	Open
8/03/2023	M151/23-12-1	Motor Accident Reply	Lola Level	Insurer/Scheme Agent	Open

M151/23-12-1 Adel Beshai v UAT_QBE

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
8/03/2023	Form M12 - Damages assessment	Damages assessment	Awaiting decision		Azquith, Andrew

Parties 2

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	UAT_QBE	Insurer / Scheme Agent	Buetz, Jeremy (I)	Timeless Lawyers (Lola Level, 0412777777) - Barrister: Ben Barrister
Applicant	Adel Beshai	Claimant	0415666777	SC Motor Accident lawyer (Savanna Gray, 0412067838)

Messages 0 View All Messages

There are no open message threads. Click View All Messages to view closed message threads.

Allocations 1

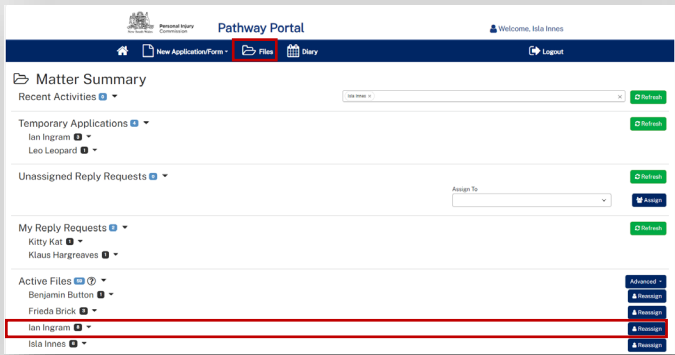
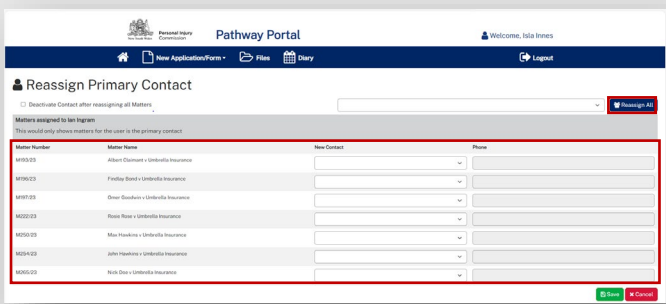
Allocation Type	Dispute/Issue/Injury/Treatment	Venue	Location	Date and Time	Duration	Mode of Allocation	Attendees	Service Provider	Language
Teleconference	M151/23-12-1/D1 Damages assessment			8/03/2023 10:00 AM	1 hour	Teleconference	Adel Beshai (Claimant), UAT_QBE (Insurer / Scheme Agent)	Cassidy, Belinda	

Documents 4

Document Date	Author	Document Category and Type	Related To
8/03/2023	Portal	Electronic Application Form - Sealed Form M12 - Damages assessment	M151/23-12-1, Sender: Portal - Recipient:
8/03/2023	Portal	Electronic Application Form - Sealed Motor Accident Reply	M151/23-12-1, Sender: Portal - Recipient:
5/03/2023	Central Court	Application - Court order	M151/23-12-1, 08/03/2023: Form M12 - Damages assessment
4/1/2022	Ami Villalobos	Reply - Index	M151/23-12-1, 08/03/2023: Motor Accident Reply

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
<p>To assign one or more Matters, complete the following:</p> <ol style="list-style-type: none"> 1. Click on the Files tab. 2. Find the person you want to reassign Matter/s from. 3. Click the Reassign button. <p>Note: The Reassign button is only available for Super Users and their delegates.</p>	
<p>➤ All Matters assigned to the selected person display.</p> <p>There are 2 options:</p> <p>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.</p> <p>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.</p>	

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

1. Click on the **Files** tab.
2. Click on the blue Matter Number link.

Page

Pathway Portal

Welcome, Isla Innes

New Application/Form • Files Diary

Matter Summary

Recent Activities

Temporary Applications

Ian Ingram

Leo Leopard

Unassigned Reply Requests

Assign To: Isla Innes

Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Assign
There are no unassigned reply requests						

My Reply Requests

Kitty Kat

Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Complete Reply
M162/23-411	Form M41: Application for appointed representative	Nathan Doe	Umbrella Insurance	23/03/2023	13/04/2023	Complete Reply

- Matter Details page displays
3. Go to **Parties** section and Click on **Maintain Contacts**

Pathway Portal

Welcome, Isla Innes

New Application/Form • Files Diary

Matter Details

Application Forms

Date Filed	Application Number	Application Type	Filed By Name	Filed By Role	Status
16/03/2023	M162/23-411	Form M41: Application for appointed representative	Max Dickinson	Claimant Legal Representative	Open

Reply Requests

Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Complete Reply
M162/23-411	Form M41: Application for appointed representative	Nathan Doe	Umbrella Insurance	23/03/2023	13/04/2023	Complete Reply

M162/23-411 Nathan Doe v Umbrella Insurance

Date Filed: 16/03/2023 Application Type: Form M41: Application for appointed representative Issues/Dispute Type: Application for appointed representative Status: Awaiting decision Next Allocation: Nemoquidara, Russia Application Owner: Nemoquidara, Russia

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Hargreaves, Richard D	
Appointed Personal Representative	Nick Doe	Individual	0411222333	
Applicant	Nathan Doe	Claimant	0411222333	James and Co./Max Dickinson, 041234567890

- **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**

Pathway Portal

Welcome, Isla Innes

New Application/Form • Files Diary

Maintain Contacts for M162/23-Nathan Doe v Umbrella Insurance

Contacts

This would allow to maintain the matter contacts.

Primary Contact

New Contact

Kitty Kat

0433444555

Save Cancel

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**

Pathway Portal

Welcome, Isla Innes

New Application/Form • Files Diary

Maintain Contacts for M162/23-Nathan Doe v Umbrella Insurance

Contacts

This would allow to maintain the matter contacts.

Primary Contact

New Contact

Kitty Kat

0433444555

Save Cancel

Secondary Contact

Add Contact

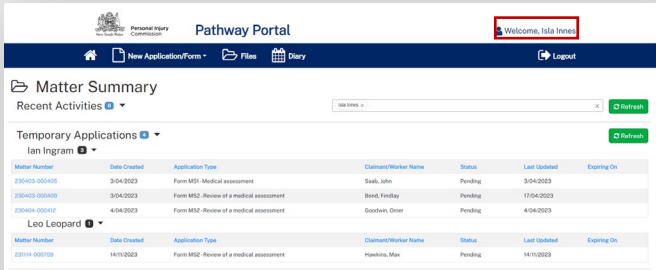
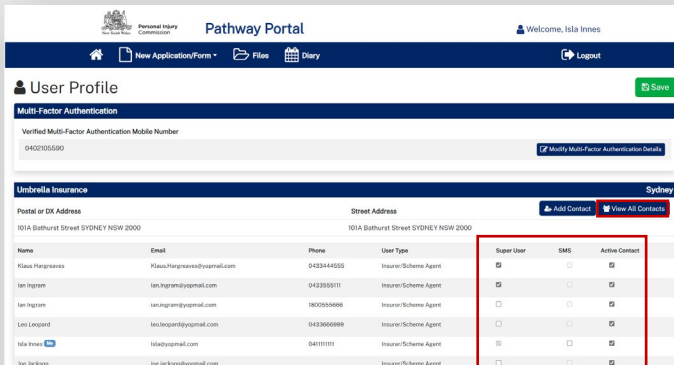
New Contact

Kitty Kat

0433444555

Save Cancel

How to Add a new Contact or Deactivate Contact

Instruction	Page																																																	
<div>1. Click the Welcome, name in the top right corner</div> <div>Note: Only Super User can add a new contact.</div>																																																		
<div>➤ User Profile page displays with a list of all active users for your organisation.</div> <div>Note: Before creating a new contact. Click on View All Contacts to check if there is an existing inactive account.</div> <div>Super User: Ticked box indicates the person has Super User access.</div> <div>Active Contact: Ticked box indicates this user is Active.</div> <div>To deactivate user:<ol style="list-style-type: none">1. Untick Active Contact check box.2. Click Save</div>	 <table><thead><tr><th>Name</th><th>Email</th><th>Phone</th><th>User Type</th><th>Super User</th><th>SMS</th><th>Active Contact</th></tr></thead><tbody><tr><td>Klaus Hargreaves</td><td>Klaus.Hargreaves@gmail.com</td><td>0433444555</td><td>Insurer/Scheme Agent</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr><tr><td>Ian Ingram</td><td>ian.ingram@gmail.com</td><td>0433333111</td><td>Insurer/Scheme Agent</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr><tr><td>Ian Ingram</td><td>ian.ingram@gmail.com</td><td>1800555666</td><td>Insurer/Scheme Agent</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr><tr><td>Leo Leopard</td><td>leo.leopard@gmail.com</td><td>0433666999</td><td>Insurer/Scheme Agent</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr><tr><td>Isla Innes</td><td>isla@gmail.com</td><td>0411111111</td><td>Insurer/Scheme Agent</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr><tr><td>Jac Jackson</td><td>jac.jackson@gmail.com</td><td></td><td>Insurer/Scheme Agent</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td></tr></tbody></table>	Name	Email	Phone	User Type	Super User	SMS	Active Contact	Klaus Hargreaves	Klaus.Hargreaves@gmail.com	0433444555	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ian Ingram	ian.ingram@gmail.com	0433333111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ian Ingram	ian.ingram@gmail.com	1800555666	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Leo Leopard	leo.leopard@gmail.com	0433666999	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Isla Innes	isla@gmail.com	0411111111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jac Jackson	jac.jackson@gmail.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Name	Email	Phone	User Type	Super User	SMS	Active Contact																																												
Klaus Hargreaves	Klaus.Hargreaves@gmail.com	0433444555	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Ian Ingram	ian.ingram@gmail.com	0433333111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Ian Ingram	ian.ingram@gmail.com	1800555666	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Leo Leopard	leo.leopard@gmail.com	0433666999	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Isla Innes	isla@gmail.com	0411111111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Jac Jackson	jac.jackson@gmail.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												

To add a new user:

1. Click Add Contact

Pathway Portal

Welcome, Isla Innes

New Application/Form Files Diary Logout

User Profile Save

Multi-Factor Authentication

Verified Multi-Factor Authentication Mobile Number

0402105590 Modify Multi-Factor Authentication Details

Umbrella Insurance Sydney

Postal or DX Address Street Address

101A Bathurst Street SYDNEY NSW 2000 101A Bathurst Street SYDNEY NSW 2000

Add Contact View All Contacts

Name	Email	Phone	User Type	Super User	SMS	Active Contact
Klaus Hengstres	Klaus.Hengstres@sydney.com	042344555	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ian Ingram	Ian.Ingram@sydney.com	043355511	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ian Ingram	Ian.Ingram@sydney.com	1800000000	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Leo Langford	Leo.Langford@sydney.com	043366688	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Isla Innes	Isla@sydney.com	041010101	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Joe Jackson	Joe.Jackson@sydney.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Pathway Portal

Welcome, Isla Innes

New Application/Form Files Diary Logout

Add New Contact

New Contact for Umbrella Insurance (Sydney)

This allows to add a new contact.

Surname* Given Name*

Title* Other Title* Gender* Other Gender*

Email* Phone*

Save Cancel

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	<ul style="list-style-type: none"> Be registered as a Legal User on Pathway Portal Lodge the application or... One party advises Commission who their legal representative is 	<ul style="list-style-type: none"> See that matter details and documents Receive email notifications for the matter Send messages
Secondary contact for a matter	<ul style="list-style-type: none"> Be registered as a Legal User on Pathway Portal, then... Primary legal representative advises the Commission of secondary contact on a matter 	<p>If filters Active Files for Matters I'm linked to can:</p> <ul style="list-style-type: none"> See that matter details, documents and messages Send messages for that matter
Super user	<ul style="list-style-type: none"> Be registered on Pathway Portal as a Legal representative Another super user can add /remove you as a Super User 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> A super user can make an administrative assistant (non-Legal User contact) a delegate 	<p>Delegate can:</p> <ul style="list-style-type: none"> See all the firms matters, documents and messages Reassign matters to existing contacts Manage contacts for the matter <p>Delegate can NOT:</p> <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> • 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

Pathway Portal | Welcome, Lola Level

Matter Details | New Form

Application Forms 2

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
8/03/2023	M149/23-01-1	Form M01 - Medical assessment	Lola Level	Claimant Legal Representative	Open
8/03/2023	M149/23-01-1	Motor Accident Reply	Grace Gilbert	Insurer/Scheme Agent Legal Representative	Open

M149/23-01-1 Fran Freidel v Umbrella Insurance | New Message

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
8/03/2023	Form M01 - Medical assessment	Treatment and care reasonable and necessary	Open		Nanayakkara, Ruwan
		Threshold Injury	Open		Nanayakkara, Ruwan

Parties 2 | Assign Barrister

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent		Liberty Lawyers (Grace Gilbert, 0488 888 888)
Applicant	Fran Freidel	Claimant	0411 222 333	Timeless Lawyers (Lola Level, 0402105590)

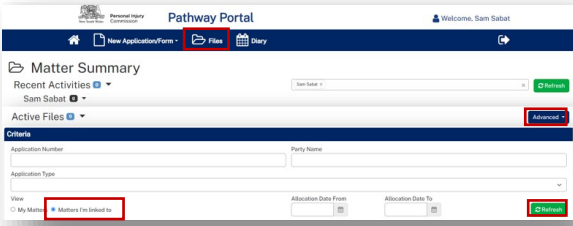
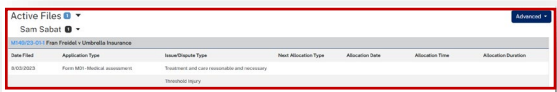
Messages 1 | View All Messages

Application	Category	Subject	Sender	Date/Time Sent
M149/23-01-1 - Form M01 - Medical assessment	N/A	1 New Add another legal rep	Pamela Allen	15/03/2023 11:00 AM

Documents 4

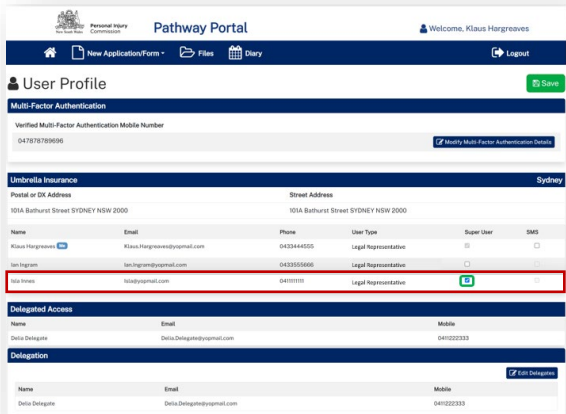
Document Date	Author	Document Category and Type	Related To
8/03/2023	Portal	Electronic Application Form - Sealed Form M01 - Medical assessment	M149/23-01-1, Sender: Portal - Recipient:

After a Secondary contact is added

Instruction	Page
<p>Secondary contact has been added</p> <p>For a secondary contact to view the matter:</p> <ul style="list-style-type: none">• Click the Files tab• Click Advanced in the Active Files section• Tick Matters I'm linked to• Click Refresh. <p><i>In this example Sam Sabat is a secondary contact on this matter</i></p>	
<p>Secondary contact visibility</p> <p>The Secondary contact:</p> <ul style="list-style-type: none">✓ Can see Matter Details✓ Can view all documents✓ Can view all messages✓ Can send messages✗ Cannot see allocations in Diary	

Super Users

How to Add/Remove Super Users

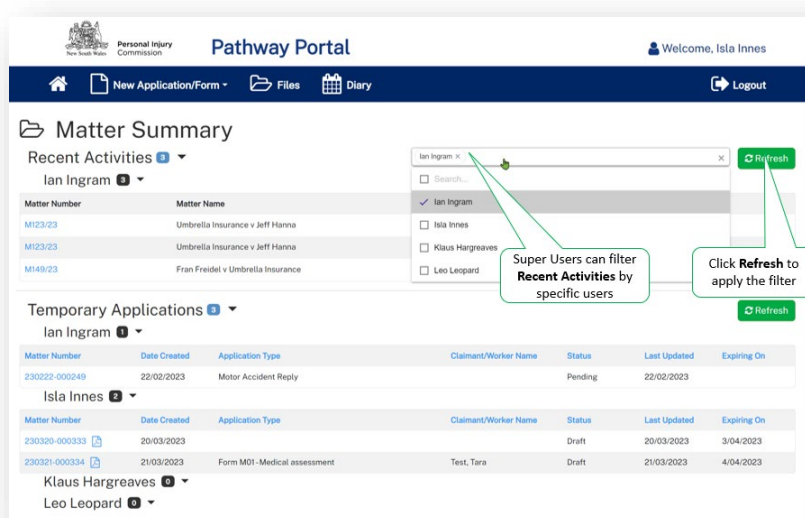
Instruction	Page
<p>Add/Remove a Super User</p> <p>A super user can add and remove other super users:</p> <ul style="list-style-type: none"> Click the name of the Super User in the top right corner Tick or untick the Super User box Click Save. 	
<p><i>In this example Isla Innes is now a Super User</i></p> <p>As a super user Isla Innes can now:</p> <ul style="list-style-type: none"> ✓ Can see and act on all matters ✓ Can add/remove other Super Users (can't remove self) ✓ Add a Delegate. 	

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:

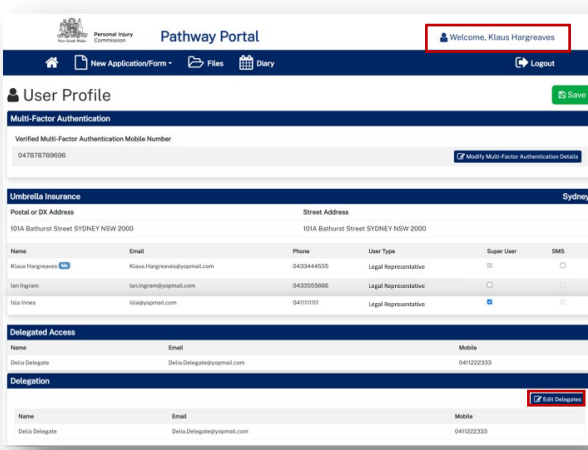
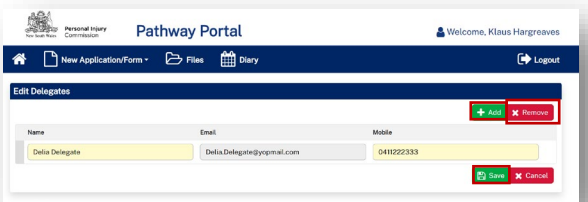
- Select the users in the drop-down menu.
- Click **Refresh**.



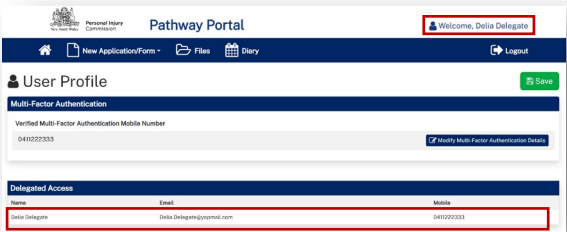
How to add/remove Delegate for a Super User

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.

Instruction	Page																								
<h3>Add/Remove Delegate for a Super User</h3> <p>To add a super user delegate, the super user will:</p> <ul style="list-style-type: none">Click the Welcome, name in the top right cornerClick Edit Delegates.	 <table><tr><th>Name</th><th>Email</th><th>Phone</th><th>User Type</th><th>Super User</th><th>SMS</th></tr><tr><td>Klaus Hargreaves</td><td>Klaus.Hargreaves@pymail.com</td><td>0423444555</td><td>Legal Representative</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>Sam Ingram</td><td>Sam.Ingram@pymail.com</td><td>0433333666</td><td>Legal Representative</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>Nola Jones</td><td>Nola.Jones@pymail.com</td><td>0477777888</td><td>Legal Representative</td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr></table> <p>Below the table, there is a section for 'Delegated Access' and a 'Delegation' table with columns for Name, Email, and Mobile. The 'Edit Delegates' link at the bottom right is highlighted with a red box.</p>	Name	Email	Phone	User Type	Super User	SMS	Klaus Hargreaves	Klaus.Hargreaves@pymail.com	0423444555	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	Sam Ingram	Sam.Ingram@pymail.com	0433333666	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	Nola Jones	Nola.Jones@pymail.com	0477777888	Legal Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name	Email	Phone	User Type	Super User	SMS																				
Klaus Hargreaves	Klaus.Hargreaves@pymail.com	0423444555	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>																				
Sam Ingram	Sam.Ingram@pymail.com	0433333666	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>																				
Nola Jones	Nola.Jones@pymail.com	0477777888	Legal Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>																				
<h3>Edit Delegates</h3> <ul style="list-style-type: none">Click +AddPopulate delegate detailsClick Save. <p>The delegate will get an email invitation to register as delegate user in Pathway Portal.</p>	 <table><tr><th>Name</th><th>Email</th><th>Mobile</th></tr><tr><td>Delia Delegate</td><td>Delia.Delegate@pymail.com</td><td>0411222333</td></tr></table>	Name	Email	Mobile	Delia Delegate	Delia.Delegate@pymail.com	0411222333																		
Name	Email	Mobile																							
Delia Delegate	Delia.Delegate@pymail.com	0411222333																							
<h3>To remove a delegate</h3> <ul style="list-style-type: none">Select the delegate line by clicking at the beginning of the line (far Left)Click X RemoveClick Save.																									

Delegate Super User

Instruction	Page
<p><i>What can the Delegate Super User do?</i></p> <p>The delegate can:</p> <ul style="list-style-type: none"> • 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 <p>Delegate can't:</p> <ul style="list-style-type: none"> • 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 <p>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.</p> <p>The named Legal Representative can then review and submit the Application or Reply, or the Delegate can submit it on their behalf.</p>	

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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Replace MASupport@pi.nsw.gov.au with PIC Digital Hub link and Link to PIC Digital hub user guide. 	