

Overview

Pathway Portal allows a user to create a “Delegate”, that is, an administrative assistant or other person to perform actions on their behalf. A Delegate will have their own login credentials and associated Multi-Factor Authentication (MFA) when logging in to the Pathway Portal.

A Delegate of a user can access all matters and perform the same actions on matters that the user they are acting on behalf of can. This includes viewing documents, sending messages and lodging forms. Multiple users can share the same Delegate in which case the Delegate will be able to access and perform actions on all the users’ combined matters.

If the user the Delegate is acting on behalf of is a Super User, the Delegate will also be able to perform the same administrative functions for matters such as changing contacts and assigning reply requests. To reduce security risks, the use of Super Users and delegates of Super Users should be limited.

Who Can/Cannot Be a Delegate

A Delegate must use an email domain that matches an allowable domain recorded for their organisation. If you need to have a domain added to your organisation’s allowable domain list, you will need to contact the Commission via the PIC Digital Hub.

An intended Delegate must follow the steps below to register in the Pathway Portal.

A user who has **already been registered** in Pathway Portal as an “Individual”, “Legal Representative”, “Insurer/Scheme Agent”, “Corporation/ Employer” or “Barrister/Counsel” **cannot also be a Delegate** of another user. If additional users require access to a matter (for example, multiple solicitors are working on the same matter), then they may be added as Secondary Contacts on the matter. If you need to change your registration from an “Individual”, “Legal Representative”, “Insurer/Scheme Agent”, or “Corporation/Employer” to become a Delegate, please contact the Commission via the PIC Digital Hub.

What Can’t a Delegate Do

A Delegate can perform almost all the same functions as the user they are delegated for except:

- A Delegate cannot themselves create another delegate.
- A Delegate will not receive notification emails sent to the user they are delegated for. A user will need to set up email forwarding from their own email accounts.
- A Delegate cannot create Super Users or add/remove new contacts for their organisation

Table of Contents

Overview.....	1
Who Can/Cannot Be a Delegate.....	1
What Can't a Delegate Do	1
Part A: Setting Up/Removing a Delegate	3
How to Add a Delegate.....	3
How to Register as a Delegate	5
How to Remove a Delegate	8
Part B: Access Pathway Portal as a Delegate	10
How to Navigate the Files Tab as a Delegate.....	10
How to View and Sort Matters as a Delegate	11
See Who I am a Delegate For.....	12
Delegate of Multiple Users	12
Performing Administrative Functions for Matters as a Delegate of a Super User	13

Part A: Setting Up/Removing a Delegate

How to Add a Delegate

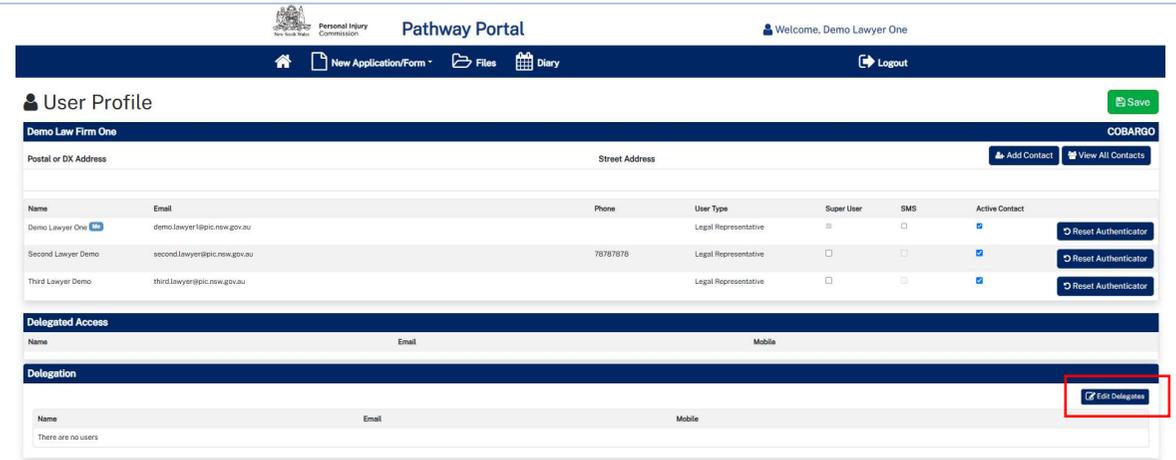
To add a Delegate

- Login to your Pathway Portal account
- Click on **Welcome, [Name]** on the top right corner of the screen



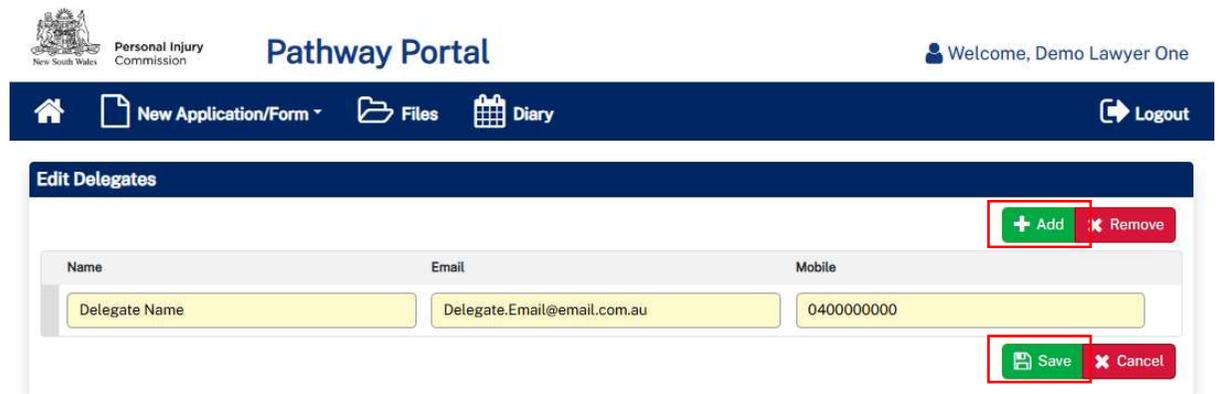
On the **User Profile** page:

- Click on **Edit Delegates**



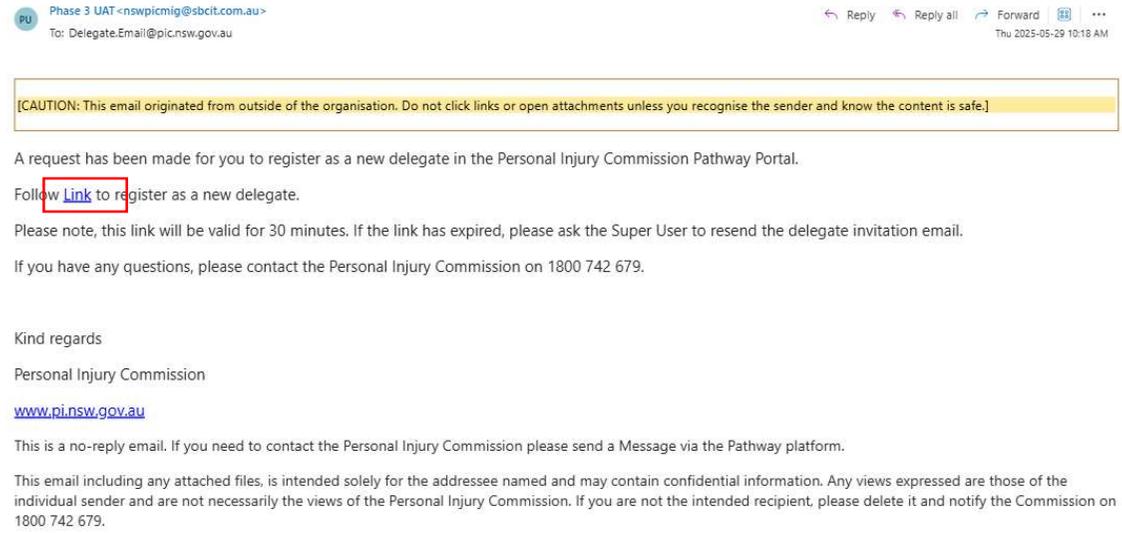
On the **Edit Delegates** page:

- Click **+Add**
- Populate the intended Delegate's **Name, Email and Mobile**
- Click **Save**



If the intended Delegate has **not previously registered** in Pathway Portal as a delegate user, they will receive an email invitation containing a **link to register** as a new Delegate in the Pathway Portal.

The intended Delegate will need to follow the instructions in the email to register for a Pathway Portal account. They will then be able to login to Pathway Portal using their own credentials and perform actions on your behalf.

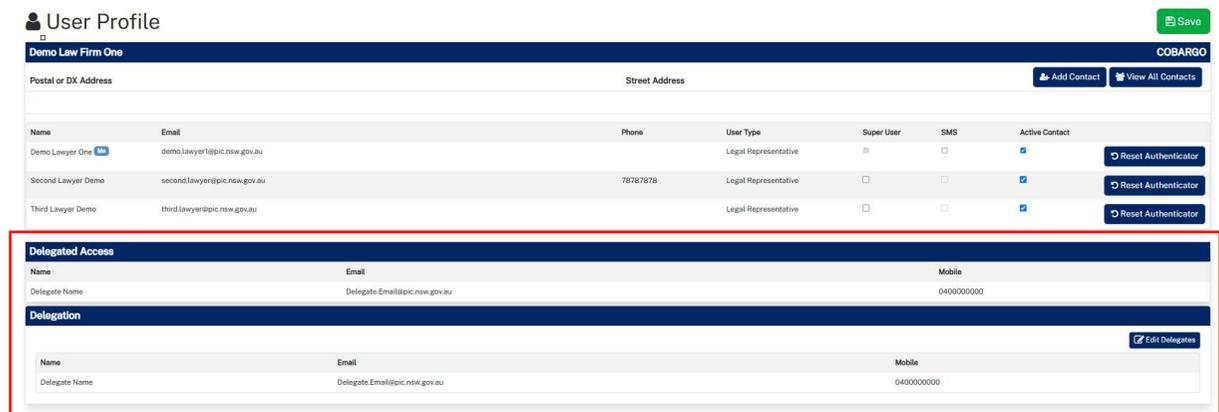


Note: The link in the delegate invitation email will expire after 30 minutes. If the link has expired, you can re-send a new link from the Edit Delegates page in your User Profile



If the intended Delegate has **already previously registered** in Pathway Portal as a delegate user, they will now be able to login to Pathway Portal using their own credentials and perform actions on your behalf.

You can view who you have given Delegate access to from your **User Profile** page



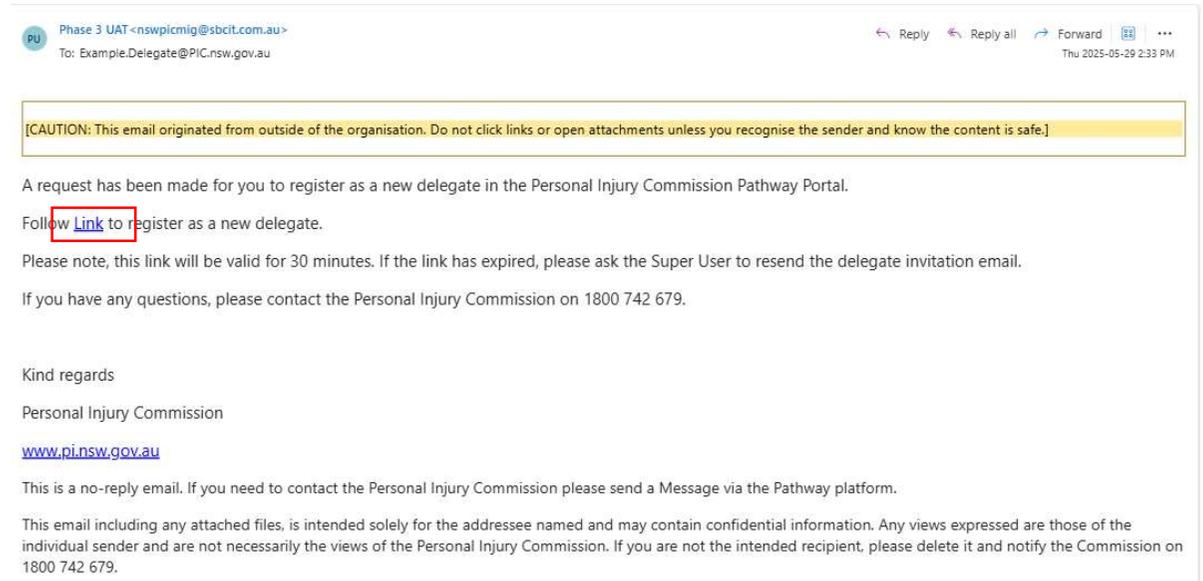
How to Register as a Delegate

You will first need to ask the user who you will be acting on behalf of to add you as their Delegate by completing the steps above.

If you have not already completed the registration process for a Delegate, you will receive an email inviting you to register in Pathway Portal as a delegate

- Click on the **link** in the email

Note: The link will expire after 30 minutes. If the link has expired, you will need to ask the user to re-send a new delegate invitation email from the Edit Delegates page in their User Profile.



- Populate a **password** that you will use to login
- **Tick I'm not a robot and complete the visual reCAPTCHA test**
- Click **Register**



Personal Injury Commission

Password Required

Email Address

Please note that the password must be at least 8 characters, contain at least one number, one symbol and upper and lower case characters.

Password

Confirm Password

I'm not a robot  [reCAPTCHA](#)
[Privacy](#) - [Terms](#)

You may be asked to set up Multifactor Authentication (MFA)

- On a mobile device, download and install an **Authenticator App**. The Commission recommends using either Microsoft or Google Authenticator.
- Open the Authenticator App and click on the + or **Scan QR** button (the camera on your device will open)
- Using your mobile device's camera, **scan the QR code** on the Pathway Portal screen on your computer
- A **Verification Code** will then display in the Authenticator App on your mobile device.
- Enter the **Verification Code** on the Pathway Portal screen
- Click **Verify and Login**

For more information about setting up and using Multifactor Authentication see: [Pathway Portal – Quick Reference Guide: How to download and use an Authenticator App to login or register](#)

Set Up Multifactor Authentication

Install an authenticator app on your mobile device

Select and download an authenticator such as Google Authenticator or Microsoft Authenticator from your application store.

Open your authenticator app

Select **Add Token** and scan the QR code and enter the verification code that displays.



Verification Code

Verify and Login

How to Remove a Delegate

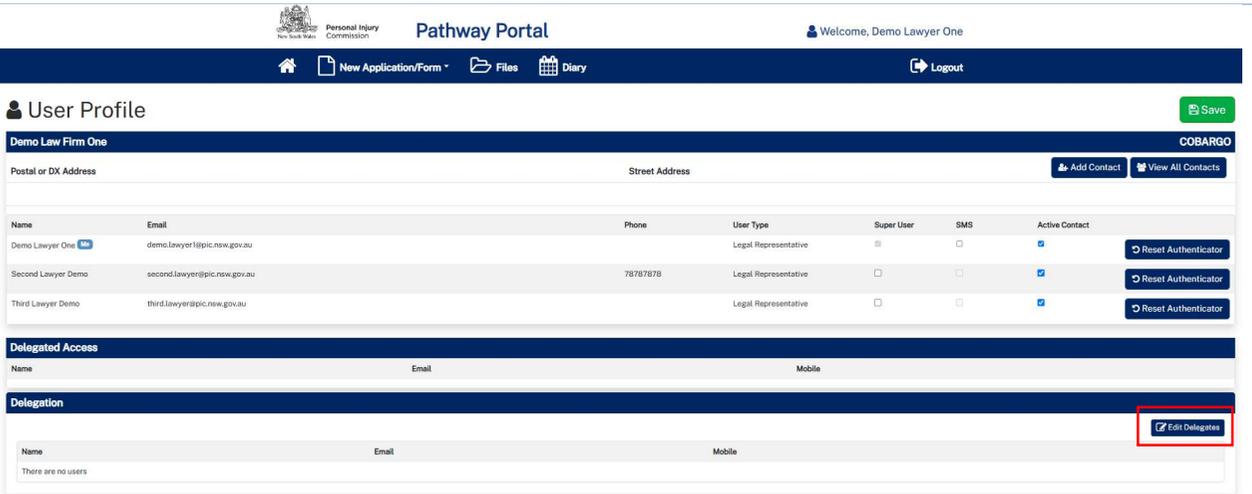
To remove a Delegate

- Login to your Pathway Portal account
- Click on **Welcome, [Name]** on the top right corner of the screen



On the **User Profile** page:

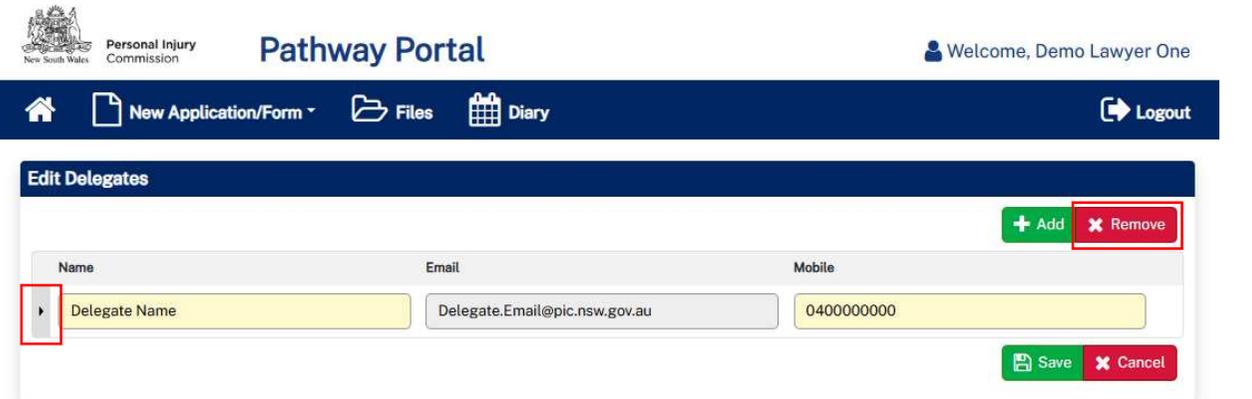
- Click on **Edit Delegates**



Name	Email	Phone	User Type	Super User	SMS	Active Contact	
Demo Lawyer One	demo.lawyer@pic.nsw.gov.au		Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator
Second Lawyer Demo	second.lawyer@pic.nsw.gov.au	78787878	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator
Third Lawyer Demo	third.lawyer@pic.nsw.gov.au		Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator

On the **Edit Delegates** page:

- Select the **delegate line** by clicking at the beginning of the line (far left)
- Click **x Remove**



Name	Email	Mobile
Delegate Name	Delegate.Email@pic.nsw.gov.au	0400000000

- When the Delegate has been removed, click on **Save**

Personal Injury Commission
New South Wales

Pathway Portal

Welcome, Demo Lawyer One

Home New Application/Form Files Diary Logout

Edit Delegates

+ Add - Remove

Name	Email	Mobile
There are no nominated delegate users		

Save Cancel

You will then see the previous Delegate no longer appears on your **User Profile** page as having delegation for you. They will no longer be able to access matters or perform action on your behalf.

User Profile

Save

Demo Law Firm One COBARGO

Postal or DX Address Street Address Add Contact View All Contacts

Name	Email	Phone	User Type	Super User	SMS	Active Contact	
Demo Lawyer One	demo.lawyer1@pic.nsw.gov.au		Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator
Second Lawyer Demo	second.lawyer@pic.nsw.gov.au	76767676	Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator
Third Lawyer Demo	third.lawyer@pic.nsw.gov.au		Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reset Authenticator

Delegated Access

Name	Email	Mobile
There are no users		

Delegation

Name	Email	Mobile
There are no users		

Edit Delegates

Part B: Access Pathway Portal as a Delegate

How to Navigate the Files Tab as a Delegate

In the **Files** tab, a Delegate will see the same

- Recent Activities,
- Temporary Applications,
- Temporary Documents
- Unassigned Reply Requests
- My Reply Requests

as any user they can act on behalf of.

If a Delegate is a **delegate of multiple users**, the above will be sorted by each user the delegate can act on behalf of.

If a Delegate is a **delegate of a Super User**, they will have the same ability as the Super User to view the above for **all matters** in their firm or organisation.

- **Recent Activities:** any recent activities that is visible to the user the Delegate is acting on behalf of. When a Delegate views the activity, the activity will also be cleared from the Recent Activities list for the user the Delegate is acting on behalf of.

Matter Number	Matter Name	Details
10000001	Demo Case 1 - Demo House 100	Form 100 - Application for Medical Assessment
10000002	Demo Case 2 - Demo House 100	Form 100 - Application for Medical Assessment
10000003	Demo Case 3 - Demo House 100	Form 100 - Application for Medical Assessment

- **Temporary Applications:** any temporary applications lodged by the Delegate, or by the user the Delegate is acting on behalf of.
- **Temporary Documents:** any temporary documents lodged by the Delegate, or by the user the Delegate is acting on behalf of.

Date Lodged	Application Type	Applicant Name	Status	Last Updated	Expiry On
10/06/2023	Form 100 - Medical assessment	Client, Demo	Pending	10/06/2023	

Document Number	Date Lodged	Matter No.	Document Type	Status	Last Updated	Expiry On
10000001	10/06/2023	10000001	Applications	Pending	10/06/2023	

- **Unassigned Reply Requests:** any unassigned reply requests that can be assigned to the user the Delegate is acting on behalf of.

Matter Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Assign
10000001	Form 100 - Damages assessment	Demo Client	Demo House 100	10/06/2023	10/06/2023	

- **My Reply Requests:** any reply requests assigned to be completed by a user the Delegate can act on behalf of

Matter Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due
10000001	Form 100 - Damages assessment	Demo Client	Demo House 100	10/06/2023	10/06/2023

How to View and Sort Matters as a Delegate

In the **Files** tab, under the **Active Files** heading:

- Click the **Advanced** button (right side of screen)

You can then filter for:

- **My Matters:** Matters where the user the Delegate is acting on behalf of is recorded as a Primary Contact
- **Matters I'm linked to:** Matters where the user the Delegate is acting on behalf of is recorded as a Primary or Secondary Contact
- **All Matters:** If the Delegate is acting on behalf of a Super User, then all matters in their firm or organisation will display and this option is selected by default. **Note** that this option will only appear if the Delegate is acting on behalf of a Super User.

The screenshot displays the 'Active Files' section of the Pathway Portal. At the top left, there is a dropdown menu labeled 'Active Files' with a blue icon and a downward arrow. At the top right, there is a red-bordered button labeled 'Advanced'. Below these is a 'Criteria' section with a dark blue header. It contains several search fields: 'Matter/Application Number', 'Party Name', 'Division', and 'Application Type'. Below the search fields is a 'View' section with three radio buttons: 'My Matters', 'Matters I'm linked to' (which is selected), and 'All Matters'. To the right of the radio buttons are two date input fields labeled 'Allocation Date From' and 'Allocation Date To', each with a calendar icon. At the bottom right of the criteria section is a green 'Refresh' button with a circular arrow icon.

See Who I am a Delegate For

A Delegate can view who they are a Delegate for from their User Profile page.

From any page,

- Click on **Welcome, [Name]** on the top right corner of the screen

The screenshot shows the Pathway Portal interface. At the top right, a user profile indicator says 'Welcome, Demo Lawyer Delegate'. Below the navigation bar, the 'User Profile' section is visible. It includes a 'Demo Law Firm' header and a table with columns for Name, Email, Phone, User Type, Super User, SMS, and Active Contact. A red box highlights the table content.

Name	Email	Phone	User Type	Super User	SMS	Active Contact
Demo Lawyer	demolawyer@test.com.au		Legal Representative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Delegate of Multiple Users

Multiple users can share the same Delegate.

When lodging any **new application**, a Delegate of multiple users will be asked to indicate which user they are lodging the application on behalf of.

They will need to **select** the user's name in blue

The screenshot shows the 'Select User to act on behalf of' screen. A table titled 'Delegated Access' lists users. The 'Second Lawyer Demo' row is highlighted in blue, indicating it is the selected user.

Select User	Party / Representative	Email
Demo Lawyer One	Demo Firm One	demo.lawyer@pic.nsw.gov.au
Second Lawyer Demo	Demo Law Firm One	second.lawyer@pic.nsw.gov.au

When viewing the **Diary tab**, a delegate of multiple users can select which user's diary/diaries they wish to view.

In the **User Name** drop down, check any user's name to view their diary. Check all users' names to see all appointments for all users together.

Note: If no user is selected, then no appointments will be displayed.

The screenshot shows the 'Weekly Diary - List' screen. A dropdown menu for 'User Name' is open, showing three options: 'Demo Lawyer One', 'Second Lawyer Demo', and 'Third Lawyer Demo'. All three options are checked, indicating they are selected for viewing.

Performing Administrative Functions for Matters as a Delegate of a Super User

A Delegate of a Super User will be able to perform the same administrative functions for matters as the Super User including:

- Assign unassigned reply requests for their organisation
- Re-assign the active files of one user to another in their organisation

Assign Unassigned Reply Requests

From the **Files** tab

- Navigate to the section headed **Unassigned Reply Requests**
- In the **Assign To** drop-down, **select** the user you wish to assign the reply request to
- **Check** the box in the column headed **Assign**.
- Then **click** the **Assign** button

Unassigned Reply Requests

Matter/Application Number	Application Type	Applicant	Respondent	Assign
M19725-01-1	Form M01- Medical assessment	Test Claimant	Demo Insurer MA	<input type="checkbox"/>

Re-assign Active Files to Another User

From the **Files** tab

- Navigate to the section headed **Active Files** and the section headed with the **name of the user** whose files you wish to reassign.
- Click the **Reassign** button (right side of screen)

Active Files

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
1/05/2025	Form M12- Damages assessment	Damages assessment				
1/05/2025	Form 7- Application for Assessment by a Medical Assessor	Assessment as to whether the degree of permanent impairment is more than 20% (section 29, Workers Compensation Act 1987)				
1/05/2025	Form M02- Application for appointed representative	Application for appointed representative				
4/06/2025	Form M01- Medical assessment	Degree of permanent impairment				

- In the **New Contact** drop down, **select** the user who you wish to reassign each matter to.
- Click on **Save**

Reassign Primary Contact

Deactivate Contact after reassigning all Matters

Matters assigned to Demo Lawyer One

Matter Number	Matter Name	Phone
M17425	Demo Claimant v Demo Insurer MA	78787878
W17525	Demo Employer v Demo Worker	
M17625	Demo Claimant Two v Demo Insurer MA	
M19725	Test Claimant v Demo Insurer MA	