



**Personal Injury
Commission**

Pathway Portal Insurer User Guide

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User Guide Overview

As an Insurer user, 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:

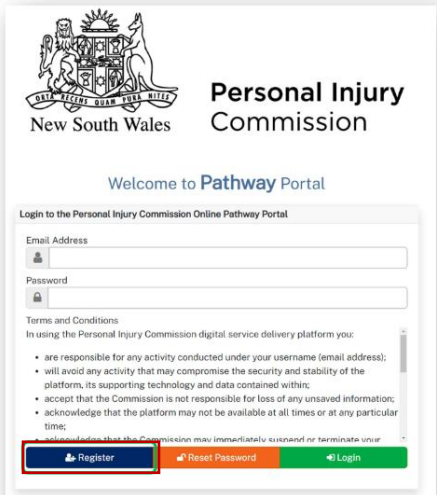
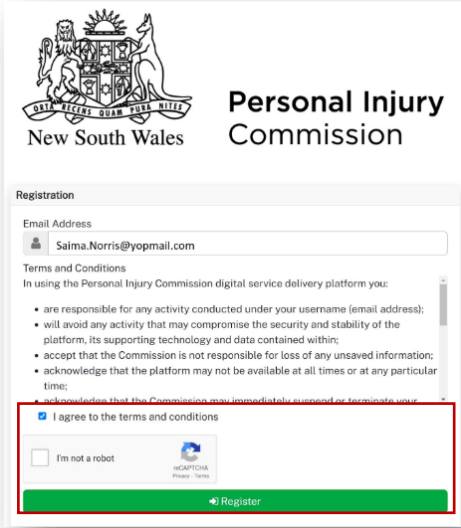
- Get started
- Navigation
- Lodge an application in Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Explain how to lodge a review and further application
- Assign a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

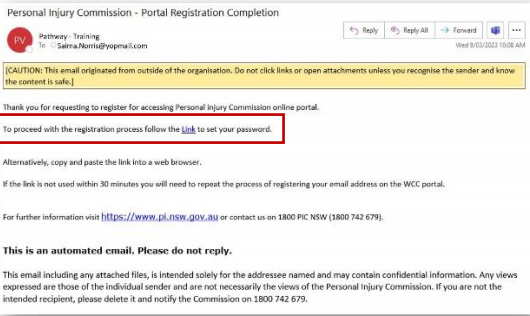
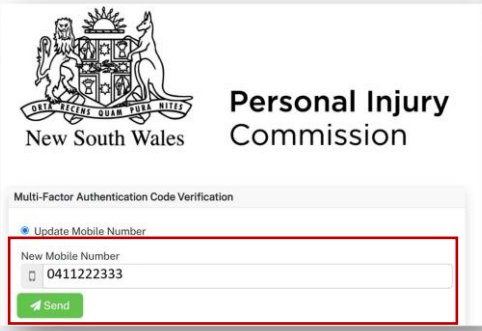
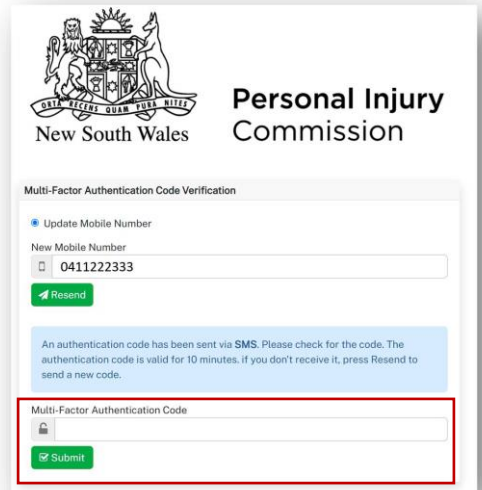
Get started

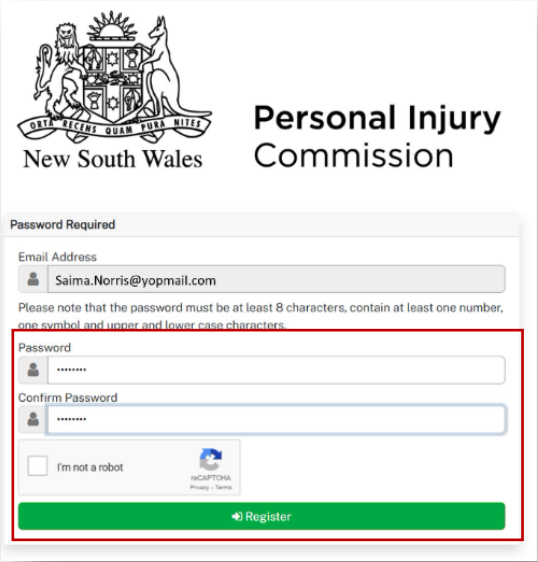
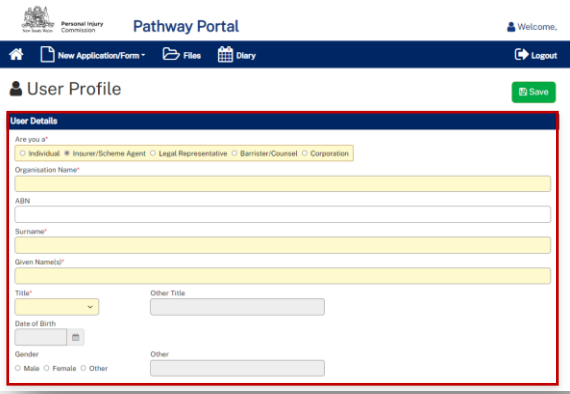
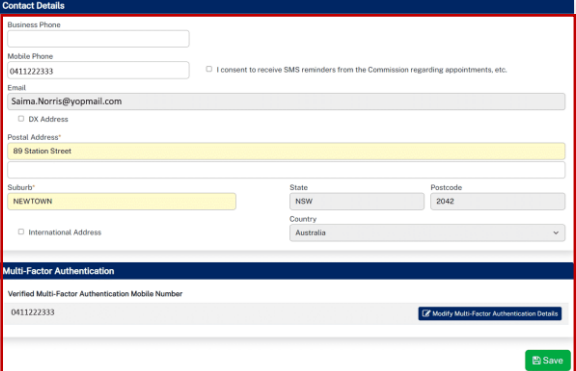
How to access and register for Pathway Portal

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

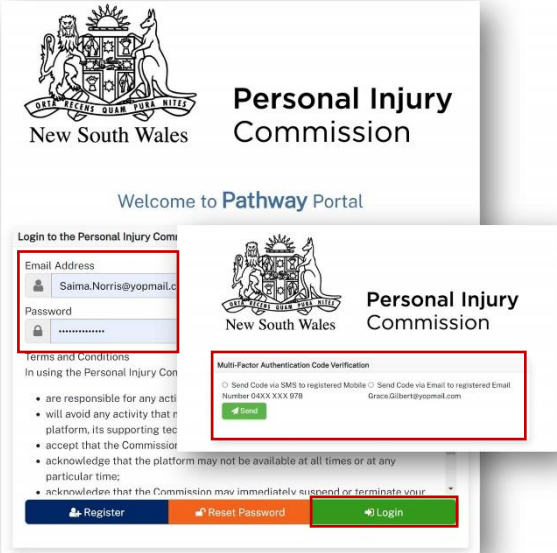
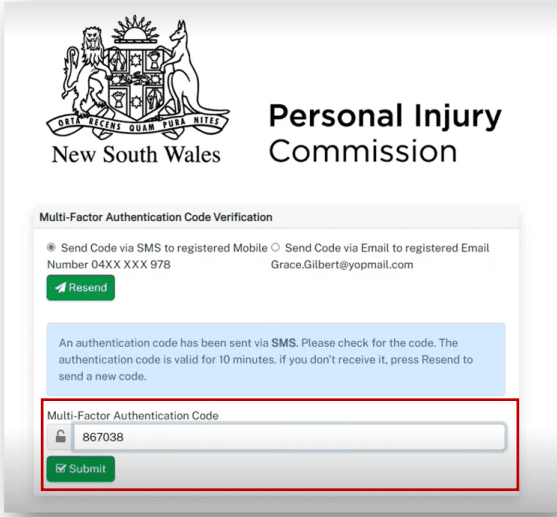
- If you are a Primary contact or Secondary contact on a Matter, you will register as an **Insurer/Scheme Agent**.
- Administrative staff may be added as **Delegates** (see the end of this User Guide for details on how to do this). Delegates do not need to follow the instructions to register as an Insurer/Scheme Agent, but are added by a **Super User** as their Delegate.

Instruction	Page
<p><i>Access Pathway Portal</i></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><i>Register your email address</i></p> <ol style="list-style-type: none">3. Follow the prompts to register your email address.4. Tick to agree to the terms and conditions.5. Tick I'm not a robot and complete the Select all squares with... test.6. Click Register. <p>➤ You will then receive an email to validate your email address.</p>	

Instruction	Page
<p><i>Click Pathway Portal link in email</i></p> <p>You will receive an email with a link to validate the email address.</p> <p>7. Click the Link in the email.</p>	
<p><i>Update Mobile Number</i></p> <p>8. Populate New Mobile Number to receive the code and click Send.</p>	
<p><i>Type code</i></p> <p>9. Type the code sent to your mobile and click Submit.</p>	

Instruction	Page
<p><i>Create new Password</i></p> <p>10. Enter Password and Confirm Password.</p> <p>11. Tick I'm not a robot and complete the Select all squares with... test.</p> <p>12. Click Register.</p>	
<p><i>Populate User Profile (top of page)</i></p> <p>13. Populate the User Profile.</p> <p>14. Select Insurer/Scheme Agent</p> <p>Note: All yellow fields are mandatory.</p>	
<p><i>Populate User Profile (bottom of page)</i></p> <p>15. Populate User Profile (bottom of page).</p> <p>16. Click Save.</p>	

How to Login to Pathway Portal

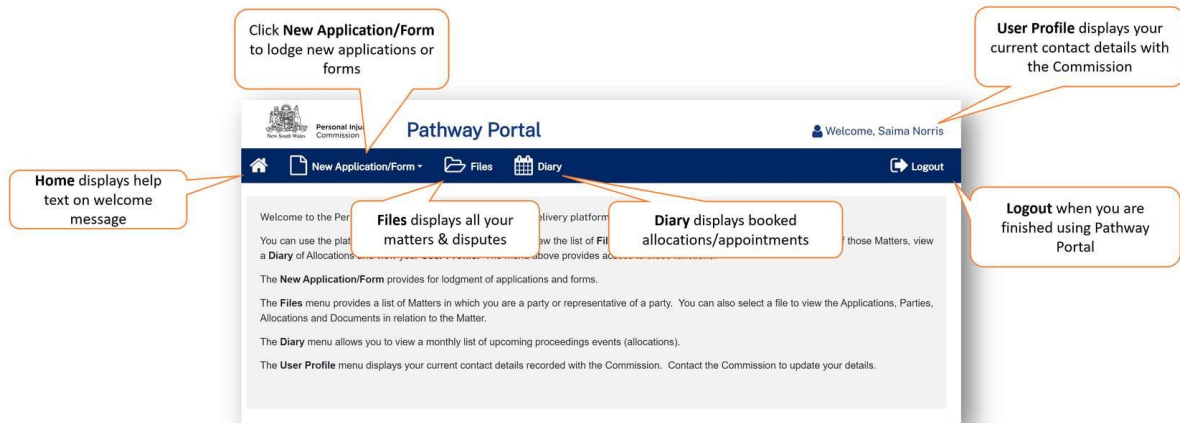
Instruction	Page
<ol style="list-style-type: none"> 1. Click the Pathway Portal link on the Personal Injury Commission website. 2. Populate the Email Address and Password. 3. Click Login. 4. Select where you would like the Multi Factor Authentication Code (MFA) sent (either your mobile or email). 5. Click Send. 	
<ol style="list-style-type: none"> 6. Populate the Multi-Factor Authentication Code from the SMS/email you were sent. 7. Click Submit. 	

Navigation

Home page

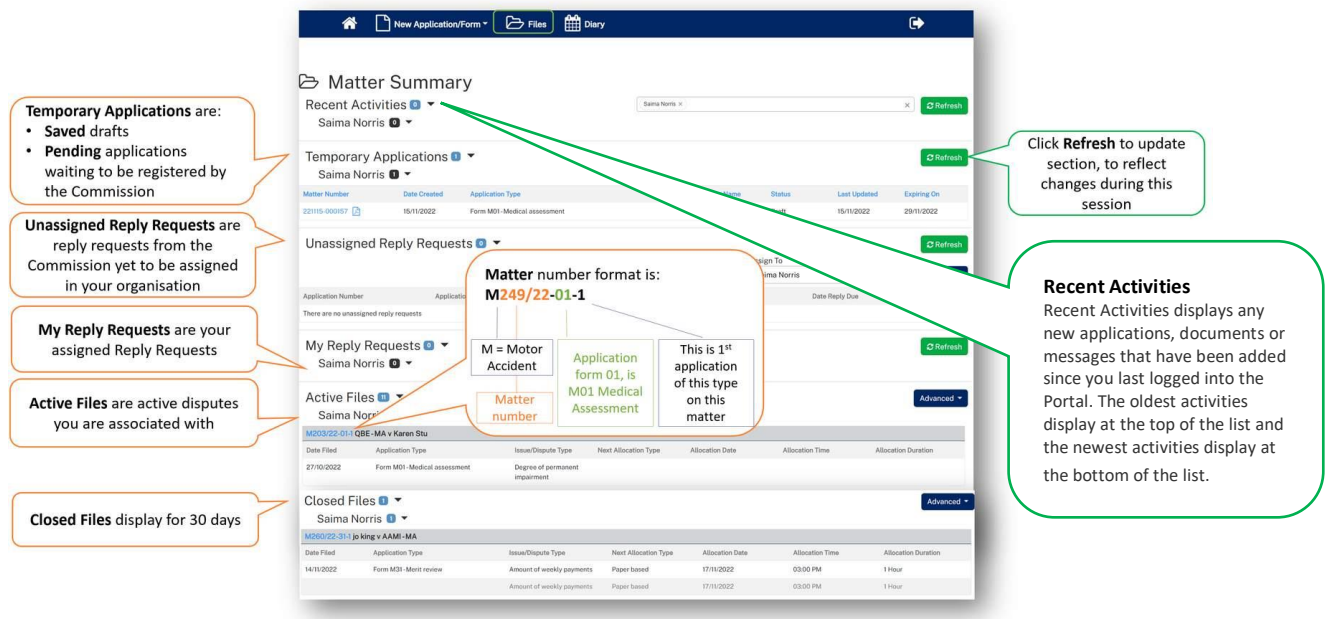
After you login to Pathway Portal the **Home page** displays:

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



Files page

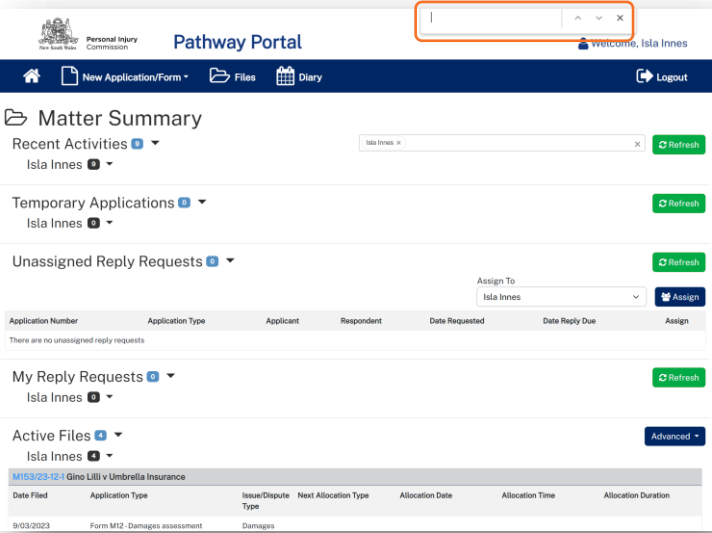
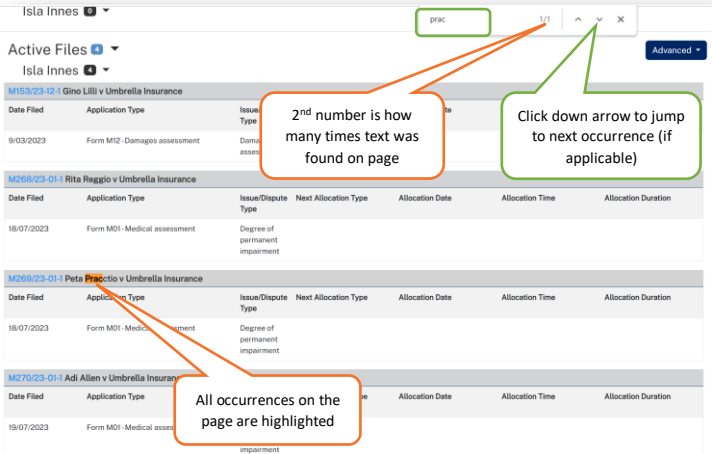
When you click the **Files** tab, the **Files** page displays all the matters where you are the party.



Filter Active Files

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

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

Instruction	Screen
<p><i>Use Ctrl+F</i></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. <ul style="list-style-type: none"> ➤ A search box displays. 	 <p>The screenshot shows the Pathway Portal interface. At the top right, there is a search bar with a magnifying glass icon and a close button (X). The search bar is highlighted with an orange box. Below the search bar, the page displays various sections: Matter Summary, Recent Activities, Temporary Applications, Unassigned Reply Requests, My Reply Requests, and Active Files. The Active Files section is currently selected and shows a table of files.</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><i>Party name example</i></p> <ul style="list-style-type: none"> ➤ In this example, we typed part of the surname of the party, which is prac (upper/ lower case doesn't matter with Ctrl+F). ➤ Can search for a partial name (eg type poulos to search for Theofanopoulos) 	 <p>The screenshot shows the search results for 'prac' in the Active Files section. The search bar at the top right contains 'prac' and has a dropdown arrow. The search results table shows several entries. Annotations include: <ul style="list-style-type: none"> An orange box around the search bar with the text: "2nd number is how many times text was found on page". A green box around the dropdown arrow with the text: "Click down arrow to jump to next occurrence (if applicable)". An orange box around the first row of the table with the text: "All occurrences on the page are highlighted". </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 box at the top right contains the number '269'. Below the search bar, there are three tables of data. The first table is for 'M153/23-01-1 Gino Lilli v Umbrella Insurance', the second for 'M266/23-01-1 Rita Reggio v Umbrella Insurance', and the third for 'M269/23-01-1 Peta Pracctio v Umbrella Insurance'. The third table is highlighted in blue, indicating it is the selected matter. The tables have columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
9/03/2023	Form M12 - Damages assessment	Damages assessment				

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
18/07/2023	Form M01 - Medical assessment	Degree of permanent impairment				

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
18/07/2023	Form M01 - Medical assessment	Degree of permanent impairment				

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
19/07/2023	Form M01 - Medical assessment	Degree of permanent impairment				

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. The 'Application Number' field is filled with 'm269/23-01-1'. The 'Party Name' field is empty. The 'View' section has radio buttons for 'My Matters' and 'Matters I'm linked to', with 'Matters I'm linked to' selected. There are checkboxes for 'Legally Represented' and 'Not Legally Represented', both of which are checked. A 'Refresh' button is visible on the right. Two callout boxes provide additional information: 'Matters I'm linked to displays matters where you are a secondary contact' and 'You can filter list based on whether you have a legal representative or not'. Below the criteria, the same table of active files is shown, with the 'M269/23-01-1 Peta Pracctio v Umbrella Insurance' row highlighted.

- The files that match your criteria display.

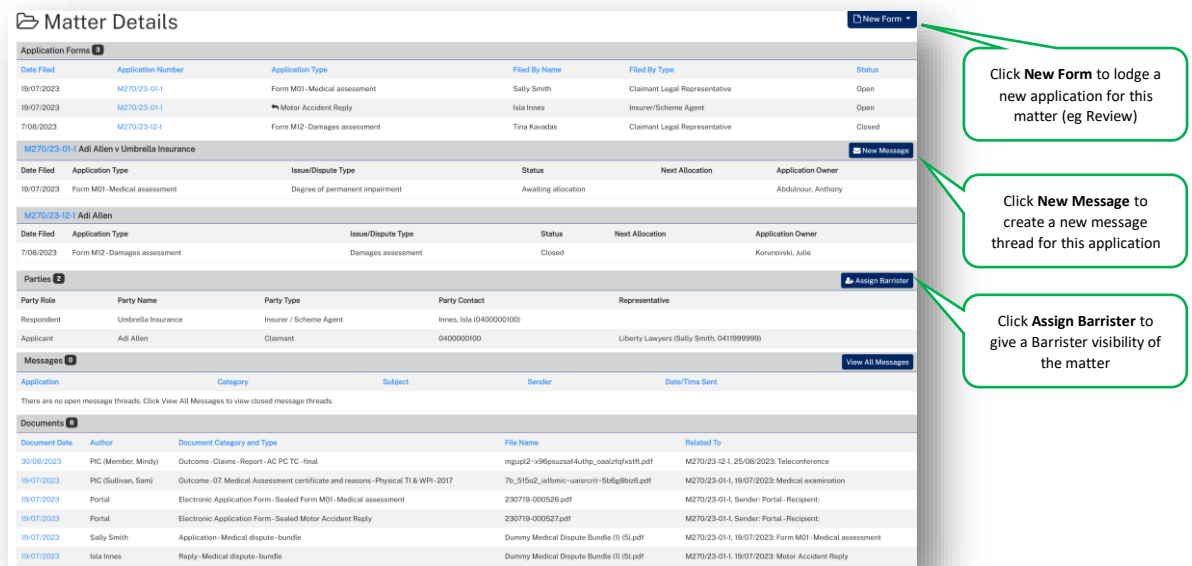
The screenshot shows the 'Active Files' page after filtering. The 'Advanced' button is visible in the top right corner. The table below shows only one row of data, which is the matter 'M269/23-01-1 Peta Pracctio v Umbrella Insurance'. The table has columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
18/07/2023	Form M01 - Medical assessment	Degree of permanent impairment				

Instruction	Screen
<p><i>No files listed after Advanced search</i></p> <p>If nothing matched your search criteria, the Active Files displays as 0.</p> <p><i>To see <u>all</u> your Active Files:</i></p> <ol style="list-style-type: none"> 1. Click Advanced. 2. Delete the criteria you entered. 3. Click Refresh. 	

Matter Details

When you click on a [blue matter number link](#) anywhere in the **Files** page the **Matter Details** display.



Matter Details

Application Forms

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
19/07/2023	M270/23-01-1	Form M01-Medical assessment	Sally Smith	Claimant Legal Representative	Open
19/07/2023	M270/23-01-1	Motor Accident Reply	Isla Innes	Insurer/Scheme Agent	Open
7/08/2023	M270/23-12-1	Form M12-Damages assessment	Tina Kavadis	Claimant Legal Representative	Closed

M270/23-01-1 Adi Allen v Umbrella Insurance

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
19/07/2023	Form M01-Medical assessment	Degree of permanent impairment	Awaiting allocation		Abdulhour, Anthony

M270/23-12-1 Adi Allen

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
7/08/2023	Form M12-Damages assessment	Damages assessment	Closed		Korunovski, Julie

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Innes, Isla (0400000100)	
Applicant	Adi Allen	Claimant	0400000100	Liberty Lawyers (Sally Smith, 0411999999)

Messages

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

Documents

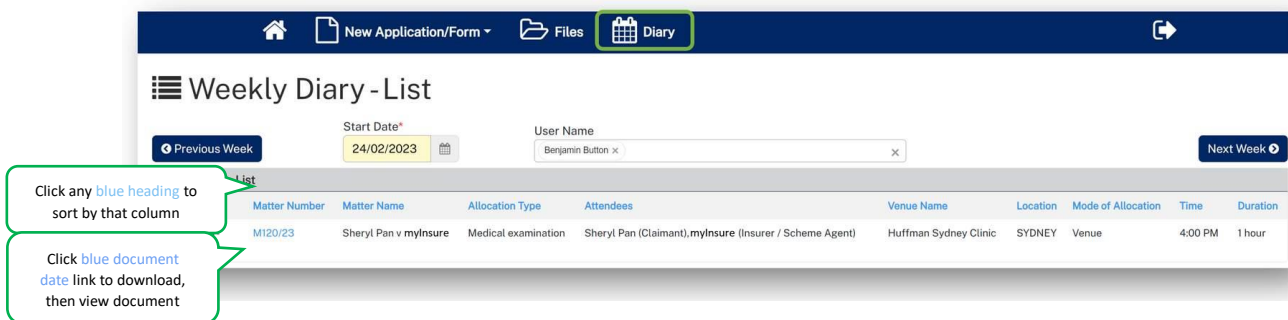
Document Date	Author	Document Category and Type	File Name	Related To
30/08/2023	PIC (Member, Mindy)	Outcome-Claims-Report-AC PC TC-final	mpp02-v96puzzaaf4rhp_00a7hfzstth.pdf	M270/23-12-1, 25/08/2023: Teleconference
19/07/2023	PIC (Sullivan, Sam)	Outcome-O7-Medical Assessment certificate and reasons-Physical TI & WPI-2017	7b_515e2_jalbmic-uasrorn-5tdg8lzu6.pdf	M270/23-01-1, 19/07/2023: Medical examination
19/07/2023	Portal	Electronic Application Form-Sealed Form M01-Medical assessment	230719-000526.pdf	M270/23-01-1, Sender: Portal-Recipient
19/07/2023	Portal	Electronic Application Form-Sealed Motor Accident Reply	230719-000527.pdf	M270/23-01-1, Sender: Portal-Recipient
19/07/2023	Sally Smith	Application-Medical dispute-bundle	Dummy Medical Dispute Bundle (I) (SI).pdf	M270/23-01-1, 19/07/2023: Form M01-Medical assessment
19/07/2023	Isla Innes	Reply-Medical dispute-bundle	Dummy Medical Dispute Bundle (I) (SI).pdf	M270/23-01-1, 19/07/2023: Motor Accident Reply

Callouts:

- 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 give a Barrister visibility of the matter

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 Button

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

Callouts:

- Click any [blue heading](#) to sort by that column
- Click [blue document date link](#) to download, then view document

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.

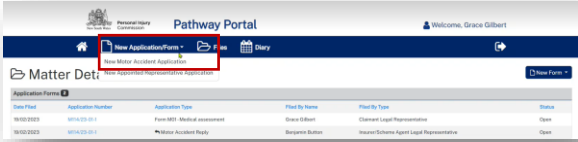
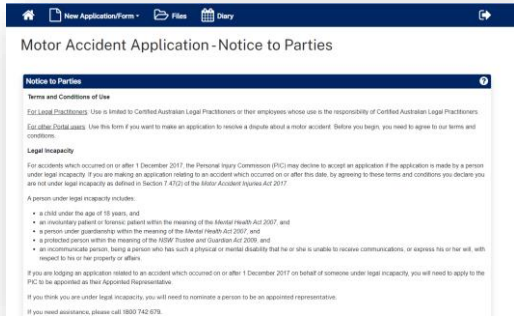
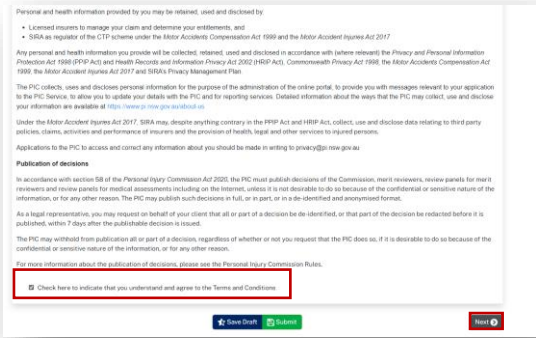
Application forms that can be submitted by parties via Pathway Portal are:

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

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

How to lodge a new application

In the following example, the Insurer user is lodging a New Motor Accident Application for the Insurer.

Instruction	Page
<p>New Application Form</p> <ol style="list-style-type: none"> Click on the New Application Form and select New Motor Accident Application. <p>➤ The Motor Accident Application – Notice to Parties page displays.</p>	
<p>Motor Accident Application – Notice to Parties</p> <ol style="list-style-type: none"> Click the check box to indicate that you understand and agree to the Terms and Conditions. Click Next. <p>➤ The Motor Accident Application - Claim Details page displays.</p>	
	

Motor Accident Application - Claim Details

4. Complete the details as follows:

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

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

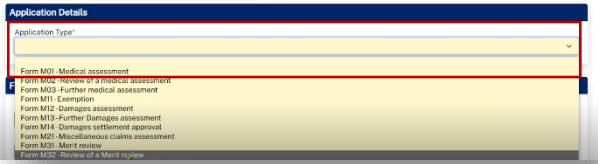

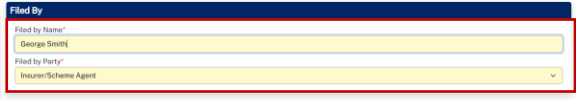
- **Claimant Date of Birth** – Type in the date or select the date from the calendar.
- **Claimant Surname** – Type in the last name of the Claimant.
- **Which Insurer is managing the Claim?** – This will auto-populate according to the user's profile but may be changed if needed.
- **Insurer not listed** - 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.

The screenshot shows the 'Motor Accident Application - Claim Details' page in the Pathway Portal. The form contains the following fields and options:

- Date of Accident:** 1/05/2022
- Claimant Date of Birth:** 13/04/1973
- Claimant Surname:** Turner
- Which Insurer is managing the Claim?:** A dropdown menu.
- Insurer not listed:** An unchecked checkbox.
- Enter the claim number:** An empty text input field.
- Location of Accident:** An empty text input field.

Matching the claim number to the Universal Claims Database

- The claim number is checked against the **Universal Claims Database (UCD)** and confirms if it is a valid claim number, it will show **The claim has been found in green**.
- If the Claim has not been found, it will display in **red**. You should check the Claim number again and make sure that it is correct.
- If the Claim has still not been found, contact the Personal Injury Commission on 1800 742 679 for assistance.

Instruction	Page
<p><i>Application Details</i></p> <p>5. 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><i>Matters in Dispute</i></p> <p>6. Select the relevant disputes.</p>	
<p><i>Filed By</i></p> <p>7. Filed by Name – Type in your name.</p> <p>8. Filed by Party – Select Insurer/Scheme Agent.</p> <p>9. Click Next.</p>	

Claimant Details

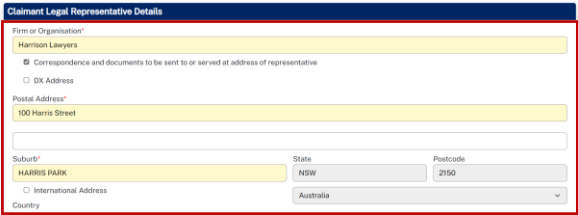
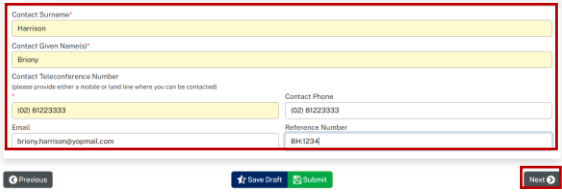
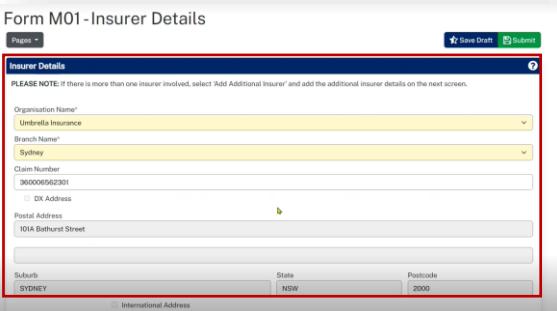
10. Complete the **Claimant Details** as follows:

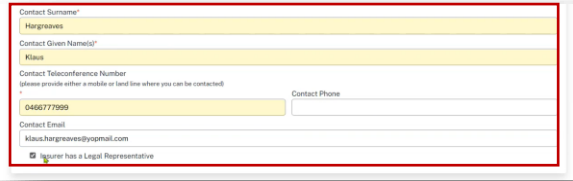
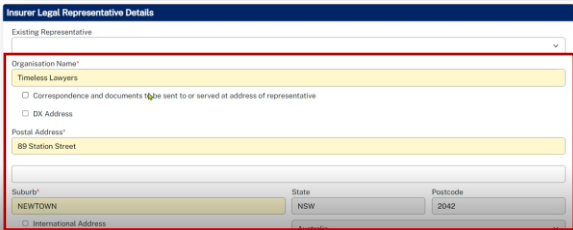
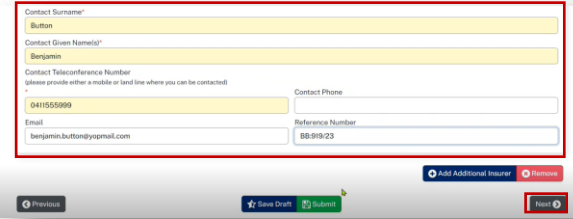
- **Surname** – Type in the Claimant’s last name.
- **Given Name(s)** – Type in the Claimant’s first and second names.
- **Title** – Select the Title from the drop-down menu.
- **Date of Birth** – Type in the Claimant’s Date of Birth or select the date from the calendar.
- **DX Address** – Check the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

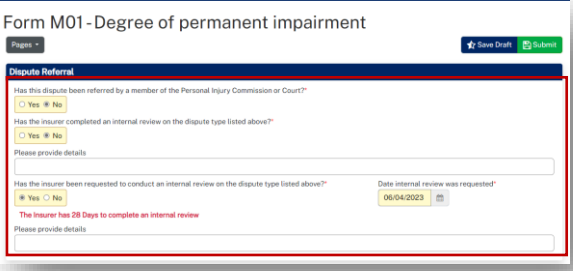
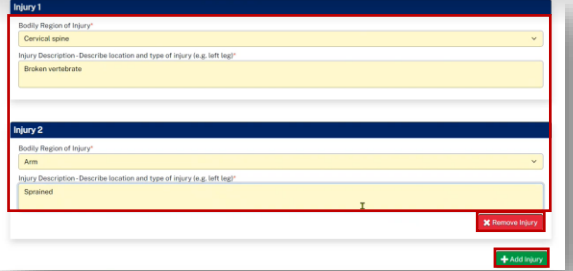
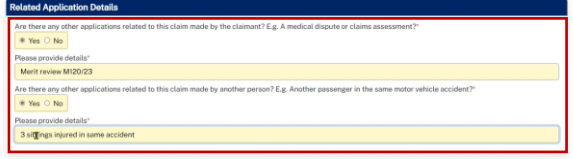
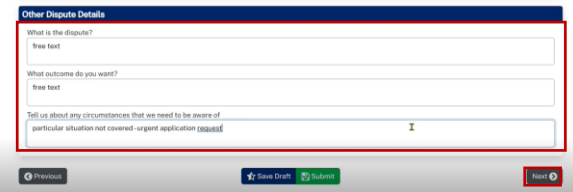
Interpreter

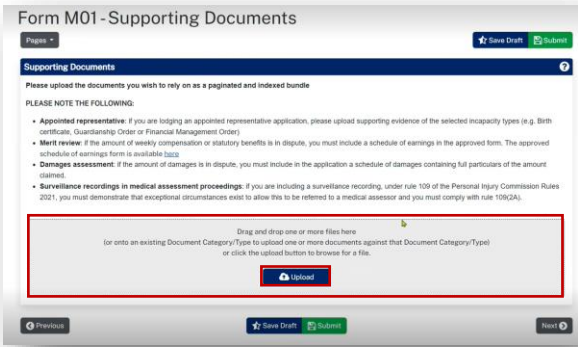
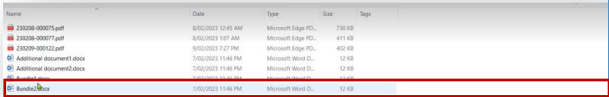
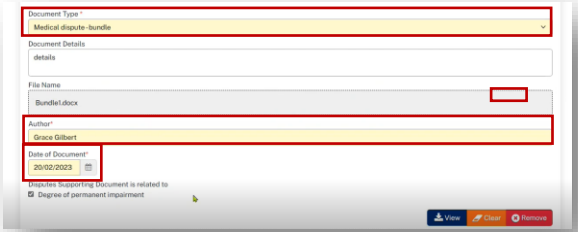

11. Complete the details as follows:

- **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.

Instruction	Page
<p><i>Claimant Legal Representative Details</i></p> <p>12. Complete the details as follows:</p> <ul style="list-style-type: none"> • Firm or Organisation – Populate the legal firm details. • 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. 	
<ul style="list-style-type: none"> • Contact Surname – Type in the name of the claimant’s lawyer, if known. • Contact Given Name (s) – Type in the name of the claimant’s lawyer, if known. • Contact Teleconference Number – Type in the contact number. • Contact Phone – Type in any other contact numbers. • Email – Populate as required. • Reference Number – Populate as required. <p>13. Click Next.</p> <p>➤ The Insurer Details page displays.</p>	
<p><i>Form M01- Insurer Details</i></p> <p>14. These details will auto populate because the Insurer was selected on the first page.</p>	

Instruction	Page
<p><i>Insurer Details continued</i></p> <p>15. Complete the details as follows:</p> <ul style="list-style-type: none"> • Scroll down and add the Contact details for the Insurer. <p>Note: This is essential, so that the correct person is added as the Primary contact for this matter.</p> <ul style="list-style-type: none"> • 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>16. Click Next.</p> <p>➤ The Degree of Permanent Impairment page displays in this example. The content and questions on the next page will vary depending on the application type and the dispute (s) selected earlier.</p>	

Instruction	Page
<p><i>Degree of Permanent Impairment</i></p> <p><i>Dispute Referral</i></p> <p>17. Select Yes/No to the questions.</p>	
<p><i>Injury 1</i></p> <p>18. 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>19. Add in any Related Application Details if applicable.</p>	
<p><i>Other Dispute Details</i></p> <p>20. Add in any Other Dispute Details we need to be aware of.</p> <p>21. Click Next.</p> <p>➤ The Supporting Documents page displays.</p>	

Instruction	Page
<p><i>Supporting Documents</i></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.</p> <p>22. Click Upload or drag and drop the documents onto the page.</p>	
<p><i>What are the document requirements?</i></p> <p>23. Select the document and click Open.</p>	<p>See Appendix A – Document requirements for information on the acceptable file types and document requirements.</p> 
<p>24. Add in the Document Details:</p> <ul style="list-style-type: none"> • 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. 	
<p>25. Add another document if required.</p> <p>26. Click Next.</p> <p>➤ The Certification and Signature page displays.</p>	

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.

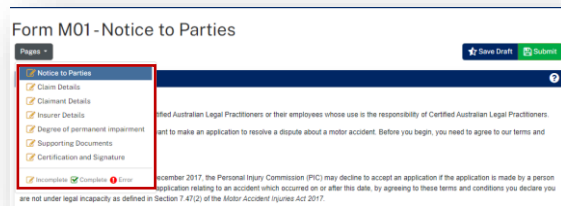
Save Draft

27. You can **Save Draft** so that the application can be reviewed before it is signed and submitted.

- The draft application can be viewed in **Temporary Applications** with a status of **Draft**.
- Click the **PDF icon** to view the draft.
- Once the draft has been updated, you can submit the application by clicking on the **Matter Number** in **Temporary Applications**.



- **Check/update** any details by navigating to the **relevant page**.
- Once you are ready to submit the document, navigate to the **Certification and Signature page** and submit the document as shown below.

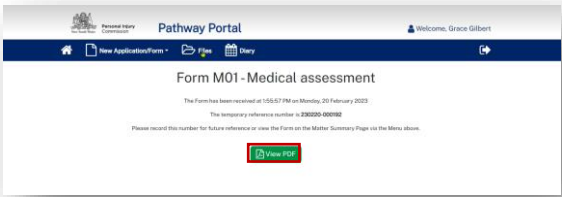
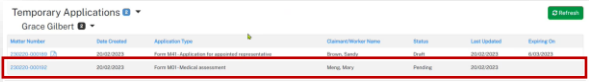


Submit

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



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

Instruction	Page														
<p><i>Form M01 - Medical Assessment</i></p> <p>29. Click View PDF to view and download the application.</p>															
<p><i>Temporary Applications</i></p> <p>30. 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 border="1"> <thead> <tr> <th>Member Number</th> <th>Date Created</th> <th>Application Type</th> <th>Claimant/Member Name</th> <th>Status</th> <th>Last Updated</th> <th>Expiry Date</th> </tr> </thead> <tbody> <tr> <td>00000-00000</td> <td>2020-00-00</td> <td>Form M01 - Medical assessment</td> <td>Henry, Mary</td> <td>Pending</td> <td>2020-00-00</td> <td></td> </tr> </tbody> </table>	Member Number	Date Created	Application Type	Claimant/Member Name	Status	Last Updated	Expiry Date	00000-00000	2020-00-00	Form M01 - Medical assessment	Henry, Mary	Pending	2020-00-00	
Member Number	Date Created	Application Type	Claimant/Member Name	Status	Last Updated	Expiry Date									
00000-00000	2020-00-00	Form M01 - Medical assessment	Henry, Mary	Pending	2020-00-00										

Temporary Applications

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

Click [blue temporary Matter Number](#) link to open and update any application with **Status of Draft or Rejected**

Status of:

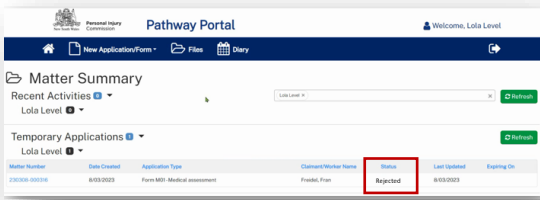
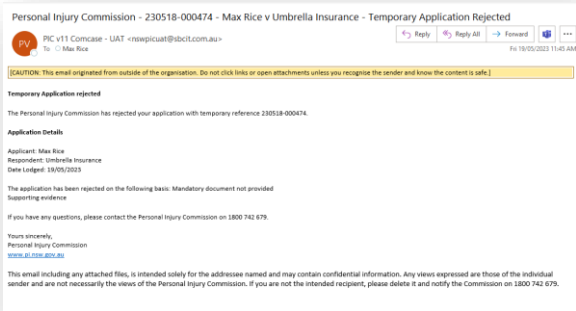
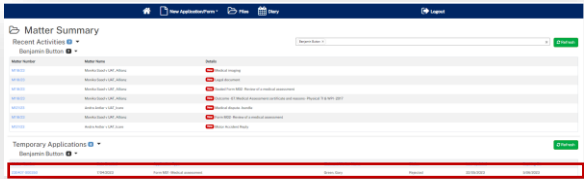
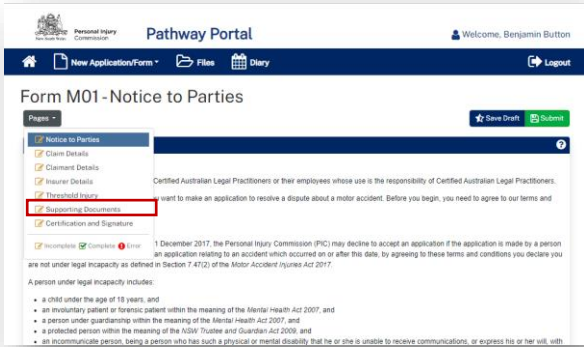
- **Pending** = temporary application submitted to the Commission
- **Draft** = you have saved the application to finish later
- **Rejected** = the Commission has rejected the application, refer to the email notification for reason

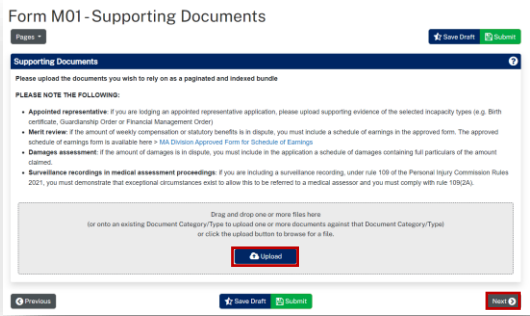

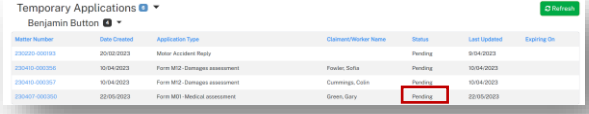
- Only the filing party will be able to see the temporary application in Pathway Portal.
- When the application has been registered by the Commission it will then be shared with the respondent who needs to lodge a reply.

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**.

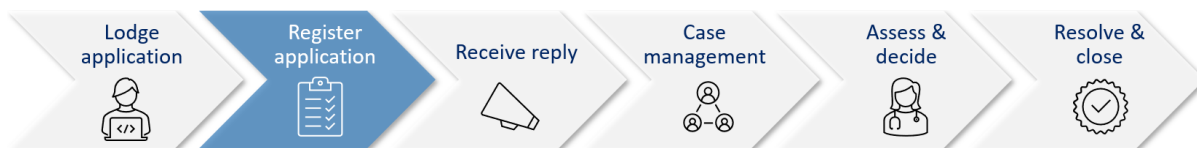
How to resubmit a rejected temporary application

Instruction	Page
<p>Notification of rejected temporary application</p> <ul style="list-style-type: none"> If the Commission rejects a temporary application, you will receive an email notification with the reason. In the Files tab the Temporary Application will have a Status of Rejected 	
<p>To resubmit rejected application:</p> <ol style="list-style-type: none"> 1. Refer to the email notification to understand the rejection reason. 	
<ol style="list-style-type: none"> 2. In the Files tab, click the blue temporary Matter Number link of the rejected matter. This reopens the application. 	
<ol style="list-style-type: none"> 3. Navigate to Supporting Documents and make the required changes to the form (if this was the reason for rejection). 	

Instruction	Page																																			
<p>1. Click Upload to upload the supporting document bundle (if this was the reason for rejection) and click Next.</p>																																				
<p>2. Once changes are made, sign and date the application on the last page and click Submit.</p>																																				
<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>	 <table border="1"> <thead> <tr> <th>Meter 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> </thead> <tbody> <tr> <td>230220-000193</td> <td>20/02/2023</td> <td>Motor Accident Ready</td> <td></td> <td>Pending</td> <td>0/04/2023</td> <td></td> </tr> <tr> <td>230410-000355</td> <td>10/04/2023</td> <td>Form M02 - Damages assessment</td> <td>Fowler, Sofia</td> <td>Pending</td> <td>10/04/2023</td> <td></td> </tr> <tr> <td>230449-000367</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>230447-000360</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> </tbody> </table>	Meter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	230220-000193	20/02/2023	Motor Accident Ready		Pending	0/04/2023		230410-000355	10/04/2023	Form M02 - Damages assessment	Fowler, Sofia	Pending	10/04/2023		230449-000367	10/04/2023	Form M02 - Damages assessment	Cummings, Colin	Pending	10/04/2023		230447-000360	22/05/2023	Form M01 - Medical assessment	Green, Gary	Pending	22/05/2023	
Meter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On																														
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230447-000360	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:

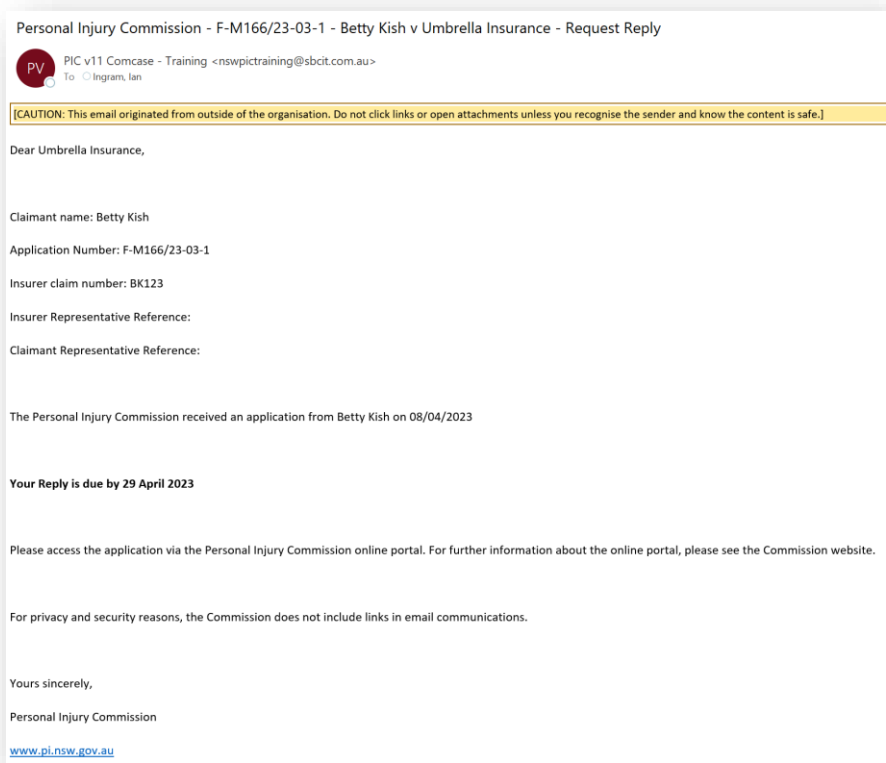
- Displays in the **Temporary Applications** section of Pathway Portal
- Has a temporary number.

↔ Assigning a reply request to someone is a new concept

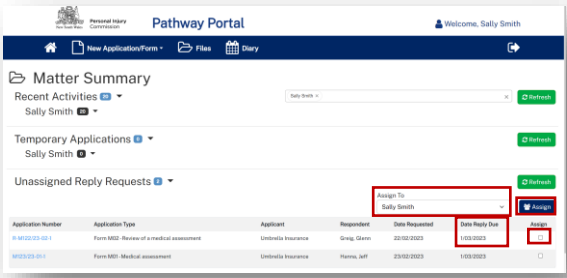
↔ Reply is a **Temporary application** until reviewed then registered by the Commission

Reply Request Notification

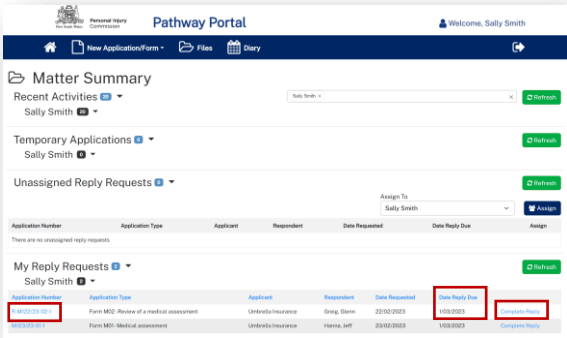
When a reply has been requested the respondent (or their legal representative) receives an email notification to advise that an application has been received by the Commission, the date the reply is due and to access the Pathway Portal to view the application and submit the reply.



How to Assign the Reply Request

Instruction	Page
<p>Unassigned Reply Requests must be assigned to someone in your organisation.</p> <ol style="list-style-type: none"> To assign a Reply Request, complete the following: <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> <ol style="list-style-type: none"> To respond to the reply request, complete the following: <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>➤ 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

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

Page

The screenshot shows the 'Notice to Parties' page in the Pathway Portal. The page title is 'Motor Accident Application - Reply - Notice to Parties'. It contains sections for 'Terms and Conditions of Use', 'Legal Incapacity', and 'Legal Representative'. The 'Legal Incapacity' section lists criteria for a person under legal incapacity, such as being a child under 18, an involuntary patient, or a person with a physical or mental disability. At the bottom, there are buttons for 'Save Draft', 'Submit', and 'Next'.

This screenshot shows a section of the 'Notice to Parties' page with a checkbox labeled 'Check here to indicate that you understand and agree to the Terms and Conditions'. Below the checkbox are buttons for 'Save Draft', 'Submit', and 'Next'.

3. 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.
4. Click **Next**.

The screenshot shows the 'Reply' page in the Pathway Portal. The page title is 'Motor Accident Application - Reply - Reply'. It contains an 'Application Details' section with fields for 'Application Number', 'Application Type', 'Applicant', and 'Respondent'. Below this is a 'Filed By' section with dropdown menus for 'Filed by Name' and 'Filed by Party'. The 'Dispute: Treatment and care reasonable and necessary' section has a dropdown for 'Dispute Type' and a text area for 'Reply to the dispute'. At the bottom, there are buttons for 'Previous', 'Save Draft', 'Submit', and 'Next'.

Instruction

Page

5. Complete the Insurer **Details page**. Add a Contact Name and number for the Insurer and click **Next**.

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

Note: If the Insurer is now legally represented on this matter, advise the Commission by emailing help@pi.nsw.gov.au or on 1800 742 679, so that the Reply request can be sent to the legal representative.

6. Upload **supporting documents** for the Reply, complete the **Document Details** and click **Next**.

Note: Supporting documents must be submitted as a single indexed and paginated bundle.

7. **Sign and date** the application – **Submit** if ready or **Save Draft** and have someone else review the reply before it is submitted.

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

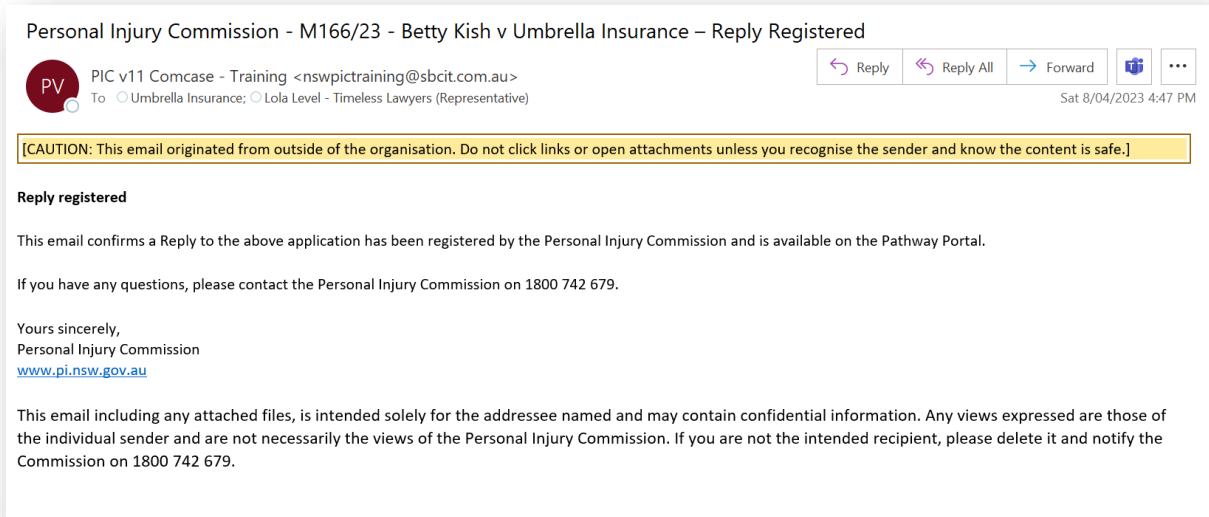
How to view the Reply

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:

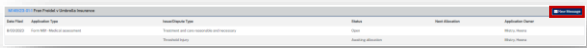
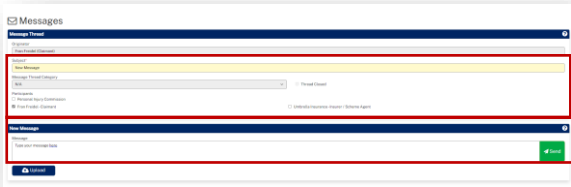
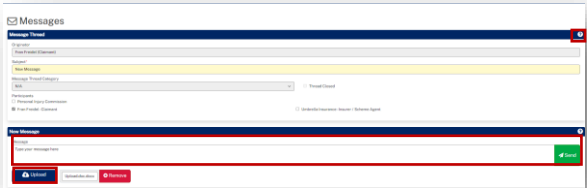
- Applicant’s Legal Representative
- Respondent’s Legal Representative or
- Unrepresented parties.



Instruction	Page																				
<p><i>View the Reply</i></p> <p>The Documents section lists the:</p> <ul style="list-style-type: none"> • Sealed reply form • Reply document bundle <p>1. Click the blue document date link to download and view the document.</p>	<p>The screenshot shows the 'Matter Details' page for application M166/23-01. The 'Documents' section lists the following items:</p> <table border="1"> <thead> <tr> <th>Document Date</th> <th>Author</th> <th>Document Category and Type</th> <th>Related To</th> </tr> </thead> <tbody> <tr> <td>8/10/2023</td> <td>Patrol</td> <td>Electronic Application Form - Sealed Form MED - Medical assessment</td> <td>M166/23-01, Sender Patrol - Recipient</td> </tr> <tr style="border: 2px solid red;"> <td>15/10/2023</td> <td>Patrol</td> <td>Electronic Application Form - Sealed Minor Accident Reply</td> <td>M166/23-01, Sender Patrol - Recipient</td> </tr> <tr style="border: 2px solid red;"> <td>15/10/2023</td> <td>Lola Level</td> <td>Application - Medical dispute bundle</td> <td>M166/23-01, 16/10/2023 Form MED - Medical assessment</td> </tr> <tr style="border: 2px solid red;"> <td>15/10/2023</td> <td>Grace Gilbert</td> <td>Reply - Medical dispute bundle</td> <td>M166/23-01, 16/10/2023 Minor Accident Reply</td> </tr> </tbody> </table>	Document Date	Author	Document Category and Type	Related To	8/10/2023	Patrol	Electronic Application Form - Sealed Form MED - Medical assessment	M166/23-01, Sender Patrol - Recipient	15/10/2023	Patrol	Electronic Application Form - Sealed Minor Accident Reply	M166/23-01, Sender Patrol - Recipient	15/10/2023	Lola Level	Application - Medical dispute bundle	M166/23-01, 16/10/2023 Form MED - Medical assessment	15/10/2023	Grace Gilbert	Reply - Medical dispute bundle	M166/23-01, 16/10/2023 Minor Accident Reply
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15/10/2023	Grace Gilbert	Reply - Medical dispute bundle	M166/23-01, 16/10/2023 Minor 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"> 1. 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"> 2. Type the Subject. 3. Select the Participants. <ul style="list-style-type: none"> • Legal representative (or self-represented party) receives email notification of new Portal message • Claimant/insurer can see messages but not respond if they have Legal Representative. 4. Type the Message body. 	
<p><i>Upload a document</i></p> <p>You can Upload a document to your message as follows:</p> <ol style="list-style-type: none"> 1. Click the help icon in the top right of the New Message box to display help and link for attaching various forms. 2. Click Upload when document is ready. 3. Select the document and click OK. 4. Click Send. 	

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 columns: Application, Category, Subject, Sender, and Date/Time Sent. A 'View Open Messages' button is located in the top right corner. A red 'New' badge is present next to the first subject link.

Application	Category	Subject	Sender	Date/Time Sent
M20006/23 64 1 - Form MG4 - Special Assessment	For Action	Message to Claimant for Stood Over claim	Priyanka Singh	9/06/2023 9:56 AM
M20006/23 64 1 - Form MG4 - Special Assessment	For Action	Msg02 to Claimant	Priyanka Singh	9/06/2023 9:52 AM
M20006/23 64 1 - Form MG4 - Special Assessment	For Action	Message01 to Claimant	Mohan Dalchan	9/06/2023 9:50 AM

Category for incoming messages will be:

- For Action
- For Noting
- For Review

N/A Category indicates thread was initiated by you

New badge indicates a new message in the thread

Click **blue subject link** to view and respond to the message

Click to toggle between:
View All Messages – Which includes closed threads.
View Open Messages – which only displays threads that are open

How to respond to messages

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

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

The screenshot displays the Pathway Portal interface. At the top, there is a navigation bar with the logo for the Personal Injury Commission, the text "Pathway Portal", and a user greeting "Welcome, Max Rice". Below the navigation bar are icons for "New Application/Form", "Files", "Diary", and "Logout".

The main content area is titled "Messages". It features a "Message Thread" section with a header and a question mark icon. The thread details include:

- Originator: Sophie Jones (Personal Injury Commission)
- Subject: Response needed
- Message Thread Category: For Action (dropdown menu)
- Thread Status: Thread Closed
- Participants: Personal Injury Commission, Max Rice - Claimant, UAT Allianz - Insurer / Scheme Agent
- Action: Print Message Thread

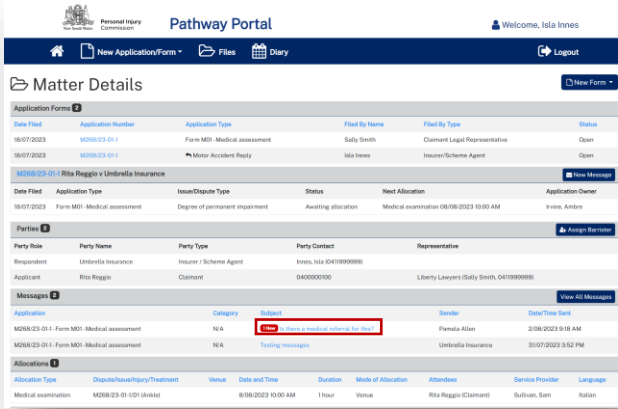
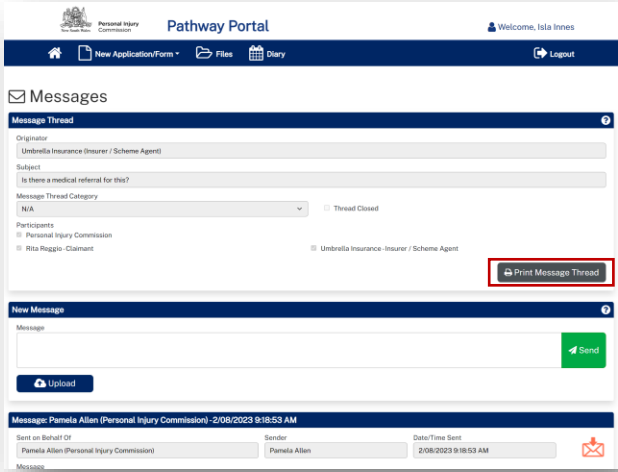
Below the thread is a "New Message" section with a text input field containing "Response is typed here" and a green "Send" button. There is also an "Upload" button.

At the bottom, a message header shows "Message: Sophie Jones (Personal Injury Commission) - 5/05/2023 3:50:23 PM". Below this is a table with columns for "Sent on Behalf Of", "Sender", and "Date/Time Sent".

Sent on Behalf Of	Sender	Date/Time Sent
Sophie Jones (Personal Injury Commission)	Sophie Jones	5/05/2023 3:50:23 PM

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>2. Click the Print Message Thread button.</p>	

Instruction

Page


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

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



Personal Injury
Commission

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



Originator
Umbrella Insurance (Insurer / Scheme Agent)

Message Thread Category
N/A

Subject
Is there a medical referral for this?

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

Message: Pamela Allen (Personal Injury Commission) - 02/08/2023 09:18:53 AM

Sender
Pamela Allen

Sent on behalf of
Pamela Allen (Personal Injury Commission)

Message
Yes, I will share it with you.

Message: Umbrella Insurance (Insurer / Scheme Agent) - 02/08/2023 09:15:15 AM

Sender
Isla Innes

Sent on behalf of
Umbrella Insurance (Insurer / Scheme Agent)

Message
I can't see that the medical referral for his appointment. Can you please share with me?

Case Management

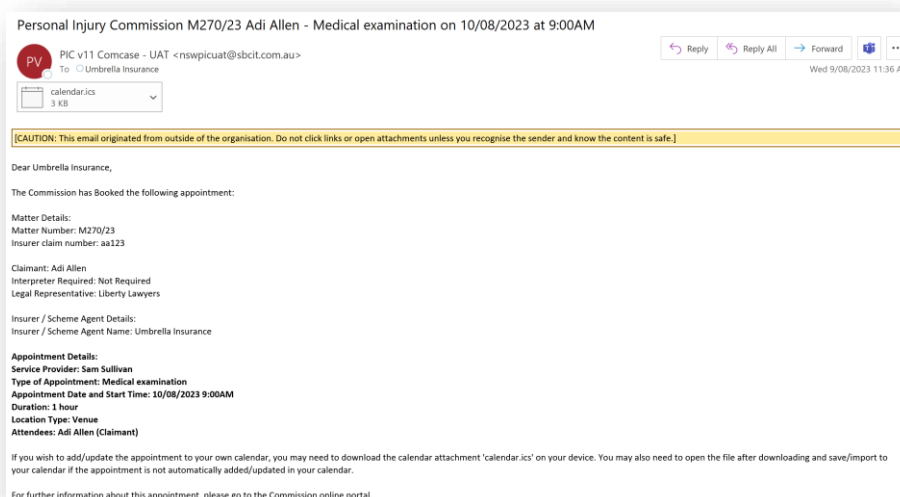


When the Commission allocates the dispute to a decision maker an email notification with date, time, venue, address and required attendees for the allocation is automatically sent to:

- 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.

The screenshot shows a table titled "Allocations" with the following data row:

Allocation Type	Dispute/Issue/Injury/Treatment	Venue	Date and Time	Duration	Mode of Allocation	Attendees	Decision Maker	Language
Medical examination	M270/23-01-I/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	

Callout boxes provide definitions for the following headers:

- Allocation type** is the type of appointment (eg Teleconference, Medical Examination, Paper based)
- Dispute/Injury/Issue/Treatment** displays what is to be assessed in appointment
- Attendees** displays who needs to attend, eg if it's a Teleconference the legal representative may need to attend but not Claimant/Insurer
- Decision Maker** is the member or medical assessor

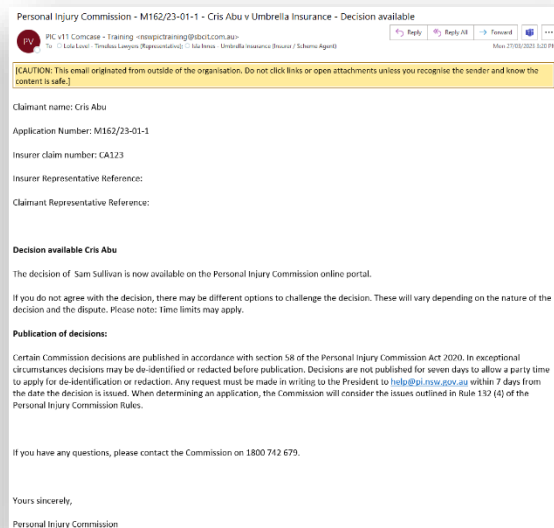
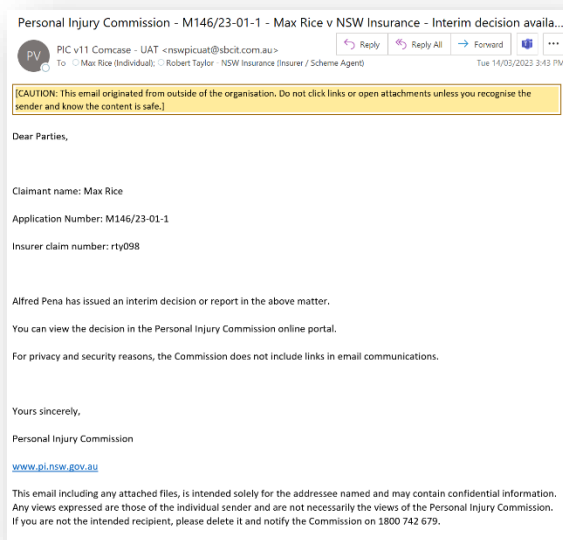
Assess and Decide




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

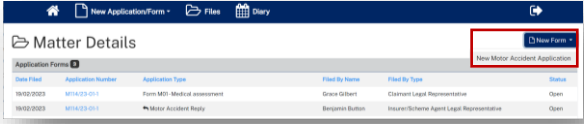
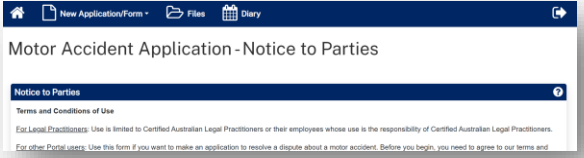

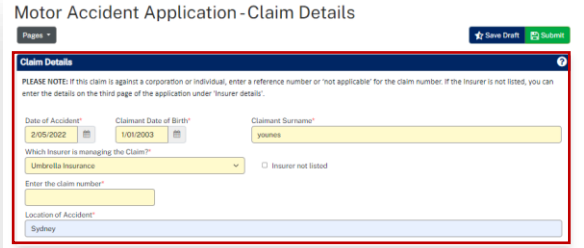
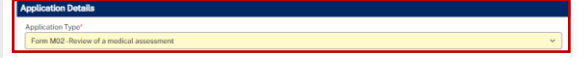

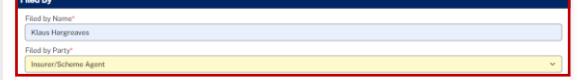


How to view the Outcome Document

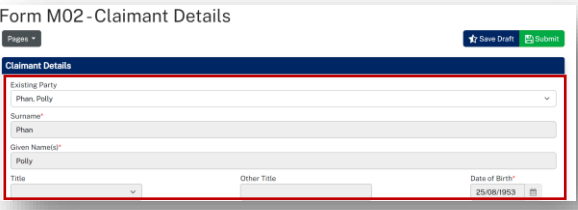
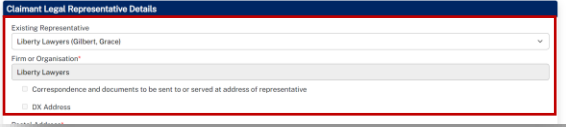
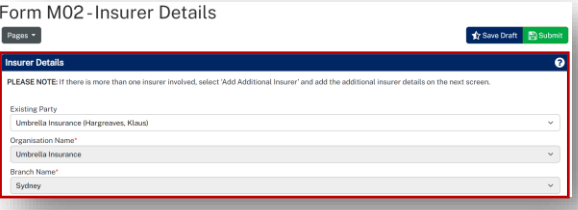
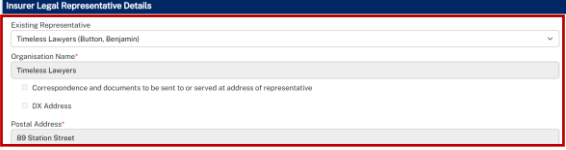
Instruction	Page																																								
<p>From the Matter Details page, scroll down to Documents</p> <ol style="list-style-type: none"> 1. Click the blue Document Date link to download the document. 2. Click the downloaded document to view. 	 <table border="1"> <thead> <tr> <th>Document Date</th> <th>Author</th> <th>Document Category and Type</th> <th>File Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>08/15/2023</td> <td>FC</td> <td>Document - Medical Assessment referral</td> <td>08/15/2023 0455 - Miller, Jeff - 08/15/2023 Medical Assessment referral.docx</td> <td>Sent To Liberty/Lawyers</td> </tr> <tr> <td>08/15/2023</td> <td>FC (See Details)</td> <td>Document - ET Medical Assessment certificate and review - Physical T/A SPH-2023</td> <td>08/15/2023 0454 - Miller, Jeff - 08/15/2023 ET.pdf</td> <td>MTD/23-01-L-08/15/2023 Medical Assessment</td> </tr> <tr> <td>08/15/2023</td> <td>Perkins, EJ Peter</td> <td>Additional document - Application to admit late documents</td> <td>More Accidents-08/15/2023 Application to Admit Late Documents.docx</td> <td>MTD/23-01-L-08/15/2023 Perkin, Peter</td> </tr> <tr> <td>08/15/2023</td> <td>Partial</td> <td>Electronic Application Form - Susited Form (M) - Medical assessment</td> <td>23060-00000.pdf</td> <td>MTD/23-01-L-08/15/2023 Perkin, Peter</td> </tr> <tr> <td>08/15/2023</td> <td>Partial</td> <td>Electronic Application Form - Susited Motor Accident Reply</td> <td>23060-00000.pdf</td> <td>MTD/23-01-L-08/15/2023 Perkin, Peter</td> </tr> <tr> <td>08/15/2023</td> <td>Training Log#99</td> <td>Application - Medical Specialist - Susited</td> <td>08/15/2023 0454 - Miller, Jeff - 08/15/2023 Form (M) - Medical Assessment.pdf</td> <td>MTD/23-01-L-08/15/2023 Perkin, Peter</td> </tr> <tr> <td>08/15/2023</td> <td>Training Log#99</td> <td>Reply - Medical Specialist - Susited</td> <td>08/15/2023 0454 - Miller, Jeff - 08/15/2023 Motor Accident Reply.pdf</td> <td>MTD/23-01-L-08/15/2023 Perkin, Peter</td> </tr> </tbody> </table>	Document Date	Author	Document Category and Type	File Name	Status	08/15/2023	FC	Document - Medical Assessment referral	08/15/2023 0455 - Miller, Jeff - 08/15/2023 Medical Assessment referral.docx	Sent To Liberty/Lawyers	08/15/2023	FC (See Details)	Document - ET Medical Assessment certificate and review - Physical T/A SPH-2023	08/15/2023 0454 - Miller, Jeff - 08/15/2023 ET.pdf	MTD/23-01-L-08/15/2023 Medical Assessment	08/15/2023	Perkins, EJ Peter	Additional document - Application to admit late documents	More Accidents-08/15/2023 Application to Admit Late Documents.docx	MTD/23-01-L-08/15/2023 Perkin, Peter	08/15/2023	Partial	Electronic Application Form - Susited Form (M) - Medical assessment	23060-00000.pdf	MTD/23-01-L-08/15/2023 Perkin, Peter	08/15/2023	Partial	Electronic Application Form - Susited Motor Accident Reply	23060-00000.pdf	MTD/23-01-L-08/15/2023 Perkin, Peter	08/15/2023	Training Log#99	Application - Medical Specialist - Susited	08/15/2023 0454 - Miller, Jeff - 08/15/2023 Form (M) - Medical Assessment.pdf	MTD/23-01-L-08/15/2023 Perkin, Peter	08/15/2023	Training Log#99	Reply - Medical Specialist - Susited	08/15/2023 0454 - Miller, Jeff - 08/15/2023 Motor Accident Reply.pdf	MTD/23-01-L-08/15/2023 Perkin, Peter
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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><i>Notice to Parties</i></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>➤ The Form Claim Details displays.</p>	 
<p><i>Claim Details</i></p> <ol style="list-style-type: none"> Complete the Claim Details as follows: <ul style="list-style-type: none"> Populate the Claim Details Select the Application Type <p>This example selects M02 – Review of medical assessment</p> <ul style="list-style-type: none"> Tick relevant Matters in Dispute Filed by Party – Select as appropriate. Click Next. <p>➤ The Claimant Details page displays.</p>	   

How to lodge an application for a Review continued

Instruction	Page
<p><i>Claimant Details</i></p> <ol style="list-style-type: none"> Populate the Claimant Details page. When done click Next. 	
<div data-bbox="236 651 756 779" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; background-color: #e6f2ff;"> <p>Selecting Existing Party and Existing Representative auto-populates their details which speeds up data entry ↔</p> </div> <p>➤ The Insurer Details page displays.</p>	
<p><i>Insurer Details</i></p> <ol style="list-style-type: none"> Populate the Insurer Details page, including the Contact Name details. <p>Note: This is essential, so that the correct person is added as the Primary contact for this matter. <ol style="list-style-type: none"> Click Next. </p>	
<div data-bbox="236 1294 756 1422" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; background-color: #e6f2ff;"> <p>Selecting Existing Party and Existing Representative auto-populates their details which speeds up data entry ↔</p> </div> <p>➤ The Form M02 – Panel Review of single medical assessment page displays if this is the application that was selected.</p>	

Instruction

Form M02 – Panel Review of single medical assessment

10. Complete the details as follows:

- The Matter number should pre-populate based on the matter you were in when you selected **New Form**.
- Select the relevant **Previous Decision**.
- If the decision is not available, tick **Previous Decision not available for selection** and type in the details.
- **The Date of the previous decision** and **Full Name of Decision Maker of previous decision** auto-populate based on decision selected above, otherwise manually populate.
- Complete the required fields on the page.

11. Click **Next**.

➤ The **Supporting Documents** page displays.

Page

Form M02 - Panel Review of single medical assessment

Pages

Save Draft Submit

Previous Decision

Matter Number of Previous Decision* M1423 Previous Decision not available for selection

Previous Decision* 20/02/2023 - Alfred Pena - Outcome - Medical Assessment certificate and reasons - Physical TI & Earning capacity - 2017

Date of previous decision* 20/02/2023 Full Name of Decision Maker of previous decision* Alfred Pena

Was a combined certificate issued?* Yes No

Are you lodging this review application outside the statutory time period?* Yes No

What is the error made by the Decision Maker?*
Need to consider...

How is this material to the outcome of the decision?*

It is material because...

Other Circumstances

Tell us about any circumstances that we need to be aware of

Notes: []

Previous Save Draft Submit Next

Supporting Documents

12. Upload the relevant **supporting document** as a single indexed and paginated bundle.

13. Click **Next**

➤ The Certification and Signature page displays.

Form M02 - Supporting Documents

Pages

Save Draft Submit

Supporting Documents

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

PLEASE NOTE THE FOLLOWING:

- **Appointed representative:** If you are lodging an appointed representative application, please upload 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 dispute, you must include a schedule of earnings in the approved form. The approved schedule of earnings form is available here
- **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).

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

Certification and Signature

14. **Read** and **tick** the acknowledgments.

15. Click **Save Draft** if application needs to be reviewed internally before being submitted to the Commission.

16. Click **Submit**.

Form M02 - Certification and Signature

Pages

Save Draft Submit

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.

Application Signed Date Signed 14/03/2023

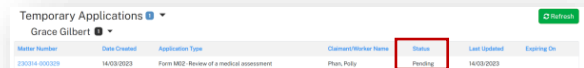
Previous Save Draft Submit

Instruction

What happens after Submit?

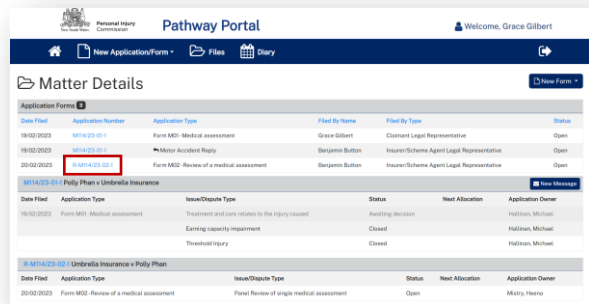
The Review **Temporary Application** displays with a **Status** of **Pending** until it is registered by the Commission.

Page



Matter Number	Date Closed	Application Type	Claimed/Worker Name	Status	Last Updated	Expiring On
23024-00028	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**.



Pathway Portal

Welcome, Grace Gilbert

New Applications/Form Files Diary

Matter Details

New Form

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
18/02/2023	M14023-011	Form M01 - Medical assessment	Grace Gilbert	Claimant Legal Representative	Open
18/02/2023	M14023-014	Motor Accident Reply	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open
20/02/2023	R23024-00028	Form M02 - Review of a medical assessment	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open

M14023-011 Polly Phan v Umbrella Insurance

New Message

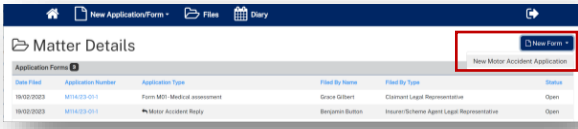
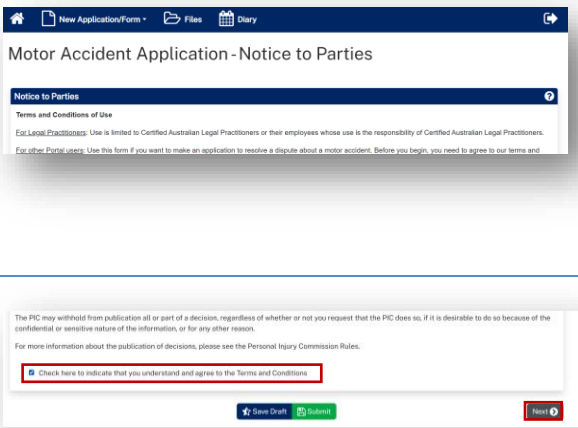
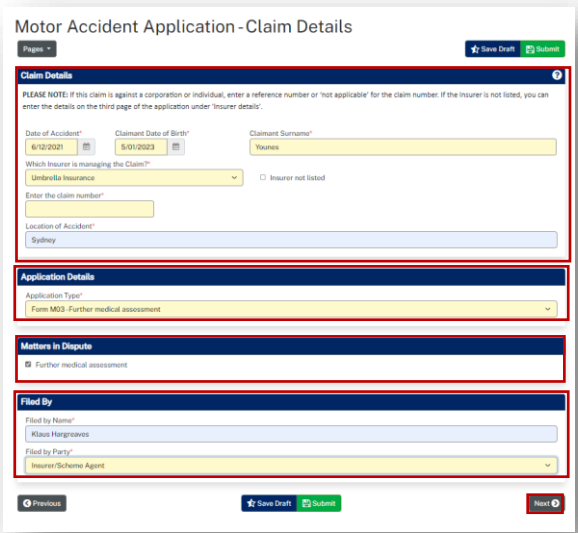
Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
18/02/2023	Form M01 - Medical assessment	Treatment and care related to the injury claimed	Awaiting decision		Hallinan, Michael
		Earning capacity impairment	Closed		Hallinan, Michael
		Threshold injury	Closed		Hallinan, Michael

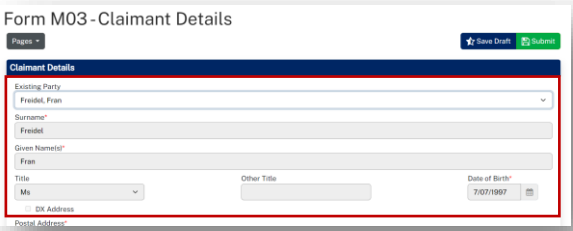

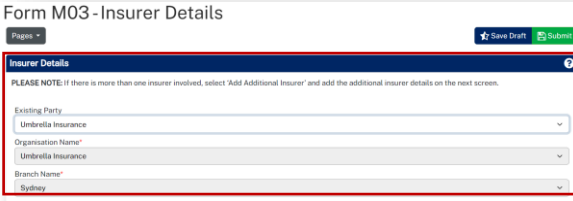
R23024-00028 Umbrella Insurance v Polly Phan

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		Mistry, Harne

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"> In the Matter Details, click New Form in the top right corner and select New Motor Accidents Application. 	
<p><i>Notice to Parties</i></p> <ol style="list-style-type: none"> Read the Terms and Conditions. Scroll to the bottom and tick to agree to Terms and Conditions and click Next. <p>➤ The Motor Accident Application – Claim Details page displays.</p>	
<p><i>Motor Accident Application – Claim Details</i></p> <ol style="list-style-type: none"> Complete the Claim Details as follows: <ul style="list-style-type: none"> Application Type Matters in Dispute Filed by Party <p>This example selects M03 – Further medical assessment</p> <ol style="list-style-type: none"> Click Next. <p>➤ The Claimant Details page displays.</p>	

Instruction	Page
<p><i>Claimant Details</i></p> <p>5. 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>6. Click Next.</p> <p>➤ The Insurer Details page displays.</p>	
<p><i>Insurer Details</i></p> <p>7. Populate the Insurer Details page, including the Contact Name details.</p> <p>Note: This is essential, so that the correct person is added as the Primary contact for this matter.</p> <p>Note: You can select the Existing Party and the Existing Representative from the drop down to quickly populate.</p> <p>8. Click Next.</p> <p>➤ The Form M03 – Further medical assessment page displays if this is the application that was selected.</p>	

Instruction

Further medical assessment

10. Complete the details as follows:

- The **Matter number** should pre-populate based on the matter you were in when you selected the **New Form**.
- Select the Previous Decision.
- If the decision is not available, tick **Previous Decision not available for selection** and type in details.
- The **Date of previous decision** and **Full Name of Decision Maker of previous decision** auto-populate based on decision selected above, otherwise manually populate.
- Are you selecting for a further assessment on the grounds of? – Select as appropriate.
- Complete the rest of the page.

11. Click **Next**.

➤ The **Supporting Documents** page displays.

Page

Form M03 - Further medical assessment

Pages ▾ Save Draft Submit

Dispute Referral

Has this dispute been referred by a member of the Personal Injury Commission or Court?*

Yes No

Previous Decision

Has this dispute been previously assessed at the DRS or the Personal Injury Commission?*

Yes No

Previous Assessment

Matter Number of Previous Decision* Previous Decision not available for selection

Previous Decision*
20/02/2023 - Alfred Pena - Outcome - Medical Assessment certificate and reasons - Physical T1 & Earning capacity - 2017

Date of previous decision* Full Name of Decision Maker of previous decision*

Was a combined certificate issued?*

Yes No

Further Medical Assessment Details

Are you applying for a further assessment on the grounds of?

Additional relevant information about the injury

Additional relevant information about the injury

Deterioration of the injury

Resilience

How is this information such as to be capable of having a material effect on the outcome of the previous assessment?*

more info here...

Previous Save Draft Submit May 23 Next

Supporting Documents

12. **Upload** relevant supporting documents as a single indexed and paginated bundle.

13. Click **Next**.

➤ The **Certification and Signature** page displays.

Form M02 - Supporting Documents

Pages ▾ Save Draft Submit

Supporting Documents

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

PLEASE NOTE THE FOLLOWING:

- **Appointed representative:** if you are lodging an appointed representative application, please upload supporting evidence of the selected incapacity types (e.g. Birth certificate, Guardianship Order or Financial Management Order)
- **Metric 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](#).
- **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 100 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).

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

Certification and Signature

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**.

Form M02 - Certification and Signature

Pages ▾ Save Draft Submit

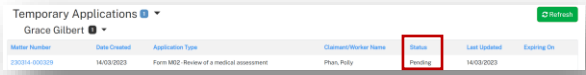
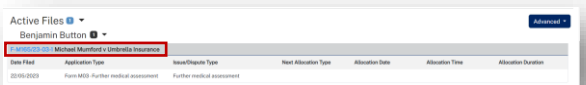
Certification and Signature

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.

Application Signed Date Signed

Previous Save Draft Submit

What happens after the Further Assessment application has been submitted?

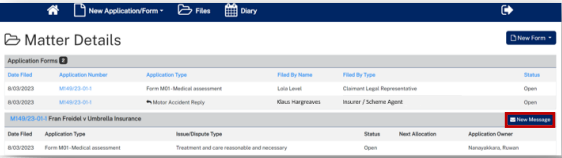
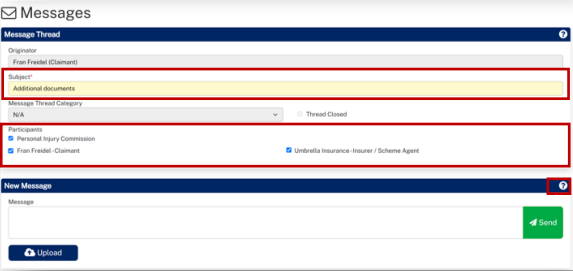
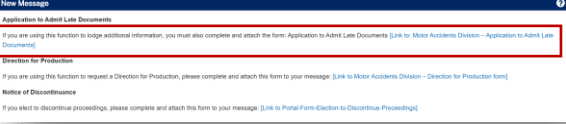
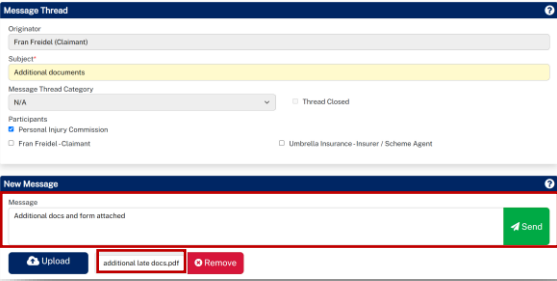
Instruction	Page
<p>The Further Assessment Temporary Application displays with Status of Pending until it is registered by the Commission.</p>	 <p>The screenshot shows a table titled 'Temporary Applications' for 'Grace Gilbert'. The table has columns: Matter Number, Date Created, Application Type, Claimant/Worker Name, Status, Last Updated, and Expiring On. A single row is visible with Matter Number 220514-000209, Date Created 14/03/2023, Application Type Form MED- Review of a medical assessment, Claimant/Worker Name Phas, Polly, Status Pending (highlighted with a red box), Last Updated 14/03/2023, and Expiring On.</p>
<p>Once the application is registered it displays within the Matter Details for the originating dispute and has matter number prefixed with F.</p>	 <p>The screenshot shows a table titled 'Active Files' for 'Benjamin Burton'. The table has columns: Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration. A single row is visible with Date Filed 22/05/2023, Application Type Form MED- Further medical assessment, Issue/Dispute Type Further medical assessment (highlighted with a red box), Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.</p>

Lodge Additional Documents

How to lodge Additional Documents

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

Additional documents are submitted via a message to the case owner, with a form downloaded from the message help page.

Instruction	Page
<p>To lodge additional documents:</p> <ol style="list-style-type: none"> From the Matter Details page, click New Message. 	
<ol style="list-style-type: none"> Populate the Subject. Tick the relevant Participants (recipients). Click the question mark icon in the New Message section. 	
<ol style="list-style-type: none"> Click the Link to: Motor Accidents - Application to Admit Late Documents to download form. Open, populate and save the downloaded form. 	
<ol style="list-style-type: none"> Drag and drop the form and additional documents to the New Message section (or Upload). Type the Message content and click Send. <div style="border: 1px solid #00a0e3; border-radius: 15px; padding: 10px; margin-top: 10px; background-color: #e6f2ff;"> <p>Include Application to Admit Late documents and additional documents as single indexed and paginated document ↔</p> </div>	

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 a web application interface for 'Form M12 - Damages assessment'. The top navigation bar includes icons for Home, New Application/Form, Files, Diary, and Logout. The form is divided into three main sections:

- Claim for Damages:** Contains the question 'Has the claimant served a claim for damages on the insurer?' with radio button options: Yes (selected), No, and Not applicable - claim not against an insurer.
- Best Endeavours/Time Limits:** Contains the question '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 button options: Yes (selected) and No. Below this is a text input field labeled 'Please provide details'.
- Assessment Details:** Contains two questions:
 - 'Do you believe the claim is suitable for assessment?' with radio button options: Yes (selected) and No.
 - 'Is the claim ready for assessment?' with radio button options: Yes and No (selected).Below these is another text input field labeled 'Please provide details'. At the bottom, there are two more questions:
 - 'Do you apply for the matter to be referred to the Stood Over List?' with radio button options: Yes (selected) and No.
 - 'Please select one of the following reasons*' with a dropdown menu.

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 is divided into several sections:

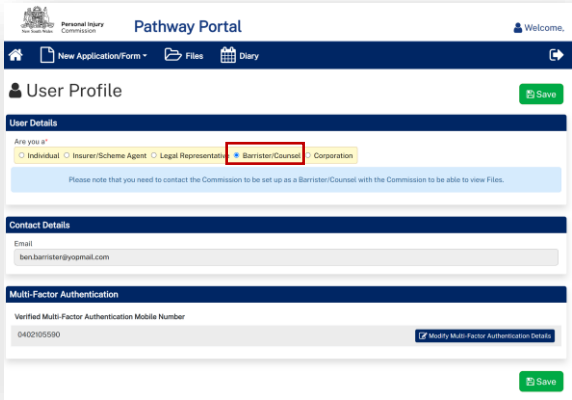
- Application Forms:** A table with columns: Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. It shows two entries for 'New Form M01 - Medical assessment' and 'New Form M02 - Damages assessment', both filed by 'Saima Norris' on 11/11/2022, with a status of 'Open'.
- Reply Requests:** A section indicating 'There are no reply requests'.
- Stood Over List:** A table with columns: Date Filed, Application Type, Issue/Dispute Type, Status, Stood Over Expiry Date, and Next Allocation. It shows two entries for 'Form M02 - Damages assessment' with a status of 'Stood over list - medical dispute not yet finalised' and an expiry date of '1/05/2023'.
- Application Summary:** A table with columns: Date Filed, Application Type, Issue/Dispute Type, Status, and Next Allocation. It shows two entries for 'Form M01 - Medical assessment' with a status of 'Open'.

An orange callout box points to the 'Stood over list - medical dispute not yet finalised' status in the Stood Over List table, containing the text: **Status changes to Stood over list... after the Commission process stood over request**.

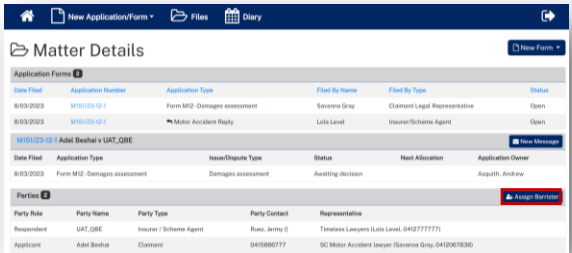
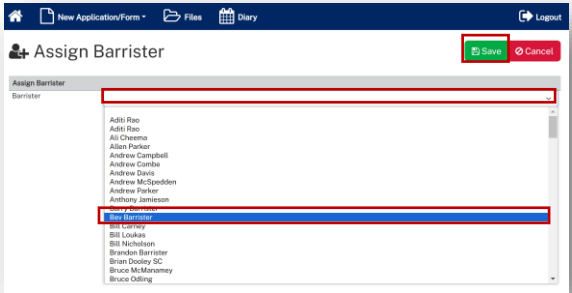
How to give a Barrister visibility to a dispute

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 2. Click Save 3. The barrister then emails MASupport@pi.nsw.gov.au asking for their email address be registered for barrister access. 	

How to assign a Barrister

Instruction	Page
<p><i>Assign a Barrister</i></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><i>To change the barrister:</i></p> <ol style="list-style-type: none"> 1. Repeat above steps and select the new Barrister name. <p><i>To remove barrister:</i></p> <ol style="list-style-type: none"> 2. Select the blank line at the top of Barrister drop down menu. 	

What does the Barrister see?

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

Matter Summary
Recent Activities
Ben Barrister

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

Temporary Applications
Ben Barrister

Unassigned Reply Requests
Assign To: Ben Barrister

My Reply Requests
Ben Barrister

Active Files
Ben Barrister

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

Matter Details
Welcome, Ben Barrister

Application Forms

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		Aaquith, Andrew

Parties

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

Messages

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

Allocations

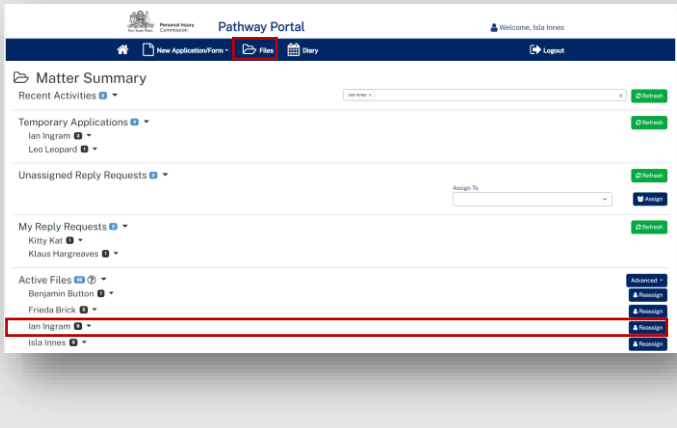
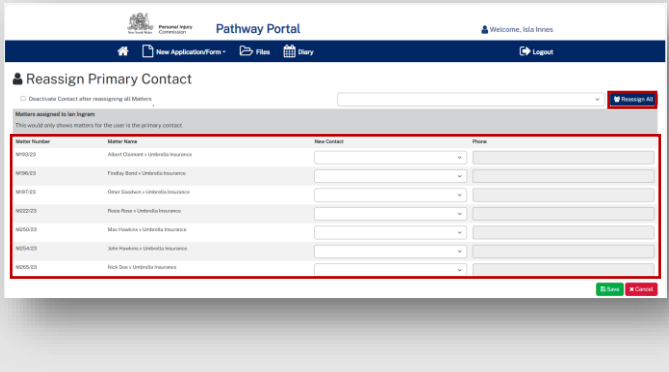
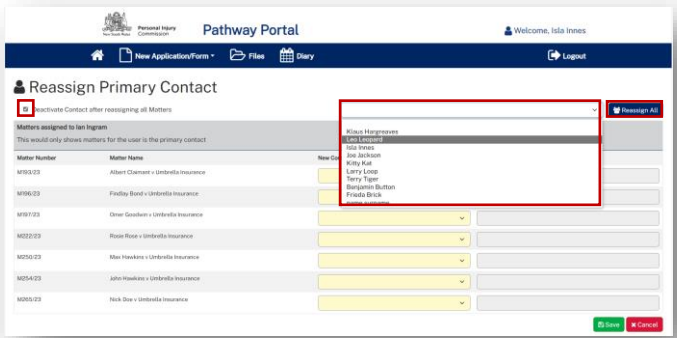
Allocation Type	Dispute/Issue/Injury/Treatment	Venue	Location	Date and Time	Duration	Mode of Allocation	Attendees	Service Provider	Language
Teleconference	M151/23-12-1/D1 Damages assessment			8/03/2023 10:00 AM	1 hour	Teleconference	Adel Beshai (Claimant), UAT_QBE (Insurer / Scheme Agent)	Cassidy, Belinda	

Documents

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
4/11/2022	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>	
<p>To Reassign All</p> <ol style="list-style-type: none"> 1. From the drop-down list select a new person to assign all Matters to <p>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.</p> <ol style="list-style-type: none"> 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.

Matter Number	Matter Name	New Contact	Phone
M193-23	Albert Claxton v Umbrella Insurance	Leo Leopold	0433066999
M196-23	Fredley Bond v Umbrella Insurance	Leo Leopold	0433066999
M197-23	Omer Goodwin v Umbrella Insurance	Leo Leopold	0433066999
M202-23	Rissa Rose v Umbrella Insurance	Leo Leopold	0433066999
M250-23	Max Hawkins v Umbrella Insurance	Leo Leopold	0433066999
M254-23	John Hawkins v Umbrella Insurance	Leo Leopold	0433066999
M255-23	Nick Doe v Umbrella Insurance	Leo Leopold	0433066999

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.

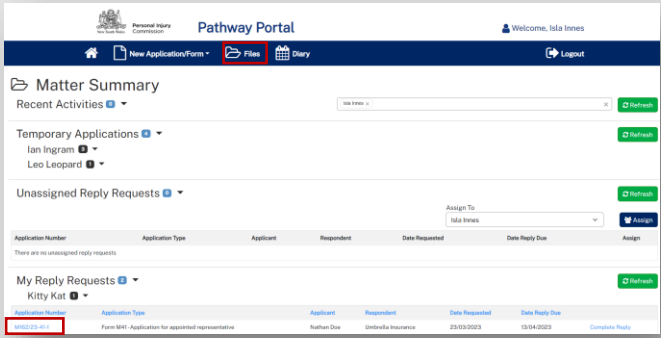
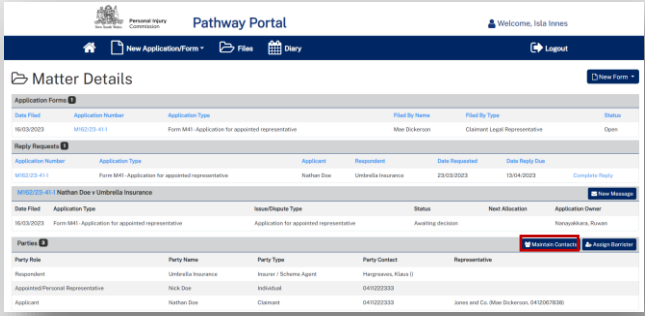
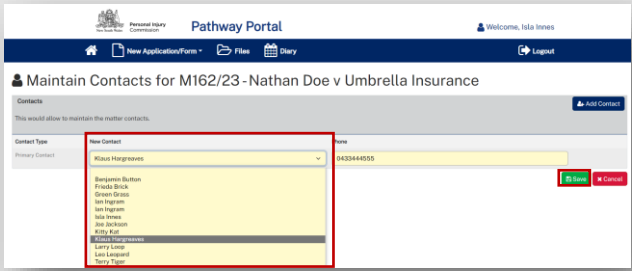
2 Click **Save**

- The selected Matters will now be reassigned to the person selected.

Matter Number	Matter Name	New Contact	Phone
M193-23	Albert Claxton v Umbrella Insurance	[Dropdown Open]	
M196-23	Fredley Bond v Umbrella Insurance		
M197-23	Omer Goodwin v Umbrella Insurance		
M202-23	Rissa Rose v Umbrella Insurance		
M250-23	Max Hawkins v Umbrella Insurance		
M254-23	John Hawkins v Umbrella Insurance		
M255-23	Nick Doe v Umbrella Insurance		

How to Manage Primary and Secondary Contacts

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

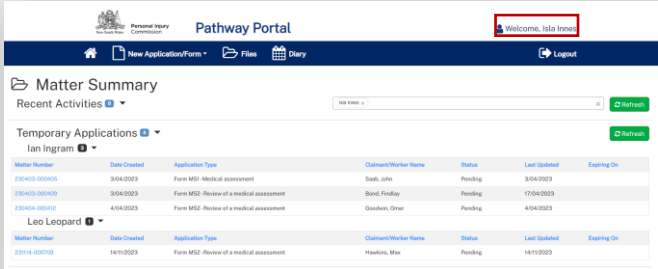
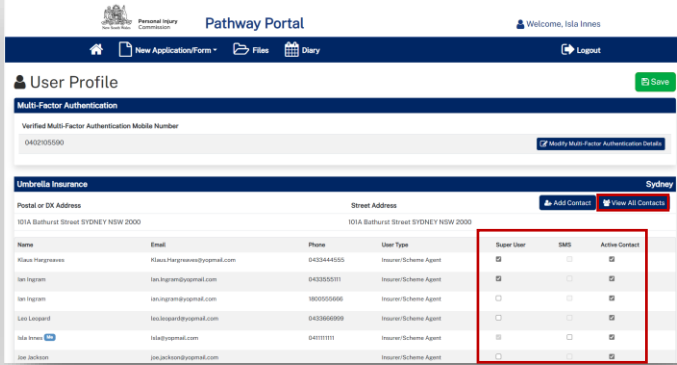
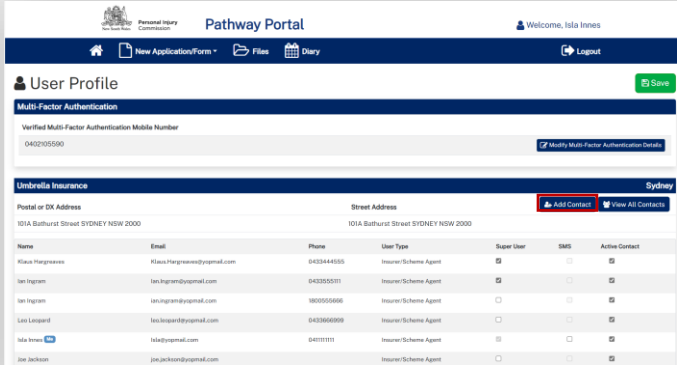
Instruction	Page
<ol style="list-style-type: none"> 1. Click on the Files tab. 2. Click on the blue Matter Number link. 	
<ol style="list-style-type: none"> 3. Go to Parties section and Click on Maintain Contacts 	
<ol style="list-style-type: none"> ➤ Maintain Contacts page displays with current contacts. <p>To update Primary Contact:</p> <ol style="list-style-type: none"> 4. In the Primary Contact section, select the new Primary Contact's name from the New Contact drop-down menu. 5. Click Save 	

If you need to add a Secondary Contact:

1. Click **Add Contact**
2. In the Secondary Contact section, select name from the New Contact drop down list
3. Click **Save**

The screenshot shows the 'Pathway Portal' interface for 'Maintain Contacts for M162/23-Nathan Doe v Umbrella Insurance'. The page title is 'Pathway Portal' and the user is logged in as 'Welcome, Isla Innes'. The main heading is 'Maintain Contacts for M162/23-Nathan Doe v Umbrella Insurance'. Below this, there is a section for 'Contacts' with a sub-heading 'This would allow to maintain the matter contacts.' and an 'Add Contact' button. The form has two main sections: 'New Contact' and 'Phone'. The 'New Contact' section has a dropdown menu for 'Contact Type' and a text input for 'Name'. The 'Phone' section has a text input for 'Phone' and a 'Remove Contact' button. The 'Secondary Contact' section has a dropdown menu for 'Contact Type' and a text input for 'Name'. The dropdown menu is open, showing a list of names: Benjamin Button, Francis Brink, Green Grass, Ian Ingram, Isla Innes, Joe Jackson, Joe Jackson, Kelly Kell, Klaus Hargreaves, Larry Long, Lois Longard, and Mary Page. The 'Primary Contact' section has a dropdown menu for 'Contact Type' and a text input for 'Name'. The 'Phone' section has a text input for 'Phone' and a 'Remove Contact' button. The 'Save' and 'Cancel' buttons are located at the bottom right of the form.

How to Add a new Contact or Deactivate Contact

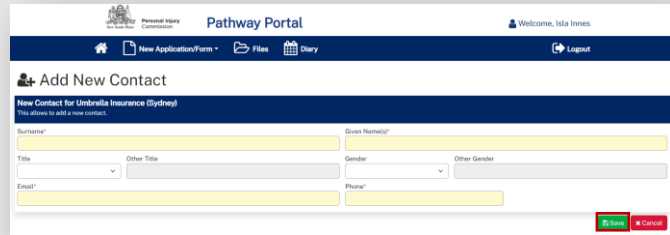
Instruction	Page
<p>1. Click the Welcome, name in the top right corner</p> <p>Note: Only Super User can add a new contact.</p>	
<p>➤ User Profile page displays with a list of all active users for your organisation.</p> <p>Note: Before creating a new contact. Click on View All Contacts to check if there is an existing inactive account.</p> <p>Super User: Ticked box indicates the person has Super User access.</p> <p>Active Contact: Ticked box indicates this user is Active.</p> <p><i>To deactivate user:</i></p> <ol style="list-style-type: none"> 1. Untick Active Contact check box. 2. Click Save 	
<p><i>To add a new user:</i></p> <ol style="list-style-type: none"> 1. Click Add Contact 	

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

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

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

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



The screenshot shows the 'Add New Contact' form in the Pathway Portal. The form is titled 'New Contact for Umbrella Insurance (Sydney)' and includes the following fields: 'Surname*', 'Given Name*', 'Title', 'Other Title', 'Gender', 'Other Gender', 'Email*', and 'Phone*'. The 'Surname*' and 'Given Name*' fields are highlighted in yellow, indicating they are mandatory. The 'Email*' and 'Phone*' fields are also highlighted in yellow. The form has a 'Save' button (green) and a 'Cancel' button (red) at the bottom right. The top navigation bar includes 'Home', 'New Applications/Form', 'Files', 'Diary', and 'Logout'. The user is logged in as 'Welcome, Isla Innes'.

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 an Insurer User on Pathway Portal • Lodge the application or... • One party advises Commission who the Insurer Primary Contact 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 an Insurer User on Pathway Portal, then... • Insurer Primary Contact 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 an Insurer User • 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 other Insurer Users • 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-Insurer User contact) a delegate 	<p>Delegate can:</p> <ul style="list-style-type: none"> • See all the organisation's 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 • Add a new contact • Receive email notifications (they go to primary contact)

Primary contact and secondary contacts

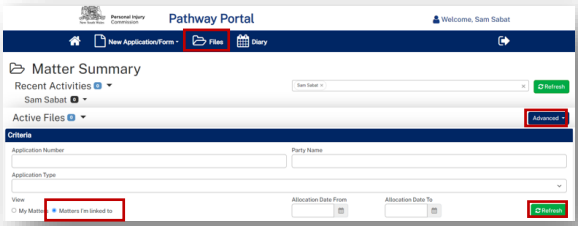
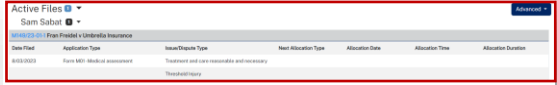
- The Primary Contact for a matter is listed as the **Party Contact** in the Parties section of **Matter Details**.
- If you have someone in your organisation that will also work on a matter, they can be setup to be a secondary contact which provides visibility to the matter.
- A Super User in your organisation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

In this example Klaus Hargreaves is the Party Contact for the Insurer (Umbrella Insurance) and neither the Insurer or claimant are legally represented:

The screenshot displays the 'Matter Details' page in the Pathway Portal. The page is titled 'Matter Details' and includes a 'New Form' button. It is divided into several sections:

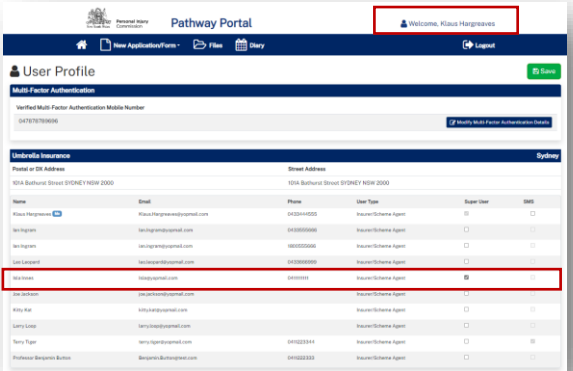
- Application Forms:** A table with columns: Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. It lists two forms: M199/23-51-1 (Form M51-Medical assessment) and M199/23-62-1 (Form M62-General Assessment), both filed by Max Rice on 5/04/2023 and 21/04/2023 respectively, with a status of 'Open'.
- M199/23-51-1 Max Rice v Umbrella Insurance:** A table with columns: Date Filed, Application Type, Issue/Dispute Type, Status, Next Allocation, and Application Owner. It shows two entries: 'Degree of permanent impairment' (Closed) and 'Dismiss medical assessment application' (Awaiting decision), both with Application Owner 'Ninovic, Vera'.
- M199/23-62-1 Max Rice v Umbrella Insurance:** A table with columns: Date Filed, Application Type, Issue/Dispute Type, Status, Stood Over Expiry Date, Next Allocation, and Application Owner. It shows two entries: 'Damages Assessment' (Stood over list - medical dispute not yet finalised) and 'Stood over list' (Closed), both with Application Owner 'Barake, Ehab'.
- Parties:** A table with columns: Party Role, Party Name, Party Type, Party Contact, and Representative. A red box highlights the 'Respondent' row, which lists 'Umbrella Insurance' as the Party Name and 'Hargreaves, Klaus @' as the Party Contact. The 'Applicant' row lists 'Max Rice' as the Party Name and '042222222' as the Party Contact.
- Messages:** A section with a 'View All Messages' button and a message stating 'There are no open message threads. Click View All Messages to view closed message threads.'
- Documents:** A section with a 'View All Documents' button and a table with columns: Document Date, Author, Document Category and Type, File Name, and Related To.

After a Secondary contact is added

Instruction	Page
<p><i>Secondary contact has been added</i></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><i>Secondary contact visibility</i></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 X Cannot see allocations in Diary 	

Super Users

How to add/remove Super Users

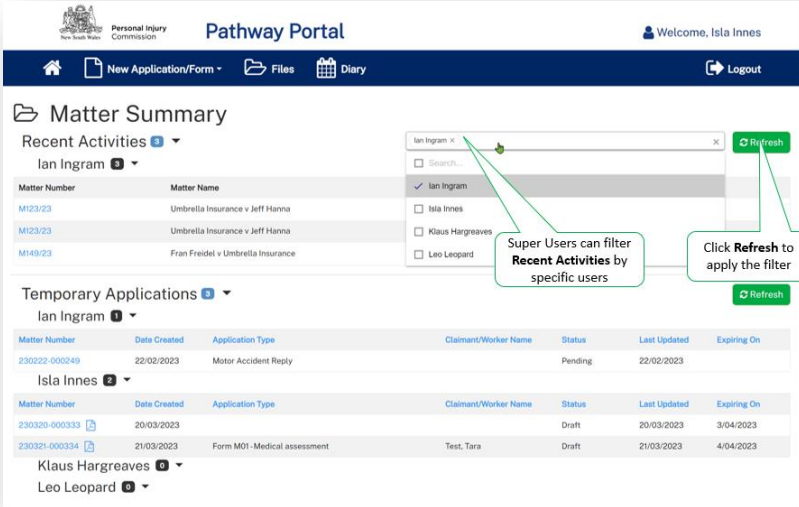
Instruction	Page
<p>Add/Remove a Super User</p> <p>A super user can add and remove other super users:</p> <ul style="list-style-type: none"> • Click the name of the Super User in the top right corner • Tick or untick the Super User box • Click Save. 	
<p>In this example Isla Innes is now a Super User</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 users in the drop-down menu.
- Click Refresh.



Recent Activities

Isla Innes

Matter Number	Matter Name
M123/23	Umbrella Insurance v Jeff Hanna
M123/23	Umbrella Insurance v Jeff Hanna
M149/23	Fran Freidel v Umbrella Insurance

Temporary Applications

Isla Innes

Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
230222-000249	22/02/2023	Motor Accident Reply		Pending	22/02/2023	

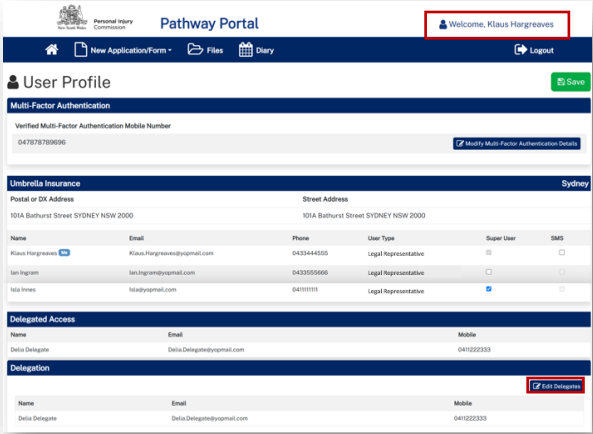
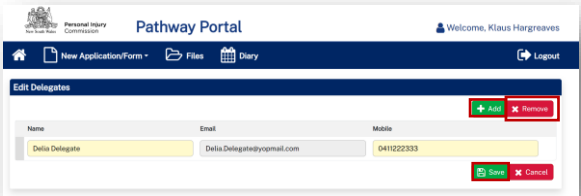
Isla Innes

Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
230320-000333	20/03/2023			Draft	20/03/2023	3/04/2023
230321-000334	21/03/2023	Form M01-Medical assessment	Test, Tara	Draft	21/03/2023	4/04/2023

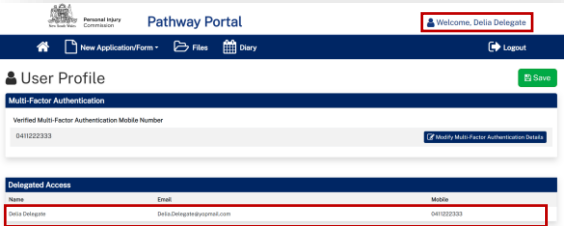
How to add/remove Delegate for a Super User

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
<p><i>Add/Remove Delegate for a Super User</i></p> <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 corner • Click Edit Delegates. 	 <p>The screenshot shows the 'Pathway Portal' interface. At the top right, the user's name 'Welcome, Klaus Hargreaves' is highlighted with a red box. Below the navigation bar, the 'User Profile' section is visible. At the bottom of the page, the 'Edit Delegates' button is highlighted with a red box.</p>
<p><i>Edit Delegates</i></p> <ul style="list-style-type: none"> • Click +Add • Populate delegate details • Click Save. <p>The delegate will get an email invitation to register as delegate user in Pathway Portal.</p>	 <p>The screenshot shows the 'Edit Delegates' page. The '+Add' button is highlighted with a red box. Below it, there is a table with one row for 'Della Delegate' with fields for Name, Email, and Mobile.</p>
<p><i>To remove a delegate</i></p> <ul style="list-style-type: none"> • Select the delegate line by clicking at the beginning of the line (far Left) • Click X Remove • Click Save. 	

Delegate Super User

Instruction	Page						
<p><i>What can the super user delegate 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 Insurer user in the organisation ✓ Can do everything on matters, including sending messages ✓ Assign unassigned reply requests ✓ Draft and submit applications and replies ✓ Reassign matters to existing contacts ✓ Manage contacts for the matter <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 Insurer contact name field.</p> <p>The named Insurer contact can then review and submit the Application or Reply, or the Delegate can submit it on their behalf.</p>	 <table border="1" data-bbox="774 526 1324 571"> <thead> <tr> <th>Name</th> <th>Email</th> <th>Mobile</th> </tr> </thead> <tbody> <tr> <td>Della Delella</td> <td>Della.Delella@insurex.com</td> <td>0411222333</td> </tr> </tbody> </table>	Name	Email	Mobile	Della Delella	Della.Delella@insurex.com	0411222333
Name	Email	Mobile					
Della Delella	Della.Delella@insurex.com	0411222333					

Appendix A – Document requirements

Document requirements to submit with the application are:

Document type	Requirements
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 and indexed bundle.

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	<ul style="list-style-type: none"> Updated Filter Active Files section 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	<ul style="list-style-type: none"> Updated Matter Details screen shots: Service Provider now called Decision Maker 	
1.3	16 January 2024	Oksana Eremina	<ul style="list-style-type: none"> Added new functions: How to reassign Matter to someone else, add a new contact and manage contacts 	Tina Kavadas – Pathway Project Manager

