Personal Injury Commission

New South Wales

Pathway Portal User Guide

Contents

OVERVIEW OF THE PATHWAY PORTAL

This user guide is for Insurers, Legal Representatives, Barristers and Individuals (self-represented injured claimants, workers and police officers), Employers and Corporations. The Pathway Portal is your interface to the Commission's case management platform called Pathway for Motor Accident, Workers Compensation and Police Officer Support Scheme applications.

The Pathway Portal is a secure platform, providing a single place for all Commission staff, decision makers and parties to engage online in a similar way. You can only access information relating to you or your firms/organisations matters.

The first step towards resolving your dispute is to lodge the appropriate application form through the Pathway Portal. Users can draft and submit digital forms, upload and download relevant documents, check an application status, message the Commission and download decisions.

Additional Information for Individuals (injured claimants and workers):

- If you have legal representation, your lawyer will use the Portal to communicate with the Commission. You can also register for the Portal; however, your access is limited to viewing your own application and documents.
- If you do not have legal representation and need assistance, the Commission can assist you to register for the Pathway Portal. You have full access to the functions of the Portal.

ⓘ	Due to security controls, you will not be able to access the Portal if you're overseas

ACCESS TO PATHWAY PORTAL

- Access Pathway Portal (the Portal) in a browser (**Edge is recommended however Chrome can also be used**).
- The weblink is found on the Personal Injury Commission website: https://pathwayportal.pi.nsw.gov.au

ⓘ	TIP! Add the Portal link to your browser favourites for ease of access

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 and set up multi-factor authentication. This added layer of security provides an extra safeguard for your account.
- Administrative staff added as a Delegate do **not** need to follow the instructions below to register as they are sent an email with different registration instructions. A Primary Contact or Super User initiates the registration process to access the Portal.

Instructions
Register your email address on Pathway Portal 1. Follow the prompts to register your email address 2. Tick to agree to the terms and conditions 3. Tick **I'm not a robot** and complete the visual reCAPTCHA test/s 4. Click **Register**
You will receive an email from the Commission to validate your email address. *Subject: Portal Registration Completion*
5. Click the hyperlink in the email to validate the email address 6. Populate **New Mobile Number** to receive the code and click **Send** 7. Type the code sent to your mobile and click **Submit**
Create new password 8. Enter Password and Confirm Password 9. Tick I'm not a robot and complete the visual reCAPTCHA test 10. Click **Register**
Enter User Profile details
Note: all yellow fields are mandatory
11. Enter your **User Details** 12. Complete **User Profile** details 13. **Save**

Multi-factor Authentication

- We recommend using either Microsoft or Google Authenticator. Both apps are free to download and do not require a subscription.

Information

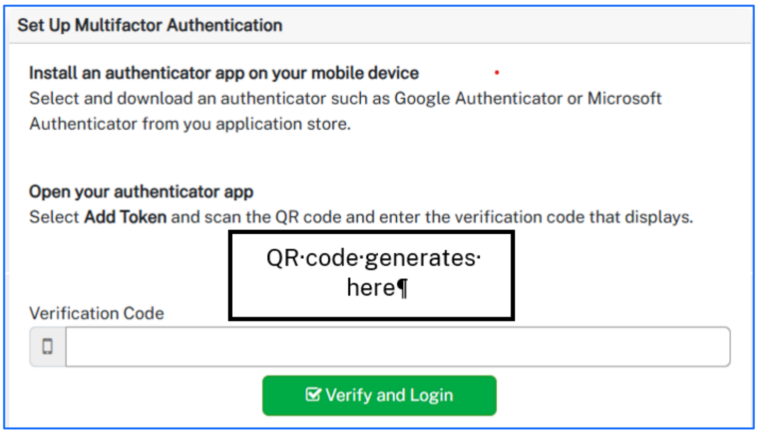
For iPhone users: Go to the App Store and search for "Microsoft Authenticator" or “Google Authenticator”. Tap Get and then Install.

If using the Microsoft Authenticator app, you may be asked to accept the collection of diagnostic data by the app and you will need to select Accept.

For Android users: Go to the Google Play Store and search for "Microsoft Authenticator" or “Google Authenticator”. Tap Install.

If using the Google Authenticator app, you may be asked to Sign In to your Google Account. You do not have to sign in with your Google Account and can instead select Use Authenticator without an account.

Using the QR code to register (first time only)



Set Up Multifactor Authentication

Install an authenticator app on your mobile device

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

Open your authenticator app

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

QR·code·generates· here¶

Verification Code

Verify and Login

When logging in for the very first time, scan the QR code that appears on this screen to log into your account.

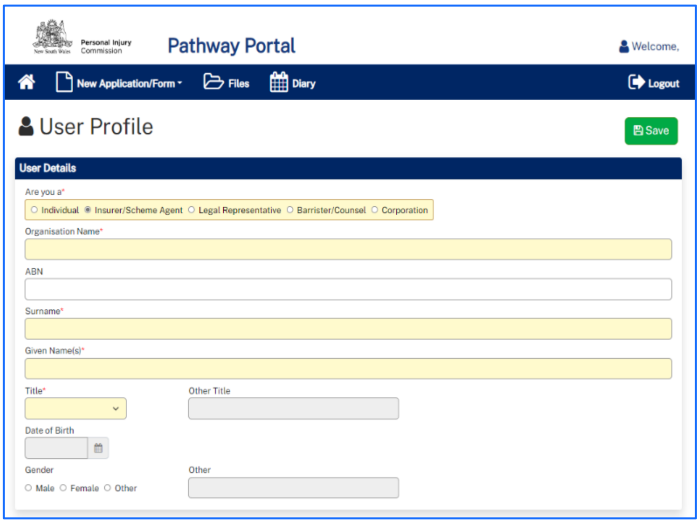
Subsequent logins to the Portal do not require scanning the QR code.

You may need to select Allow Notifications from the app and/or allow access to your phone’s camera.

Who to register as on the User Details page

The first question asks you to select what type of party you are under the question **"Are you a …".**

- Select **Individual** if you are an injured person in either a Motor Accidents matter, a Workers Compensation matter or a Police Officers Support Scheme matter
- Select **Insurer / Scheme agent** if you are an insurer (incl self-insurers)
- Select **Legal Representative** working in a law firm.
    - If you are a legal assistant or administrative staff that need to access the Portal on behalf of a legal practitioner, do NOT follow this registration process. Instead see instructions below on how to be added as a Delegate.
- Select **Barrister/Counsel** where applicable
- Select **Corporation** if you are an Employer or lodging as the Commissioner of Police



Individuals who <u>have legal representation</u>

You can register for the Portal to see information on your matter including documents; however, you cannot interact with the Commission through the Portal. This is the role of your legal representative.

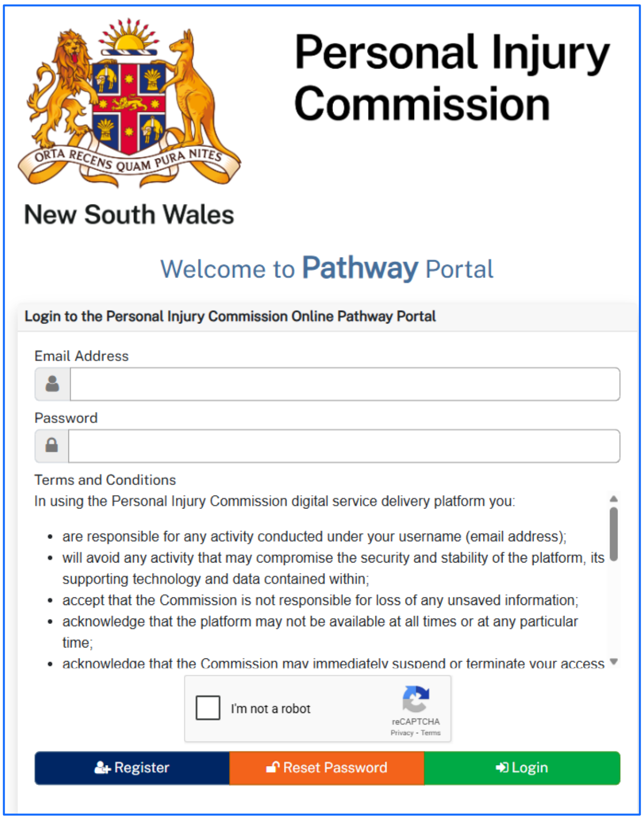
Individuals who <u>do not have legal representation</u>

Register for the Portal. You will be able to use all of the functions on the Portal.

For technical help using the Portal, log a ticket with the Digital Hub or call us for assistance.

For help on the progress of your matter, contact your Dispute Owner.

HOW TO LOGIN TO PATHWAY PORTAL



Instructions
Logging in 1. Access the Pathway Portal on a browser and open the Authenticator App 2. Enter your email address and password 3. Tick **I'm not a robot** and complete the visual reCAPTCHA test/s 4. Click **Login** * 5. Enter the Authenticator code generated in your Authenticator App 6. Enter the MFA code and click **Verify and Login**
The Home Page displays

Error messages when entering your password

- To strengthen the overall security of Pathway, when you enter your password to login to the Pathway Portal, a check will be performed in the background against a list of known compromised passwords.
- If your password is identified as compromised, you will be forced to change your password for the Pathway Portal before you are able to log in.
- **The performed check is against the password only and is for common passwords used on other websites. It does not mean that your Personal Injury Commission account has been compromised.**

Instructions
Compromised password
* A password check is made when you click **Login**
1. Message displayed during logging in: **'This password has previously been exposed in compromised password lists from other services. Please nominate a different, unique and complex password to ensure your account is secure'** 2. Clear the message 3. Tick **I'm not a robot** and complete the visual reCAPTCHA test 4. Click **Register** to update your password
Password no longer meets security requirements 5. Message displayed if your password is identified on the list of breached passwords: **'Your existing password no longer meets the security requirements of the Pathway Portal and must be changed'** 6. You will be sent a **Reset Password** email 7. Click on the link in the body of the email to reset your password Email subject: Portal Password Reset 8. Continue logging in as normal

REGISTER FOR THE PIC DIGITAL HUB

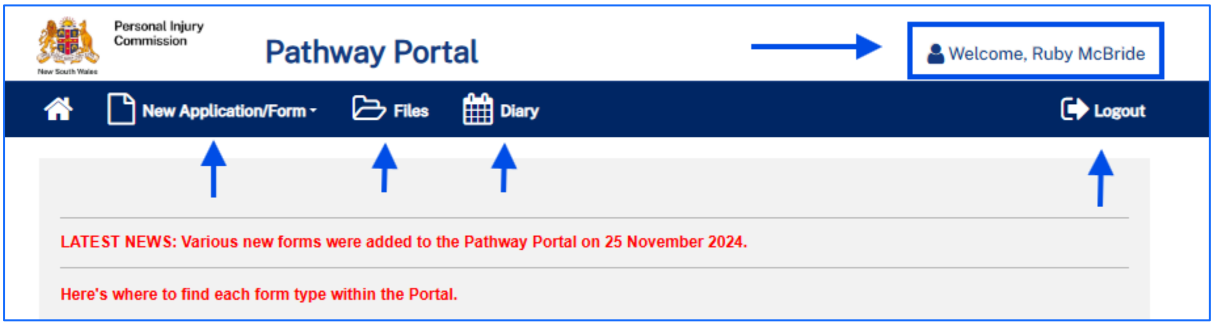
Cannot find what you are looking for in a User Guide?

Log a ticket in the Digital Hub for all Portal technical questions or issues.

- To register and login, go to the PIC Digital Hub
- For more information on how to register for the PIC Digital Hub go to the PIC Digital Hub User Guide

	Need technical help with the Portal? 1. Log a ticket in the Digital Hub and explain the issue you're having 2. Call us on 1800 742 679 (1800 PIC NSW) and then select Option 3 for Technical Assistance. We will log your call as a ticket in the Digital Hub and provide you with the ticket number
	Individuals who have legal representation Do not register for the Digital Hub. Questions relating to the progress of your matter must be made with through your legal representative Individuals who do not have legal representation You can register for the Digital Hub. Questions relating to the progress of your matter must be made with your Dispute Owner (Dispute Officer / Dispute Support Officer)

NAVIGATING MENU ITEMS



Home page

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

- The grey information box displays help text, latest news items and information on the menu items.
- Use the menu at the top to navigate the page as they will display on every page you're on.
- Remember to log out at the end of your session.
- To come back to this page, click on the logo or the Home icon.
- All new information to review is prefixed with the New icon. New

Welcome, <your name> menu option – User Profile

- This page displays your User Profile which holds your current contact details with the Commission.

New Application/Form menu option

- Click on **New Application**, then select one of the jurisdiction options (Motor Accidents, Workers Compensation, Police Officer Support Scheme) and then select the appropriate application form.
- Each form has different mandatory questions/information shown as Yellow-shaded areas.
- You cannot move onto the next page until all mandatory questions have been completed.
- Information can be entered as free text, selecting from drop down lists or using a calendar.

Files menu option

- The **Files** menu takes you to a **Matter Summary** page. This page displays information that relate to your applications.
- As a **Primary contact** you will be able see all of your temporary applications, temporary documents, all unassigned reply requests in your firm/organisation, your own assigned reply requests, active and closed files.
- The **Files** page is broken down into sections that contain the following sections:
  - **Recent activities:**
    - Displays at the top of the page showing any new applications or documents that have been added since you last logged into Pathway Portal. The oldest activities display at the top of the list and the newest activities display at the bottom of the list.
  - **Temporary Applications:**
    - Displays any applications that you have submitted to the Personal Injury Commission but have not yet been registered. These have a status of Pending.
    - Any applications you have saved to finish and submit later. These have a status of Draft.
    - Any applications that the Commission has rejected and sent back to you. These have a status of Rejected.
  - **Temporary Documents:**
    - Displays any documents that you have submitted that have not yet been accepted. These have a status of Pending.
  - **Unassigned Reply Requests:**
    - If you are named as the Respondent to an application, the Commission will request a Reply to the application from you. Reply requests display here. You need to assign the Reply Request to yourself to complete the form (even if you are an individual).
  - **My Reply Requests:**
    - Displays all reply requests that have been assigned and are awaiting action.
  - **Active files:**
    - To view the details for the matter, locate the matter in **Active Files** and click on the blue matter number hyperlink. This will take you to the **Matter Details** page.
    - To view and download documents, click on the blue document date hyperlink.
    - Use the shortcut menu items on the right side of the screen.
    - If you have a high volume of Active Files, to search for specific matters you can either use Windows CTRL+F or use the Advanced button to search on the page using part of a matter number or name. Use the down arrow to jump to the next occurrence.
    - To clear the filter options, delete the criteria and click Refresh.
  - **Closed files:**
    - Displays at the bottom of the page for 42 days.
    - Refer to the section below on Document Archiving if you need to access any documents previously provided to the Commission in a closed matter after 42 days.

Diary menu option

- This page lists all upcoming allocations/appointments.

Document preview information

- Document preview allows you to view the document or file before choosing whether to download it.
- The preview screen opens over the Supporting Documents screen, ie, it will not open in a popup window.
- **Do NOT use the X button at the top of screen to exit Document Preview!** This will close the browser / Portal session.
- Click on **Download** to save a version of the document offline if required.
- The following file formats are available to preview: PDF, PNG, JPEG, JPG, GIF, EML, MSG.

ⓘ	Use the red Close button (low right corner) to exit out of document preview and return to the Portal screen

LODGE A NEW APPLICATION

Instructions
1. Click on New Application Form and select either **Motor Accidents, Workers Compensation or Police Officer Support Scheme**
The Notice to Parties page displays
1. Read and confirm the Terms and Conditions to proceed **(MA only)** 2. Review the Notice to Applicants information and then click **Next** 3. Complete **Claims Details (MA only)** 4. Select the relevant **Matters in Dispute** 5. Type in **Filed by name** 6. Select **Filed by party** from the list of options 7. Click if the Individual is under **legal incapacity**
Note: If you select **Yes** to 'Is the <Individual> under legal incapacity?' and then select **No** to 'Has the Commission appointed to an Appointed Representative previously?' you will not be able to continue with the application. You need to lodge an Appointed Representative application first.
8. Click **Next**
The Claimant/Worker/Police Officer Details page displays
9. Complete Claimant/Worker/Police Officer Details 10. Select and complete **Interpreter** information if applicable 11. Select and complete **Disability** information if applicable 12. Select if the Individual has a Legal Representative
If yes, the Legal Representative page displays
Add Legal Representative Details 13. Complete all of required details on the Legal Representative screen.
Check the Contact Name that has auto populated. The person named is the Primary Contact for this matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details. If you are completing this application as a delegate, you will need to enter the primary contact as the Contact Name. This is essential, so that the correct person from your firm/organisation is added to this matter.
14. Click **Next**

The Insurer page displays

Add Insurer Details

15. Complete all of the required details on the **Insurer screen**
16. Tick the box if the Insurer has a legal representative and add in the details

You can add an additional insurer if there is more than one insurer involved in this matter.

17. Click **Next**

Form Details

18. Complete the details of the application form

Add Supporting Documents

14. Upload the Supporting Documents bundle in a single, indexed and paginated bundle (noting the 500 page rule)

When you need to add more than 500 pages

19. Tick **Lodge additional documents**
20. Click **Next**

The Service and Consent page displays

Service and Consent

21. Complete the service and consent page
22. Click **Next**
23. Upload your additional documents
24. Click **Next**

If the additional documents relate to medical proceedings, evidence of consent should be attached on the supporting documents page

The Certification and Signature page displays

Certification and Signature

25. Tick the declaration (**MA only**)
26. Tick **Application Signed** and enter the date
27. Click either **Save Draft** or **Submit**

If you are not ready to submit straight away, click on Save Draft

Not all applications require you to tick the declaration

Save Draft

You can save the draft to review it before you sign and submit

28. View the draft application in Temporary Applications by clicking on the blue matter number hyperlink
29. Click the PDF icon to view the draft
30. Once you are ready to submit the application, navigate back to the **Certification and Signature page** (under 'Pages' menu on the Notice to Parties page)

Submit

31. Confirm your declaration, sign and click **Submit**
32. Click **View PDF** to preview the application on screen
33. Click on **Download** if you want to save a copy offline
34. Click on **Close** to return to the message screen

When you click on submit, a message will display on screen

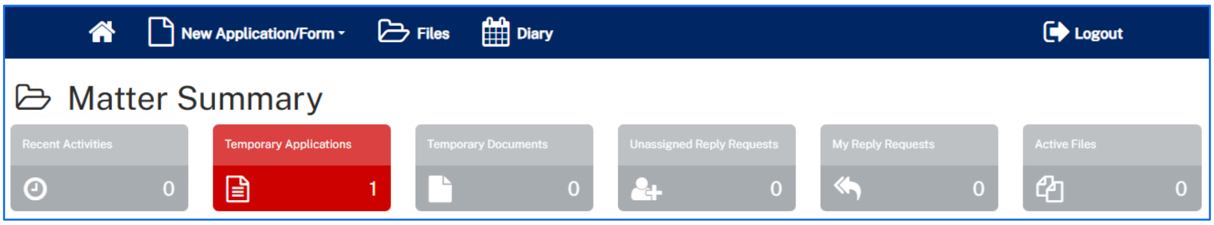
The Form has been received at <time> on <day, date>
The temporary reference number is <number>
Please record this number for future reference or view the Form on the Matter Summary Page via the Menu above

The application is now with the Commission's Registry as a Temporary Application

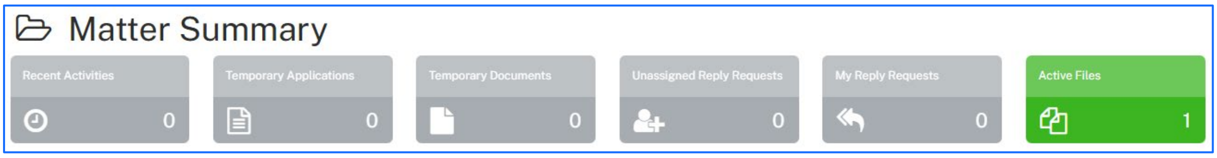
Temporary Application information

- Only the filing party will be able to see the temporary application in Pathway Portal.
- The status of the application is now **Pending**. Click Refresh if you cannot see the application.
- You will receive an automatic email from the Commission's Registry that a temporary application has been received.

Example: Temporary application lodged



Example: Temporary application accepted



Application registered notification

- The Commission's Registry will review the application and if it meets all compliance criteria for the application type, the application will be registered.
- Once registered, the application is no longer temporary; it has now been converted to a full matter with a full matter number.
    - Motor Accident mattes are prefixed with **M**
    - Motor Accident Review of a medical assessment matters are prefixed with **R**
    - Motor Accident Further assessment matters are prefixed with **F**
    - Workers Compensation matters are prefixed with **W**
- The Registry will send you an acknowledgement email once registered.
- The application will now display in the **Recent Activities section** and **Active Files**.

Explanation of matter numbers

<SCHEME PREFIX> <the next unique number lodged in a scheme><year of lodgement><application type><how many applications lodged under an application type>. For example, a matter number would be ***M30/26 or W104/26***.

Application rejected notification

Instructions

Reason/s for rejection

1. The Registry will send you an email with the reason/s for rejection
2. The **Status** in **Temporary Applications** will now have a status of **Rejected** against that application
3. Navigate to the blue temporary matter number hyperlink to reopen the application
4. Navigate to the section that needs to be fixed under **Pages** menu on the **Notice to Parties** page
5. Make the required changes and re-submit the application

Common rejection: where supporting documents bundle is over 500 pages

You must lodge an application to lodge additional documents (an ALAD) with your application if the supporting documents bundle is over 500 pages.

1. Remove the document
2. Split the document offline
3. Re-upload the first bundle (up to 500 pages)
4. Select **Lodge Additional documents**
5. Once the changes are made to all the issues the application was rejected for and you are ready to submit the application, navigate back to the **Certification and Signature page** (under 'Pages' menu on the Notice to Parties page)
6. Click **Submit**

If the Registry accepts and registers the re-submitted application, the Filed Date will be the date the application was re-submitted.

Other common reasons for rejection:

* Bundle not a single, indexed, and paginated file

* Not providing the internal review for Motor Accident matters for every dispute that requires an internal review

Lodging Motor Accident applications

Extra information to note

➢ The **Date of Accident** determines the Scheme and the application forms available for selection.
➢ Depending on who the claim is against and what issues are in dispute will determine the additional information you are required to complete.
➢ If the **Insurer** is not listed, tick this box and enter the Insurer's details on the subsequent page.
➢ **Location of Accident** - If it is a valid claim number the accident location will populate automatically. If there is no match, you can manually type in the location.
➢ The **claim number** is checked against the Universal Claims Database to confirm if it is a valid claim number.
➢ A valid claim number will show in green.
➢ If the Claim has not been found, it will display in red. You should check the Claim number again and make sure that it is correct.
➢ If you are satisfied that it is correct, there will be another checkbox that you can tick: Proceed without a matched claim.
➢ For Medical applications:
    o there is a page to capture details of the dispute/injury/treatment.
    o 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 the supporting bundle

- The Supporting Documents page provides information about what you need to lodge for each application type.
- Supporting documents must uploaded as a single, indexed, and paginated file.
- Bundle file size must not exceed **2GB**.
  - To correct, re-upload the bundle as 2 or more files (each file must be no more than 2GB), under 500 pages limit
- Bundles more than 500 pages
  - If the bundle exceeds 500 pages a warning message will display. Continuing to submit may result in the rejection of the application.
  - If the application is excluded from the 500 page limit, proceed with your application.
  - If the application is not excluded from the 500 page limit, lodge a P01 ALAD found on the Supporting Documents page. Select **Lodge Additional Documents**.

Files that can be uploaded into Supporting Documents

- Contact us if you need advice about any other file type.

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

Document archiving

- For security reasons, the Commission will archive all documents once a matter is closed.
- If you require access to a closed matter after 42 days (when access to that record is removed from the list of closed files), log a ticket with the Digital Hub.
- If the document has been archived, a request to retrieve those documents will take a minimum of two (2) days to take action (due to enabling system run activities to make the information available). This time cannot be shortened.
- The matter will be re-opened for a brief period to enable access the required documents.

REPLY AND RESPONSE FORMS

Reply request notifications

- When a reply or a response has been requested, the respondent (or their legal representative) receives an email notification to advise that an application has been received and registered by the Commission, the date the reply is due and to access the Pathway Portal to view the application and submit the reply.
- All parties must have the reply assigned in order to complete the form.

Self-represented individuals: Your name will auto-populate into the "Assign to" box. You need to click the Assign button to give yourself access to then complete the form. If you need help with assigning yourself the reply, log a ticket with Digital Hub.

If you need help completing the reply form, please call us and select either option 1 or 2 (depending on if you need help from Workers Compensation or Motor Accident registry staff).

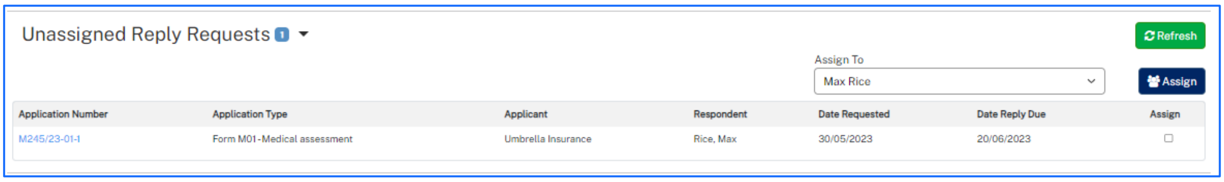
How to complete a reply

- If the reply is lodged **after 5pm**, it will be deemed to be received by the Commission on the next working day in accordance with rule 26(1)(b) of the PIC Rules.
- A super user will usually assign reply requests to the primary contact; however, the primary contact can also assign the reply to themselves.

Instructions

Assign the Reply Request

1. Navigate to **Unassigned Reply Requests**
2. Tick the **Assign** checkbox
3. Select your name from the **Assign To** drop down menu
4. Click on the blue **Assign** button



A super user in your firm/organisation may action this for you

Access the Assigned Reply

5. Navigate to **My Reply Requests**
6. Click on **Complete Reply**

This will generate the Reply Form to complete and submit

Complete the Reply information

7. Read and confirm the Terms and Conditions to proceed (tick box on MA matters only)
8. Review the Notice to Applicants information and then click **Next**
9. Type in **Filed by Name**
10. Select **Filed by party** from the list of options
11. Complete the **Claimants Details** page
12. Complete the **Legal Representative** page
13. Complete the **Insurer Details** page

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

If you are completing the reply on behalf of another person who is managing the application, you will need to enter their name as the Contact Name. This is essential, so that the correct person from your firm/organisation is added as the Primary contact for this matter.

14. Upload the Supporting Documents bundle (noting the 500 page rule)

Certification and Signature

15. Tick the declaration
16. Tick **Application Signed** and enter the **Date**
17. Click either **Save Draft** or **Submit**

Save Draft

If you are not ready to submit straight away, click on Save Draft.

18. View the draft reply in Temporary Applications by clicking on the blue matter number hyperlink
19. Click the PDF icon to view the draft

Once you are ready to submit the reply, navigate back to the **Certification and Signature page** (under 'Pages' menu on the Notice to Parties page)

Submit

20. Confirm your declaration, sign and click **Submit**
21. Click **View PDF** to preview the application on screen
22. Click on **Download** if you want to save a copy offline
23. Click on **Close** to return to the message screen

When you click on submit, a message will display on screen:

The Form has been received at <time> on <day, date>
The temporary reference number is <number>
Please record this number for future reference or view the Form on the Matter Summary Page via the Menu above.

The reply is now with the Commission's Registry

Notification the reply has been registered

- Registry will now review and check the application and register it if it meets all the compliance criteria for the application type.
- Once registered, the reply is no longer a temporary application.
- The Registry team will send an acknowledgement email to the:
  - Applicant or legal representative, and
  - Respondent or their legal representative
- The application will now display in the **Recent Activities section** and **Active Files** on the **Matter Summary** page **(**under **Files)**.

Viewing the reply

- Navigate to the Matter Summary page and click on the blue document date hyperlink in Documents.

How to lodge a reply after the due date

- **If the Reply Due Date is in the past, you are required to provide reasons for late filing and submissions addressing why the reply should be accepted into proceedings**.
- If the **Reply Due Date is blank, it is because there is no Reply Request**, and you will need to populate the Reply Due Date if you know it (e.g. from proceedings timetable or directions), otherwise just leave it blank.
- If the **Reply Due Date is in the future**, 'Is this reply being filed outside the prescribed timeframe' will default to No. Leave this as is.
- If **lodging after 5pm on the reply due date**, you should tick Yes to the reply being filed outside the prescribed timeframe and provide reasons for late filing or otherwise the reply may be rejected.

Instructions
Lodging a Reply when you have received a Reply Request 1. On the **Matter Summary**, click the blue matter number hyperlink and review the application 2. Click **Complete Reply** to reply from either the Matter Summary page or the Matter Details page
Workers Compensation replies can also be accessed on the **New Application/Form** menu

Notification the reply or response has been rejected

Instructions
What happens when a reply is rejected 1. The Registry team will send you an email with the reason/s for rejecting the reply. 2. The Status in Temporary Applications will now have a status of **Rejected** against that application.
Re-submitting the reply 3. Navigate back to the blue temporary matter number hyperlink to reopen the reply. 4. Navigate to the section that needs to be fixed under **Pages** menu on the **Notice to Parties** page.
Reply rejected when supporting documents bundle over 500 pages 5. Remove the document 6. Split the document offline 7. Re-upload the first bundle (up to 500 pages) 8. Select Lodge Additional documents 9. Once the changes are made to all the issues the reply was rejected for and you are ready to submit the application, navigate back to the **Certification and Signature page** (under 'Pages' menu on the Notice to Parties page) 10. Click **Submit**
If the Registry accepts and registers the re-submitted reply, the Filed Date will be the date the reply was re-submitted.

CASE MANAGEMENT OF MATTERS

Allocation notifications

- Once the application and reply (if one is lodged) is ready for allocation, the Dispute Owner will review all of the material, including any other Received Documents to confirm that the matter is ready to be allocated.
- If the matter cannot be allocated, you will receive an email with information about what is required.
- If the matter is allocated, all parties will receive an automatic allocation email with the date, time, venue, address and required attendees.
- You can add the appointment to your local calendar by double clicking the calendar.ics attachment.
- Further information will be provided to applicable parties if the allocation will be held virtually (Microsoft Teams video conference).

Viewing the allocation

- Navigate to the **Matter Details** page to view all of the allocations for the matter.
- The headings in a Motor Accident medical allocation also display the Dispute/Injury/Issue/Treatment information to be assessed.

THE DECISION

Outcome notifications

- After a decision maker submits the outcome document (interim or final), the Dispute Owner will seal the outcome document which automatically shares the document with you. You can view the document in the Portal.
- You may receive email notification that the decision document is available on the Portal and any other important information.

Viewing the decision

- Navigate to the **Matter Details** page and go to the Documents section.
- Click on the blue document date hyperlink to download the document.
- Click on the downloaded document to view.

HOW TO SEND AND REVIEW MESSAGES

- Use the message function to communicate with the Dispute Owner and/or the other party.
- When we send you a message, you will receive an email notification which contains the message subject-line only. Log in to the Portal to view the message.
- There are 3 categories of incoming messages – For Action, For Noting, For Review. A new message initiated by you will display a category of **N/A**.
- Note: if we send you an **email**, it will not appear in Messages as it will be sent to your email program, for example MS Outlook.

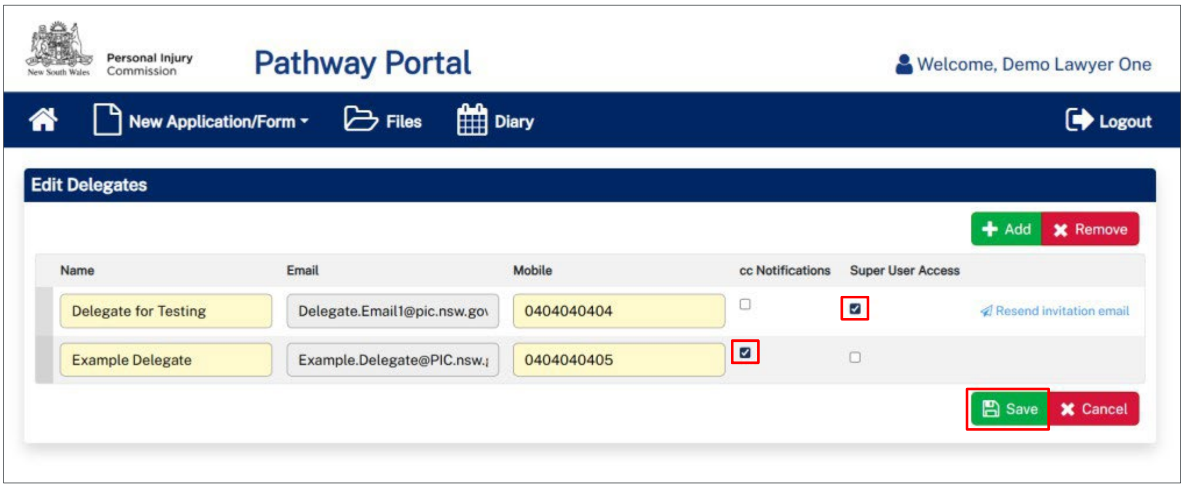
Instructions
Send a new message 1. Navigate to the **Matter Summary** page (Files menu) 2. Select the blue matter number hyperlink to go to **Matter Details** 3. Click **New Message** 4. Type in the **Subject** 5. Select the **Participants** 6. Type in your message 7. Click **Send**
The other party or self-represented party will receive an email notification of the new message which contains the message subject only (for cyber security reasons) You must log into the Portal to view the message
How to review and/or respond to messages 1. Navigate to **Matter Details** 2. Click the blue subject hyperlink to view the message 3. Open the Message (new messages have a 'new' prefix) 4. The message or thread displays at the end of the screen 5. Reply to the message in the **New Message** area. 6. Click **Send**
Download and print the message thread 7. On the Messages screen, click on Print Message Thread
A sealed PDF document with the entire message thread is generated on screen. You can now download or print as required

HOW TO LODGE SUBMISSIONS OR CORRESPONDENCE

Instructions
Submissions 1. Navigate to the **Matter Details** page 2. Click **New Submission/Correspondence** button opposite the matter number 3. Upload (or drag/drop) the file/s onto the page 4. Select the **Document Type**: **Correspondence** or **Submissions**, and add a description if required 5. Click **Submit**
A confirmation screen will appear with the Temporary Document number Navigate to the **Matter Details page** to view all Documents (any temporary documents can be viewed from the Files menu)

THE ROLE AND FUNCTION OF A SUPER USER

- This information is for a primary contact (legal representative or insurer contact) who also has super user admin rights.
- Click on **Welcome <your name>** to open the **User Profile** page.
- It is recommended that each firm/insurer have minimal super users (1-2 only)



What can the Super User see and do

How to become this type of user	What the user can see / do
• Be registered on Pathway Portal as a Legal Representative	• Can see and act on all matters in your firm/organisation • Can add/remove other Super Users (can't remove self) • Can assign any reply request to another person in your firm/organisation • Can reassign matters • Can manage primary and secondary contacts for matters • Can add a new contact • Can add a delegate and make them a Super User (conditional) • Can add a Barrister • Will NOT receive email notifications for any matters unless you are also the primary contact for the matter

How to add a new Primary contact

Instructions
User profiles 1. Click on **Welcome <your name>** on the Matter Summary page to open the **User Profile** page 2. Tick **Add Contact** 3. Complete the details of the new contact 4. **Save**
The system will perform a check for duplication and will generate an error if a duplicate is found The new contact needs to be registered as a Portal User before they can be assigned to matters

How to add and change existing primary and secondary contacts on a matter

Instructions
Primary contacts 1. On the **Matter Details** page in the Parties section, click on **Maintain Contacts** 2. Click **Add Contact** 3. On the Primary Contact line, select the new primary contact's name from the drop down list 4. **Save**
Secondary contacts 5. Navigate to the **Maintain Contacts** page 6. Click **Add Contact** 7. On the secondary contact line, select the name from the drop down list 8. **Save**

How to add or remove a Super User

- You cannot remove yourself as a super user. Nominate or request another super user in your firm/organisation to remove you.

Instructions
1. Navigate to the **User Profile** page 2. Tick or untick the **Super User box** next to the contacts name 3. **Save**

How to add or remove a Delegate

- Applicable only after the delegate is registered as a Portal user.

Instructions
1. Navigate to the **User Profile** page
2. In the Delegate section, click **Edit Delegates**
3. To add a delegate: click **+Add** and enter their name, email and mobile
4. To remove a delegate: select the line of the delegate and click **xRemove**
5. **Save**

How to add or remove super user access for a Delegate

Instructions
1. Navigate to the **User Profile** page
2. In the Delegate section, click **Edit Delegates**
3. Tick/untick the **Super User Actions** box
4. **Save**

How to give/remove a Delegate access to notification emails

Instructions
1. Navigate to the **User Profile** page
2. In the Delegate section, click **Edit Delegates**
3. Tick/untick the cc Notification box
4. **Save**

How to reassign a matter or multiple matters

Instructions
1. Click on the **Files** tab to view the Matter Summary page 2. Find the person you want to reassign in the Active Files section
All of the matters assigned to the selected person display
3. **Option 1: Reassign all matters** – use this option to move all of their matters when the primary contact is on holidays or has left your firm 4. **Option 2: Reassign some matters** – use this option when you only need to reassign some of the primary contact's matters or you need to reassign matters to more than one person
If the person has left your firm, tick **Deactivate Contact**. This will remove the contact from all drop down lists in the Portal. You must reassign a Primary Contact to all matters.
Reassign all matters 5. Click on the drop down list to the left of the **Reassign All** button and select the new person from the list 6. Click **Reassign All** 7. Update the **Phone** field if it's blank as it's a mandatory field 8. Click **Save** and the new contact will auto populate for all matters the previous primary contact was assigned
Reassign multiple matters 9. Select the New Contact drop down list next to each matter and select the new person from the list 10. Click **Save** and the new contacts will auto populate for all matters the previous primary contact was assigned

How to assign a Barrister to a matter

Instructions
Assigning a Barrister 1. On the **Matter Details** page in the Parties section, click on **Assign Barrister** 2. Select the barrister from the drop down list of options 3. **Save**
The barrister can see what matters they are attached to by navigating to **Active Files** on the **Files** page
To change the Barrister 4. Click on Assign Barrister and select the **new Barrister** from the drop down list
To remove the Barrister 5. Click on Assign Barrister and select the **blank line** at the top of the drop down list

THE ROLE AND FUNCTION OF A DELEGATE

A delegate super user can **not** be a primary or secondary contact

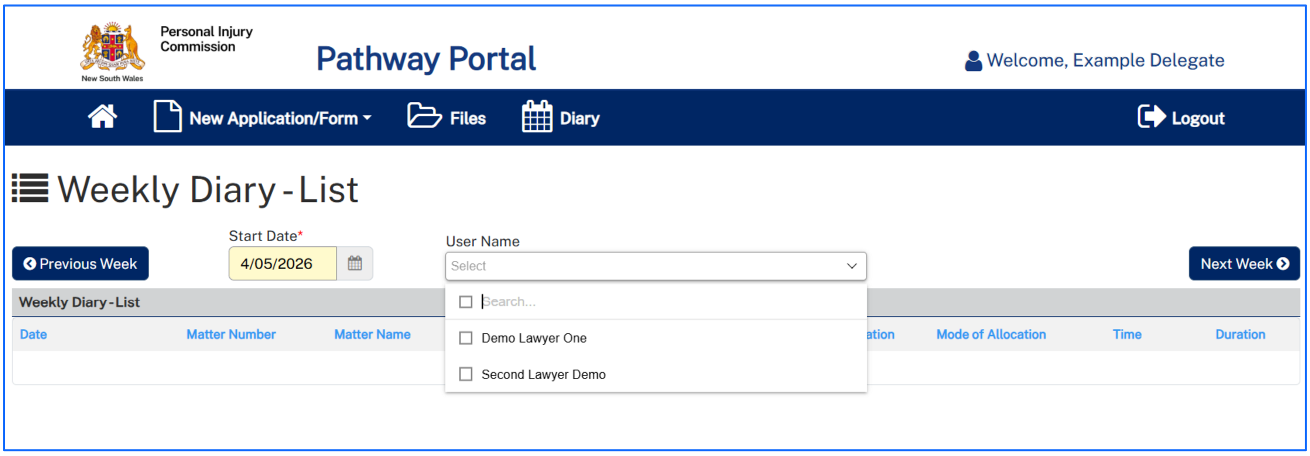
- Pathway Portal allows a Primary Contact to create a **delegate**, that is, an administrative assistant or other person to perform actions on their behalf.
- A delegate will have their own login credentials and associated Multi-Factor Authentication (MFA) when logging in to the Pathway Portal.
- A delegate of a user can access all matters and perform the same actions on matters that the user they are acting on behalf of can. This includes viewing documents, sending messages and lodging forms.
- Multiple users can share the same delegate in which case the Delegate will be able to access and perform actions on all the users' combined matters.
- If you do work for **multiple primary contacts**, use the filter options on Active Files by each primary contact to navigate easier to the matter you need to work on (My Matters / Matters I'm linked to / All Matters).

How to become this type of user	What the user can see / do	What the user cannot do
• A Primary Contact adds you as a delegate	• Can do everything on matters! • Can see all your firms matters, documents and messages • Can see the diary for each Portal user in your firm/organisation • Can send messages • Can assign unassigned reply requests • Can draft and submit applications and replies	• Cannot be a primary or secondary contact • Cannot create another delegate • Cannot add or remove super users • Cannot add or remove new contacts • Cannot receive email notifications (unless a super user gives specific access)

View who you are a delegate for

Instructions
1. Navigate to the **User Profile** page 2. Click on the blue username hyperlink

View the diary list for who you are a delegate for



Instructions
1. Navigate to the **Diary** page and click on the User Name filter and select/deselect users
If you are a delegate for multiple users, all user names are selected and you will see all upcoming allocations (appointments or assessments etc) together If no user is selected, no appointments will display

A delegate who is also a super user or who works for a super user

- A delegate super user **cannot** be a primary or secondary contact.
- If the delegate acts for a primary contact who has super user access, then the delegate will have additional administrative functions for those matters that are assigned to that primary contact.

How to become this type of user	What the user can see / do
• A super user adds you as a super user	• Everything a super user and delegate can do on a matter

THE ROLE AND FUNCTION OF PRIMARY AND SECONDARY CONTACTS

Type of User	**How to become this type of user**	**What the user can see / do**
Primary Contact for a matter	• Be registered as a Legal Representative on the Pathway Portal • Application/Reply is lodged with you nominated as the primary contact • A Super User in your organisation adds you as a primary contact for a matter	• Can see the details and documents for matters that are assigned to you • Can send and receive messages • Can receive email notifications for the matter • Can add a registered delegate to a matter
Secondary Contact for a matter	• Be registered as a Legal Representative on the Pathway Portal • A Super User adds you as a secondary contact for a matter which gives you matter visibility	When the filter called *Active Files for Matters I'm linked* is active, you can: • Can see that matter's details, documents and messages • Can send messages for that matter • Can **not** receive email notifications or see allocations in the diary

THE ROLE AND FUNCTION OF THE PRIMARY CONTACT ADDING A DELEGATE

How to register a Delegate for the first time

- An Administrative Assistant (or similar role) can be given delegate access to do work on behalf of another person/s in your firm/organisation.
- **A delegate must be first added by a Primary Contact of the person they are working on behalf of.**
- The delegate will receive a registration email with a link to register in the Portal.
- A delegate can only be a user that will **never be a primary or secondary contact** on a matter as their email address will only have delegate user access ability.

Resending a Delegate an invitation email to access the Portal (first time only)

- A delegate must ONLY register through the email link sent by the Primary Contact so that the correct profile and access is created.
- The link in the email will expire after 30 minutes. Click on **Resend Invitation Email** if the link expires.
- The Resend Invitation Email button is only visible until the delegate is registered.

How to add a Delegate

Instructions
1. Navigate to the **User Profile** page 2. In the Delegate section, click **Edit Delegates** 3. To add a delegate: click **+Add** and enter their name, email and mobile 4. **Save**

How to remove a delegate

Instructions
1. Navigate to the **User Profile** page 2. In the Delegate section, click **Edit Delegates** 3. To remove a delegate: select the line of the delegate and click **xRemove** 4. **Save**

THE ROLE AND FUNCTION OF A BARRISTER

- You must be a registered user.
- Once Portal access is available, a Super User within the firm you are engaged by can provide access to the matter.
- Alternatively, a ticket can be lodged by either you or the firm you are engaged by on the **Digital Hub** and we will link you to the matter.
- **The New application form** menu item is not applicable and you will not be required to lodge an application.
- The **message** function is not available for you to use.
- Log out at the conclusion of your session.

Instructions

1. Log into the Portal
2. Click on **Files** to access all of the matters linked to you
3. Click on **Diary** to display scheduled events

What can you see on the Matter Details page?

4. All information about the matter (parties, issues in dispute etc)
5. You can view and download documents in the Document section on the matter

How to download a document

6. Navigate to the **Matter Details** page
7. Scroll down to the **Documents** section
8. Click the blue document date hyperlink for the document you want to read
9. A PDF icon of the document will appear. Click on the **PDF** to open and view

End of User Guide instructions

Document change control

Version	Date	Authors	Status
1.0	22/05/2026	Digital Transformation Team, Personal Injury Commission	Approved.