



**Personal Injury
Commission**

Pathway Portal Insurer User Guide

Contents

User Guide Overview	4
What will the guide cover?	4
Get started	5
How to access and register for Pathway Portal.....	5
How to Login to Pathway Portal.....	8
Navigation	9
Home page	9
Files page.....	9
Filter Active Files.....	10
Matter Details	12
Diary	12
Lodge a new application	14
Overview	14
What application forms can be submitted?.....	15
How to lodge a new application	16
Temporary Applications	28
How to resubmit a rejected temporary application	29
Replies	31
How to complete a Reply – Respondent.....	31
Reply Request Notification	31
How to Assign the Reply Request	33
How to complete a Reply	33
How to view the Reply	36
Messages	37
How to send a message.....	37
How to view messages	38
How to respond to messages	39
How to download a message thread	40
Case Management	42
How to view allocation details.....	43
Assess and Decide	44
How to view the Outcome Document.....	45
How to lodge an application for a Review	46
How to lodge an application for a Review continued	47

Lodge an application for a Further Assessment.....	51
How to lodge an Application for a Further Assessment.....	51
What happens after the Further Assessment application has been submitted?.....	55
How to lodge Submissions and other Correspondence.....	55
How to lodge an additional document after initiating application or reply.....	56
How to apply for a matter to be referred to the Stood Over list.....	59
What happens next?.....	60
How to give a Barrister visibility to a dispute.....	61
Barrister registers as Pathway Portal user.....	61
How to assign a Barrister.....	61
What does the Barrister see?.....	62
How to reassign a Matter from one person to one or more others.....	63
How to Manage Primary and Secondary Contacts.....	65
How to Add a new Contact or Deactivate Contact.....	68
Super Users, Delegates and Contacts.....	70
Types of user access.....	70
Primary contact and secondary contacts.....	71
After a Secondary contact is added.....	72
Super Users.....	73
How to add/remove Super Users.....	73
What can Super Users see - Files - Recent Activities.....	73
How to add/remove Delegate for a Super User.....	74
Delegate Super User.....	75
Appendix A - Document requirements.....	77
Appendix B - Glossary of Terms.....	78
Appendix C - Email Notifications - When and what happens.....	79
Appendix D - Version Control.....	79

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:

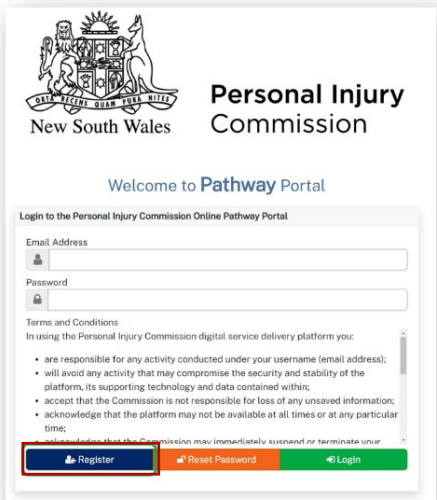
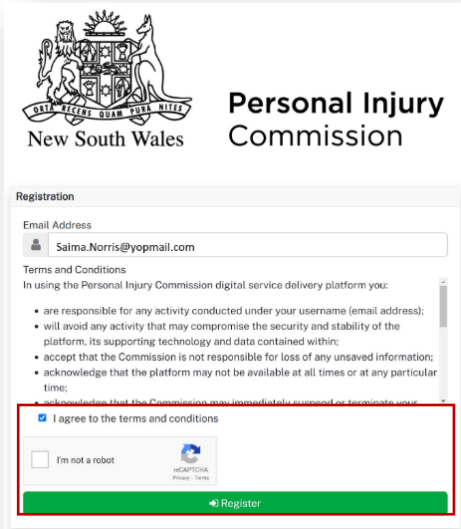
- Get started
- Navigation
- Lodge an application in Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Explain how to lodge a review and further application
- Assign a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

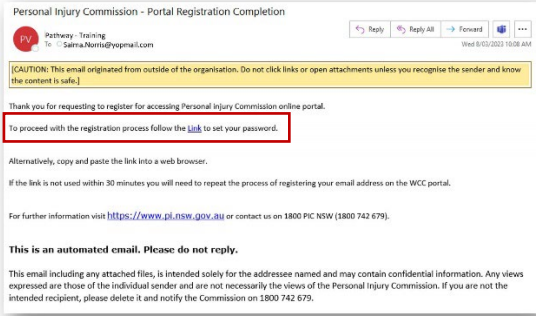
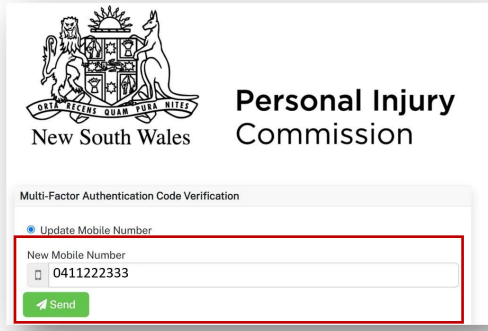
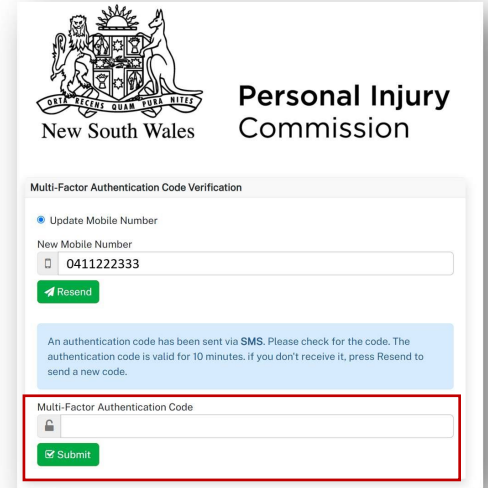
Get started

How to access and register for Pathway Portal

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

- If you are a 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>Access Pathway Portal</p> <ul style="list-style-type: none"> • You can access Pathway Portal via a browser. • Chrome and Edge are the recommended browsers. • The weblink is found on the Personal Injury Commission website and in the first step below. <ol style="list-style-type: none"> 1. Click the following link: https://pathwayportal.pi.nsw.gov.au 2. Click Register. 	
<p>Register your email address</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 visual reCAPTCHA test. 6. Click Register. <p>➤ You will then receive an email to validate your email address.</p>	

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

Instruction

Page

Create new Password

- 10. Enter **Password** and **Confirm Password**.
- 11. Tick **I'm not a robot** and complete the visual **reCAPTCHA** test.
- 12. Click **Register**.

Populate User Profile (top of page)

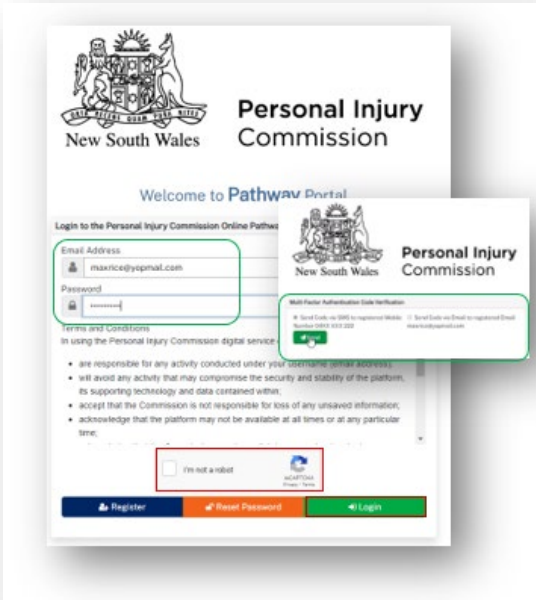
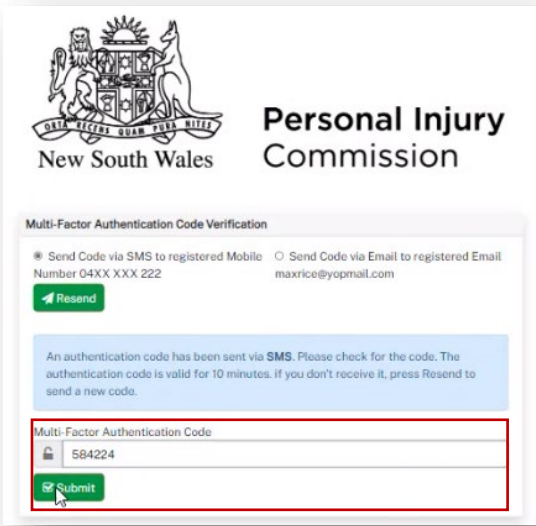
- 13. Populate the **User Profile**.
- 14. Select **Insurer/Scheme Agent**

Note: All yellow fields are mandatory.

Populate User Profile (bottom of page)

- 15. Populate **User Profile** (bottom of page).
- 16. Click **Save**.

How to Login to Pathway Portal

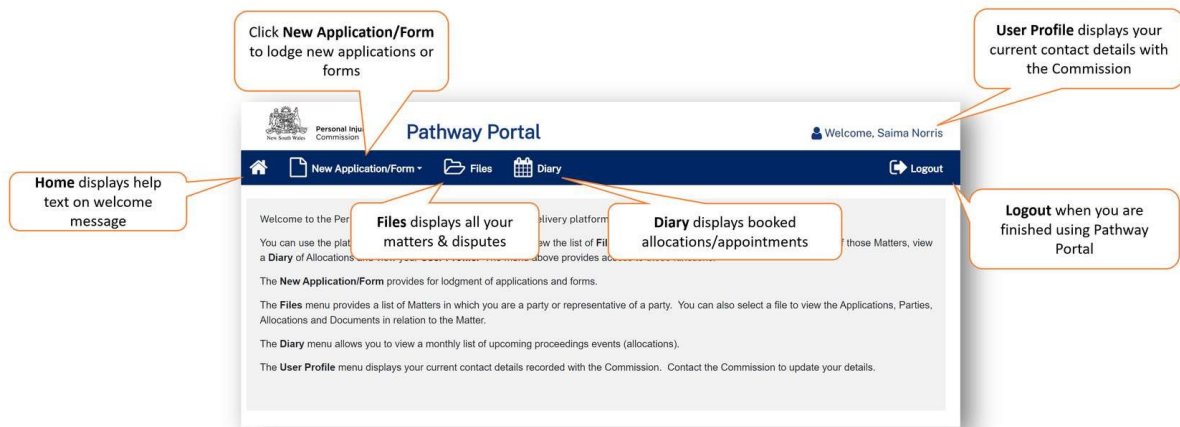
Instruction	Page
<ol style="list-style-type: none"> 1. Click the Pathway Portal link on the Personal Injury Commission website. 2. Populate the Email Address and Password. 3. Click Login. 17. Tick I'm not a robot and complete the visual reCAPTCHA test. 4. Select where you would like the Multi Factor 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

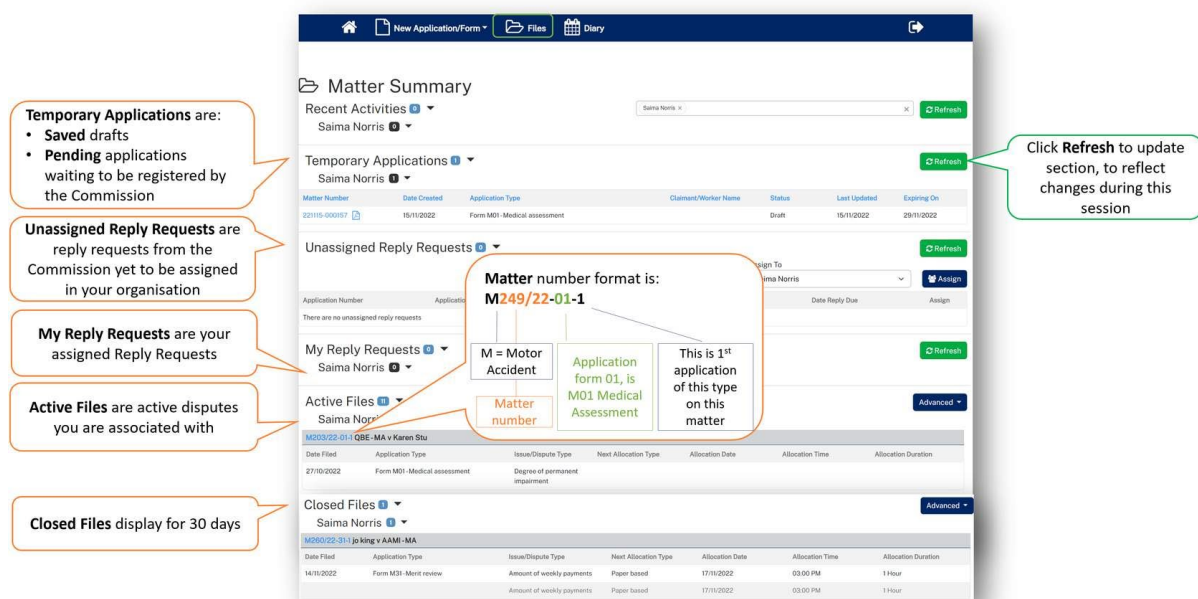
After you login to Pathway Portal the **Home page** displays:

- 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

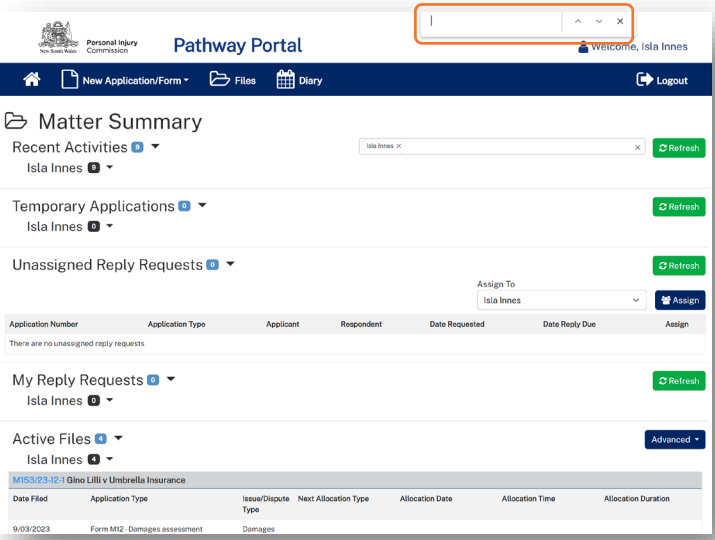
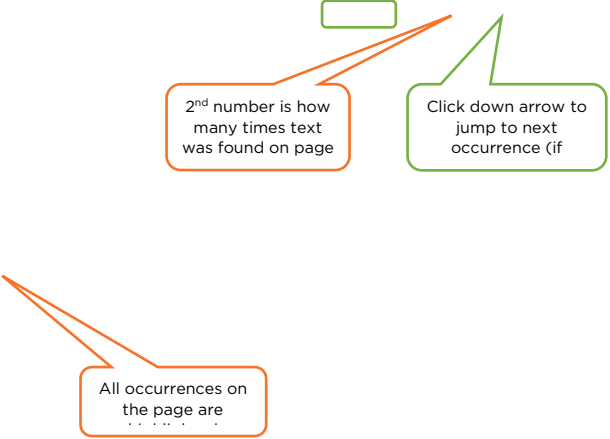
When you click the **Files** tab, the **Files** page displays all the matters where you are the party.



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>Use Ctrl+F</p> <p>Ctrl+F allows you to search for any text (ie letters or numbers) on the page, eg part of a party name or matter number.</p> <p>While on the Files page:</p> <ol style="list-style-type: none"> 1. Hold down the Ctrl key and press the F key on your keyboard simultaneously. <ul style="list-style-type: none"> ➤ A search box displays. 	
<ol style="list-style-type: none"> 2. Type partial party name or matter number you need to search for. 3. System jumps to first occurrence of what you're searching for (if found on the page): <ul style="list-style-type: none"> ➤ The occurrence jumped to, is highlighted orange ➤ The rest of the occurrences (if any) are highlighted yellow 4. Click the down arrow in the search box to jump to next occurrence (if/as needed). <p>Party name example</p> <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). <ol style="list-style-type: none"> 1. Can search for a partial name (eg type poulos to search for Theofanopoulos) 	

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 active files. The first table is for 'M153/23-01-1 Gino Lilli v Umbrella Insurance', the second for 'M268/23-01-1 Rita Reggio v Umbrella Insurance', and the third for 'M269/23-01-1 Peta Pracotto v Umbrella Insurance'. The third table is highlighted in blue, indicating it is the selected matter. The table columns are: 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. The 'Allocation Date From' and 'Allocation Date To' fields are empty. A 'Refresh' button is visible on the right. Below the criteria, the same three tables of active files are shown as in the previous screenshot, but only the second table for 'M268/23-01-1 Rita Reggio v Umbrella Insurance' is visible, indicating that the search criteria have filtered the results.

- The files that match your criteria display.

The screenshot shows the 'Active Files' page for 'Isla Innes' after applying the search criteria. Only one table is displayed, corresponding to 'M268/23-01-1 Rita Reggio v Umbrella Insurance'. The table columns are: 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

No files listed after Advanced search

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

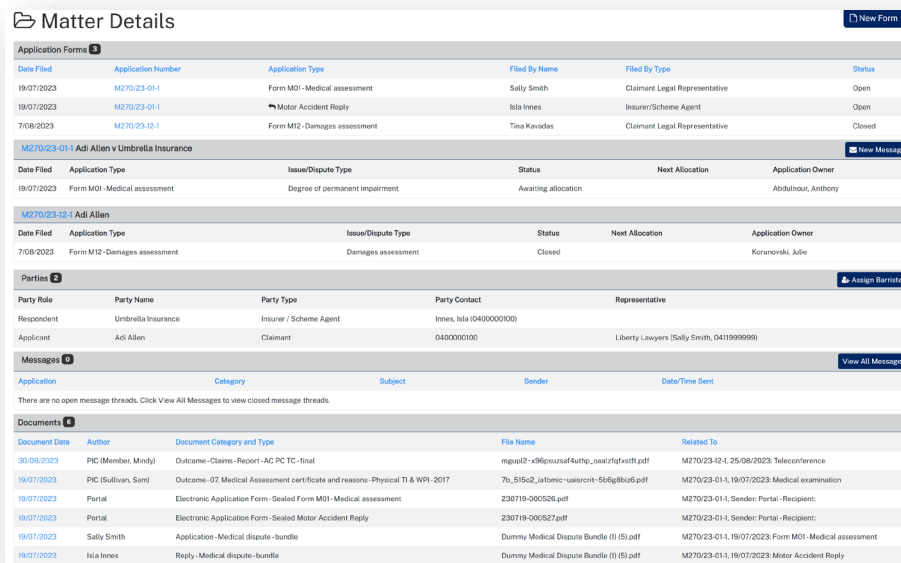
To see *all* your Active Files:

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



Matter Details

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



The screenshot shows the 'Matter Details' page for 'Adi Allen v Umbrella Insurance'. It includes sections for 'Application Forms', 'Messages', and 'Documents'. The 'Application Forms' section shows a table with columns: Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. The 'Messages' section shows a table with columns: Application, Category, Subject, Sender, and Date/Time Sent. The 'Documents' section shows a table with columns: Document Date, Author, Document Category and Type, File Name, and Related To.

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

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

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

Diary

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

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

Weekly Diary - List

[Previous Week](#)
 Start Date*
 User Name
[Next Week](#)

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

Click any blue heading to sort by

Click blue document date link to download, then

Lodge a new application

Overview



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

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

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

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

↔ **Temporary application** is a new concept

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

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

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

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

What application forms can be submitted?

Forms and schemes

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

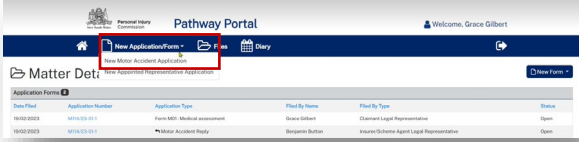
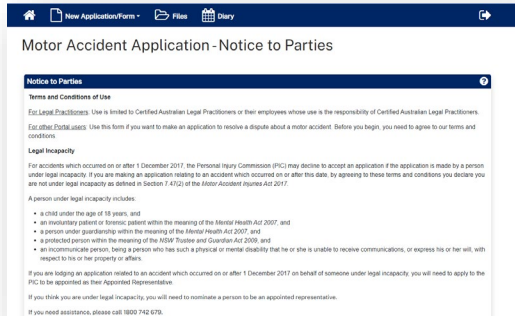
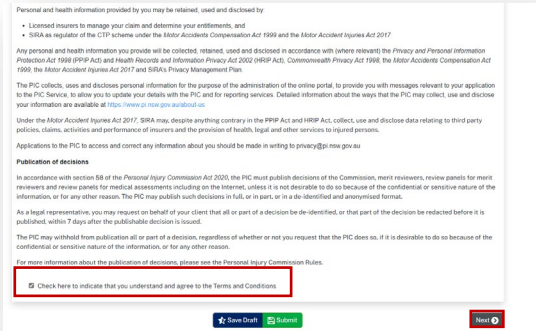
Application forms that can be submitted by parties via Pathway Portal are:

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

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

How to lodge a new application

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

Instruction	Page
<p>New Application Form</p> <p>2. Click on the New Application Form and select New Motor Accident Application.</p> <p>➤ The Motor Accident Application - Notice to Parties page displays.</p>	
<p>Motor Accident Application - Notice to Parties</p> <p>3. Click the check box to indicate that you understand and agree to the Terms and Conditions.</p> <p>4. Click Next.</p> <p>➤ The Motor Accident Application - Claim Details page displays.</p>	
	

Motor Accident Application - Claim Details

5. 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.

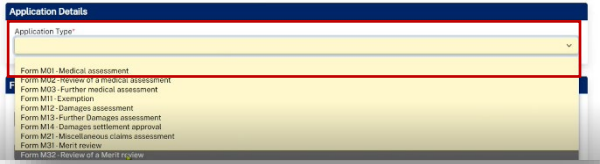

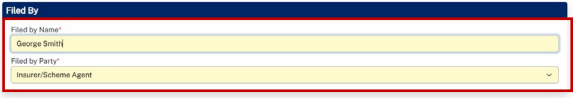
- **Claimant Date of Birth** – Type in the date or select the date from the calendar.
- **Claimant Surname** – Type in the last name of the Claimant.
- **Which Insurer is managing the Claim?** – This will auto-populate according to the user's profile but may be changed if needed.
- **Insurer not listed** - 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 is titled 'Claim Details' and includes a 'PLEASE NOTE' section. The form fields are as follows:

- Date of Accident:** 10/05/2022
- Claimant Date of Birth:** 13/01/1973
- Claimant Surname:** Turner
- Which Insurer is managing the Claim?:** Umbrella Insurance
- Insurer not listed:**
- Enter the claim number:** [Empty text field]
- Location of Accident:** [Empty text 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>Application Details</p> <p>6. Complete the following:</p> <ul style="list-style-type: none"> • Application Type - Select from the drop-down menu. <p>➤ The Matters in Dispute page displays.</p>	
<p>Matters in Dispute</p> <p>7. Select the relevant disputes.</p>	
<p>Filed By</p> <p>8. Filed by Name - Type in your name.</p> <p>9. Filed by Party - Select Insurer/Scheme Agent.</p> <p>10. Click Next.</p>	

Claimant Details

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

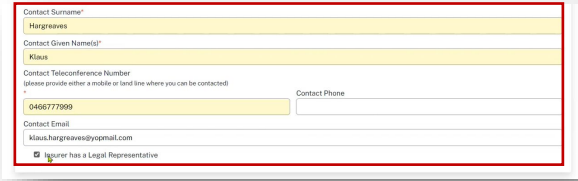
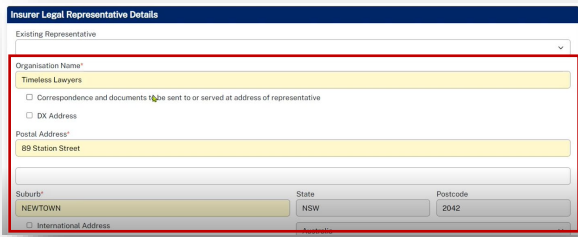
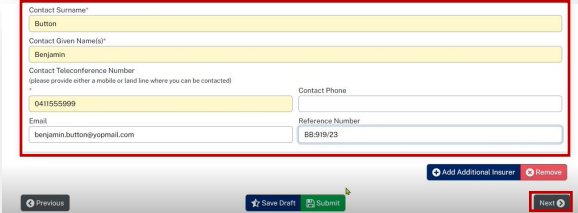
- **Surname** – Type in the Claimant’s last name.
- **Given Name(s)** – Type in the Claimant’s first and second names.
- **Title** – Select the Title from the drop-down menu.
- **Date of Birth** – Type in the Claimant’s Date of Birth or select the date from the calendar.
- **DX Address** – Check the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

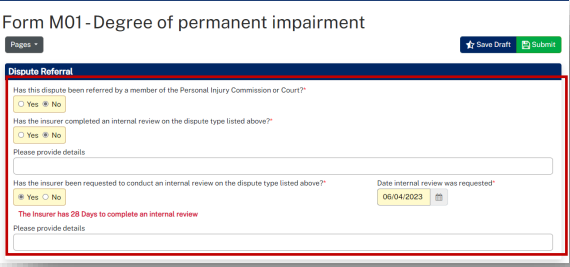
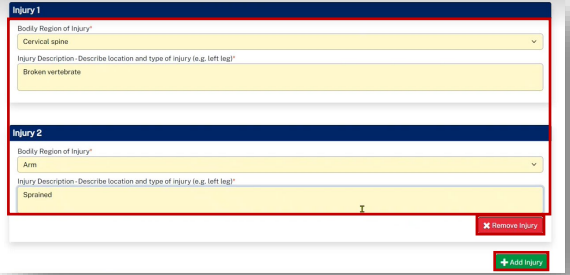
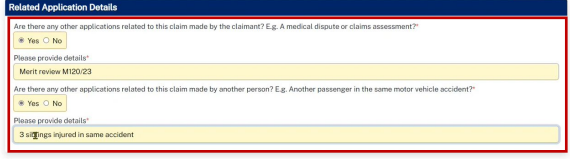
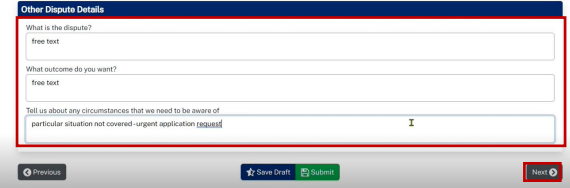
Interpreter

12. 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>Claimant Legal Representative Details</p> <p>13. 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>14. Click Next.</p> <p>➤ The Insurer Details page displays.</p>	
<p>Form M01- Insurer Details</p> <p>15. These details will auto populate because the Insurer was selected on the first page.</p>	

Instruction	Page
<p>Insurer Details continued</p> <p>16. 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>17. Click Next.</p> <ul style="list-style-type: none"> ➤ 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. 	

Instruction	Page
<p>Degree of Permanent Impairment</p> <p>Dispute Referral</p> <p>18. Select Yes/No to the questions.</p>	
<p>Injury 1</p> <p>19. 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>Related Application Details</p> <p>20. Add in any Related Application Details if applicable.</p>	
<p>Other Dispute Details</p> <p>21. Add in any Other Dispute Details we need to be aware of.</p> <p>22. Click Next.</p> <p>➤ The Supporting Documents page displays.</p>	

Instruction

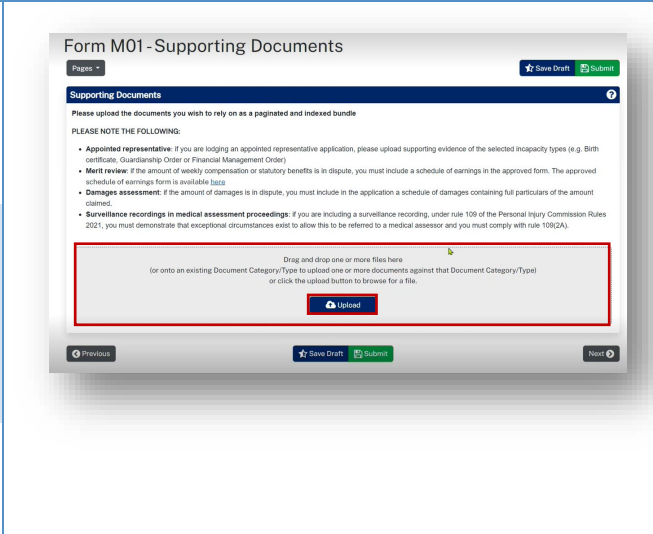
Page

Supporting Documents

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

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

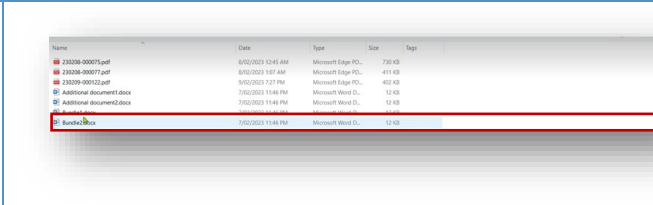
23. Click **Upload** or drag and drop the documents onto the page.



What are the document requirements?

See Appendix A – Document requirements for information on the acceptable file types and document requirements.

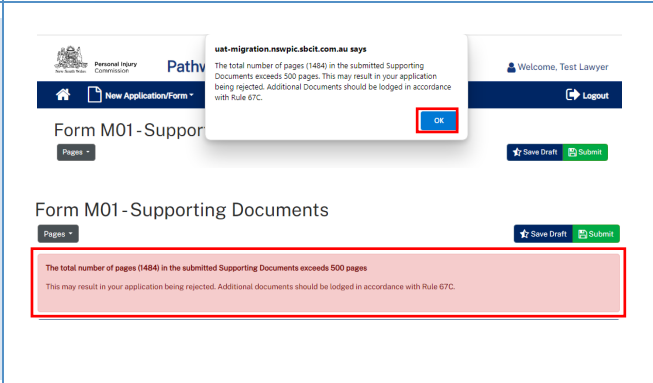
24. Select the **document** and click **Open**.



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

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

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



Dispute types excluded from the 500-page limit are:

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

What are the document requirements?

See Appendix A – Document requirements for information on the acceptable file types and document requirements.

25. Add in the Document Details:

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



The screenshot shows a web form titled "Document Details" with the following fields and values:

- Document Type***: A dropdown menu with "Medical dispute - bundle" selected.
- File Name**: "Bundle1.docx"
- Author***: "Grace Gilbert"
- Date of Document***: "20/02/2023" with a calendar icon.

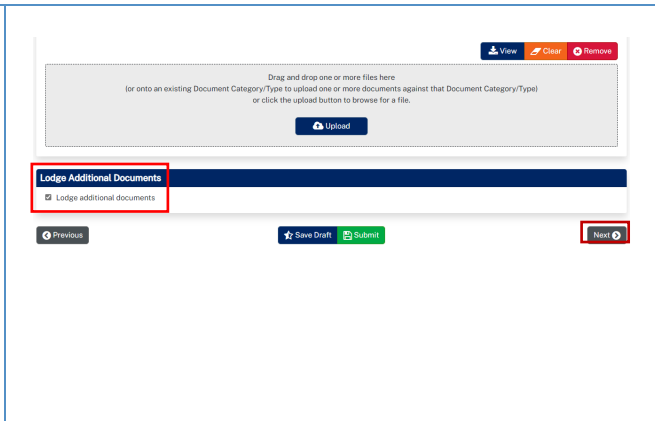
Below the form, there is a note: "Supporting Document is related to Degree of permanent impairment." At the bottom right, there are buttons for "View", "Clear", and "Remove".

When you need to add more than 500 pages of supporting documents to your initiating application

26. Tick **Lodge Additional Documents** if required.

27. Click **Next**.

The Service and Consent page displays.



Lodge Additional Documents

28. Provide answers to the Service and Consent questions.

Note: Refer to the help text on the screen if your bundle contains multiple documents with varying dates.

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

29. Click **Next**.

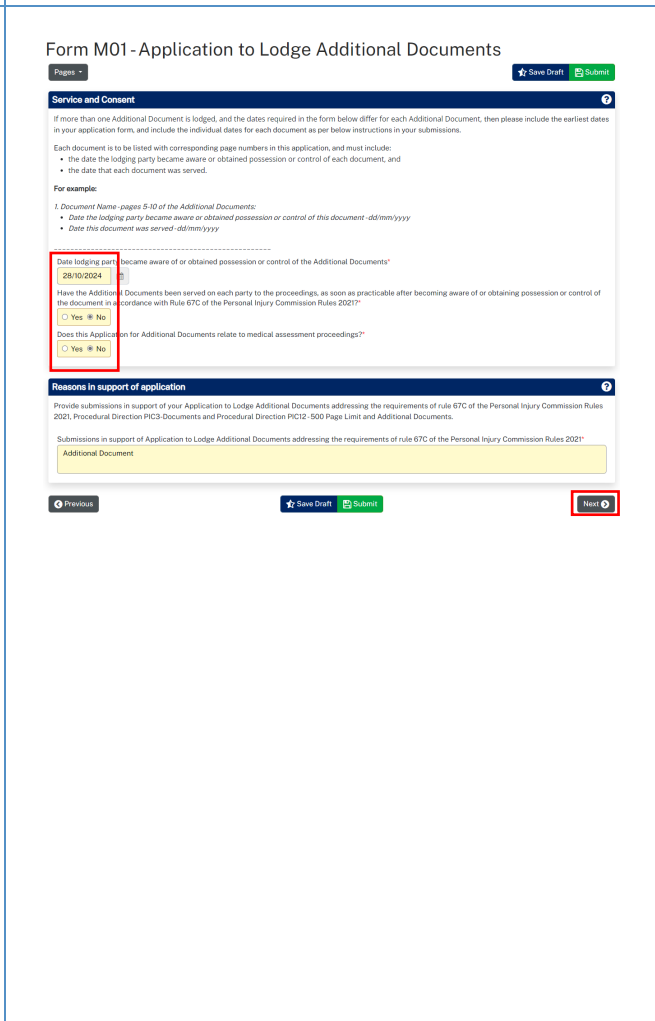
➤ The Supporting Documents page displays

30. Upload your additional documents.

31. Add in the Document Details.

32. Click **Next**.

Note: For additional documents on medical proceedings, evidence of consent from other parties should be attached.



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

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

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

Form M01 - Certification and Signature

Application ID	Application Type	Customer/Matter Name	Status	Last Updated	Expiring On
30020202	Personal Injury Compensation for legal representation	Brian Smith	Draft	20/02/2023	04/03/2023
30020202	Personal Injury Compensation	Wendy Smith	Draft	20/02/2023	

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

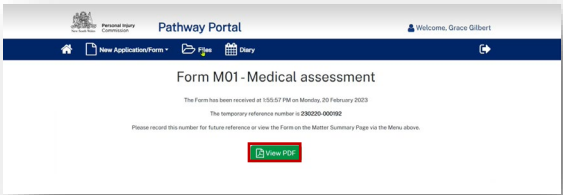
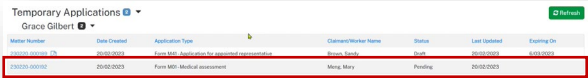
Form M01 - Notice to Parties

Submit

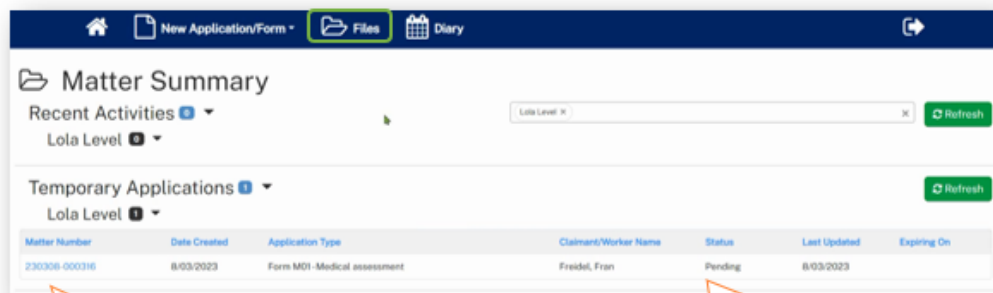
34. Confirm your declaration, signature and date and click **Submit**.

Form M01 - Certification and Signature

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

Instruction	Page														
<p>Form M01 - Medical Assessment</p> <p>35. Click View PDF to view and download the application.</p>															
<p>Temporary Applications</p> <p>36. 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>Expiring On</th> </tr> </thead> <tbody> <tr> <td>030220-000001</td> <td>2023-02-23</td> <td>Form M01 - Application for personal representative</td> <td>Grace Gilbert</td> <td>Pending</td> <td>2023-02-23</td> <td>6/30/2023</td> </tr> </tbody> </table>	Member Number	Date Created	Application Type	Claimant/Member Name	Status	Last Updated	Expiring On	030220-000001	2023-02-23	Form M01 - Application for personal representative	Grace Gilbert	Pending	2023-02-23	6/30/2023
Member Number	Date Created	Application Type	Claimant/Member Name	Status	Last Updated	Expiring On									
030220-000001	2023-02-23	Form M01 - Application for personal representative	Grace Gilbert	Pending	2023-02-23	6/30/2023									

Temporary Applications



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

Status of:

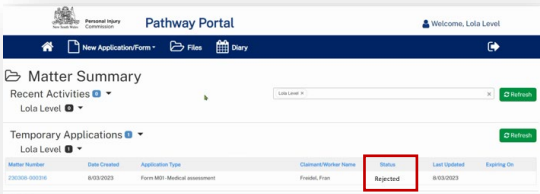
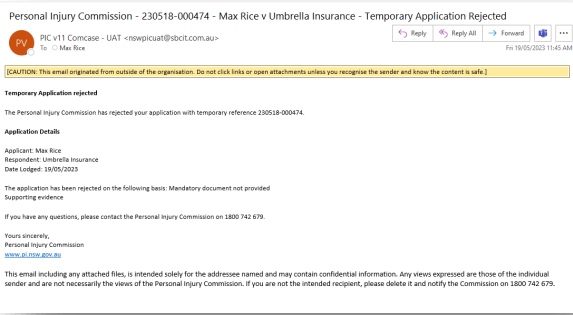
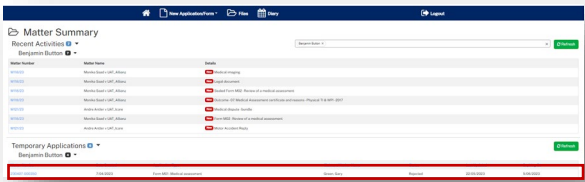

- **Pending** = temporary application submitted to the Commission
- **Draft** = you have saved the application to finish later
- **Rejected** = the Commission has rejected the application, refer to the email notification for reason

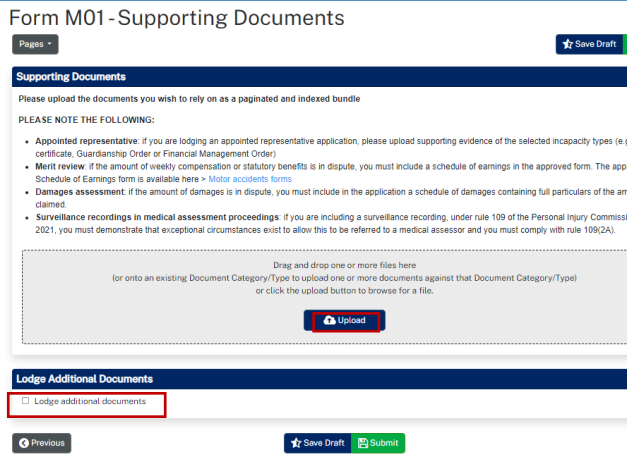
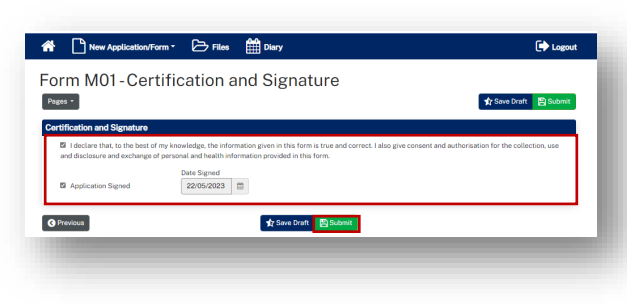
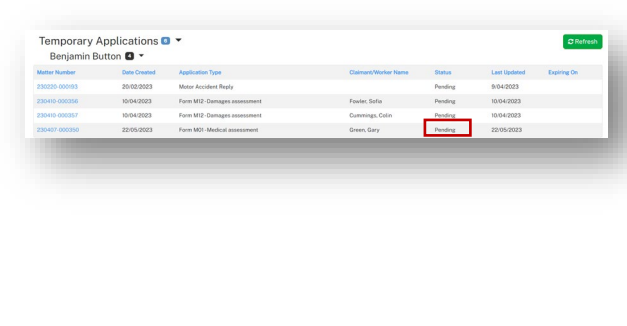
- Only the filing party will be able to see the temporary application in Pathway Portal.
- When the application has been registered by the Commission it will then be shared with the respondent who needs to lodge a reply.

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**.

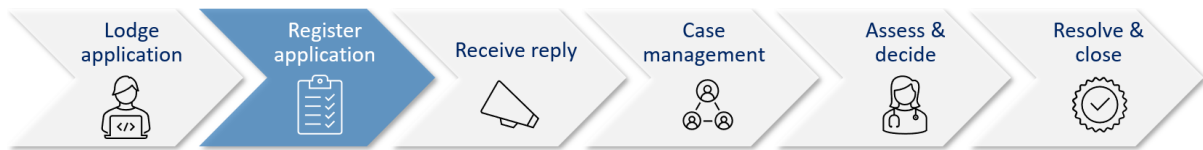
How to resubmit a rejected temporary application

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"> Refer to the email notification to understand the rejection reason. 	
<ol style="list-style-type: none"> 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"> Navigate to Supporting Documents and make the required changes to the form (if this was the reason for rejection). 	

Instruction	Page																																			
<p>4. Click Upload to upload the supporting document bundle (if this was the reason for rejection) and click Next.</p> <p>Note: If your application was rejected for having supporting documents over 500 pages,</p> <ol style="list-style-type: none"> Remove the document Split the document offline Re-upload the first bundle (up to 500 pages) Select the 'Lodge Additional Documents' checkbox 																																				
<p>9. 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>Matter Number</th> <th>Date Created</th> <th>Application Type</th> <th>Claimant/Worker Name</th> <th>Status</th> <th>Last Updated</th> <th>Expiring On</th> </tr> </thead> <tbody> <tr> <td>250250-000893</td> <td>25/02/2023</td> <td>Motor Accident Treaty</td> <td></td> <td>Pending</td> <td>9/04/2023</td> <td></td> </tr> <tr> <td>250410-000366</td> <td>10/04/2023</td> <td>Form M02 - Damages assessment</td> <td>Freder, Sofia</td> <td>Pending</td> <td>10/04/2023</td> <td></td> </tr> <tr> <td>250410-000367</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>250407-000300</td> <td>22/05/2023</td> <td>Form M01 - Medical assessment</td> <td>Green, Gary</td> <td>Pending</td> <td>22/05/2023</td> <td></td> </tr> </tbody> </table>	Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On	250250-000893	25/02/2023	Motor Accident Treaty		Pending	9/04/2023		250410-000366	10/04/2023	Form M02 - Damages assessment	Freder, Sofia	Pending	10/04/2023		250410-000367	10/04/2023	Form M02 - Damages assessment	Cummings, Colin	Pending	10/04/2023		250407-000300	22/05/2023	Form M01 - Medical assessment	Green, Gary	Pending	22/05/2023	
Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On																														
250250-000893	25/02/2023	Motor Accident Treaty		Pending	9/04/2023																															
250410-000366	10/04/2023	Form M02 - Damages assessment	Freder, Sofia	Pending	10/04/2023																															
250410-000367	10/04/2023	Form M02 - Damages assessment	Cummings, Colin	Pending	10/04/2023																															
250407-000300	22/05/2023	Form M01 - Medical assessment	Green, Gary	Pending	22/05/2023																															

Replies

How to complete a Reply - Respondent



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

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

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

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

↔ Assigning a reply request to someone is a new concept

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

Reply Request Notification

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

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



PIC v11 Comcase - Training <nswpictraining@sbcit.com.au>
To: Ingram, Ian

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

Dear Umbrella Insurance,

Claimant name: Betty Kish

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

Insurer claim number: BK123

Insurer Representative Reference:

Claimant Representative Reference:

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

Your Reply is due by 29 April 2023

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

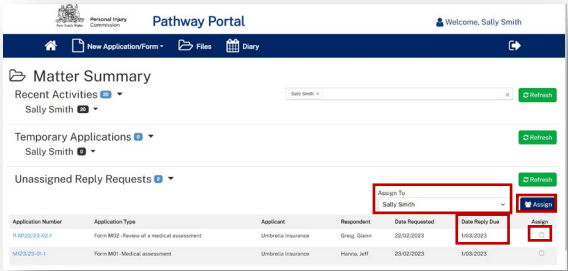
For privacy and security reasons, the Commission does not include links in email communications.

Yours sincerely,

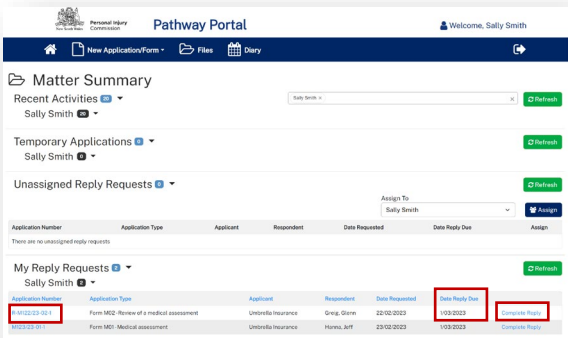
Personal Injury Commission

www.pi.nsw.gov.au

How to Assign the Reply Request

Instruction	Page
<p>Unassigned Reply Requests must be assigned to someone in your 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**.

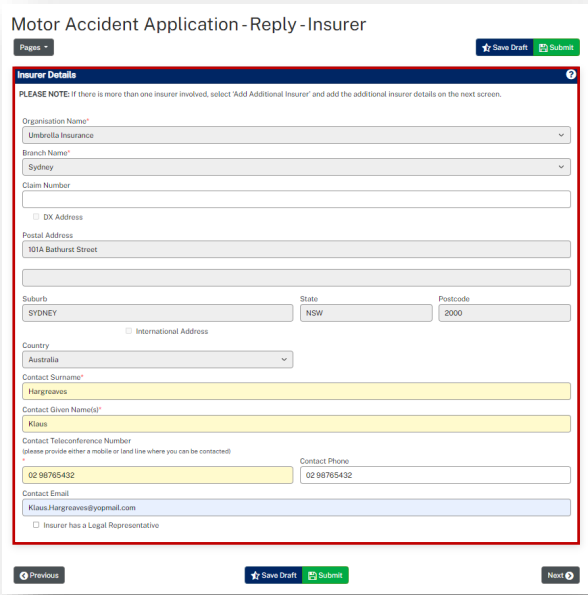
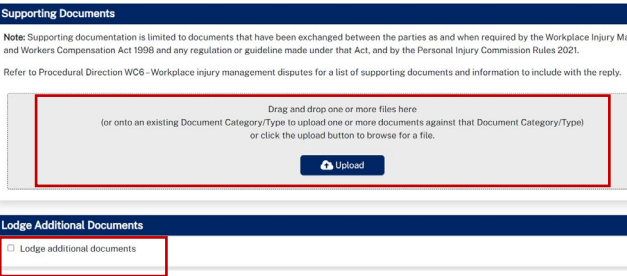
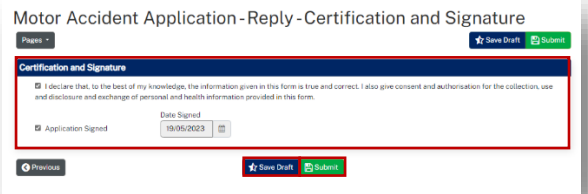
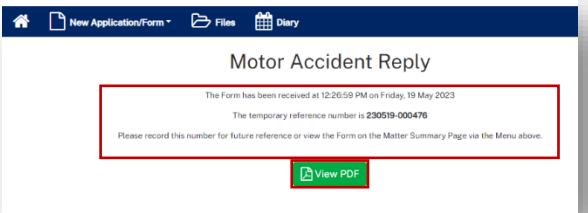
Page

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 a 'Next' button. The 'Legal incapacity' section lists criteria for legal incapacity, such as being a child under 16, an involuntary patient, or a person under guardianship. A checkbox at the bottom indicates agreement to the terms and conditions.

This screenshot shows a close-up of a checkbox labeled 'Check here to indicate that you understand and agree to the Terms and Conditions'. The checkbox is checked, and it is located below the 'Save Draft' and 'Submit' buttons.

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 'Motor Accident Application - Reply - Reply' page. It includes fields for 'Application Number' (M240/23-01-1) and 'Application Type' (Form MD1-Medical assessment). The 'Filed By' section has dropdown menus for 'Filed by Name' (Wanda Mangraves) and 'Filed by Party' (Insurer/Scheme Agent). The 'Dispute: Treatment and care reasonable and necessary' section has a dropdown for 'Dispute Type' (Treatment and care reasonable and necessary) and a text area for 'Reply to the dispute' containing 'See attached submission'. A 'Next' button is visible at the bottom right.

Instruction	Page
<p>5. Complete the Insurer Details page. Add a Contact Name and number for the Insurer and click Next.</p> <p>Note: This is essential, so that the correct person is added as the Primary contact for this matter.</p> <p>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.</p>	
<p>6. Upload supporting documents for the Reply, complete the Document Details and click Next.</p> <p>Note: Supporting documents must be submitted as a single indexed and paginated bundle and should not exceed 500 pages.</p>	
<p>7. Sign and date the application – Submit if ready or Save Draft and have someone else review the reply before it is submitted.</p>	
<p>➤ Here you can see confirmation that the Reply has been submitted.</p>	

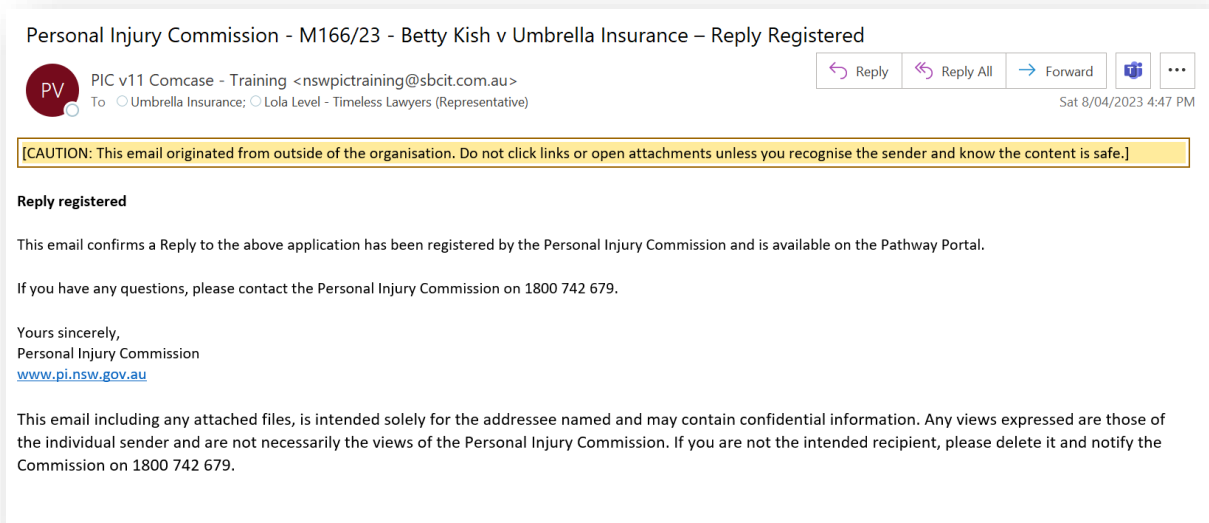
How to view the Reply

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:

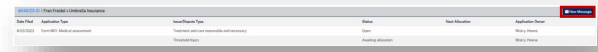
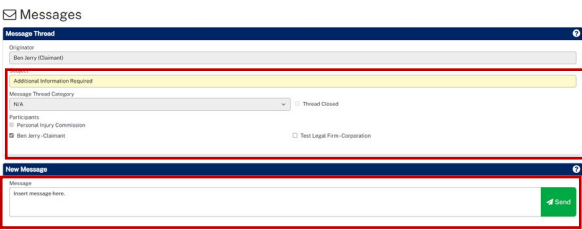
- Applicant’s Legal Representative
- Respondent’s Legal Representative or
- Unrepresented parties.



Instruction	Page
<p>View the Reply</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. It includes sections for Application Forms, Parties, Messages, and Documents. The Documents section is highlighted with red boxes, showing three items: a Sealed Application Form, a Sealed Motor Accident Reply, and a Medical Assessment. The first two items have a red box around the document date (8/10/2023), and the third has a red box around the document date (8/10/2023).</p>

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>	 <p>The screenshot shows a table with columns: Date Paid, Application Type, Issue/Response Type, Status, Next Allocation, and Application Owner. A 'New Message' button is visible in the top right corner of the application interface.</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>The screenshot shows the 'Messages' interface. It includes a 'Message Thread' section with fields for 'Originator' (Ben Jerry (Claimant)), 'Additional Information Required', 'Message Thread Category' (set to 'N/A'), and 'Participants' (Ben Jerry - Claimant, Personal Injury Commission, and Test Legal Firm - Corporation). Below this is a 'New Message' form with a text input field and a 'Send' button.</p>

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	New 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 Dahohan	9/06/2023 9:50 AM

Callout 1: New badge indicates a new message in the

Callout 2: Category for incoming messages will be:

- For Action
- For Noting
- For Review

N/A Category indicates thread was initiated by

Callout 3: Click [blue subject link](#) to view and respond to the message

Callout 4: Click to toggle between: **View All Messages** - Which includes closed threads.

View Open Messages - which

How to respond to messages

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

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

✉ Messages

Message Thread ?

Originator
Ben Jerry (Claimant)

Subject
Additional Information Required

Message Thread Category
N/A Thread Closed

Participants
 Personal Injury Commission
 Ben Jerry - Claimant Test Legal Firm - Corporation


[Print Message Thread](#)

New Message ?

Message

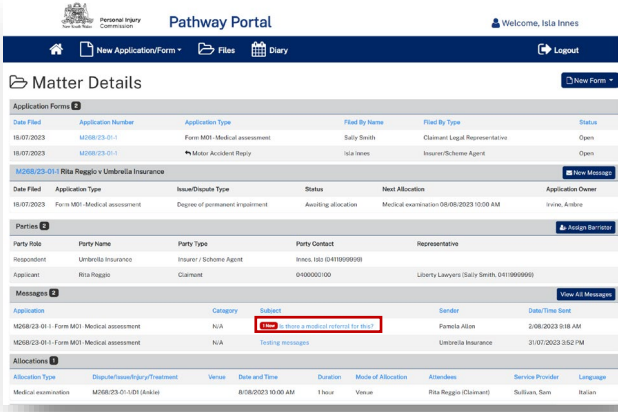
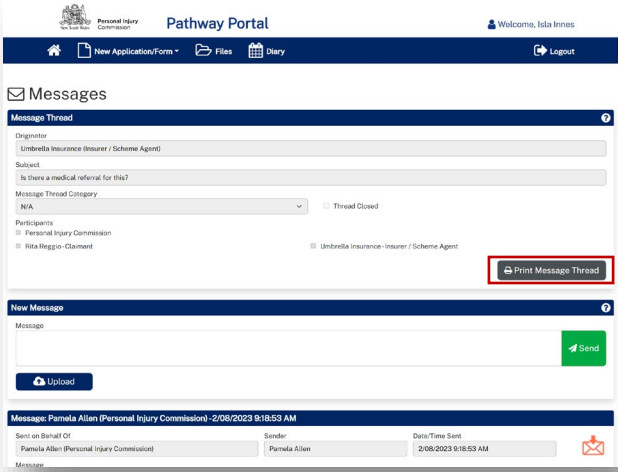
[Send](#)

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

Sent on Behalf Of	Sender	Date/Time Sent	
Leo Lopez (Personal Injury Commission)	Leo Lopez	29/10/2024 11:57:12 AM	

How to download a message thread

You can download message threads from Pathway Portal.


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


Instruction

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

Page

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

 **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 this appointment. Can you please share with me?

Case Management

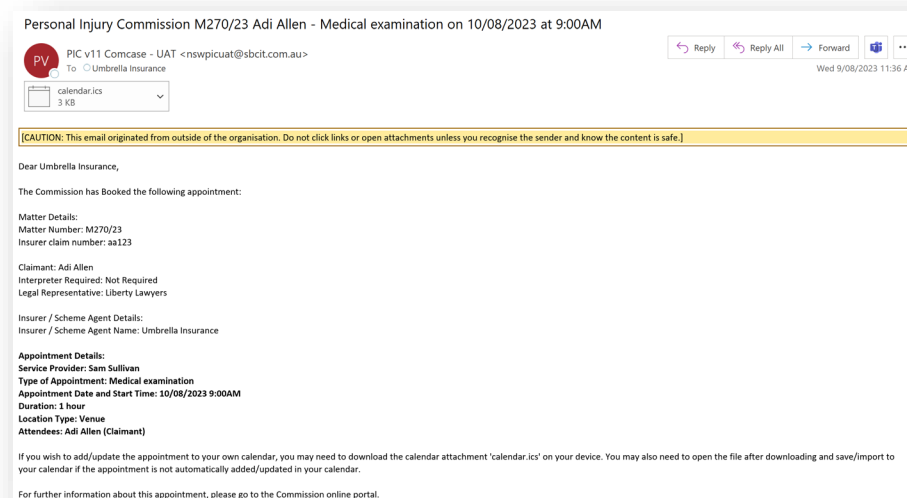


When the Commission allocates the dispute to a decision maker an email notification with date, time, venue, address and required attendees for the allocation is automatically sent to:

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

Allocation email notification

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



How to view allocation details

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

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)
- Dispute/Injury/Issue/Treatment** displays what is to be assessed in
- Attendees** displays who needs to attend, eg if it's a Teleconference the legal representative may need to
- Decision Maker** is the member or medical

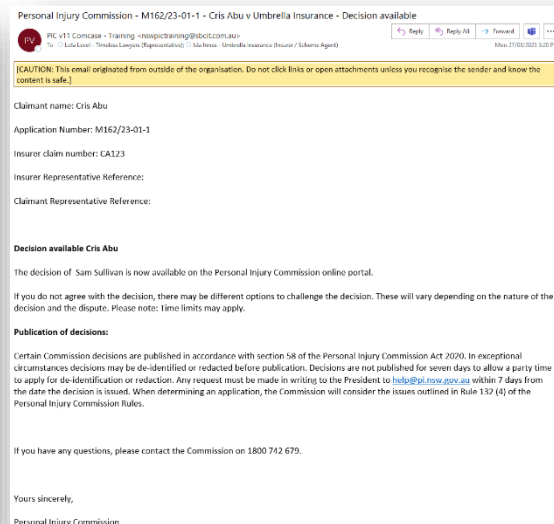
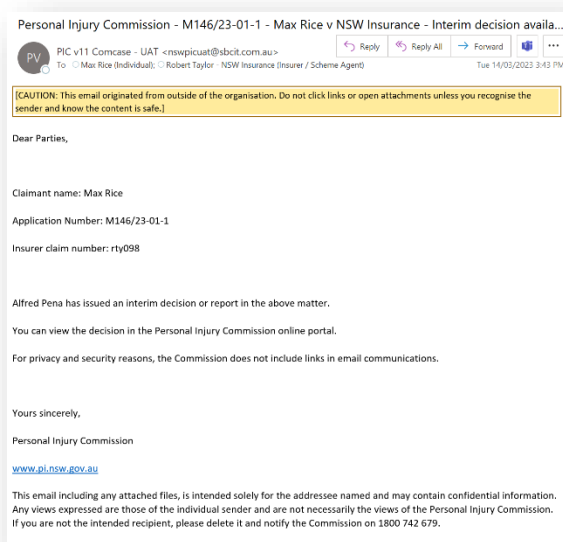
Assess and Decide



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

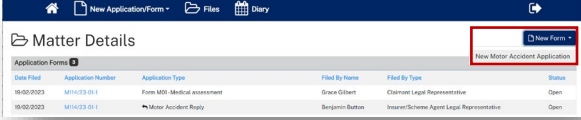

- Seals the outcome document
- Sends the Legal Representative(s) and Unrepresented parties an email notification that the decision is available on Pathway Portal.

Decision available email notification



How to 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">1. 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>	 <table border="1"><thead><tr><th>Date Filed</th><th>Application Number</th><th>Application Type</th><th>Filed By Name</th><th>Filed By Type</th><th>Status</th></tr></thead><tbody><tr><td>18-02-2023</td><td>M18/023 01 f</td><td>Form M20 - Medical assessment</td><td>Grace Gilbert</td><td>Claimant Legal Representative</td><td>Open</td></tr><tr><td>18-02-2023</td><td>M18/023 01 f</td><td>Motor Accident Reply</td><td>Benjamin Button</td><td>Insurer/Schwen Agent Legal Representative</td><td>Open</td></tr></tbody></table>	Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status	18-02-2023	M18/023 01 f	Form M20 - Medical assessment	Grace Gilbert	Claimant Legal Representative	Open	18-02-2023	M18/023 01 f	Motor Accident Reply	Benjamin Button	Insurer/Schwen Agent Legal Representative	Open
Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status														
18-02-2023	M18/023 01 f	Form M20 - Medical assessment	Grace Gilbert	Claimant Legal Representative	Open														
18-02-2023	M18/023 01 f	Motor Accident Reply	Benjamin Button	Insurer/Schwen Agent Legal Representative	Open														
<p>Notice to Parties</p> <ol style="list-style-type: none">2. Read the Terms and Conditions and scroll to the bottom and tick to agree to Terms and Conditions.3. Click Next <p>➤ The Form Claim Details displays.</p>	 <p>Motor Accident Application - Notice to Parties</p> <p>Notice to Parties</p> <p>Terms and Conditions of Use</p> <p><u>For Legal Practitioners</u> Use is limited to Certified Australian Legal Practitioners or their employees whose use is the responsibility of Certified Australian Legal Practitioners.</p> <p><u>For other Personal users</u> Use this form if you want to make an application to resolve a dispute about a motor accident. Before you begin, you need to agree to our terms and conditions.</p> <p><input checked="" type="checkbox"/> Check here to indicate that you understand and agree to the Terms and Conditions</p> <p>Save Draft Submit Next</p>																		

Claim Details

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

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

This example selects M02 – Review of medical assessment

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

5. Click **Next**.

➤ The **Claimant Details** page displays.

Motor Accident Application - Claim Details

How to lodge an application for a Review continued

Instruction

Claimant Details

6. Populate the **Claimant Details** page.

7. When done click **Next**.

Page

Form M02 - Claimant Details

Selecting **Existing Party** and **Existing Representative** auto-populates their details which speeds up data entry



➤ The **Insurer Details** page displays.

Insurer Details

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

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

9. Click **Next**.

Form M02 - Insurer Details

Form M02 - Insurer Details

Pages Save Draft Submit

Insurer Details

PLEASE NOTE: If there is more than one insurer involved, select 'Add Additional Insurer' and add the additional insurer details on the next screen.

Existing Party
Umbrella Insurance (Margreaves, Klaus)

Organisation Name*
Umbrella Insurance

Branch Name*
Sydney

Selecting **Existing Party** and **Existing Representative** auto-populates their details which speeds up data entry



➤ The **Form M02 - Panel Review of single medical assessment** page displays if this is the application that was selected.

Insurer Legal Representative Details

Existing Representative
Timeless Lawyers (Button, Benjamin)

Organisation Name*
Timeless Lawyers

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

Postal Address*
89 Station Street

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

Supporting Documents

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

Note: The 500 page limit does not apply to Review applications

12. Click **Next**

- The Certification and Signature page displays.

Certification and Signature

13. **Read** and **tick** the acknowledgments.

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

15. Click **Submit**.

Instruction

What happens after Submit?

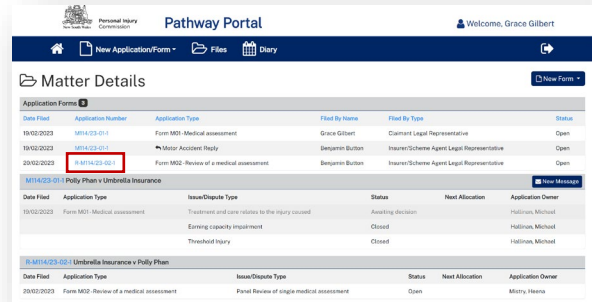
The Review **Temporary Application** displays with a **Status** of **Pending** until it is registered by the Commission.

Page



Matter Number	Date Created	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
230214-000209	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 Application/Form Files Diary

Matter Details

New Form

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
19/03/2023	M14/23-014	Form M01-Medical assessment	Grace Gilbert	Claimant Legal Representative	Open
19/03/2023	M14/23-014	Motor Accident Reply	Benjamin Burton	Insurer/Scheme Agent Legal Representative	Open
20/02/2023	R-M14/23-001	Form M02-Review of a medical assessment	Benjamin Burton	Insurer/Scheme Agent Legal Representative	Open

M14/23-001 Poly Pham v Umbrella Insurance

New Message

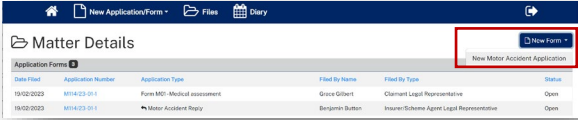
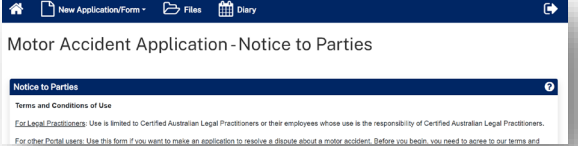
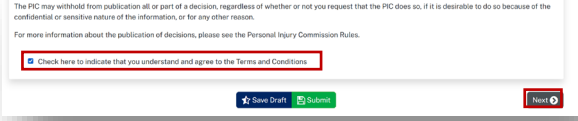
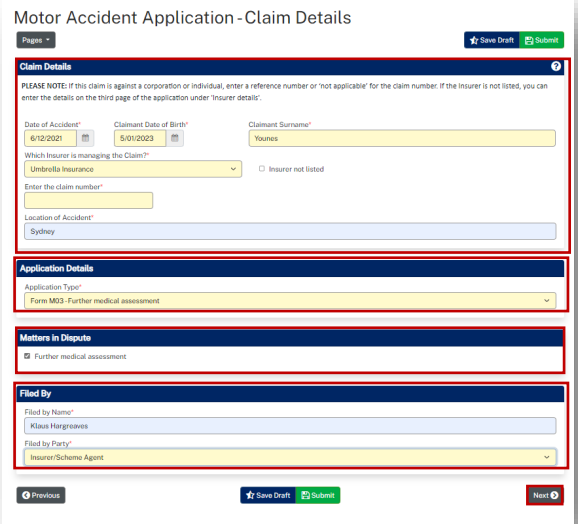
Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
19/02/2023	Form M01-Medical assessment	Treatment and care related to the injury occurred	Awaiting decision		Holliman, Michael
		Earning capacity impairment	Closed		Holliman, Michael
		Threshold injury	Closed		Holliman, Michael

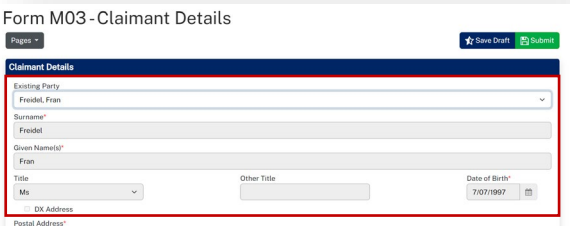
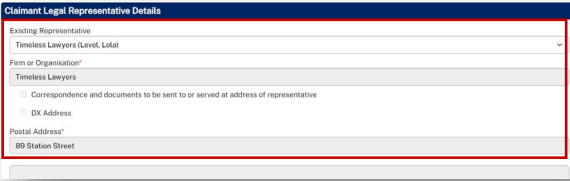
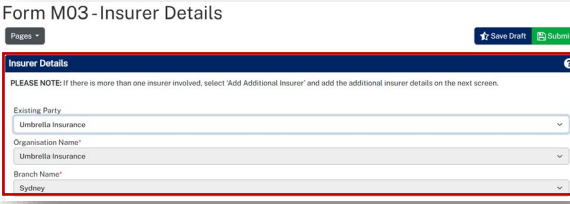
R-M14/23-001 Umbrella Insurance v Polly Pham

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		Mitty, Heena

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>Notice to Parties</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>Motor Accident Application - Claim Details</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>Claimant Details</p> <p>6. Populate the Claimant Details page.</p>	
<p>Note: You can select the Existing Party and the Existing Representative from drop down to quickly populate.</p>	
<p>7. Click Next.</p> <ul style="list-style-type: none"> ➤ The Insurer Details page displays. 	
<p>Insurer Details</p> <p>8. 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>9. Click Next.</p> <ul style="list-style-type: none"> ➤ The Form M03 - Further medical assessment page displays if this is the application that was selected. 	

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.

Supporting Documents

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

13. Click **Next**.

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

Note: If you have more than 500 pages of supporting documents, you should upload the first 500 pages on this page and also lodge an Application to Lodge Additional Documents by selecting the Lodge Additional Documents checkbox

Form M03 - Supporting Documents

Certification and Signature

Read and tick the acknowledgments.

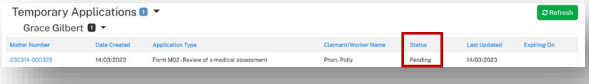

Then either:

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

15. Click **Submit**.

Form M03 - Certification and Signature

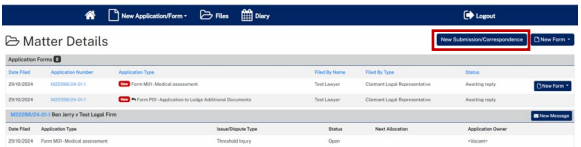
What happens after the Further Assessment application has been submitted?

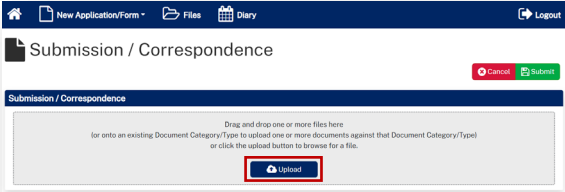
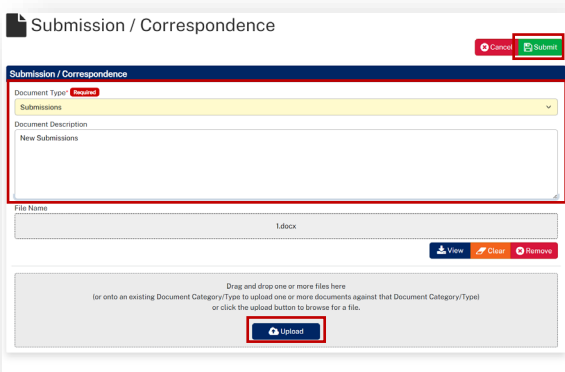
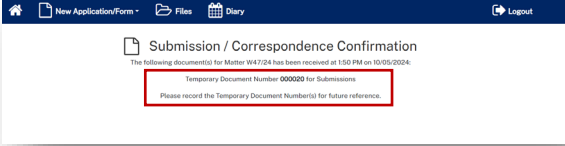

Instruction	Page
<p>The Further Assessment Temporary Application displays with Status of Pending until it is registered by the Commission.</p>	
<p>Once the application is registered it displays within the Matter Details for the originating dispute and has matter number prefixed with F.</p>	

How to lodge Submissions and other Correspondence

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

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

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

<p>2. Click Upload or drag and drop the documents onto the page.</p>															
<p>3. Choose the Document type: Correspondence or Submissions and add a Description if required.</p> <p>4. To add new Submissions or Correspondence, use the Upload feature again to repeat the process.</p> <p>5. Click Submit.</p>															
<p>6. Submissions/Correspondence Confirmation screen will appear, which will show the Temporary Document Number.</p>															
<p>7. The document will now be visible under the Temporary Documents drop down on the Matter Summary screen with a status of Pending. The case owner will action the submitted correspondence.</p>	 <table border="1" data-bbox="821 1332 1396 1400"> <thead> <tr> <th>Temporary Document No.</th> <th>Date Lodged</th> <th>Matter No.</th> <th>Document Type</th> <th>Status</th> <th>Last Updated</th> <th>Expiring On</th> </tr> </thead> <tbody> <tr> <td>000000</td> <td>10/05/2024</td> <td>W4724</td> <td>Submissions</td> <td>Pending</td> <td>10/05/2024</td> <td></td> </tr> </tbody> </table>	Temporary Document No.	Date Lodged	Matter No.	Document Type	Status	Last Updated	Expiring On	000000	10/05/2024	W4724	Submissions	Pending	10/05/2024	
Temporary Document No.	Date Lodged	Matter No.	Document Type	Status	Last Updated	Expiring On									
000000	10/05/2024	W4724	Submissions	Pending	10/05/2024										

How to lodge an additional document after initiating application or reply

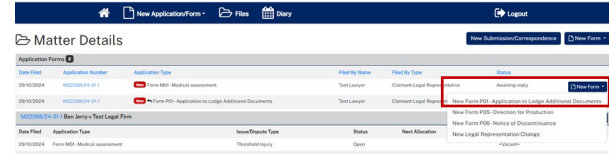
It may be necessary to lodge an additional document after you have submitted the application.

Instruction	Page
-------------	------

To lodge an additional document:

From the Matter Details page

1. Click **New Form** and select the required form.
2. Select **New Form P01 – Application to Lodge Additional Documents**.

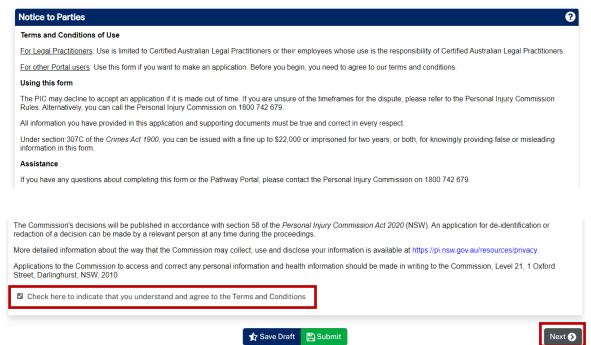


Form P01 – Notice to Parties

Read the Terms and Conditions.

3. Scroll to the bottom and **tick** to agree to **Terms and Conditions** and click **Next**.
- The Form P01 – Application to Lodge Additional Document page displays.

Form P01 - Notice to Parties



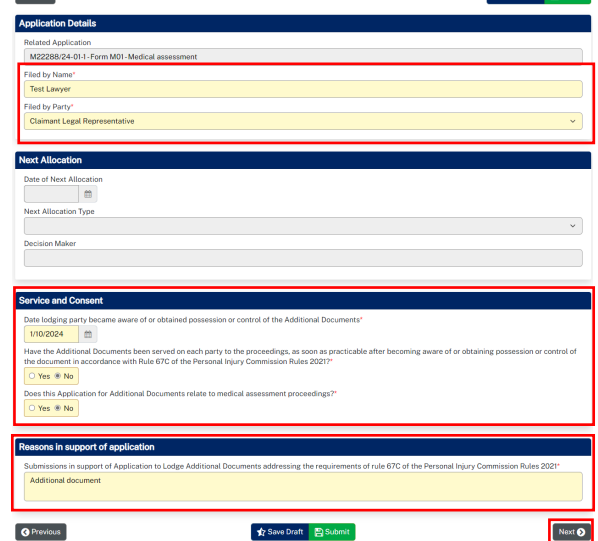
Form P01 – Application Details

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

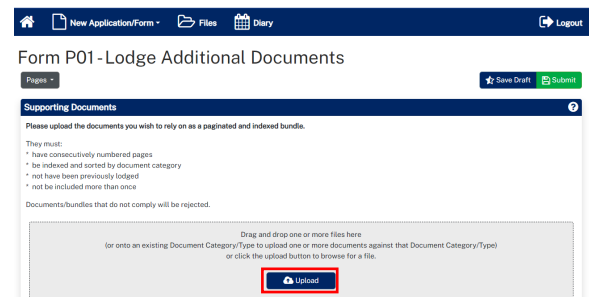
Note: The Next Allocation section will be populated if there is an allocation already booked for this application. Additional Documents should be lodged with the Commission within 14 days for Medical proceedings & 3 working days for all other proceedings.

4. Populate **Service and Consent** (as needed).
5. Populate Reason in support of application field.
6. Click **Next**.

Form P01 - Application to Lodge Additional Documents



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



8. Add in the Document Details:

- **Document Type** – Select Form P01 from the drop-down menu.
- **Author** – Type in your name.
- **Date of Document** – Type in the date of upload or select the date from the calendar.

9. Click **Next**

Form P01 - Lodge Additional Documents

Pages - Save Draft Submit

Supporting Documents

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

They must:

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

Documents/bundles that do not comply will be rejected.

Document Type*
Form P01

Document Details

File Name
Example Document.docx

Author*
Test Lawyer

Date of Document*
29/10/2024

View Clear Remove

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

Upload

Previous Save Draft Submit Next

10. **Read** and **tick** the acknowledgments.

Then either:

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

12. Click **Submit**.

Form P01 - Signature

Pages - Save Draft Submit

Signature

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

Application Signed Date Signed
29/10/2024

Previous Save Draft Submit

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

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

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

The screenshot shows a web form titled "Form M12 - Damages assessment". The form is divided into three main sections: "Claim for Damages", "Best Endeavours/Time Limits", and "Assessment Details".

Claim for Damages
Has the claimant served a claim for damages on the insurer?
 Yes No Not applicable - claim not against an insurer

Best Endeavours/Time Limits
Have the parties used their best endeavours to settle the claim before referring it for assessment as required by section 7.32(3) of the Motor Accident Injuries Act 2017?
 Yes No
Please provide details

Assessment Details
Do you believe the claim is suitable for assessment?
 Yes No
Is the claim ready for assessment?
 Yes No
Please provide details

Do you apply for the matter to be referred to the Stood Over List?
 Yes No
Please select one of the following reasons*

The form includes a navigation bar at the top with icons for Home, New Application/Form, Files, Diary, and Logout. There are also "Save Draft" and "Submit" buttons in the top right corner.

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 shows the 'Matter Details' page in the Pathway Portal. It features a navigation bar at the top with icons for 'New Application/Form', 'Files', and 'Diary'. Below the navigation bar, the page title 'Matter Details' is displayed. The main content area is divided into several sections:

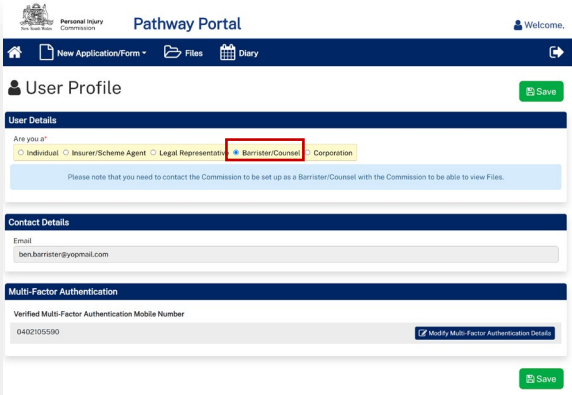
- Application Forms**: A table with columns for Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. It lists two forms: 'New Form M01 - Medical assessment' and 'New Form M02 - Damages assessment', both filed on 11/11/2022 by Saama Norris.
- Reply Requests**: A section indicating 'There are no reply requests'.
- M257/22-12-1 Holly Wood v QBE - MA**: A table with columns for Date Filed, Application Type, Issue/Dispute Type, Status, Stood Over Expiry Date, and Next Allocation. It shows two rows for 'Damages assessment' with a status of 'Stood over list - medical dispute not yet finalised' and an expiry date of '1/05/2023'.
- M257/22-01-1 Holly Wood v QBE - MA**: A table with columns for Date Filed, Application Type, Issue/Dispute Type, Status, and Next Allocation. It shows two rows for 'Degree of permanent impairment' with a status of 'Open'.

A callout box with an orange border and arrow points to the 'Stood over list - medical dispute not yet finalised' status in the 'Damages assessment' rows, 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/ Counsel2. Click Save <p>Please log a ticket via the PIC Digital Hub's Online form for the email address to be registered for barrister access. When you first access the form, you will be required to register. You should include as much information as possible to assist the team in actioning your request."</p> <p>"More information, including how to register for the PIC Digital Hub's Online form, is available in the PIC Digital Hub User Guide.</p>	

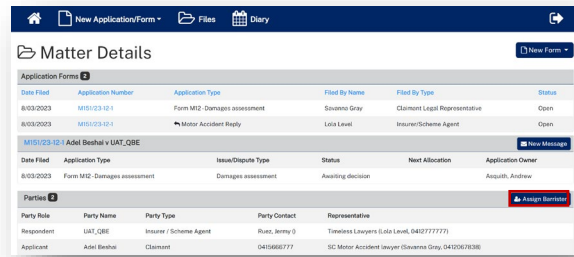
How to assign a Barrister

Instruction	Page
-------------	------

Assign a Barrister

To give a barrister visibility of a dispute:

1. In the **Matter Details**, click **Assign Barrister**.



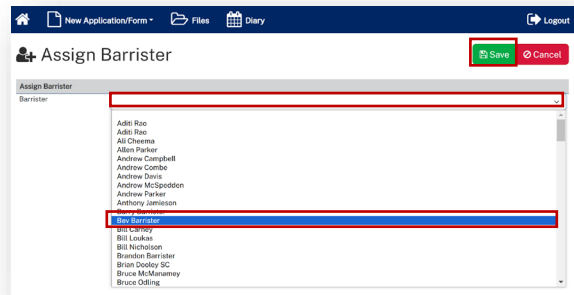
2. Select the **Barrister** from the drop-down menu.
3. Click **Save**.

To change the barrister:

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

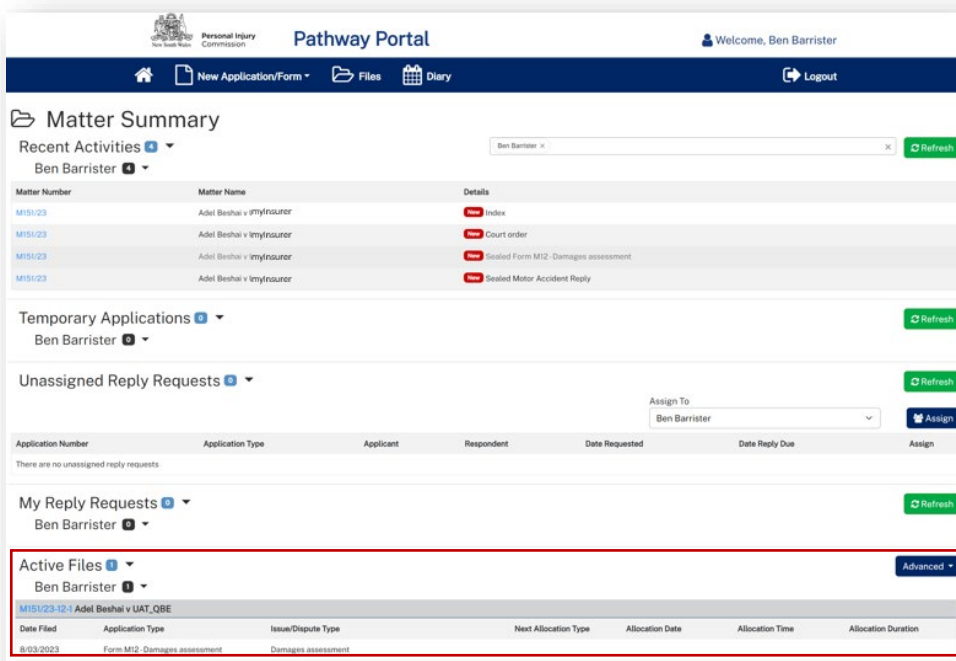
To remove barrister:

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



What does the Barrister see?

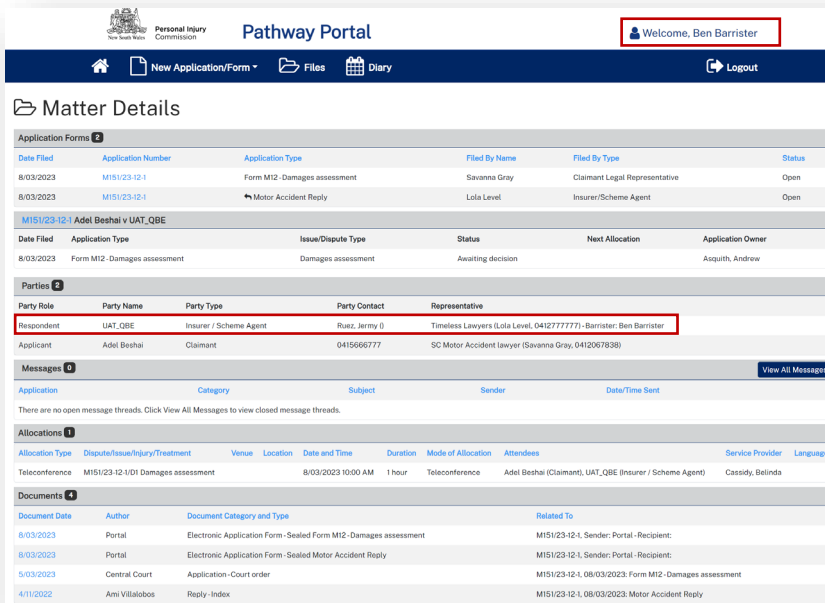
After a Barrister logs into Pathway Portal they will see the assigned disputes in the **Files** page



The Barrister:

- ✓ Can see the matter details

- ✓ Can view documents
- X Cannot send messages



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

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

Instruction	Page
<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>	

- All Matters assigned to the selected person display.

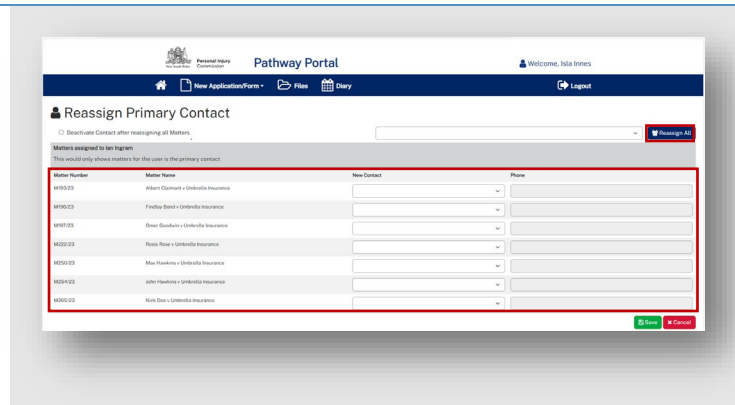
There are 2 options:

Option 1: Reassign All

Consider this option when someone is going away on holidays or has left your organisation and you need to reassign **all** of their Matters to one other person.

Option 2: Reassign some

Consider this option when you only need to reassign **some** of the Matters or you need to assign them to **more than one** person.



To Reassign All

1. From the drop-down list **select a new person** to assign all Matters to

Note: Tick **Deactivate Contact** if a person has left the organisation. This will deactivate their profile and they will no longer appear in drop down lists within the Portal.

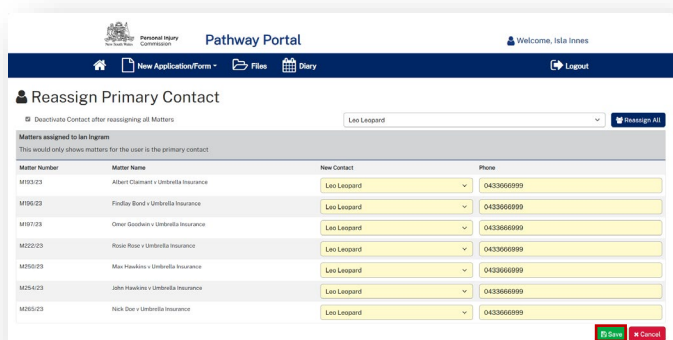
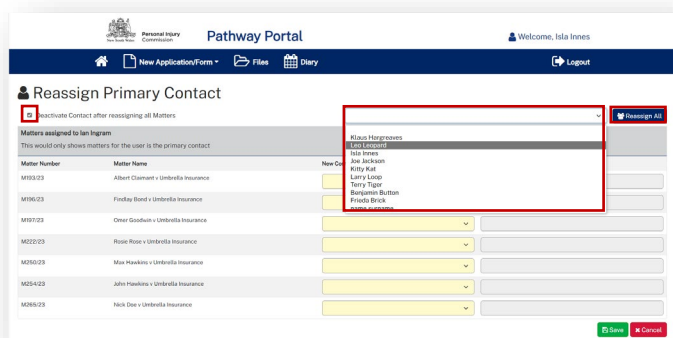
2. Click **Reassign All**

- New Contact will auto populate for all Matters

Note: The Phone field is a mandatory field. If it is blank, please add phone number.

3. Click **Save**

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



To Reassign some

- 1 From the drop-down list **select a person** to assign the Matter to. Continue this step for other Matters as needed.

Note: The Phone field is a mandatory field. If it is blank, please add phone number.

- 2 Click **Save**
 - The selected Matters will now be reassigned to the person selected.

The screenshot shows a web application interface titled "Reassign Primary Contact". At the top, there is a header with a user profile icon and the text "Deactivate Contact after reassigning all Matters". Below this is a sub-header "Matters assigned to her program" and a note: "This report only shows matters for the user in the primary contact". The main area contains a table with the following data:

Matter Number	Matter Name
M30123	Albert Campbell - Underlife Insurance
M36023	Franky Bond - Underlife Insurance
M30123	Oliver Goodwin - Underlife Insurance
M32323	Rose Rose - Underlife Insurance
M35023	Max Hawkins - Underlife Insurance
M35423	John Hawkins - Underlife Insurance
M35523	Nick Day - Underlife Insurance

To the right of the table is a form with a "New Contact" dropdown menu, which is currently open, displaying a list of names. Below the dropdown are fields for "Phone" and "Email". At the bottom right of the form are "Save" and "Cancel" buttons.

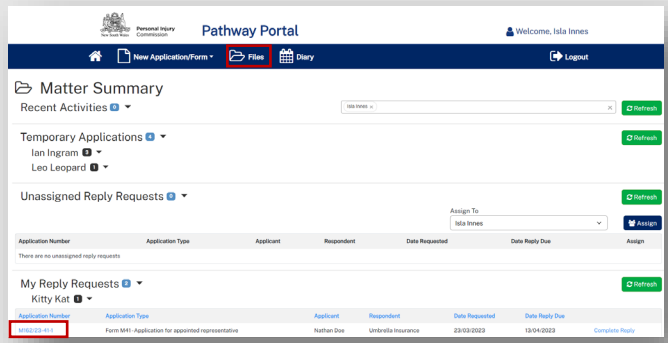
How to Manage Primary and Secondary Contacts

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

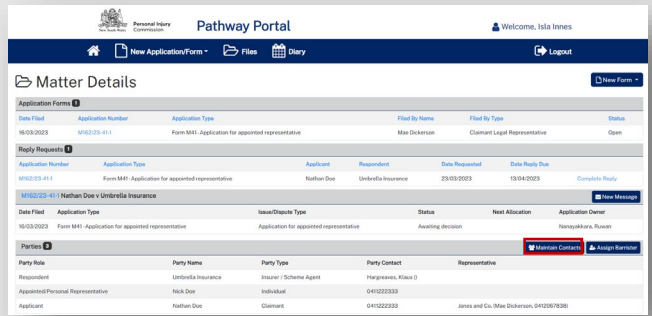
Instruction

Page

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



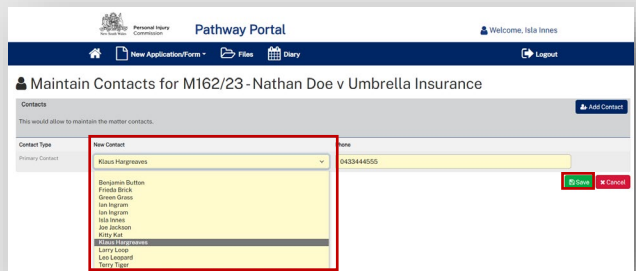
- Matter Details page displays
3. Go to **Parties** section and Click on **Maintain Contacts**



- **Maintain Contacts** page displays with current contacts.

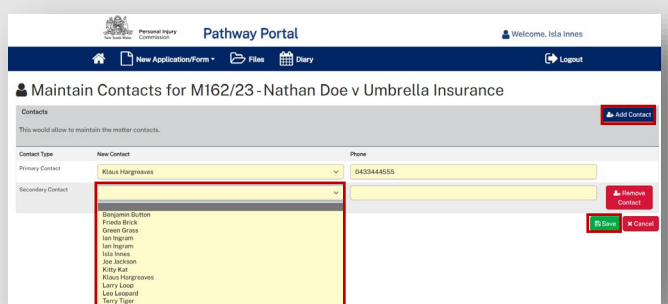
To update Primary Contact:

4. In the Primary Contact section, select the new Primary Contact's name from the New Contact drop-down menu.
5. Click **Save**

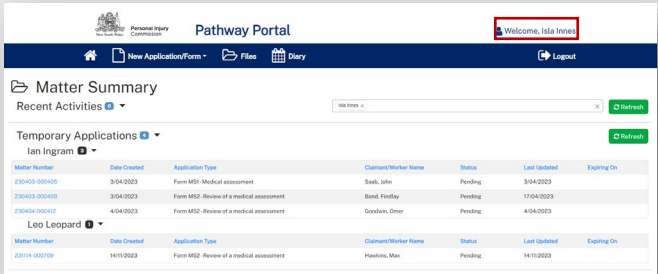
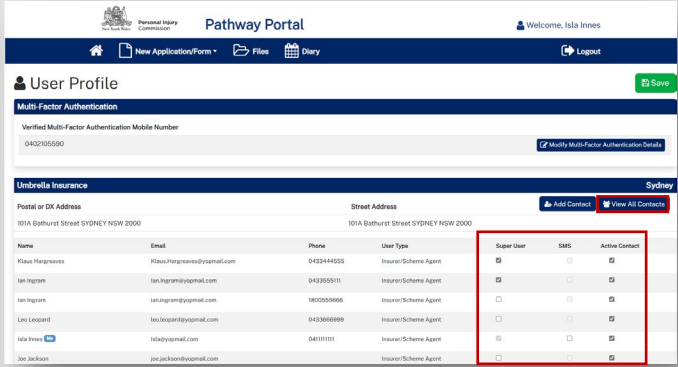


If you need to add a Secondary Contact:

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

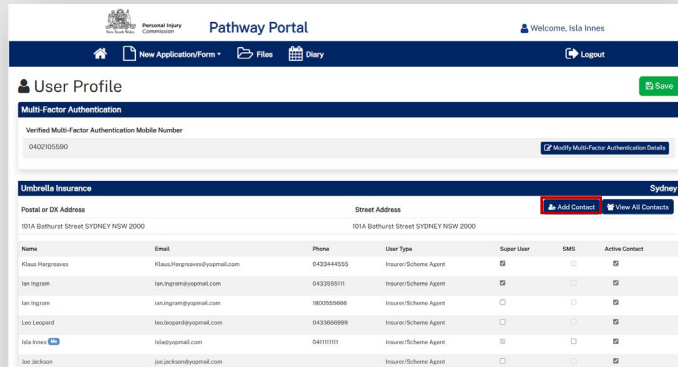


How to Add a new Contact or Deactivate Contact

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>To deactivate user:</p> <ol style="list-style-type: none"> 1. Untick Active Contact check box. 2. Click Save 	 <table border="1" data-bbox="730 1061 1378 1196"> <thead> <tr> <th>Name</th> <th>Email</th> <th>Phone</th> <th>User Type</th> <th>Super User</th> <th>SMS</th> <th>Active Contact</th> </tr> </thead> <tbody> <tr> <td>Klaus Hargreaves</td> <td>klaus.hargreaves@sydney.com</td> <td>0432444525</td> <td>Insurer/Scheme Agent</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Ian Ingram</td> <td>ian.ingram@sydney.com</td> <td>043355511</td> <td>Insurer/Scheme Agent</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Ian Ingram</td> <td>ian.ingram@sydney.com</td> <td>180005666</td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Leo Leopard</td> <td>leo.leopard@sydney.com</td> <td>043355555</td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Isla Innes</td> <td>isla@sydney.com</td> <td>041111111</td> <td>Insurer/Scheme Agent</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Joe Jackson</td> <td>joe.jackson@sydney.com</td> <td></td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Name	Email	Phone	User Type	Super User	SMS	Active Contact	Klaus Hargreaves	klaus.hargreaves@sydney.com	0432444525	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ian Ingram	ian.ingram@sydney.com	043355511	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ian Ingram	ian.ingram@sydney.com	180005666	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leo Leopard	leo.leopard@sydney.com	043355555	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Isla Innes	isla@sydney.com	041111111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Joe Jackson	joe.jackson@sydney.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name	Email	Phone	User Type	Super User	SMS	Active Contact																																												
Klaus Hargreaves	klaus.hargreaves@sydney.com	0432444525	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																												
Ian Ingram	ian.ingram@sydney.com	043355511	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																												
Ian Ingram	ian.ingram@sydney.com	180005666	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																												
Leo Leopard	leo.leopard@sydney.com	043355555	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																												
Isla Innes	isla@sydney.com	041111111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																												
Joe Jackson	joe.jackson@sydney.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																												

To add a new user:

1. Click **Add Contact**

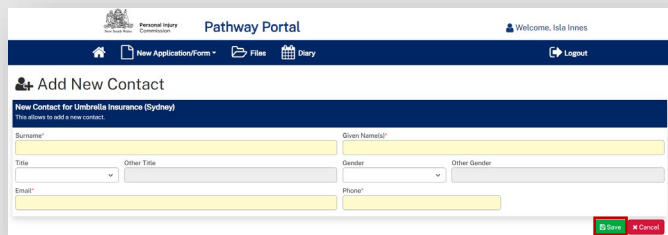


2. Fill in all yellow mandatory fields
3. Click **Save**

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

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

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



Super Users, Delegates and Contacts

Types of user access

Type of user	How to become this type of user	What user can see/do
Primary contact for a matter	<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

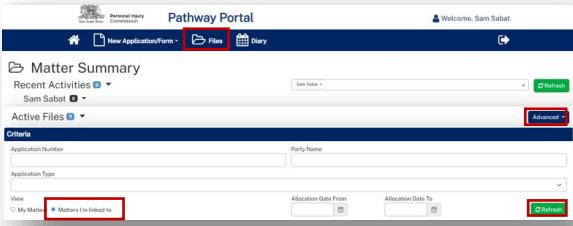
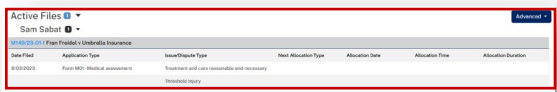
- The Primary Contact for a matter is listed as the **Party Contact** in the Parties section of **Matter Details**.
- If you have someone in your organisation that will also work on a matter, they can be setup to be a secondary contact which provides visibility to the matter.
- A Super User in your organisation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

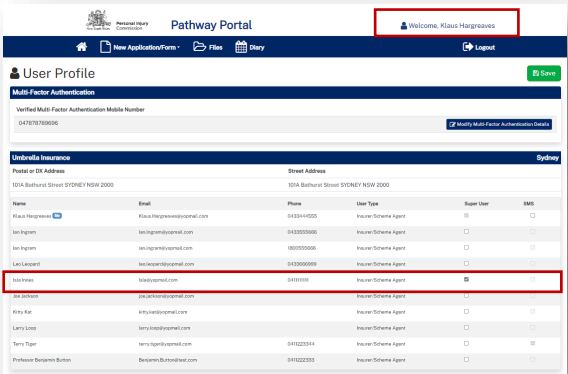
- Application Forms:** A table listing application forms with columns for Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. Two forms are listed: M199/23-51-1 (Form M51-Medical assessment) and M199/23-62-1 (Form M62-General Assessment).
- M199/23-51-1 Max Rice v Umbrella Insurance:** A table showing details for this application, including Date Filed (5/04/2023), Application Type (Form M51-Medical assessment), Issue/Dispute Type (Degree of permanent impairment), Status (Closed), Next Allocation (Ninovic, Vera), and Application Owner (Ninovic, Vera).
- M199/23-62-1 Max Rice v Umbrella Insurance:** A table showing details for this application, including Date Filed (21/04/2023), Application Type (Form M62-General Assessment), Issue/Dispute Type (Damages Assessment), Status (Stood over list-medical dispute not yet finalised), Stood Over Expiry Date (21/10/2023), Next Allocation (Barake, Ehab), and Application Owner (Barake, Ehab).
- Parties:** A table listing parties with columns for Party Role, Party Name, Party Type, Party Contact, and Representative. The 'Respondent' row is highlighted with a red box, showing 'Umbrella Insurance' as the Party Name, 'Insurer / Scheme Agent' as the Party Type, and 'Hargreaves, Klaus D' as the Party Contact.
- Messages:** A section indicating there are no open message threads.
- Documents:** A section for document management.

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 ✗ Cannot see allocations in Diary 	

Super Users

How to add/remove Super Users

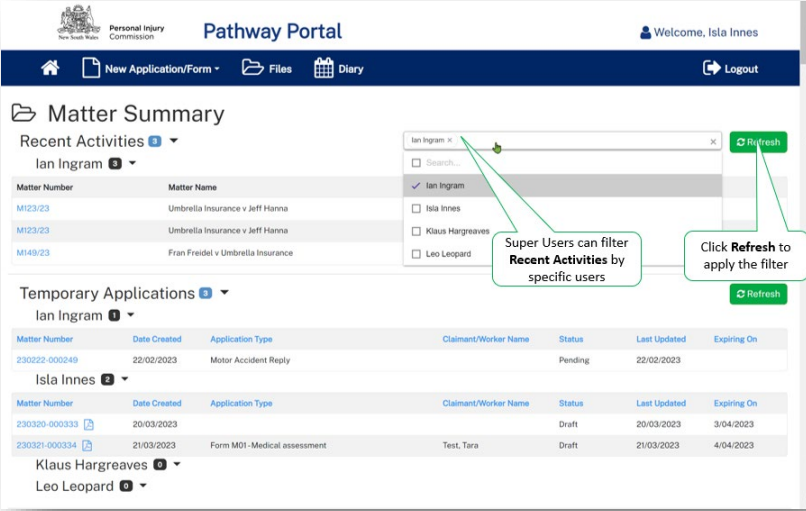
Instruction	Page
<p>Add/Remove a Super User</p> <p>A super user can add and remove other super users:</p> <ul style="list-style-type: none"> Click the name of the Super User in the top right corner Tick or untick the Super User box Click Save. 	
<p><i>In this example Isla Innes is now a Super User</i>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

What can Super Users see - Files - Recent Activities

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

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

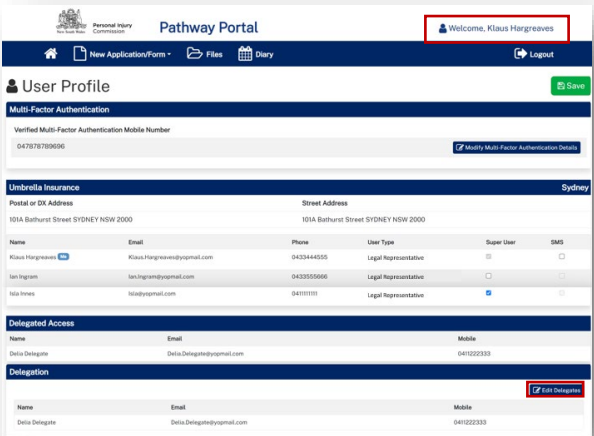
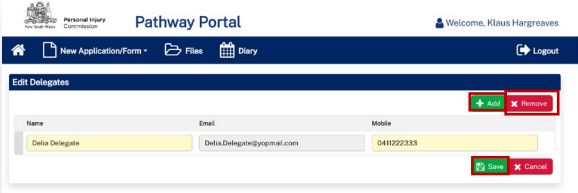
- Select users in the drop-down menu.
- Click Refresh.



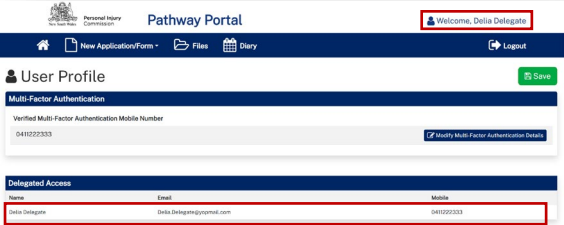
How to add/remove Delegate for a Super User

A Super User can make an administrative assistant a Delegate.

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

Instruction	Page
<p>Add/Remove Delegate for a Super User</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>Edit Delegates</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>To remove a delegate</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>What can the super user delegate do?</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>	 <p>The screenshot shows the Pathway Portal interface. At the top, it says 'Personal Injury Compensation' and 'Pathway Portal'. The user is logged in as 'Delia Delegate'. The page title is 'User Profile'. There is a 'Save' button. Below that, it shows 'Multi-Factor Authentication' with a 'Verified Multi-Factor Authentication Mobile Number' of '041022333' and a 'Verify Multi-Factor Authentication Details' button. At the bottom, there is a 'Delegated Access' table:</p> <table border="1"><thead><tr><th>Name</th><th>Email</th><th>Mobile</th></tr></thead><tbody><tr><td>Delia Delegate</td><td>Delia.Delegate@pymail.com</td><td>041022333</td></tr></tbody></table>	Name	Email	Mobile	Delia Delegate	Delia.Delegate@pymail.com	041022333
Name	Email	Mobile					
Delia Delegate	Delia.Delegate@pymail.com	041022333					

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, indexed bundle and must not exceed 500 pages.

What is the maximum document size?

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

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

Contact the Commission and follow advice.

Appendix B – Glossary of Terms

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

Appendix C – Email Notifications – When and what happens

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

Appendix D – Version Control

Version	Date	Author	Major changes	Approved by
1.0	6 June 2023	Jacqueline Mead	Initial version	Sophie Jones – Pathway Product Owner
1.1	1 August 2023	Pamela Allen	<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

1.4	6 September 2024	Nathan Johnson	<ul style="list-style-type: none"> Updated login procedure 	Melissa Golfes - Product Owner
1.5	November 2024	Leo Lopez	<ul style="list-style-type: none"> Added reference to Rule 67 Lodge a Legal Representation / Agent Change Submissions and other Correspondence Lodge an additional document after initiating application or reply 	
1.6	March 2025	Shilpashree	<ul style="list-style-type: none"> Replaced MASupport@pi.nsw.gov.au with PIC Digital Hub Portal references and link to Digital Hub user guides 	