



**Personal Injury
Commission**

Pathway Portal Legal Representative User Guide

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User Guide Overview

As a Legal Representative, Pathway Portal is your interface to the Commission's new single digital case management platform called Pathway.

What will the guide cover?

This guide will cover how to:

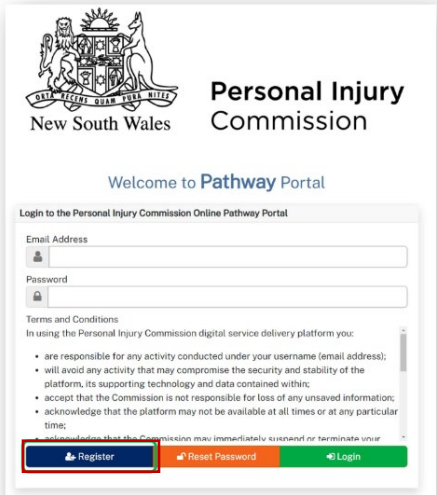
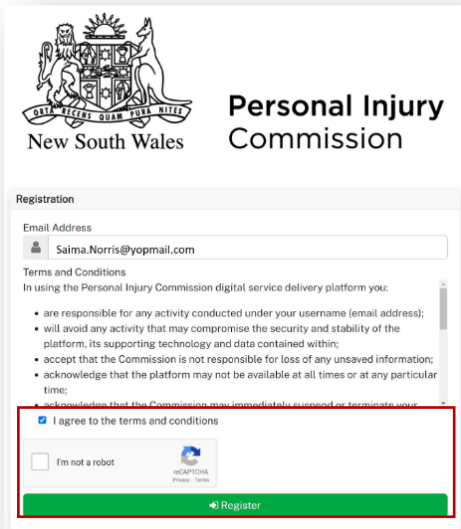
- Get started
- Navigation
- Lodge an application in Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Explain how to lodge a review and further application
- Assign a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

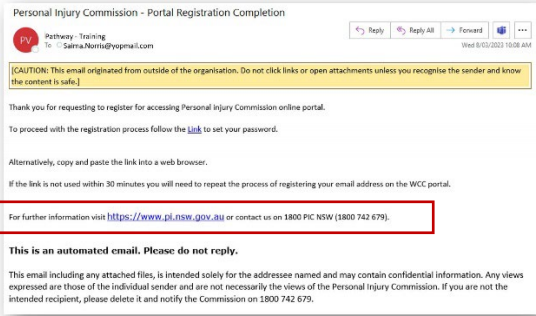
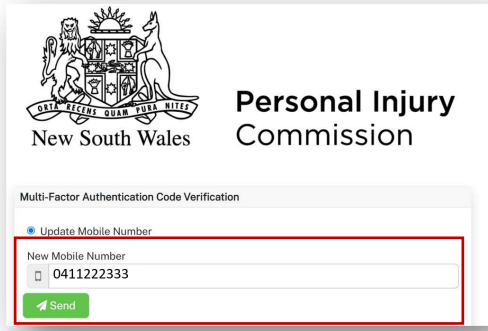
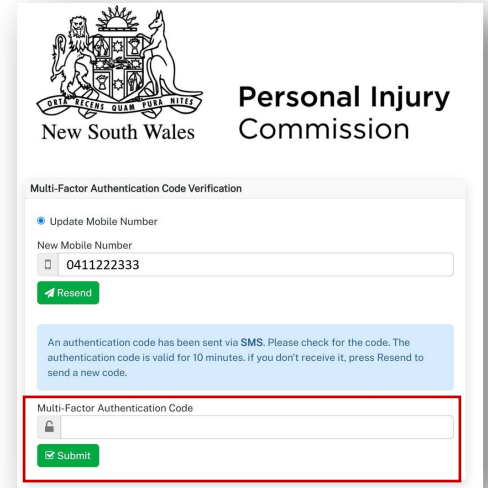
Get started

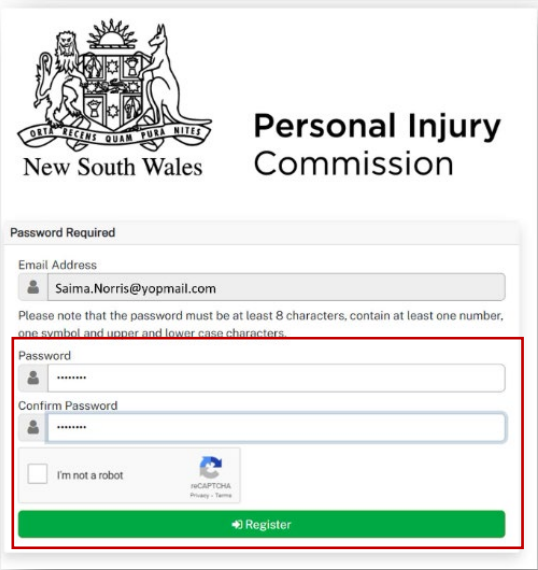
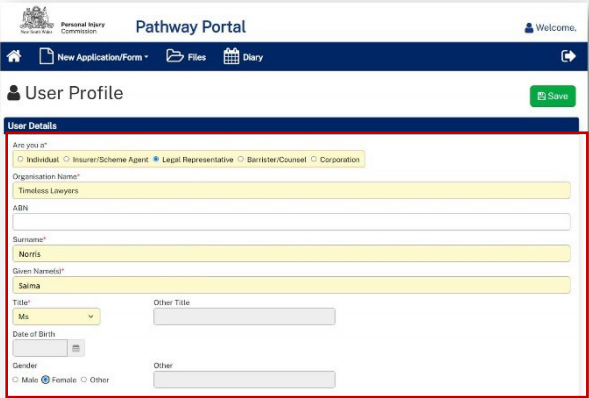
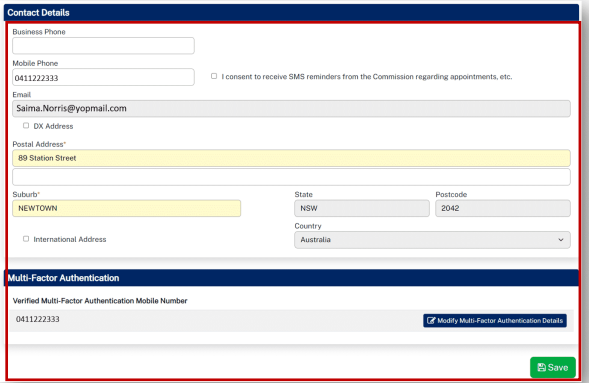
How to access and register for Pathway Portal

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

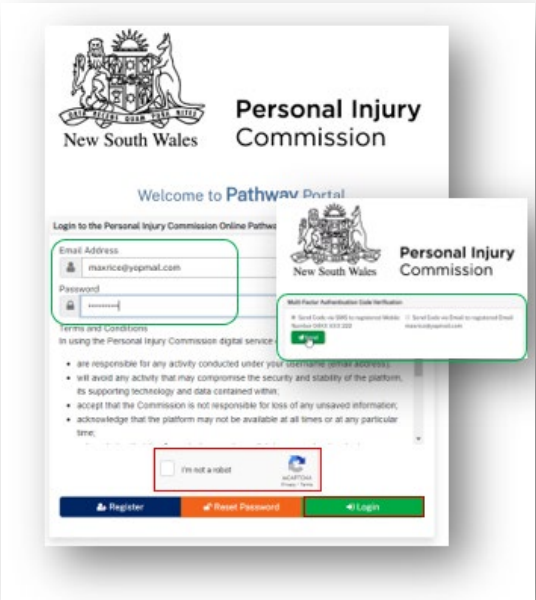
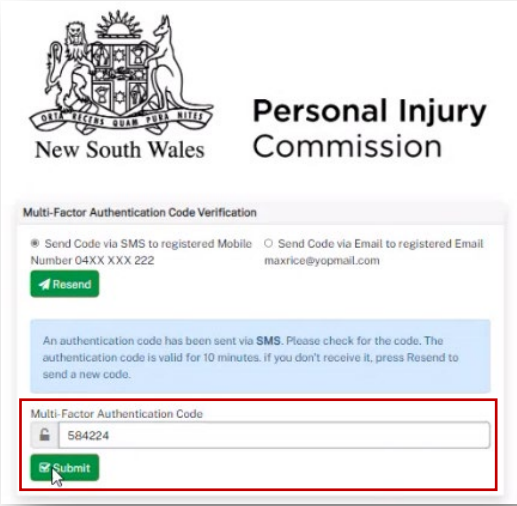
- If you are a lawyer, you will register as a **Legal Representative**.
- Administrative staff may be added as **Delegates** (see the end of this User Guide for details on how to do this). Delegates do not need to follow the instructions to register as a Legal Representative, but are added by a **Super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

Instruction	Page
<p><i>Access Pathway Portal</i></p> <ul style="list-style-type: none">• You can access Pathway Portal via a browser.• Chrome and Edge are the recommended browsers.• The weblink is found on the Personal Injury Commission website and in the first step below. <ol style="list-style-type: none">1. Click the following link: https://pathwayportal.pi.nsw.gov.au2. Click Register.	
<p><i>Register your email address</i></p> <ol style="list-style-type: none">1. Follow the prompts to register your email address.3. Tick to agree to the terms and conditions.4. Tick I'm not a robot and complete the visual reCAPTCHA test.5. Click Register. <p>➤ You will then receive an email to validate your email address.</p>	

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

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

How to Login to Pathway Portal

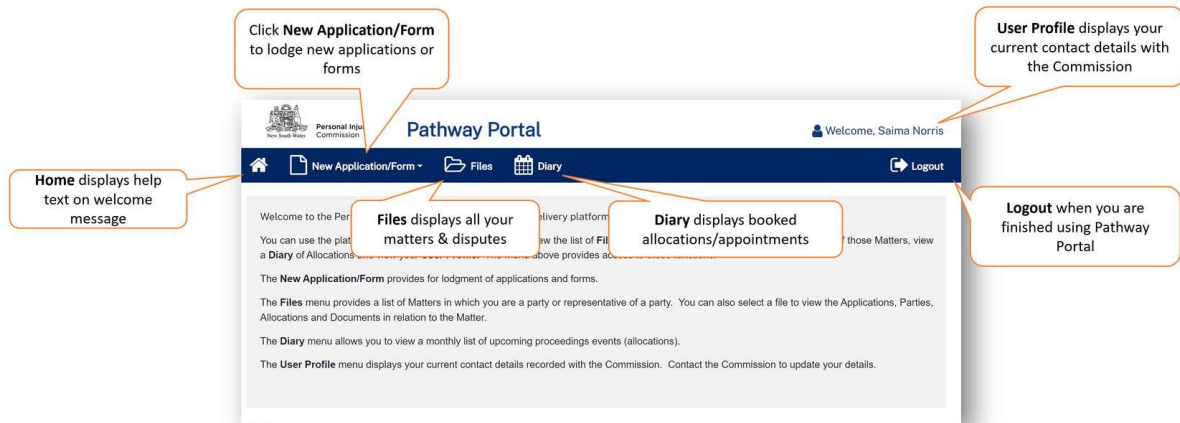
Instruction	Page
<p>12. Click the Pathway Portal link on the Personal Injury Commission website.</p> <p>13. Populate the Email Address and Password.</p> <p>14. Click Login.</p> <p>15. Tick I'm not a robot and complete the visual reCAPTCHA test.</p> <p>16. Select where you would like the Multi Factor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

Navigation

Home page

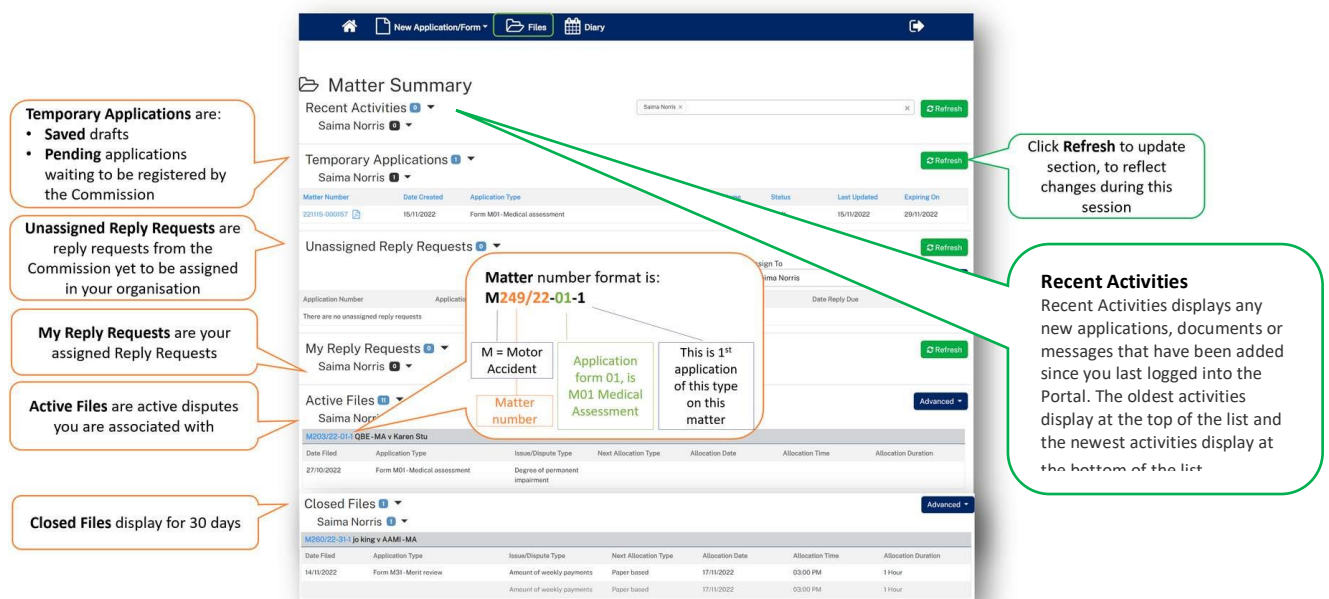
After you login to Pathway Portal the **Home page** displays:

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



Files page

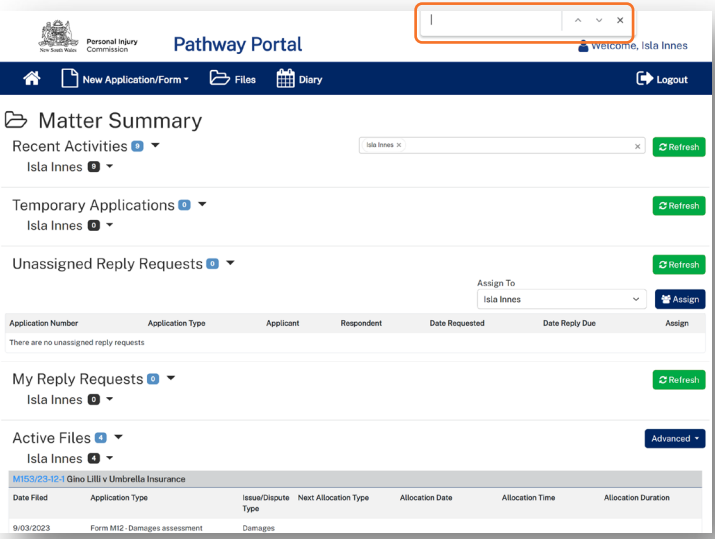
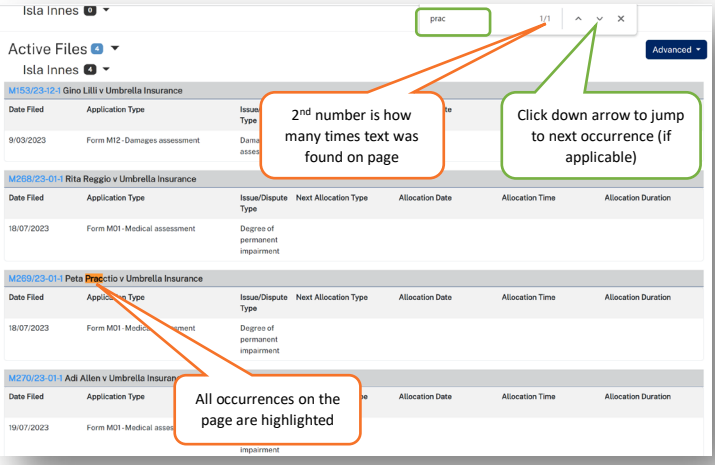
When you click the **Files** tab, the **Files** page displays all the matters where you are the party.



Filter Active Files

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

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

Instruction	Screen
<p><i>Use Ctrl+F</i></p> <p>Ctrl+F allows you to search for any text (ie letters or numbers) on the page, eg part of a party name or matter number.</p> <p>While on the Files page:</p> <ol style="list-style-type: none"> 1. Hold down the Ctrl key and press the F key on your keyboard simultaneously. <ul style="list-style-type: none"> ➤ A search box displays. 	
<ol style="list-style-type: none"> 2. Type partial party name or matter number you need to search for. 3. System jumps to first occurrence of what you're searching for (if found on the page): <ul style="list-style-type: none"> ➤ The occurrence jumped to, is highlighted orange ➤ The rest of the occurrences (if any) are highlighted yellow 4. Click the down arrow in the search box to jump to next occurrence (if/as needed). <p><i>Party name example</i></p> <ul style="list-style-type: none"> ➤ In this example, we typed part of the surname of the party, which is prac (upper/ lower case doesn't matter with Ctrl+F). ➤ Can search for a partial name (eg type poulos to search for Theofanopoulos) 	

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 'M153/23-12-1 Gino Lilli v Umbrella Insurance'. The second table is for 'M268/23-01-1 Rita Reggio v Umbrella Insurance'. The third table is for 'M269/23-01-1 Peta Pracchio v Umbrella Insurance', which is highlighted in blue. The fourth table is for 'M270/23-01-1 Adi Allen v Umbrella Insurance'. Each table has columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
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. There are two input fields: 'Application Number' with the value 'm269/23-01-1' and 'Party Name'. Below these fields are 'Allocation Date From' and 'Allocation Date To' fields. A 'Refresh' button is located at the bottom right. A callout box points to the 'Matters I'm linked to' radio button, with the text: 'Matters I'm linked to displays matters where you are a secondary contact'. Below the criteria section, a table of active files is visible, showing the same data as the previous screenshot.

- The files that match your criteria display.

The screenshot shows the 'Active Files' page after filtering. Only one table is visible, for 'M269/23-01-1 Peta Pracchio v Umbrella Insurance'. The table has columns for Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration.

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

Instruction

Screen

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.

Application Forms

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
9/03/2023	M153/23-01-1	Form M12 - Damages assessment	Lola Lovel	Claimant Legal Representative	Open
9/03/2023	M153/23-01-1	Motor Accident Reply	Grace Gilbert	Insurer/Scheme Agent	Open

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Innes, Isla (0499 959 959)	Liberty Lawyers (Grace Gilbert, 0488888888)
Applicant	Gino Lili	Claimant	040000100	Timeless Lawyers (Lola Lovel, 041999999)

Documents

Document Date	Author	Document Category and Type	File Name	Related To
07/09/23	Liberty Lawyers	Additional document - Other	DUMMY DOCUMENT FOR LEARNING PURPOSES (0.docx)	M153/23-01-1, Sender: Liberty Lawyers - Recipient:
9/03/2023	Portal	Electronic Application Form - Sealed Form M12 - Damages assessment	230309-000323.pdf	M153/23-01-1, Sender: Portal - Recipient:
9/03/2023	Portal	Electronic Application Form - Sealed Motor Accident Reply	230309-000324.pdf	M153/23-01-1, Sender: Portal - Recipient:
9/03/2023	Lola Lovel	Application - Claims assessment - bundle	claims bundle.pdf	M153/23-01-1, 08/03/2023, Form M12 - Damages assessment
9/03/2023	Grace Gilbert	Reply - Claims assessment - bundle	reply bundle.pdf	M153/23-01-1, 08/03/2023, Motor Accident Reply

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

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

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

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

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

Application Forms

Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
12/04/2023	M241/23-01-1	Form M01 - Medical assessment	Legal99 Training	Claimant Legal Representative	Open
9/05/2023	M241/23-01-2	Form M01 - Medical assessment	Training Legal99	Claimant Legal Representative	Open
9/05/2023	M241/23-01-2	Motor Accident Reply	Training Insurer99	Insurer/Scheme Agent	Open

Parties

Party Role	Party Name	Party Type	Party Contact	Representative
Respondent	Umbrella Insurance	Insurer / Scheme Agent	Insurer99, Training 9	Liberty Lawyers (Training Legal99, 0412066600)
Applicant	Peter Perkowski 00	Claimant	0411 222 333	

Documents

Document Date	Author	Document Category and Type	File Name	Related To
10/05/2023	PIC	Document - Medical Assessor referral	0318168c-4c25-4b06-b841-8490f756698f_Medical Assessor referral.docx	Sent To Liberty Lawyers
10/05/2023	PIC (Medical99 Training)	Outcome - 07 Medical Assessment certificates and reasons - Physical T1 & WPI - 2017	19231-438-6008-4646-8461-730c7991c068.pdf	M241/23-01-2, 08/05/2023, Medical examination
9/05/2023	Perkowski 01 Peter	Additional document - Application to admit late documents	dummy document bundle.docx	M241/23-01-2, Sender: Perkowski 01 Peter - Recipient:

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

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

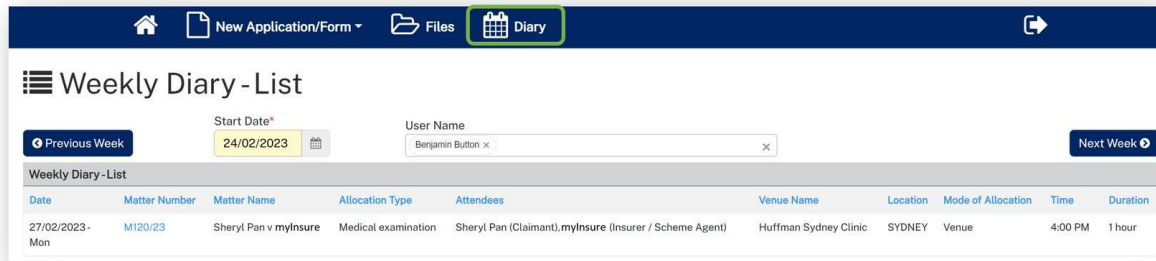
Click **New Form** to lodge a new application for this matter (eg Review)

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

Click **Assign Barrister** to add counsel

Diary

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



The screenshot displays the 'Weekly Diary - List' interface. At the top, a dark blue navigation bar contains icons for Home, New Application/Form, Files, and Diary (highlighted with a green box), and a share icon. Below the navigation bar, the page title 'Weekly Diary - List' is shown. The filter section includes a 'Previous Week' button, a 'Start Date' field with the value '24/02/2023' and a calendar icon, a 'User Name' dropdown menu with 'Benjamin Button' selected, and a 'Next Week' button. The main content area is a table titled 'Weekly Diary - List' with the following columns: Date, Matter Number, Matter Name, Allocation Type, Attendees, Venue Name, Location, Mode of Allocation, Time, and Duration. The table contains one row of data.

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

Lodge a new application

Overview



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

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

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

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

↔ **Temporary application** is a new concept

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

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

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

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

What application forms can be submitted?

Forms and schemes

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

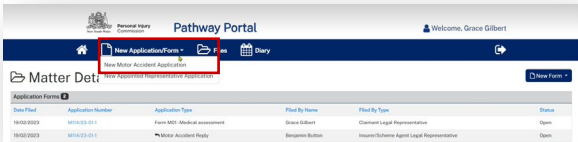
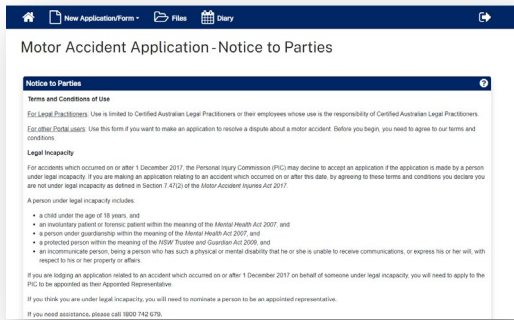
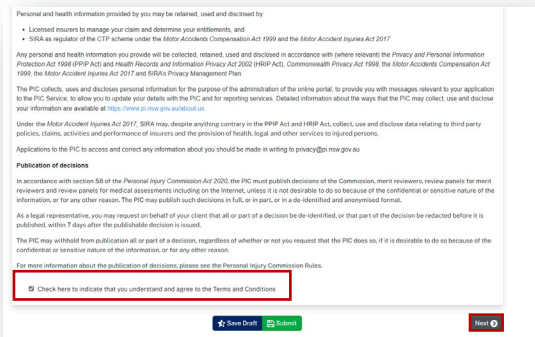
Application forms that can be submitted by parties via Pathway Portal are:

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

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

How to lodge a new application

In the following example Grace Gilbert who is the Legal Representative for the Claimant is lodging a New Motor Accident Application on behalf of the Claimant.

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

Motor Accident Application - Claim Details

23. 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.

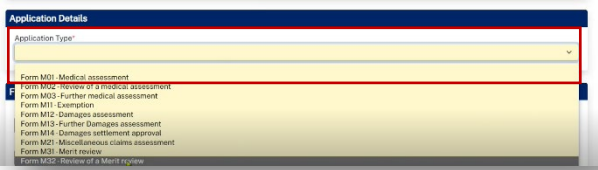

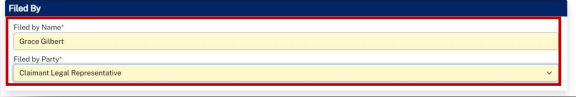
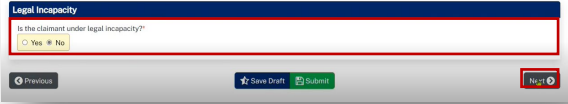
- **Claimant Date of Birth** – Type in the date or select the date from the calendar.
- **Claimant Surname** – Type in the last name of the Claimant.
- **Who is the claim against?** - Select either: An Insurer, A Corporation or An Individual.

Note: Depending on who the claim is against will determine the additional fields that you are required to complete.

- **Which Insurer is managing the Claim?** – Select the Insurer from the drop-down menu. (If Insurer has been selected in previous question).
- **Insurer not listed** - If the Insurer is not listed, tick this box and enter the Insurer's details on the subsequent page.
- **Enter the claim number** – Type in the claim number.
- **Location of Accident** – If it is a valid claim number the accident location will automatically be populated. If there is no match, you can manually type in the location.

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 you are satisfied that it is correct, there will be another check box that you can tick **Proceed without matched claim**.

Instruction	Page
<p>Application Details</p> <p>24. Complete the following:</p> <ul style="list-style-type: none"> • Application Type – Select from the drop-down menu. <p>➤ The Matters in Dispute page displays.</p>	
<p>Matters in Dispute</p> <p>25. Select the relevant disputes.</p>	
<p>Filed By</p> <p>26. Filed by Name – Type in your name/name of the Legal Representative.</p> <p>27. Filed by Party – Select Claimant Legal Representative.</p>	
<p>Legal Incapacity</p> <p>28. Is the claimant under legal incapacity? – Select No to continue.</p> <p>29. Click Next.</p> <p>➤ The Claimant Details page displays.</p>	
<p>Note: If you selected Yes to the first question - Is the Claimant under legal incapacity? and then selected No to – Has the Commission appointed to an Appointed Representative previously? You won't be able to continue with the application because you need to lodge an Appointed Representative application first.</p>	

Claimant Details

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

- **Surname** – Type in the Claimant’s last name.
- **Given Name(s)** – Type in the Claimant’s first and second names.
- **Title** – Select the Title from the drop-down menu.
- **Date of Birth** – Type in the Claimant’s Date of Birth or select the date from the calendar.
- **DX Address** – Check the box if the address is a DX address.
- **Address** – Type in the relevant fields.
- **International Address** – Tick if applicable.
- **Same as Postal Address** - Tick if the Residential address is the same as the Postal Address.
- **Teleconference Phone Number** – Type in the Claimant’s contact phone number.
- **Mobile Phone** – Type in the Claimant’s contact mobile phone number.
- **SMS Tick box** – Untick if the Claimant does not want to receive SMS reminders of appointments.
- **Email** – Type in the Claimant’s email address.

Interpreter

31. Complete the details as follows:

- **Interpreter Required** – Select if the Claimant requires an Interpreter.
- **Language of Interpreter** – Select the language from the drop-down menu.
- **Individual has a disability** – Select if applicable and add notes.
- **Claimant has a Legal Representative** – Select if applicable

Claimant Legal Representative Details

32. Complete the details as follows:

- **Existing Representative** – Select from the drop-down menu if available.
- **Firm or Organisation** – If you are representing the Claimant, these details should auto populate. Otherwise populate if required.
- Correspondence and documents to be sent to or served at address of representative – Select if applicable.
- **DX Address** – Select if applicable.
- **Postal Address** – Select if the same as the Postal address.

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

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

- **Contact Surname** – Populate the Primary contact's surname.
- **Contact Given Name (s)** – Populate the Primary contact's given name
- **Contact Teleconference Number** – Type in the best contact number for Teleconference.
- **Contact Phone** – Type in any other contact numbers.
- **Email** – Populate the Primary contact's email address.
- **Reference Number** – Populate as required.

33. Click **Next**.
 ➤ The **Insurer Details** page displays.

Instruction

Page

Form M01- Insurer Details

34. These details will auto populate because the Insurer was selected on the first page.

Insurer Details continued

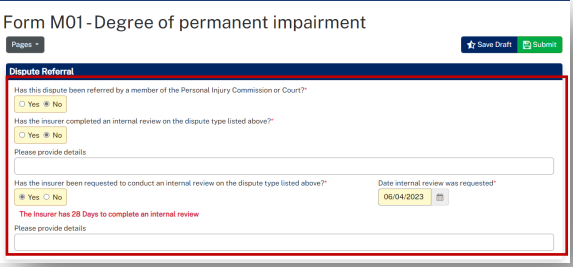
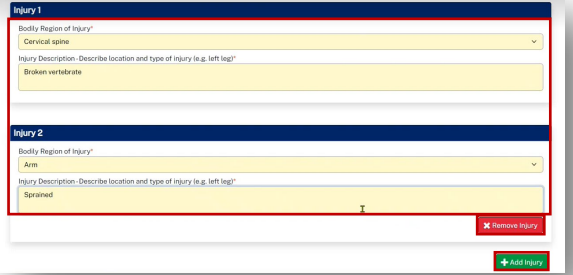
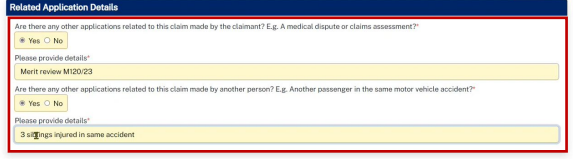
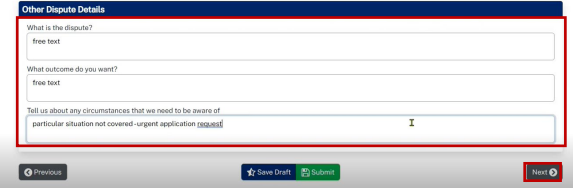
35. Complete the details as follows:
- Scroll down to add the **Contact details** if there is a particular contact for this Insurer and claim.
 - **Tick the box** if the Insurer has a Legal Representative.

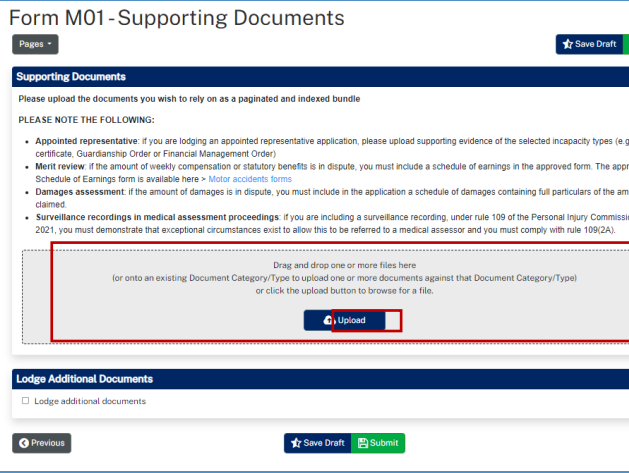
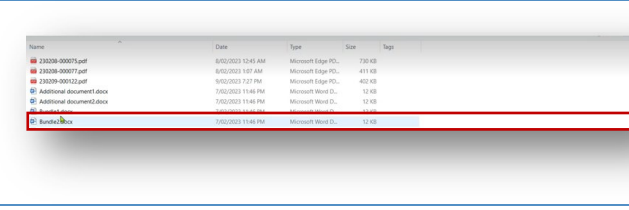
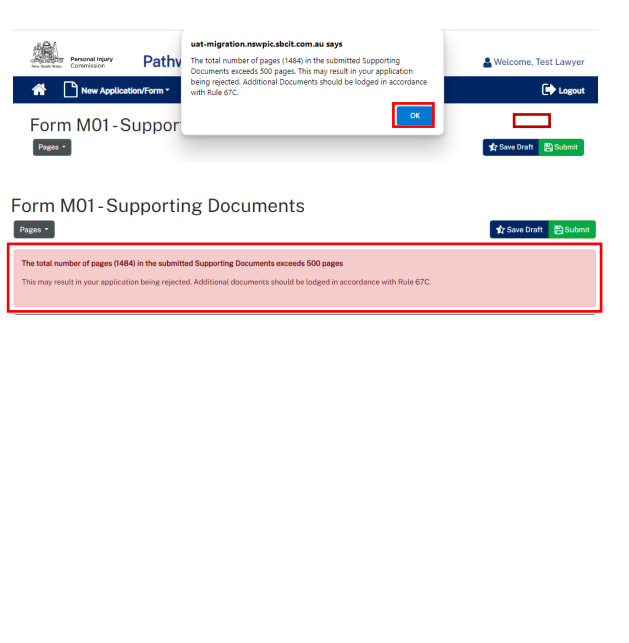
- Add in the **Insurer Legal Representative Details** name and address details.


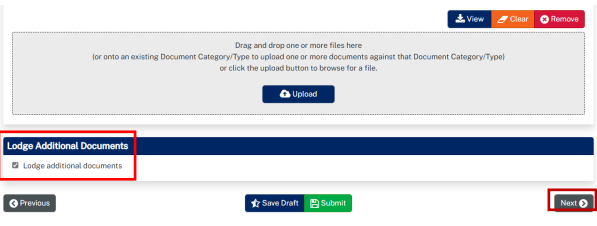
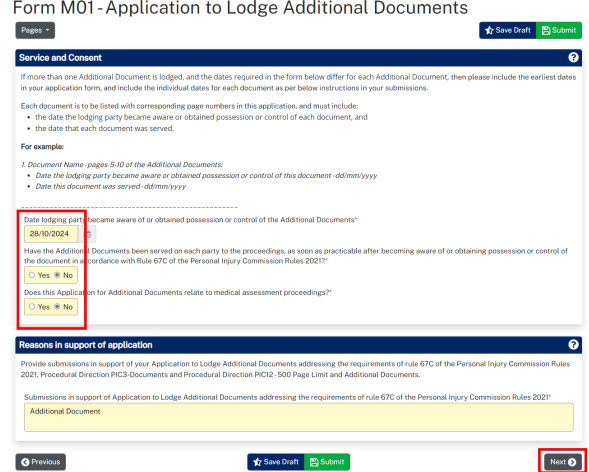
- Add in the Insurer Legal Representative contact details.

Note: You can **Add Additional Insurer** if there is more than one Insurer involved in this Matter.

36. Click **Next**.
- 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><i>Degree of Permanent Impairment</i></p> <p><i>Dispute Referral</i></p> <p>37. Select Yes/No to the questions.</p>	
<p><i>Injury 1</i></p> <p>38. Complete the details as follows:</p> <ul style="list-style-type: none"> • Add the details of Injury 1. • Click Add Injury to add another injury. • Click Remove injury to remove an injury from the page. 	
<p><i>Related Application Details</i></p> <p>39. Add in any Related Application Details if applicable.</p>	
<p><i>Other Dispute Details</i></p> <p>40. Add in any Other Dispute Details we need to be aware of.</p> <p>41. Click Next.</p> <p>➤ The Supporting Documents page displays.</p>	

Instruction	Page
<p>Supporting Documents</p> <p>The Supporting Documents page provides information about what you need to lodge for certain application types.</p> <p>Note: Supporting evidence is to be submitted as a single indexed and paginated bundle & should not exceed 500 pages on certain initiating applications. (Refer to PIC Rule 67)</p> <p>42. Click Upload or drag and drop the documents onto the page.</p>	
<p>43. Select the document and click Open.</p>	
<p>Note: If the supporting document exceeds 500 pages a warning message will be displayed.</p> <p>Continuing to submit may result in the application being rejected by the Commission.</p> <p>To correct, re-upload supporting document under 500 pages.</p> <p>Dispute types excluded from the 500-page limit are:</p> <ul style="list-style-type: none"> • Medical reviews and appeals • Merit reviews and merit review panels • Settlement approvals • Presidential appeals • Expedited assessments • Certain work injury damages disputes 	

<p><i>What are the document requirements?</i></p>	<p>See Appendix A – Document requirements for information on the acceptable file types and document requirements.</p>
<p>44. Add in the Document Details:</p> <ul style="list-style-type: none"> • Document Type – Select from the drop-down menu. If a bundle is uploaded, select the application type – bundle as the document type, e.g., Medical dispute - bundle. • Author – Type in your name. • Date of Document – Type in the date of upload or select the date from the calendar. 	
<p><i>When you need to add more than 500 pages of supporting documents to your initiating application</i></p> <p>45. Tick Lodge Additional Documents 46. Click Next.</p> <p>The Service and Consent page displays.</p>	
<p><i>Lodge Additional Documents</i></p> <p>47. Provide answers to the Service and Consent questions.</p> <p>Note: Refer to the help text on the screen if your bundle contains multiple documents with varying dates.</p> <p>Note: If the additional documents relate to medical proceedings, evidence of consent should be attached on the supporting documents page.</p> <p>48. Click Next.</p> <p>➤ The Supporting Documents page displays</p> <p>49. Upload your additional documents.</p> <p>50. Add in the Document Details.</p> <p>51. Click Next.</p>	<p>Form M01-Application to Lodge Additional Documents</p> 

Instruction

Form M01 – Certification and Signature

You can now either **Save Draft** – see **Save Draft** below or **Submit** if the application is good to go see **Submit** below.

Save Draft

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

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

Page

Matter Number	Date Signed	Application Type	Claimant/Member Name	Status	Last Updated	Expiry Date
2023020002	20/02/2023	Form M01 - Application for appointment representation	Shawn, Sandy	Draft	20/02/2023	6/12/2023
2023020003	20/02/2023	Form M01 - Medical assessment	Wong, Mica	Pending	20/02/2023	

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

Submit

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

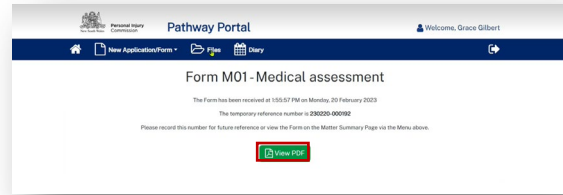
Once you have submitted the application, it will go to the **Commission Registry** as a **Temporary Application**, and it will appear on your **Temporary Applications List**.

Instruction

Page

Form M01 - Medical Assessment

54. Click **View PDF** to view and download the application.



Temporary Applications

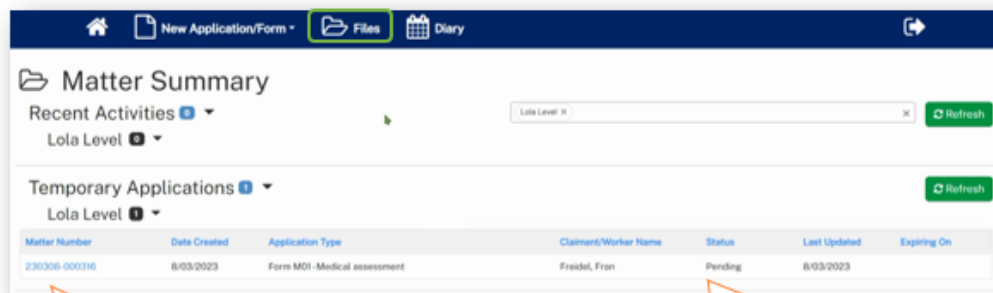
55. Go to **Files** and **Temporary Applications** to see the temporary application. You can download the PDF by clicking the **blue temporary application link**.



Note: that the status is now **Pending**. If you are unable to see the application, click **Refresh**.

You will receive an email to advise that a temporary application has been submitted.

Temporary Applications



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

Status of:

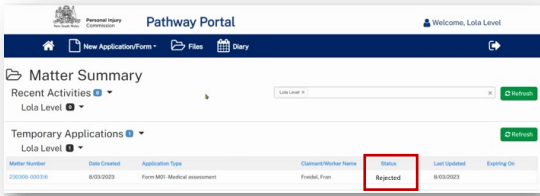
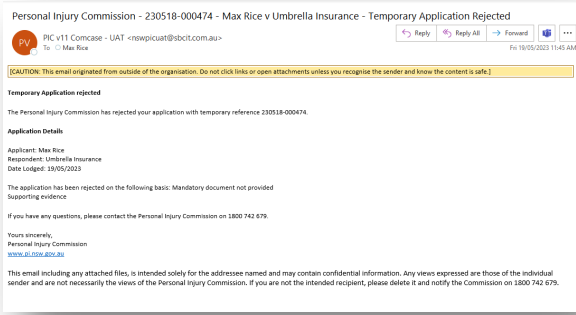
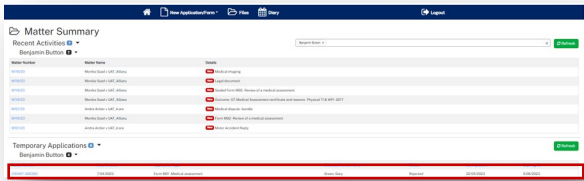

- **Pending** = temporary application submitted to the Commission
- **Draft** = you have saved the application to finish later
- **Rejected** = the Commission has rejected the application, refer to the email notification for reason

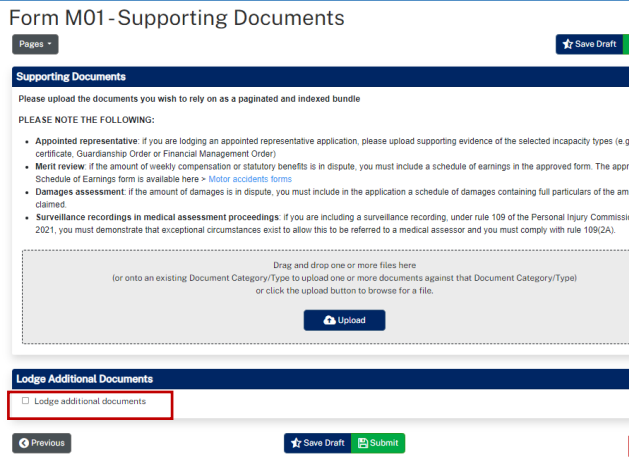
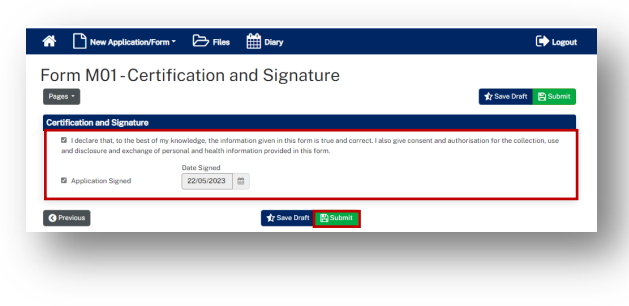
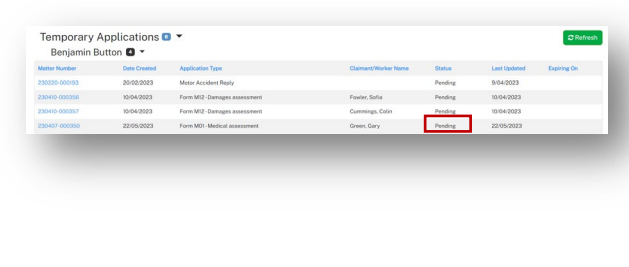
- Only the filing party will be able to see the temporary application in Pathway Portal.
- When the application has been registered by the Commission it will then be shared with the respondent who needs to lodge a reply.

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

Instruction	Page																														
<p>61. Click Upload to upload the supporting document bundle (if this was the reason for rejection) and click Next.</p> <p>Note: If your application was rejected for having supporting documents over 500 pages,</p> <p>62. Remove the document</p> <p>63. Split the document offline</p> <p>64. Re-upload the first bundle (up to 500 pages)</p> <p>65. Select the 'Lodge Additional Documents' checkbox</p>																															
<p>66. 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 Closed</th> <th>Application Type</th> <th>Claimant/Worker Name</th> <th>Status</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td>230030-00089</td> <td>20/02/2023</td> <td>Motor Accident Reply</td> <td></td> <td>Pending</td> <td>9/04/2023</td> </tr> <tr> <td>230410-00036</td> <td>10/04/2023</td> <td>Form M02 - Damages assessment</td> <td>Fraser, Sofia</td> <td>Pending</td> <td>10/04/2023</td> </tr> <tr> <td>230410-00037</td> <td>10/04/2023</td> <td>Form M02 - Damages assessment</td> <td>Cummings, Colin</td> <td>Pending</td> <td>10/04/2023</td> </tr> <tr> <td>230407-00030</td> <td>22/05/2023</td> <td>Form M01 - Medical assessment</td> <td>Green, Gary</td> <td>Pending</td> <td>22/05/2023</td> </tr> </tbody> </table>	Matter Number	Date Closed	Application Type	Claimant/Worker Name	Status	Last Updated	230030-00089	20/02/2023	Motor Accident Reply		Pending	9/04/2023	230410-00036	10/04/2023	Form M02 - Damages assessment	Fraser, Sofia	Pending	10/04/2023	230410-00037	10/04/2023	Form M02 - Damages assessment	Cummings, Colin	Pending	10/04/2023	230407-00030	22/05/2023	Form M01 - Medical assessment	Green, Gary	Pending	22/05/2023
Matter Number	Date Closed	Application Type	Claimant/Worker Name	Status	Last Updated																										
230030-00089	20/02/2023	Motor Accident Reply		Pending	9/04/2023																										
230410-00036	10/04/2023	Form M02 - Damages assessment	Fraser, Sofia	Pending	10/04/2023																										
230410-00037	10/04/2023	Form M02 - Damages assessment	Cummings, Colin	Pending	10/04/2023																										
230407-00030	22/05/2023	Form M01 - Medical assessment	Green, Gary	Pending	22/05/2023																										

Replies

How to complete a Reply - Respondent



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

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

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

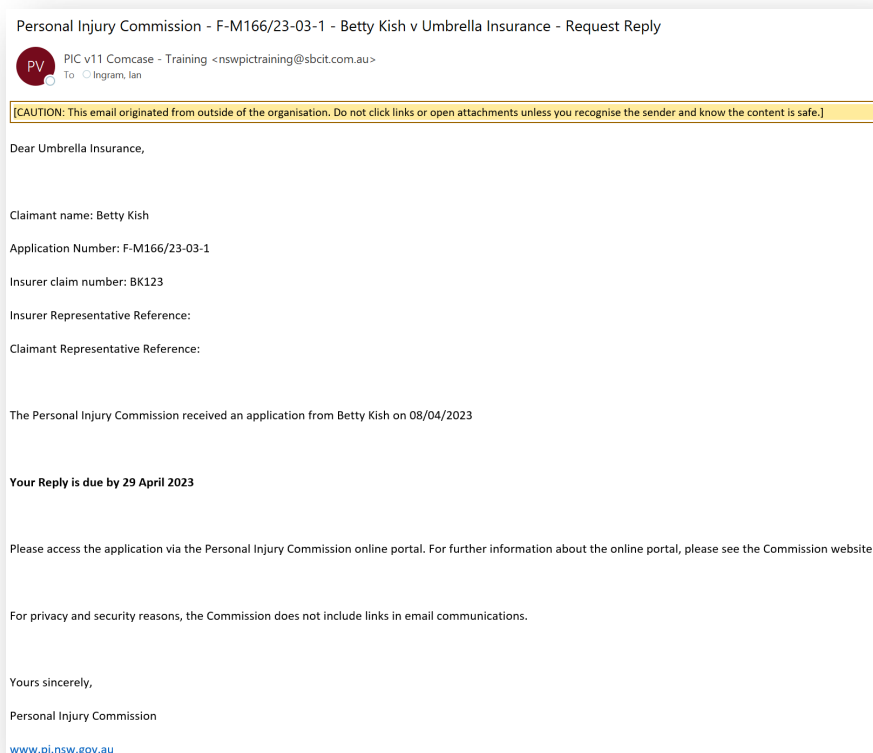
- Displays in the **Temporary Applications** section of Pathway Portal
- Has a temporary number.

↔ Assigning a reply request to someone is a new concept

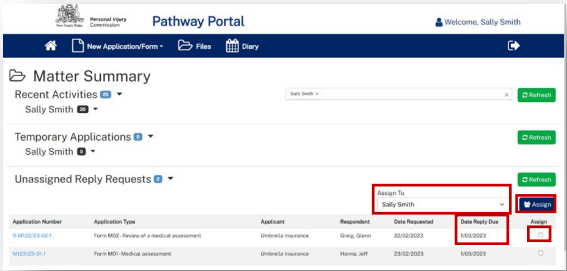
↔ Reply is a **Temporary application** until reviewed then registered by the Commission

Reply Request Notification

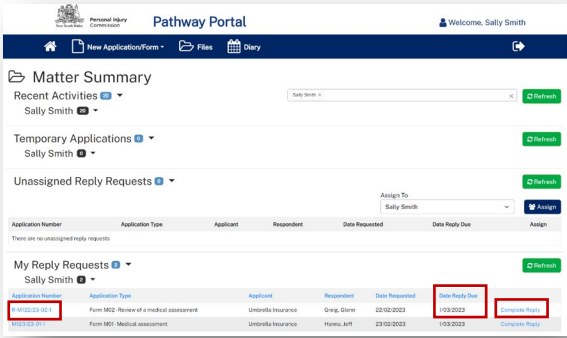
When a reply has been requested the respondent (or their legal representative) receives an email notification to advise that an application has been received by the Commission, the date the reply is due and to access the Pathway Portal to view the application and submit the reply.



How to Assign the Reply Request

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

How to complete a Reply

Instruction	Page
<p>My Reply Requests are your assigned Reply Requests</p> <p>67. To respond to the reply request, complete the following:</p> <ul style="list-style-type: none"> • Click the blue application number link and review the Matter Details, including the parties, application form and supporting documents. • When ready, click Complete Reply to reply from either the Matter Summary page or the Matter Details page. <p>68. This will generate the Motor Accident Application – Reply form which you need to complete and submit.</p> <p>Note: Be mindful of the Date Reply Due</p>	

Instruction

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

Page

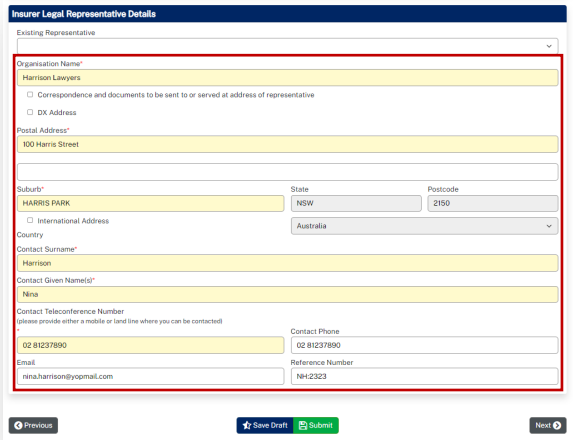
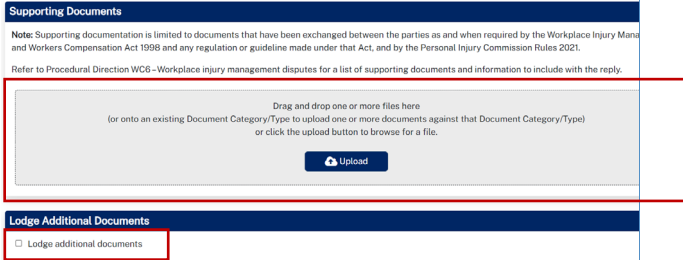
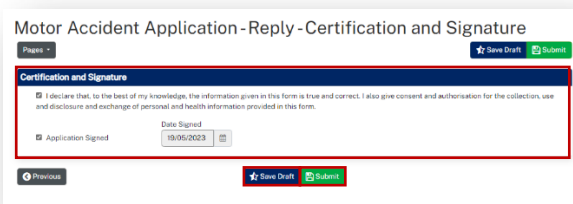
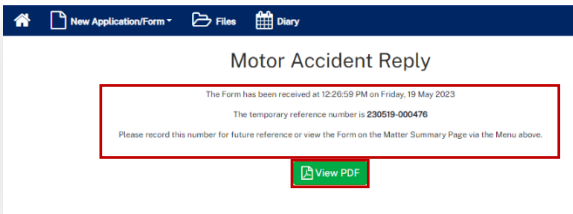
The screenshot shows the 'Notice to Parties' page in the Pathway Portal. The page title is 'Motor Accident Application - Reply - Notice to Parties'. It includes sections for 'Terms and Conditions of Use', 'Legal Incapacity', and 'Legal Representative'. The 'Legal Incapacity' section lists criteria for legal incapacity, such as being a child under 18, an involuntary patient, or a person under guardianship. At the bottom, there is a checkbox for 'Check here to indicate that you understand and agree to the Terms and Conditions' and a 'Next' button.

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

70. Enter the **Filed by Name**, **Filed by Party**, and the **reply to the dispute**. If more than one dispute is listed, enter a reply to each dispute.

71. Click **Next**.

The screenshot shows the 'Motor Accident Application - Reply - Reply' page. It includes sections for 'Application Details', 'Filed By', and 'Dispute: Damages assessment'. The 'Filed By' section has fields for 'Filed by Name' (Max Rice) and 'Filed by Party' (Sydney Corporation Pty Ltd). The 'Dispute: Damages assessment' section has a dropdown for 'Dispute Type' (Damages assessment) and a text area for 'Reply to the dispute'. At the bottom, there are buttons for 'Previous', 'Save Draft', 'Submit', and 'Next'.

Instruction	Page
<p>72. Complete the Claimant Details page and Legal Representative page / Insurer Details page and Legal Representative page.</p> <p>73. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.</p> <p>If you are completing the Reply on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p>	
<p>74. Upload supporting documents for the Reply, complete the Document Details and click Next.</p> <p>Note: Supporting documents must be submitted as a single indexed and paginated bundle and should not exceed 500 pages</p>	
<p>75. Sign and date the application – Submit if ready or Save Draft and have someone else review the reply before it is submitted.</p>	
<p>76. Here you can see confirmation that the Reply has been submitted.</p>	

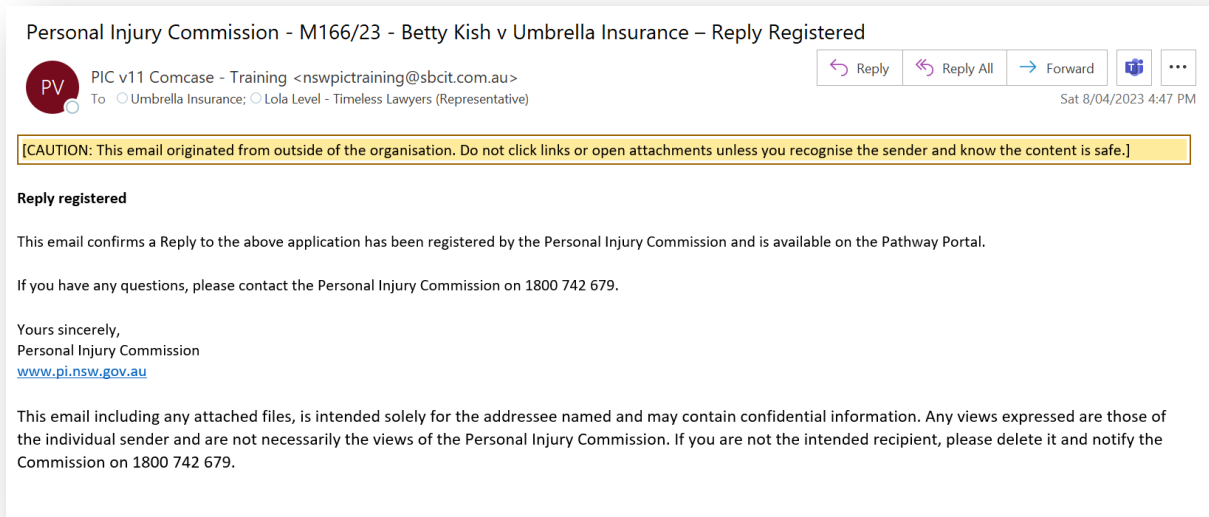
How to view the Reply

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:

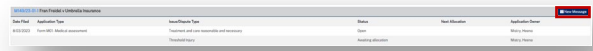
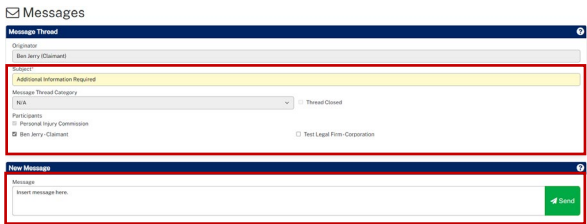
- Applicant’s Legal Representative
- Respondent’s Legal Representative or
- Unrepresented parties.



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 M166/23-01. It includes sections for Application Forms, Parties, Messages, and Documents. The Documents section lists several files, including a 'Sealed Form M01 - Medical assessment' and a 'Reply - Medical dispute - bundle'.</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>	
<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.	

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 'New' badge is present next to the first subject line. A 'View Open Messages' button is located in the top right corner.

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

Callout 1: New badge indicates a new message in the thread

Callout 2: Category for incoming messages will be:
•
•
•
N/A Category indicates thread was initiated by you

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 only displays threads that are open

How to respond to messages

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

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

✉ Messages

Message Thread ?

Originator
Ben Jerry (Claimant)

Subject
Additional Information Required

Message Thread Category
N/A Thread Closed

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


[Print Message Thread](#)

New Message ?

Message

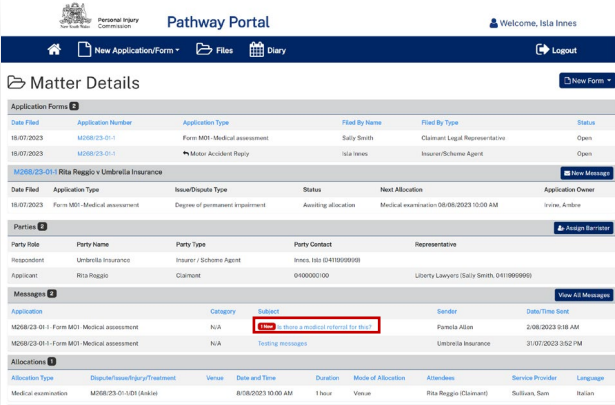
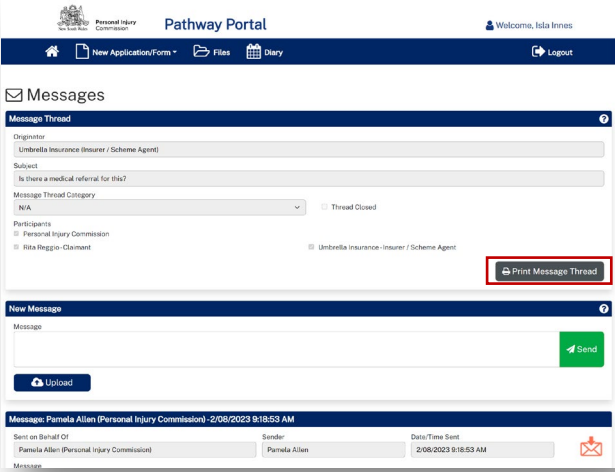
[Send](#)

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

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

How to download a message thread

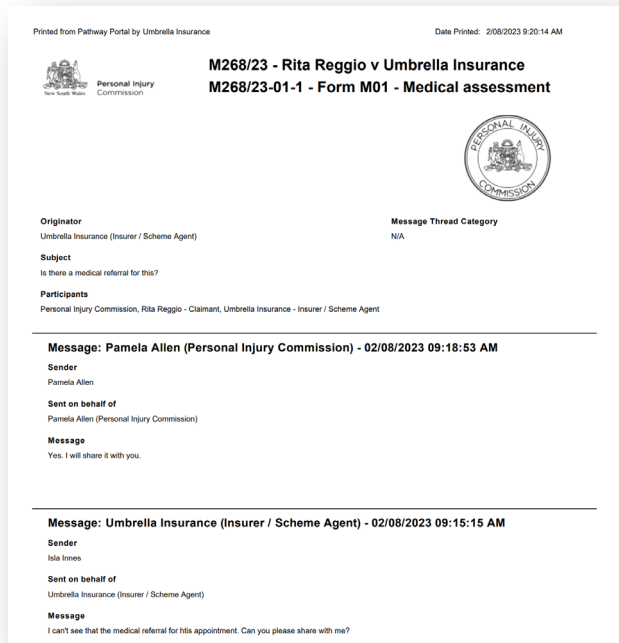
You can download message threads from Pathway Portal.

Instruction	Page															
<p>1. From the Matter Details page click the blue subject link to view message thread.</p>	 <p>The screenshot shows the 'Matter Details' page in Pathway Portal. It includes sections for 'Application Forms', 'Parties', and 'Messages'. The 'Messages' table has a red box highlighting the subject 'Medical assessment for Rita Reggato'.</p> <table border="1"><thead><tr><th>Application</th><th>Category</th><th>Subject</th><th>Sender</th><th>Date/Time Sent</th></tr></thead><tbody><tr><td>M268/23-01-1 Form MCI - Medical assessment</td><td>N/A</td><td>Medical assessment for Rita Reggato</td><td>Pamela Allen</td><td>2/08/2023 9:18 AM</td></tr><tr><td>M268/23-01-1 Form MCI - Medical assessment</td><td>N/A</td><td>Testing Message</td><td>Umbrella Insurance</td><td>31/07/2023 3:52 PM</td></tr></tbody></table>	Application	Category	Subject	Sender	Date/Time Sent	M268/23-01-1 Form MCI - Medical assessment	N/A	Medical assessment for Rita Reggato	Pamela Allen	2/08/2023 9:18 AM	M268/23-01-1 Form MCI - Medical assessment	N/A	Testing Message	Umbrella Insurance	31/07/2023 3:52 PM
Application	Category	Subject	Sender	Date/Time Sent												
M268/23-01-1 Form MCI - Medical assessment	N/A	Medical assessment for Rita Reggato	Pamela Allen	2/08/2023 9:18 AM												
M268/23-01-1 Form MCI - Medical assessment	N/A	Testing Message	Umbrella Insurance	31/07/2023 3:52 PM												
<p>2. Click the Print Message Thread button.</p>	 <p>The screenshot shows the 'Messages' page in Pathway Portal. It displays message details and a 'Print Message Thread' button highlighted with a red box.</p> <p>Print Message Thread</p>															

Instruction

Page

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



Case Management

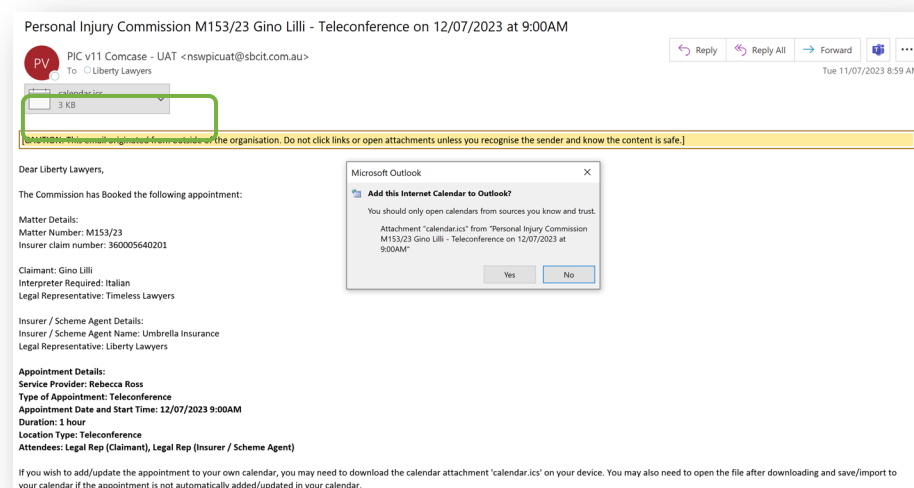


When the Commission allocates the dispute to a decision maker an email notification with date, time, venue, address and required attendees for the allocation is automatically sent to:

- 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 1" with the following columns: Allocation Type, Dispute/Issue/Injury/Treatment, Venue, Date and Time, Duration, Mode of Allocation, Attendees, Decision Maker, and Language. A single row of data is visible, representing a medical examination appointment.

Allocation Type	Dispute/Issue/Injury/Treatment	Venue	Date and Time	Duration	Mode of Allocation	Attendees	Decision Maker	Language
Medical examination	M270/Z3-01-1/D1 (Arm)	PIC Medical Suites, Level 8/1 Oxford Street, SURRY HILLS NSW	4/09/2023 9:00 AM	1 hour	Venue	Adi Allen (Claimant)	Sullivan, Sam	

Allocation type is the type of appointment (eg Teleconference, Medical Examination, Paper based)

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

Attendees displays who needs to attend, eg if it's a Teleconference the legal representative may need to attend but not Claimant/Insurer

Decision Maker is the member or medical assessor

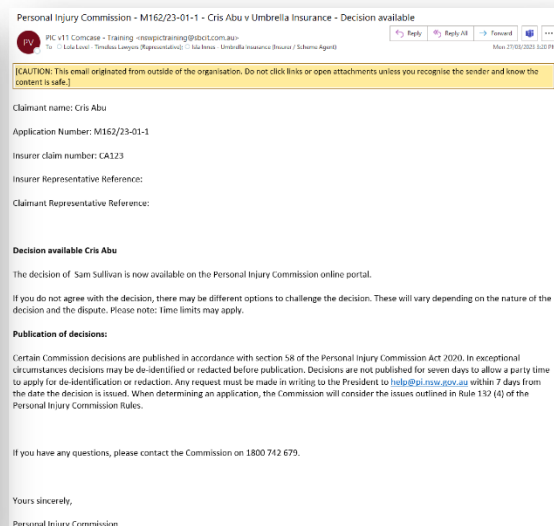
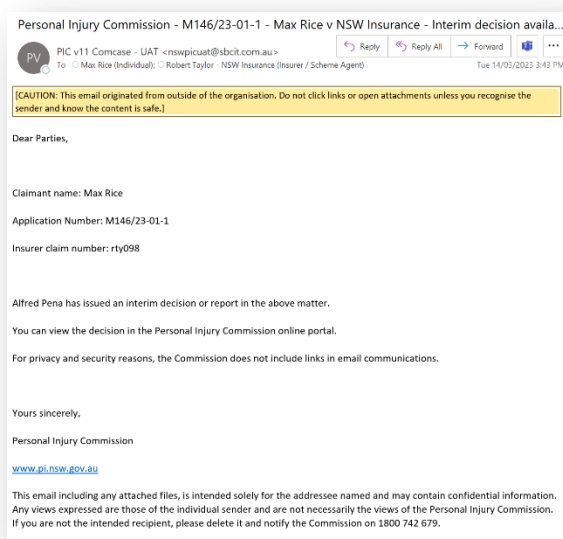
Assess and Decide



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

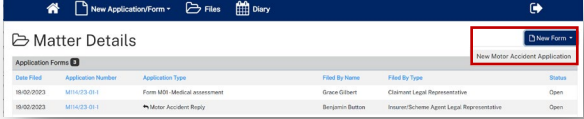

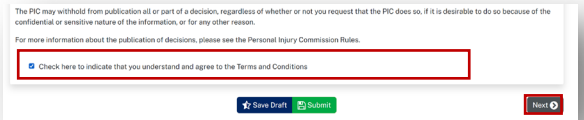
- Seals the outcome document
- Sends the Legal Representative(s) and Unrepresented parties an email notification that the decision is available on Pathway Portal.

Decision available email notification



How to lodge an application for a Review

If you need to apply for a review of a decision in Pathway Portal, complete the following:

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

Claim Details

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

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

This example selects M02 – Review of medical assessment

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

5. Click **Next**.

78. The **Claimant Details** page displays.

Form M02 - Claim Details

How to lodge an application for a Review continued

Instruction

Claimant Details

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

Page

Form M02 - Claimant Details

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



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

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

79. The **Insurer Details** page displays.

Instruction

Insurer Details

10. Populate the **Insurer Details** page, including the **Contact Name** details.
11. Click **Next**.

Page

Form M02 - Insurer Details

Form M02 - 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 (Hargreaves, Klauz)

Organisation Name*
Umbrella Insurance

Branch Name*
Sydney

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

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

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

80. 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

Organisation Name*
Harrison Lawyers

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

DK Address

Postal Address*
100 Harris Street

Suburb*
HARRIS PARK

State
NSW

Postcode
2150

International Address

Country
Australia

Contact Surname*
Harrison

Contact Given Name(s)*
Nina

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

Contact Phone
02 81237890

Email
nina.harrison@pymail.com

Reference Number
NH2323

Instruction

Form M02 - Panel Review of single medical assessment

14. 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.

15. Click **Next**.

81. The **Supporting Documents** page displays.

Supporting Documents

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

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

16. Click **Next**

83. The Certification and Signature page displays.

Certification and Signature

17. **Read** and **tick** the acknowledgments.

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

19. Click **Submit**.

Page

Form M02 - Panel Review of single medical assessment

Pages ▾ Save Draft Submit

Previous Decision

Matter Number of Previous Decision* M14423 Previous Decision not available for selection

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

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

Was a combined certificate issued?* Yes No

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

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

How is this material to the outcome of the decision?* It is material because...

Other Circumstances

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

Notes: []

Previous Save Draft Submit Next

Form M02 - Supporting Documents

Pages ▾ Save Draft Submit

Supporting Documents

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

PLEASE NOTE THE FOLLOWING:

- **Appointed representative:** If you are lodging an appointed representative application, please upload supporting evidence of the selected incapacity types (e.g. Birth certificate, Guardianship Order or Financial Management Order)
- **Merit review:** If the amount of weekly compensation or statutory benefits is in dispute, you must include a schedule of earnings in the approved form. The approved schedule of earnings form is available [here](#)
- **Damages assessment:** If the amount of damages is in dispute, you must include in the application a schedule of damages containing full particulars of the amount claimed
- **Surveillance recordings in medical assessment proceedings:** If you are including a surveillance recording, under rule 136 of the Personal Injury Compensation Rules 2021, you must demonstrate that exceptional circumstances exist to allow this to be referred to a medical assessor and you must comply with rule 109(2A).

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

Upload

Previous Save Draft Submit Next

Form M02 - Certification and Signature

Pages ▾ Save Draft Submit

Certification and Signature

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

Application Signed Date Signed 14/03/2023

Previous Save Draft Submit Next

Instruction

What happens after Submit?

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

Page

Matter Number	Date Closed	Application Type	Claimant/Worker Name	Status	Last Updated	Expiring On
23014-00029	14/03/2023	Form M02 - Review of a medical assessment	PPhon, Polly	Pending	14/03/2023	

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

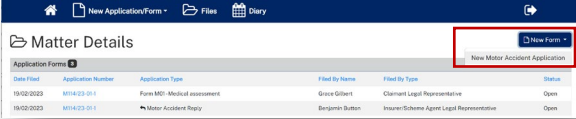

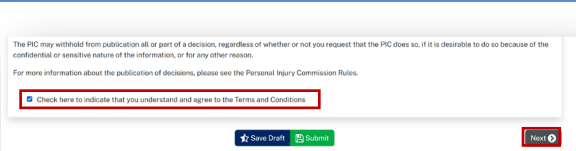
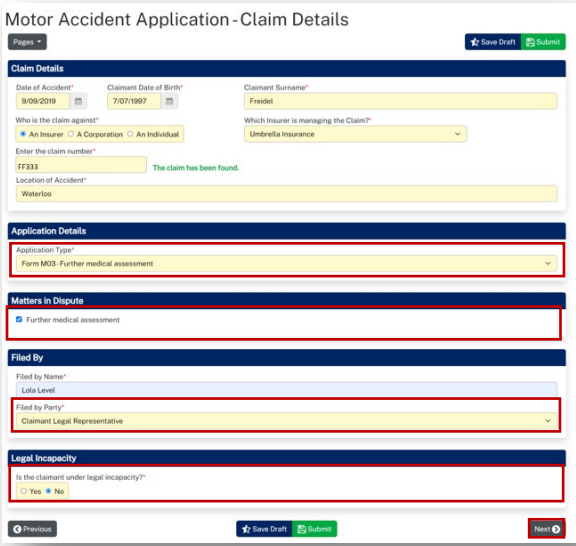
Date Filed	Application Number	Application Type	Filed By Name	Filed By Type	Status
19/02/2023	M14-03-01-1	Form M02 - Medical assessment	Grace Gilbert	Client/Legal Representative	Open
19/02/2023	M14-03-01-1	Medical Accident Reply	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open
20/02/2023	R-M14-03-01-1	Form M02 - Review of a medical assessment	Benjamin Button	Insurer/Scheme Agent Legal Representative	Open

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

Date Filed	Application Type	Issue/Dispute Type	Status	Next Allocation	Application Owner
20/02/2023	Form M02 - Review of a medical assessment	Revised Review of single medical assessment	Open		Mistry, 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>84. 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 Is the claimant under legal capacity? <p>This example selects M03 – Further medical assessment</p> <ol style="list-style-type: none"> Click Next. <p>85. The Claimant Details page displays.</p>	

Claimant Details

- Populate the **Claimant Details** page.

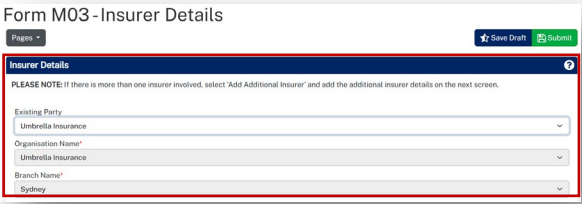
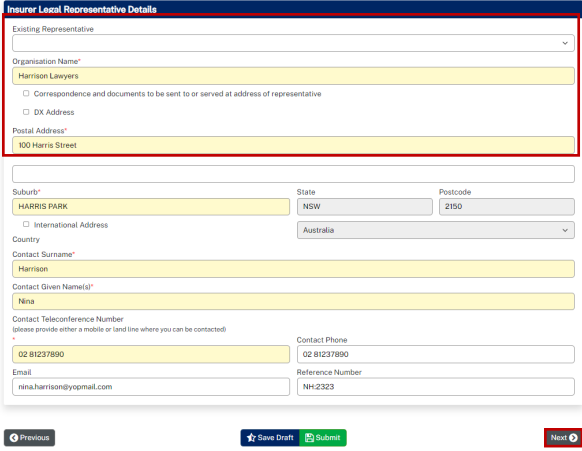
Note: You can select the Existing Party and the Existing Representative from drop down to quickly populate.

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

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

- Click **Next**.

86. The **Insurer Details** page displays.

Instruction	Page
<p>Insurer Details</p> <p>10. Populate the Insurer Details page, including the Contact Name details.</p>	
<p>Note: You can select the Existing Party and the Existing Representative from the drop down to quickly populate.</p> <p>11. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.</p> <p>12. If you are completing the application on behalf of the lawyer who is managing the matter, you will need to enter their name as the Contact Name.</p>	
<p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <p>13. Click Next.</p> <p>87. The Form M03 – Further medical assessment page displays if this is the application that was selected.</p>	

Instruction

Page

Further medical assessment

14. 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.

15. Click **Next**.

88. The **Supporting Documents** page displays.

Form M03 - Further medical assessment

Pages - Save Draft Submit

Dispute Referral

Has this dispute been referred by a member of the Personal Injury Commission or Court?
 Yes No

Previous Decision

Has this dispute been previously assessed at the DRS or the Personal Injury Commission?
 Yes No

Previous Assessment

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

Previous Decision:

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

Was a combined certificate issued?
 Yes No

Further Medical Assessment Details

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

Additional relevant information about the injury
Deterioration of the injury
Neither

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

Previous Save Draft Submit May 23 Next

Supporting Documents

89. **Upload** relevant supporting documents as a single indexed and paginated bundle that does not exceed 500 pages.

16. Click **Next**.

90. 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

Form M03 - Supporting Documents

Pages - Save Draft Submit

Supporting Documents

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

PLEASE NOTE THE FOLLOWING:

- **Appointed representative:** if you are lodging an appointed representative application, please upload supporting evidence of the selected incapacity types (e.g. Birth certificate, Guardianship Order or Financial Management Order)
- **Merit review:** if the amount of weekly compensation or statutory benefits is in dispute, you must include a schedule of earnings in the approved form. The approved Schedule of Earnings form is available here > [Motor accidents forms](#)
- **Damages assessment:** if the amount of damages is in dispute, you must include in the application a schedule of damages containing full particulars of the amount claimed.
- **Surveillance recordings in medical assessment proceedings:** if you are including a surveillance recording, under rule 109 of the Personal Injury Commission Rules 2021, you must demonstrate that exceptional circumstances exist to allow this to be referred to a medical assessor and you must comply with rule 109(2A).

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

Upload

Lodge Additional Documents

Lodge additional documents

Previous Save Draft Submit Next

Certification and Signature

17. **Read** and **tick** the acknowledgments.

Then either:

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

19. Click **Submit**.

Form M03 - Certification and Signature

Form M03 - Certification and Signature

Pages - Save Draft Submit

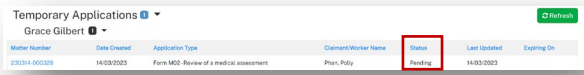

Certification and Signature

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

Date Signed
 Application Signed

Previous Save Draft Submit

What happens after the Further Assessment application has been submitted?

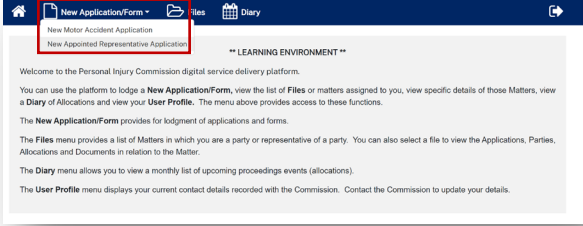

Instruction	Page
<p>The Further Assessment Temporary Application displays with Status of Pending until it is registered by the Commission.</p>	 <p>The screenshot shows a table titled 'Temporary Applications' for user 'Grace Gilbert'. The table has columns: Matter Number, Date Created, Application Type, Client/Matter Name, Status, Last Updated, and Expire On. A single row is visible with the following data: Matter Number: 030294-000208, Date Created: 14/03/2023, Application Type: Form M02- Review of a medical assessment, Client/Matter Name: Plan Policy, Status: Pending (highlighted with a red box), Last Updated: 14/03/2023, and Expire On: (empty).</p>
<p>Once the application is registered it displays within the Matter Details for the originating dispute and has matter number prefixed with F.</p>	 <p>The screenshot shows a table titled 'Active Files' for user 'Benjamin Burton'. The table has columns: Date Filed, Application Type, Issue/Dispute Type, Next Allocation Type, Allocation Date, Allocation Time, and Allocation Duration. A single row is visible with the following data: Date Filed: 23/05/2023, Application Type: Form M02- Further medical assessment, Issue/Dispute Type: Further medical assessment, Next Allocation Type: (empty), Allocation Date: (empty), Allocation Time: (empty), and Allocation Duration: (empty). The 'Application Type' and 'Issue/Dispute Type' cells are highlighted with a red box.</p>

Lodge Appointed Representative Application

How to lodge an Appointed Representative Application

For any 2017 Scheme applications, a claimant who is under a legal incapacity (such as a child) must have an appointed representative.

The **New Appointed Representative Application** must be lodged and processed first.

Instruction	Page
<p>To lodge an Appointed Representative Application, complete the following:</p> <ol style="list-style-type: none">1. Select the New Appointed Representative Application from the New Application/Form menu. <p>➤ The Form 41 – Notice to Parties page displays.</p>	 <p>The screenshot shows the top navigation bar of the Personal Injury Commission digital service delivery platform. The 'New Application/Form' menu is highlighted with a red box, and it contains three options: 'New Motor Accident Application', 'New Appointed Representative Application', and 'New Appointed Representative Application'. Below the navigation bar, there is a 'LEARNING ENVIRONMENT' section with a welcome message and instructions on how to use the platform.</p>
<p>Form 41 - Notice to Parties</p> <ol style="list-style-type: none">2. Read the Terms and Conditions.3. Scroll to the bottom and tick to agree to Terms and Conditions and click Next. <p>➤ The Form M41 – Claim Details page displays.</p>	 <p>The screenshot shows the 'Form M41 - Notice to Parties' page. The page title is 'Form M41 - Notice to Parties'. Below the title, there is a 'Pages' dropdown menu and 'Save Draft' and 'Submit' buttons. The main content area is titled 'Notice to Parties' and contains the following sections: 'Terms and Conditions of Use', 'For Legal Practitioners', 'For other Parties', 'Legal Incapacity', and a checkbox for 'Check here to indicate that you understand and agree to the Terms and Conditions'. The checkbox is highlighted with a red box. At the bottom of the page, there are 'Save Draft', 'Submit', and 'Next' buttons.</p>

Instruction

Page

Form M41 – Claim Details

4. Populate the **Claim Details**, specifically the **Legal Incapacity** section.
 5. Select Yes to the question is the Claimant under Legal Incapacity and indicate the type of legal incapacity.
 6. Click **Next**.
- The **Form M41 – Claimant Details** page displays.

Form M41 - Claim Details

Pages Save Draft Submit

Claim Details

PLEASE NOTE: If this claim is against a corporation or individual, enter a reference number or 'not applicable' for the claim number. If the insurer is not listed, you can enter the details on the third page of the application under 'insurer details'.

Date of Accident* 1/05/2022 Claimant Date of Birth* 9/09/2010 Claimant Surname* Sterling

Who is the claim against? An Insurer A Corporation An Individual Which Insurer is managing the Claim? Insurer not listed

Umbrella Insurance

Enter the claim number* JJJ111 The claim could not be found. Proceed without matched claim

Please review the claim details entered and correct any errors. If the details are correct, select the "Proceed without matched claim" checkbox to continue with the application.

Location of Accident* Tuggerah

Filed by

Filed by Name* Max Rice

Filed by Party* Claimant Appointed Representative

Legal Incapacity

Are you lodging this application for someone else because of their legal incapacity? Yes No

Please indicate the legal incapacity of the claimant

A child under the age of 18 years

A person under guardianship

A protected person

An incommunicative person

An involuntary patient or forensic patient

Has the Commission appointed an Appointed Representative previously? Yes No

Previous Save Draft Submit Next

Form M41 – Claimant Details

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

Form M41 - Claimant Details

Pages Save Draft Submit

Claimant Details

Surname* Clean

Given Name(s)* Mini

Title Other Title Date of Birth* 12/12/2012

DX Address

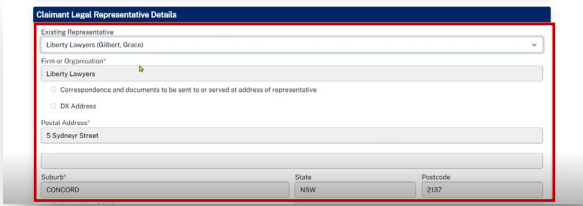
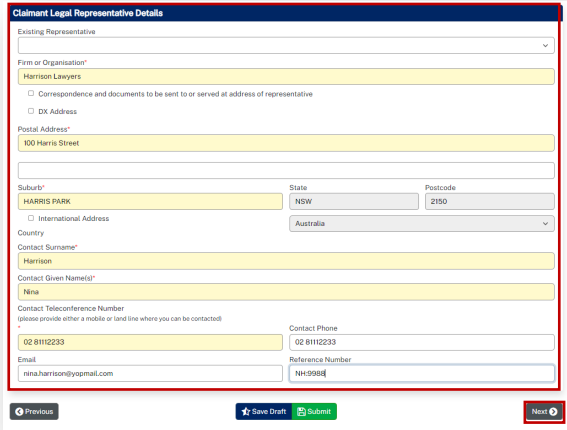
Postal Address* 33 Hollywood Avenue

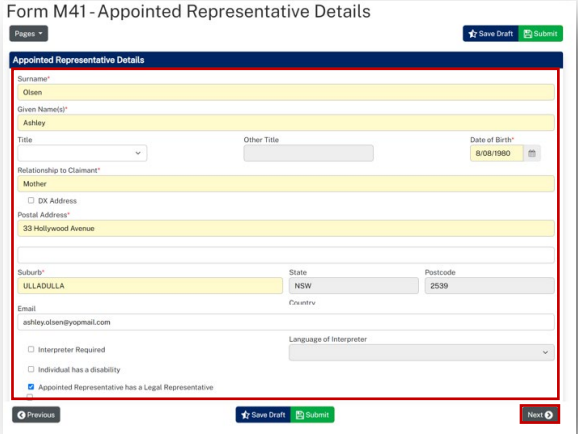
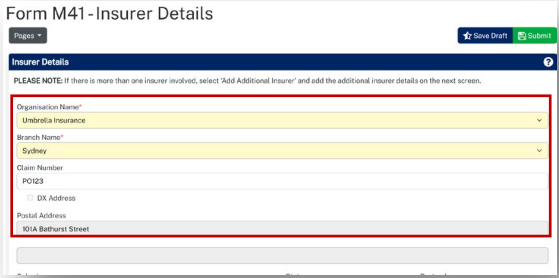
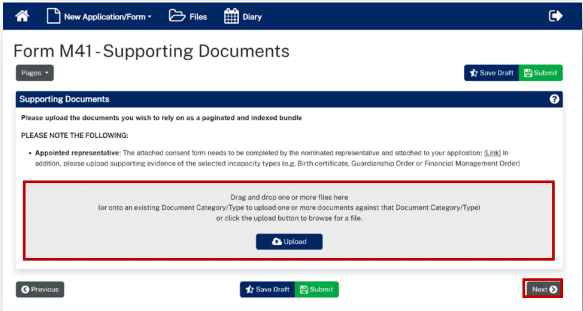
Suburb* ULLADULLA State NSW Postcode 2539

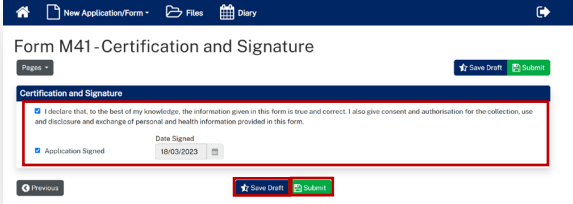
International Address Country Australia

Residential Address* 33 Hollywood Avenue

Previous Save Draft Submit Next

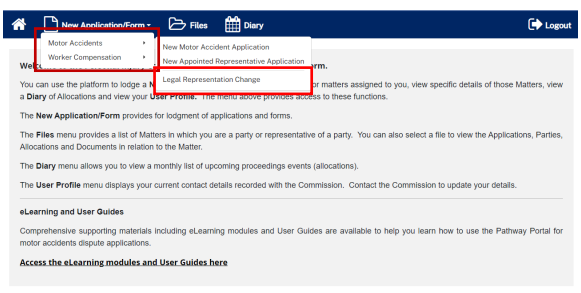
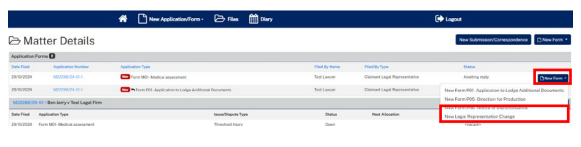
Instruction	Page
<p>Claimant Legal Representative Details</p> <p>9. Complete the details as follows:</p> <ul style="list-style-type: none"> • Existing Representative – Select from the drop-down menu if available. • Firm or Organisation – If you are representing the Claimant, these details should auto populate. Otherwise populate if required. • Correspondence and documents to be sent to or served at address of representative – Select if applicable. • DX Address – Select if applicable. • Postal Address – Select if the same as the Postal address. 	
<p>10. Check the Contact Name that has auto-populated. The person named is the Primary Contact for this Matter. If the auto-populated name is not correct, select the blank row in the Existing Representative drop-down menu and manually enter the contact name and details.</p> <p>11. If you are completing this application on behalf of the lawyer who is managing the application, you will need to enter their name as the Contact Name.</p> <p>Note: This is essential, so that the correct person from your firm is added as the Primary contact for this matter.</p> <ul style="list-style-type: none"> • Contact Surname – Populate the Primary contact's surname. • Contact Given Name (s) – Populate the Primary contact's given name • Contact Teleconference Number – Type in the best contact number for Teleconference. • Contact Phone – Type in any other contact numbers. • Email – Populate the Primary contact's email address. • Reference Number – Populate as required. <p>12. Click Next.</p>	

<p>➤ The Form M41 – Appointed Representative Details page displays.</p>	
<p>Instruction</p>	<p>Page</p>
<p>Form M41 – Appointed Representative Details</p> <p>13. Populate the Appointed Representative Details.</p> <p>14. Click Next.</p> <p>➤ The Form M41 – Insurer Details page displays.</p>	
<p>Form M41 – Insurer Details</p> <p>15. Populate the Insurer Details page.</p> <p>16. Populate the Insurer Legal Representative Details (as needed).</p> <p>17. Click Next.</p> <p>➤ The Form M41 – Supporting Documents page displays.</p>	
<p>Form M41 – Supporting Documents</p> <p>18. Click the Link to download the form for the appointed representative to sign.</p> <p>19. Drag the completed form and evidence of legal incapacity e.g., birth certificate into Supporting Documents area (or use Upload).</p> <p>20. Click Next.</p> <div style="border: 1px solid #00aaff; border-radius: 10px; padding: 10px; margin: 10px 0;"> <p>Include Appointed representative form and incapacity evidence in single indexed and paginated bundle ↔</p> </div> <p>➤ The Form M41 – Certification and Signature page displays.</p>	

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

Lodge Legal Representation / Agent Change

How to lodge a Legal Representation / Agent Change

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

Notice to Parties

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

Notice to Parties

Pages: - Save Draft Submit

Notice to Parties

Terms and Conditions of Use

For Legal Practitioners: Use is limited to Certified Australian Legal Practitioners or their employees whose use is the responsibility of Certified Australian Legal Practitioners.
For other Portal users: Use this form if you want to make an application to resolve a dispute about a motor accident. Before you begin, you need to agree to our terms and conditions.

Legal Incapacity

For accidents which occurred on or after 1 December 2017, the Personal Injury Commission (PIC) may decline to accept an application if the application is made by a person under legal incapacity. If you are making an application relating to an accident which occurred on or after this date, by agreeing to these terms and conditions you declare you are not under legal incapacity as defined in Section 7.47(2) of the Motor Accident Injuries Act 2017.

A person under legal incapacity includes:

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

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

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

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

Save Draft Submit Next

Application Details

4. Populate the Application Details.
 5. Select the Application Type:
 - **Form P03** – Notice of Change of Legal Representative / Agent
 - **Form P04** – Notice of Representation
 6. Click **Next**.
- The **Party Represented** page displays.

Legal Representation / Agent Change

Pages: - Save Draft Submit

Application Details

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

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

Claimant/Worker Surname*
Jerry Date of Birth*
1/10/1983

Claimant/Worker Given Name(s)*
Ben

Filed By

Filed by Name*
Test Lawyer

Filed by Party*
Claimant Legal Representative

Application Type

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

Capacity to Act

Are there any restrictions or limitations on your capacity to act for the party*
 Yes No

Restrictions/Limitations on Capacity to Act for Party

Previous Save Draft Submit Next

Application Details

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

Party Represented

Pages: - Save Draft Submit

Represented Party Details

Surname*
Jerry

Given Name(s)*
Ben Date of Birth*
1/10/2024

New Representative Details

Existing Representative
Test Legal Rep

Firm or Organisation*
Test Legal Rep

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

DX Address

Postal Address*
1 Oxford Street

Suburb*
Darlinghurst State
NSW Postcode
2010

International Address
Country
Australia

Contact Surname*
Lawyer

Contact Given Name(s)*
Test

Contact Teleconference Number
(please provide either a mobile or land line where you can be contacted*)
0411222333 Contact Phone

Email
test.lawyer@cpmail.com Reference Number

Date Commenced to Act*
29/10/2024

Previous Save Draft Submit Next

Former Representative Details

10. Populate the Former Representative Details.
11. Populate the New Representative Details.
12. Click **Next**.
- The **Former Representative / Agent Details** page displays.

Former Representative / Agent Details

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

Then either:

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

Signature

Lodge Submissions and other Correspondence

How to lodge Submissions and other Correspondence

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

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

Instruction	Page
<p>To lodge Submissions or other Correspondence:</p> <ol style="list-style-type: none"> 1. From the Matter Details page, click New Submissions/Correspondence. 	
<ol style="list-style-type: none"> 2. Click Upload or drag and drop the documents onto the page. 	

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

Submission / Correspondence

Document Type: Submissions

Document Description: New Submissions

File Name: 1.docx

Upload

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

Submission / Correspondence Confirmation

The following document(s) for Matter W4724 has been received at 1:50 PM on 10/05/2024:

Temporary Document Number 000020 for Submissions

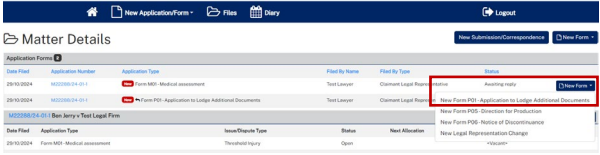
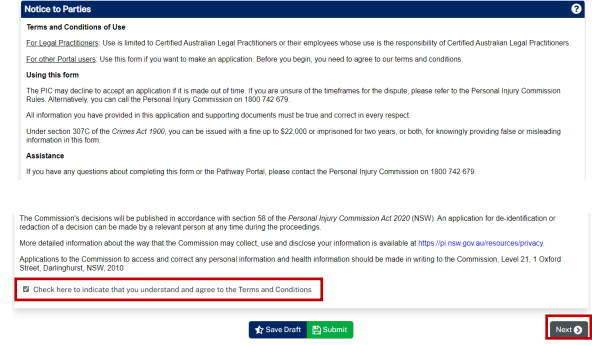
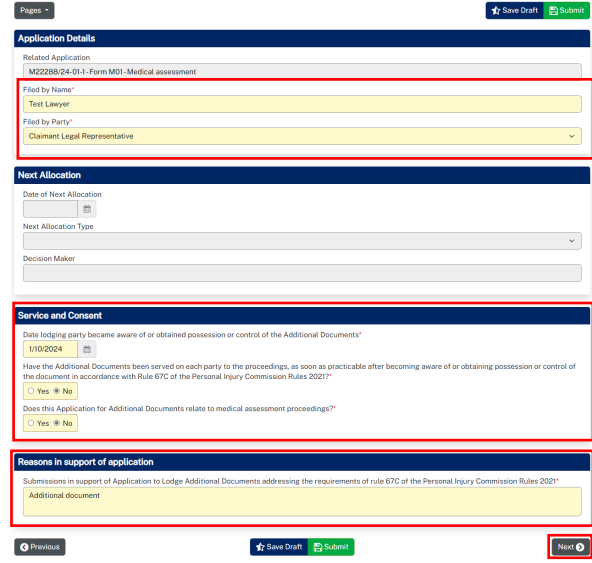
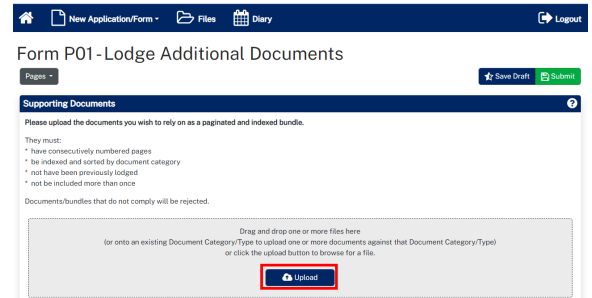
Please record the Temporary Document Number(s) for future reference.

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.

Temporary Document No.	Date Lodged	Matter No.	Document Type	Status	Last Updated	Expiring On
000020	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
<p>To lodge an additional document:</p> <p>From the Matter Details page</p> <ol style="list-style-type: none"> 1. Click New Form and select the required form. 2. Select New Form P01 – Application to Lodge Additional Documents. 	
<p>Form P01 – Notice to Parties</p> <p>Read the Terms and Conditions.</p> <ol style="list-style-type: none"> 3. Scroll to the bottom and tick to agree to Terms and Conditions and click Next. <p>➤ The Form P01 – Application to Lodge Additional Document page displays.</p>	<p>Form P01 -Notice to Parties</p> 
<p>Form P01 – Application Details</p> <p>16. Populate the Application Details page.</p> <p>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.</p> <ol style="list-style-type: none"> 4. Populate Service and Consent (as needed). 5. Populate Reason in support of application field. 6. Click Next. 	<p>Form P01 -Application to Lodge Additional Documents</p> 
<p>17. Click Upload or drag and drop the documents onto the page.</p>	<p>Form P01 -Lodge Additional Documents</p> 

<p>7. Add in the Document Details:</p> <ul style="list-style-type: none"> • 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. <p>8. Click Next</p>	
<p>9. Read and tick the acknowledgments.</p> <p>Then either:</p> <p>10. Click Save Draft if application needs to be reviewed internally before being submitted to the Commission.</p> <p>11. Click Submit.</p>	

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

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

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

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

- Claim for Damages:** Contains the question 'Has the claimant served a claim for damages on the insurer?' with radio button options: Yes (selected), No, and Not applicable - claim not against an insurer.
- Best Endeavours/Time Limits:** Contains the question 'Have the parties used their best endeavours to settle the claim before referring it for assessment as required by section 7.32(3) of the Motor Accident Injuries Act 2017?' with radio button options: Yes (selected) and No. Below this is a text input field labeled 'Please provide details'.
- Assessment Details:** Contains two questions:
 - 'Do you believe the claim is suitable for assessment?' with radio button options: Yes (selected) and No.
 - 'Is the claim ready for assessment?' with radio button options: Yes and No (selected).Below these is another text input field labeled 'Please provide details'. At the bottom, there are two more questions:
 - 'Do you apply for the matter to be referred to the Stood Over List?' with radio button options: Yes (selected) and No.
 - 'Please select one of the following reasons*' with a dropdown menu.

What happens next?

If the dispute is referred to Stood Over list:

- You will receive an email notification that there is an outcome document in the Portal for this dispute
- The dispute **Status** will reflect the status of **Stood Over list** and the **Stood Over Expiry Date** will display
- The outcome document (Stood Over Certificate) will be listed in **Recent Activities**
- The outcome document (Stood Over Certificate) can be downloaded/viewed from **Documents** section of **Matter Details**.

The screenshot displays the 'Matter Details' page in the Pathway Portal. The page is divided into several sections:

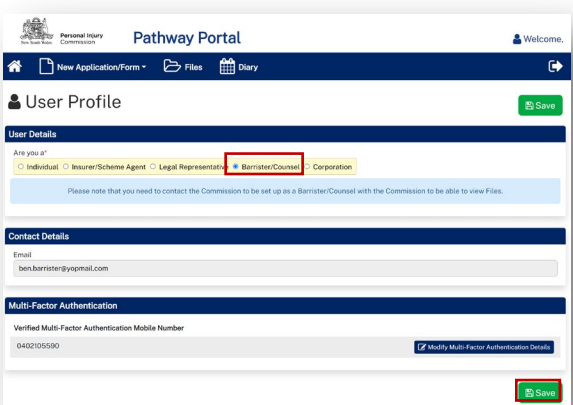
- Application Forms:** A table with columns: Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status. It lists two forms: 'New Form M01 - Medical assessment' and 'New Form M12 - Damages assessment', both filed on 11/11/2022 by Saime Norris, with a status of 'Open'.
- Reply Requests:** A section indicating 'There are no reply requests'.
- M257/22-12-1 Holly Wood v QBE - MA:** A table with columns: Date Filed, Application Type, Issue/Dispute Type, Status, Stood Over Expiry Date, and Next Allocation. It shows two entries 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: Date Filed, Application Type, Issue/Dispute Type, Status, and Next Allocation. It shows two entries for 'Degree of permanent impairment' with a status of 'Open'.

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

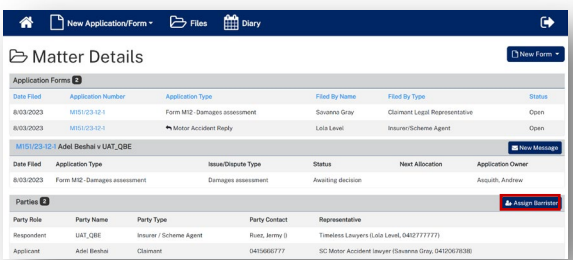
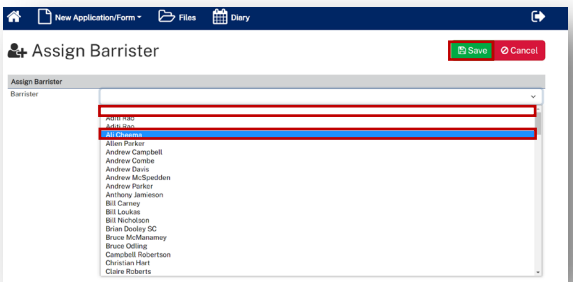
How to give a Barrister visibility to a dispute

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

Barrister registers as Pathway Portal user

Instruction	Page
<p>The barrister must first register as a Pathway Portal user. They will only need to do this once.</p> <p>At the end of registration, the User Profile displays the barrister would:</p> <ol style="list-style-type: none"> 1. Select Barrister/ Counsel and click Save. 2. The barrister then emails MASupport@pi.nsw.gov.au asking for their email address be registered for barrister access. 	

How to assign a Barrister

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

What does the Barrister see?

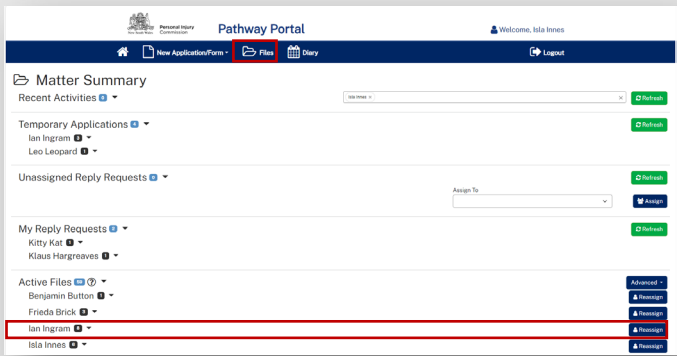
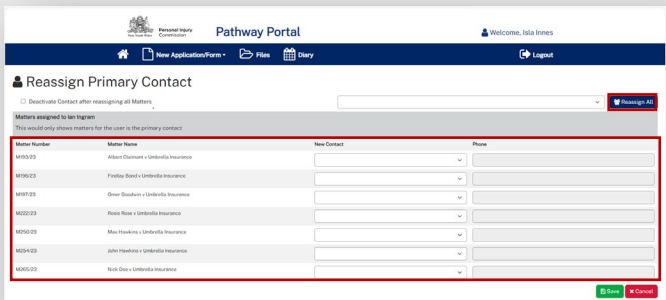
After a Barrister logs into Pathway Portal they will see the assigned disputes in the **Files** page

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>																																	
<p>➤ All Matters assigned to the selected person display.</p> <p>There are 2 options:</p> <p>Option 1: Reassign All Consider this option when someone is going away on holidays or has left your organisation and you need to reassign all of their Matters to one other person.</p> <p>Option 2: Reassign some Consider this option when you only need to reassign some of the Matters or you need to assign them to more than one person.</p>	 <table border="1"> <thead> <tr> <th>Matter Number</th> <th>Matter Name</th> <th>New Contact</th> <th>Phone</th> </tr> </thead> <tbody> <tr> <td>M19025</td> <td>Allen O'Connell v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M19023</td> <td>Freddie Stone v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M19024</td> <td>Oliver Bonobus v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M20023</td> <td>Rose Rose v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M20025</td> <td>Mia Hawkins v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M20026</td> <td>John Hawkins v Umbrella Insurance</td> <td></td> <td></td> </tr> <tr> <td>M20022</td> <td>Nick Day v Umbrella Insurance</td> <td></td> <td></td> </tr> </tbody> </table>	Matter Number	Matter Name	New Contact	Phone	M19025	Allen O'Connell v Umbrella Insurance			M19023	Freddie Stone v Umbrella Insurance			M19024	Oliver Bonobus v Umbrella Insurance			M20023	Rose Rose v Umbrella Insurance			M20025	Mia Hawkins v Umbrella Insurance			M20026	John Hawkins v Umbrella Insurance			M20022	Nick Day v Umbrella Insurance		
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M20022	Nick Day v Umbrella Insurance																																

To Reassign All

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

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

2. Click Reassign All

- New Contact will auto populate for all Matters

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

3. Click **Save**

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

To Reassign some

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

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

- 2 Click **Save**

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

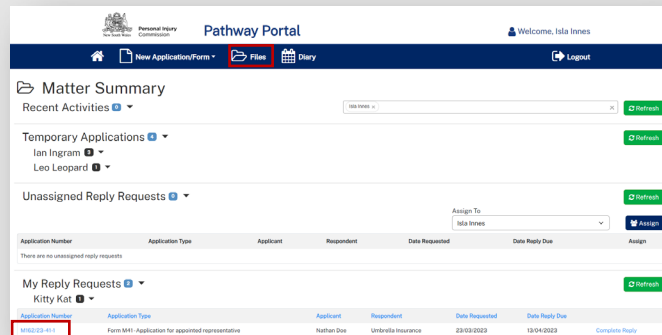
How to Manage Primary and Secondary Contacts

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

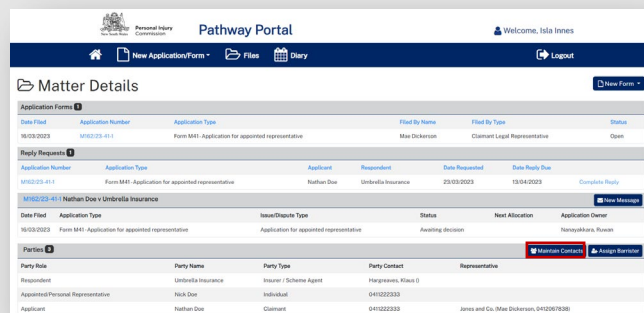
Instruction

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

Page



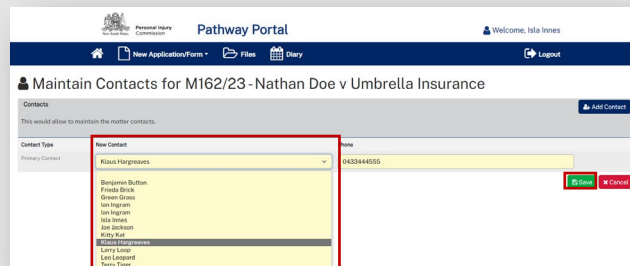
- Matter Details page displays
3. Go to **Parties** section and Click on **Maintain Contacts**



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

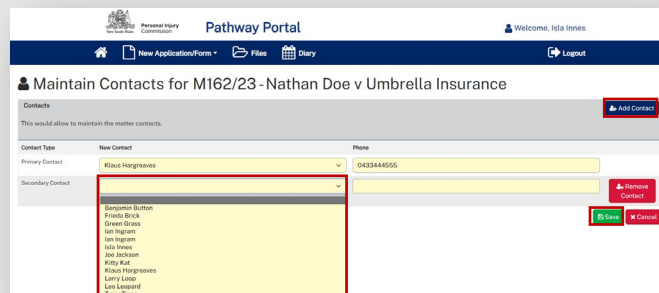
To update Primary Contact:

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

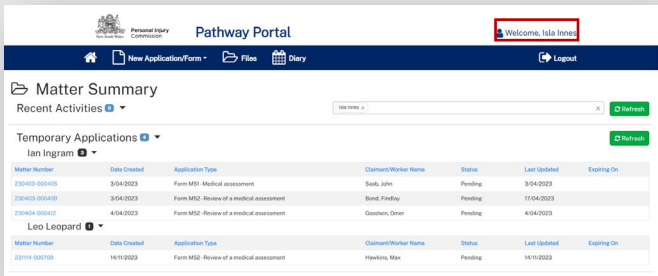
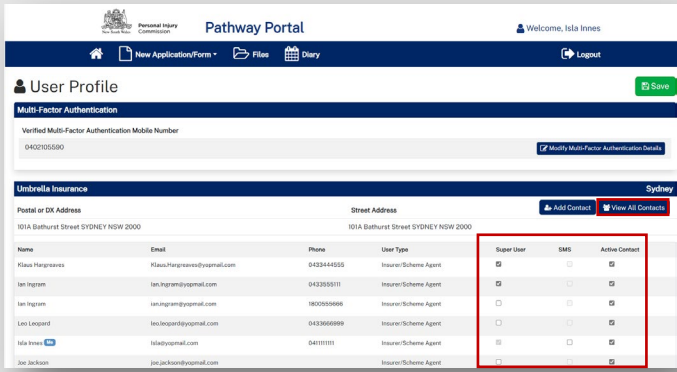
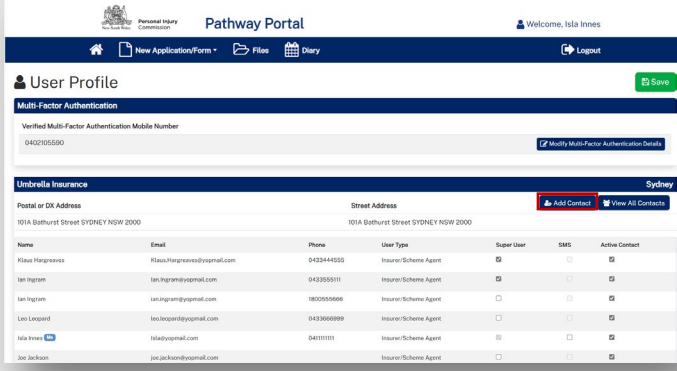


If you need to add a Secondary Contact:

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

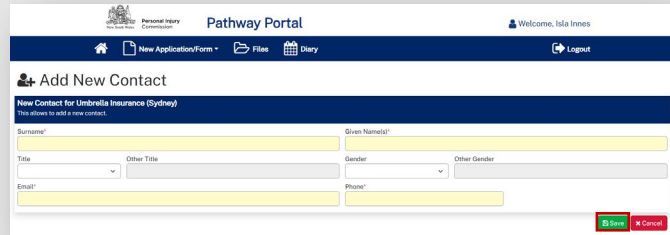
Instruction	Page																																																	
<p>1. Click the Welcome, name in the top right corner</p> <p>Note: Only Super User can add a new contact.</p>																																																		
<p>➤ User Profile page displays with a list of all active users for your organisation.</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><i>To deactivate user:</i></p> <ol style="list-style-type: none"> 1. Untick Active Contact check box. 2. Click Save 	 <table border="1" data-bbox="730 1070 1377 1205"> <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@sygsmail.com</td> <td>0423444525</td> <td>Insurer/Scheme Agent</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Ian Ingram</td> <td>ian.ingram@sygsmail.com</td> <td>043265911</td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Ian Ingram</td> <td>ian.ingram@sygsmail.com</td> <td>1800556666</td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Leo Leopord</td> <td>leo.leopard@sygsmail.com</td> <td>0433666689</td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Isla Innes</td> <td>isla@sygsmail.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@sygsmail.com</td> <td></td> <td>Insurer/Scheme Agent</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Name	Email	Phone	User Type	Super User	SMS	Active Contact	Klaus Hargreaves	klaus.hargreaves@sygsmail.com	0423444525	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ian Ingram	ian.ingram@sygsmail.com	043265911	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ian Ingram	ian.ingram@sygsmail.com	1800556666	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Leo Leopord	leo.leopard@sygsmail.com	0433666689	Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Isla Innes	isla@sygsmail.com	041111111	Insurer/Scheme Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Joe Jackson	joe.jackson@sygsmail.com		Insurer/Scheme Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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<p><i>To add a new user:</i></p> <ol style="list-style-type: none"> 1. Click Add Contact 																																																		

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

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

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

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



The screenshot shows the 'Pathway Portal' interface. At the top, there is a navigation bar with the logo, 'Personal Injury Compensation', 'Pathway Portal', and a user profile 'Welcome, Isla Innes'. Below the navigation bar are icons for 'New Application/Form', 'Files', and 'Diary', along with a 'Logout' button. The main content area is titled 'Add New Contact' and includes a sub-header 'New Contact for Umbrella Insurance (Sydney)'. The form contains several fields: 'Surname*' (yellow), 'Given Name(s)*' (yellow), 'Title' (dropdown), 'Other Title' (text), 'Gender' (dropdown), 'Other Gender' (text), 'Email*' (yellow), and 'Phone*' (yellow). At the bottom right of the form are 'Save' and 'Cancel' buttons.

Super Users, Delegates and Contacts

Types of user access

Type of user	How to become this type of user	What user can see/do
Primary contact for a matter	<ul style="list-style-type: none"> • Be registered as a Legal User on Pathway Portal • Lodge the application or... • One party advises Commission who their legal representative is 	<ul style="list-style-type: none"> • See that matter details and documents • Receive email notifications for the matter • Send messages
Secondary contact for a matter	<ul style="list-style-type: none"> • Be registered as a Legal User on Pathway Portal, then... • Primary legal representative advises the Commission of secondary contact on a matter 	<p>If filters Active Files for Matters I'm linked to can:</p> <ul style="list-style-type: none"> • See that matter details, documents and messages • Send messages for that matter
Super user	<ul style="list-style-type: none"> • Be registered on Pathway Portal as a Legal representative • Another super user can add /remove you as a Super User 	<ul style="list-style-type: none"> • Can see and act on all matters • Can add/remove other Super Users (can't remove self) • Assign any reply request to legal representatives • Add a Delegate • Do NOT receive email notifications • Reassign matters • Manage contacts for the matter • Can add a new contact
Delegate	<ul style="list-style-type: none"> • A super user can make an administrative assistant (non-Legal User contact) a delegate 	<p>Delegate can:</p> <ul style="list-style-type: none"> • See all the firms matters, documents and messages • Reassign matters to existing contacts • Manage contacts for the matter <p>Delegate can NOT:</p> <ul style="list-style-type: none"> • Be added as a Primary contact or Secondary contact on a matter • Delegate to another user • Add/remove super users • Receive email notifications (they go to primary contact) • Add a new contact

Primary contact and secondary contacts

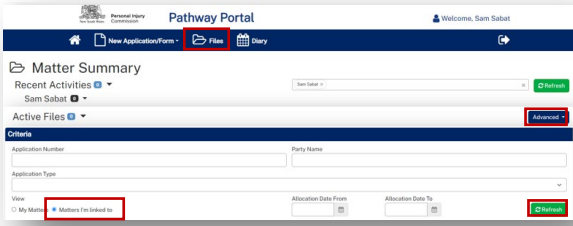
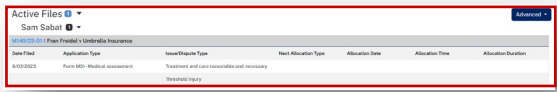
1. The primary legal contact for a matter is listed as the **Representative** in the **Parties** section of **Matter Details**
2. If you have someone in your firm that will also work on a matter, they can be setup to be a secondary contact which provides visibility to the matter.
3. A Super User in your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

In this example Lola Level is the primary legal contact on this matter

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

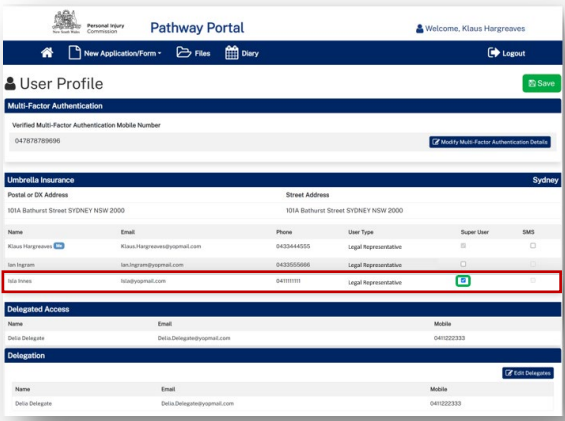
- Application Forms (2):** A table listing application forms with columns for Date Filed, Application Number, Application Type, Filed By Name, Filed By Type, and Status.
- M149/23-01-1 Fran Freidel v Umbrella Insurance:** A table showing application details with columns for Date Filed, Application Type, Issue/Dispute Type, Status, Next Allocation, and Application Owner.
- Parties (2):** A table listing parties with columns for Party Role, Party Name, Party Type, Party Contact, and Representative. The representative for the Applicant, 'Timeless Lawyers (Lola Level, 0402105590)', is highlighted with a red box.
- Messages (1):** A table listing messages with columns for Application, Category, Subject, Sender, and Date/Time Sent.
- Documents (4):** A table listing documents with columns for Document Date, Author, Document Category and Type, and Related To.

After a Secondary contact is added

Instruction	Page																					
<p><i>Secondary contact has been added</i></p> <p>For a secondary contact to view the matter:</p> <ul style="list-style-type: none"> • Click the Files tab • Click Advanced in the Active Files section • Tick Matters I'm linked to • Click Refresh. <p><i>In this example Sam Sabat is a secondary contact on this matter</i></p>																						
<p><i>Secondary contact visibility</i></p> <p>The Secondary contact:</p> <ul style="list-style-type: none"> ✓ Can see Matter Details ✓ Can view all documents ✓ Can view all messages ✓ Can send messages X Cannot see allocations in Diary 	 <table border="1" data-bbox="821 795 1380 840"> <thead> <tr> <th>Date Filed</th> <th>Application Type</th> <th>Matter/Dependent Type</th> <th>Next Allocation Type</th> <th>Allocation Date</th> <th>Allocation Time</th> <th>Allocation Duration</th> </tr> </thead> <tbody> <tr> <td>18/03/2013</td> <td>Form 100 - Medical assessment</td> <td>Treatment and care assessment and necessary</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Treated injury</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Date Filed	Application Type	Matter/Dependent Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration	18/03/2013	Form 100 - Medical assessment	Treatment and care assessment and necessary							Treated injury				
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		Treated injury																				

Super Users

How to Add/Remove Super Users

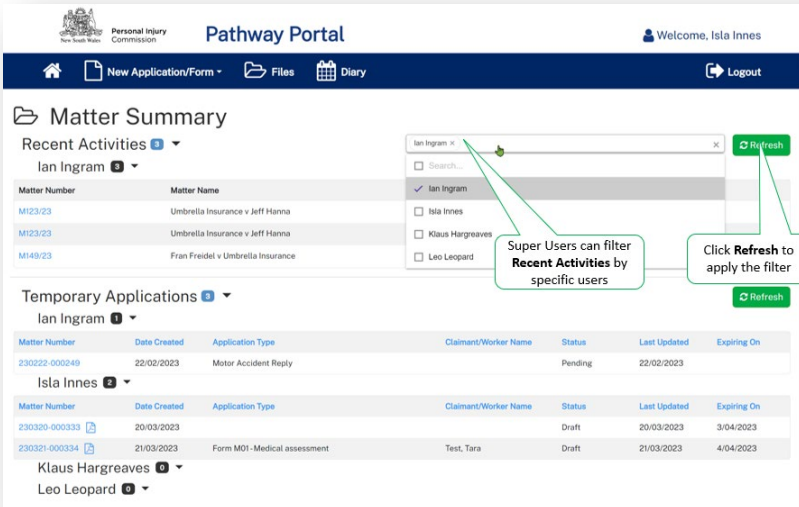
Instruction	Page
<p>Add/Remove a Super User</p> <p>A super user can add and remove other super users:</p> <ul style="list-style-type: none"> • Click the name of the Super User in the top right corner • Tick or untick the Super User box • Click Save. 	
<p><i>In this example Isla Innes is now a Super User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

What can Super Users see - Files - Recent Activities

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

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

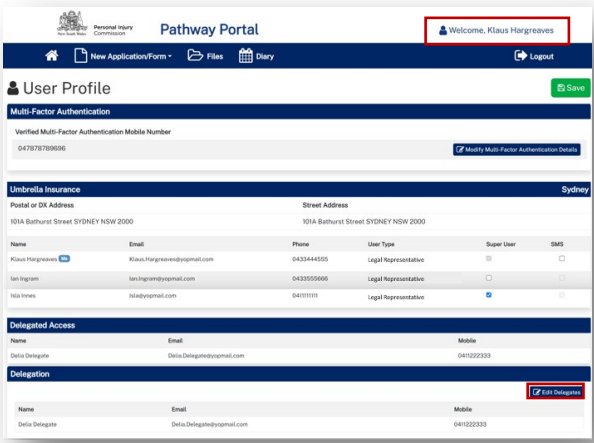
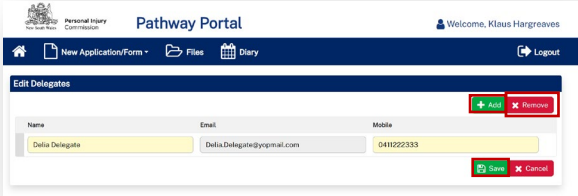
- Select the users in the drop-down menu.
- Click **Refresh**.



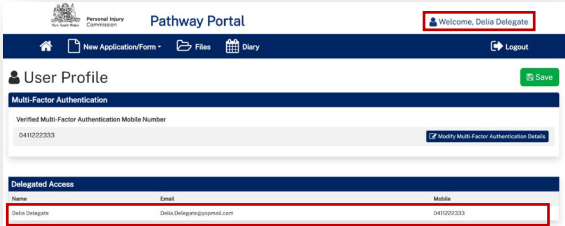
How to add/remove Delegate for a Super User

A Super User can make an administrative assistant a Delegate.

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

Instruction	Page
<p><i>Add/Remove Delegate for a Super User</i></p> <p>To add a super user delegate, the super user will:</p> <ul style="list-style-type: none"> • Click the Welcome, name in the top right corner • Click Edit Delegates. 	
<p><i>Edit Delegates</i></p> <ul style="list-style-type: none"> • Click +Add • Populate delegate details • Click Save. <p>The delegate will get an email invitation to register as delegate user in Pathway Portal.</p>	
<p><i>To remove a delegate</i></p> <ul style="list-style-type: none"> • Select the delegate line by clicking at the beginning of the line (far Left) • Click X Remove • Click Save. 	

Delegate Super User

Instruction	Page						
<p><i>What can the Delegate Super User do?</i></p> <p>The delegate can:</p> <ul style="list-style-type: none">• See all the firms matters, documents and messages• See the diary for each legal user in the firm• Can do everything on matters, including sending messages• Assign unassigned reply requests• Draft and submit applications and replies <p>Delegate can't:</p> <ul style="list-style-type: none">• Delegate to another user• Add/remove super users• Receive email notifications (they go to primary contact)• Be the Primary contact or a Secondary contact on a matter• Add a new contact <p>Note: When drafting an Application or Reply, the Delegate needs to record the name of the person who will be the Primary contact in the Legal Representative contact name field.</p> <p>The named Legal Representative can then review and submit the Application or Reply, or the Delegate can submit it on their behalf.</p>	 <p>The screenshot shows the Pathway Portal interface. At the top, there is a navigation bar with 'Pathway Portal' and a 'Welcome, Della Delegate' message. Below this is a 'User Profile' section with a 'Save' button. The profile includes a 'Multi-Factor Authentication' section with a 'Verified Multi-Factor Authentication Mobile Number' field containing '041022333' and a 'Verify Multi-Factor Authentication Details' button. At the bottom, there is a 'Delegated Access' table with the following data:</p> <table border="1"><thead><tr><th>Name</th><th>Email</th><th>Mobile</th></tr></thead><tbody><tr><td>Della Delegate</td><td>Della.Delegate@pymark.com</td><td>041022333</td></tr></tbody></table>	Name	Email	Mobile	Della Delegate	Della.Delegate@pymark.com	041022333
Name	Email	Mobile					
Della Delegate	Della.Delegate@pymark.com	041022333					

Appendix A – Document requirements

Document requirements to submit with the application are:

Document type	Requirements
Appointed Representative	The consent form needs to be completed by the nominated appointed representative and attached to the application together with supporting evidence of the selected incapacity types (e.g., Birth certificate, Guardianship Order or Financial Management Order).
Merit Review	If the amount of weekly compensation or statutory benefits is in the dispute, you must indicate a schedule of earnings in the approved form.
Damages assessment	If the amount of damages is in dispute, you must include in the application a schedule of damages containing full particulars of the amount claimed.
Surveillance recordings in medical assessment proceedings	If you are including a surveillance recording under rule 109 of the Personal Injury Commission Rules 2021, you must demonstrate that exceptional circumstances exist to allow this to be referred to a medical assessor and you must comply with rule 109 (2A).

Note: The document should be a single paginated, indexed bundle and must not exceed 500 pages.

What is the maximum document size?

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

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

Contact the Commission and follow advice.

Appendix B – Glossary of Terms

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

Appendix C – Email Notifications – When and what happens

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

Appendix D – Version Control

Version	Date	Author	Major changes	Approved by
1.0	6 June 2023	Jacqueline Mead	Initial version	Sophie Jones – Pathway Product Owner
1.1	1 August 2023	Pamela Allen	Added Print Message Thread button Added Venue address to Allocations section of Matter Summary	Tina Kavadas – Pathway Project Manager
1.2	1 Sept 2023	Pamela Allen	Updated most prominent screenshots: Service Provider now called Decision Maker	
1.3	16 January 2024	Oksana Eremina	Added new functions: How to assign Matter to someone else, add a new contact and manage contacts	Tina Kavadas – Pathway Project Manager
1.4	6 September 2024	Nathan Johnson	Updated login procedure	Melissa Golfes – Product Owner
1.5	November 2024	Leo Lopez	<ul style="list-style-type: none"> Added reference to Rule 67 Lodge a Legal Representation / Agent Change Submissions and other Correspondence 	

