Personal Injury Commission
New South Wales

Pathway Portal

Insurer User Guide

Contents

User Guide Overview

As an Insurer user, the 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
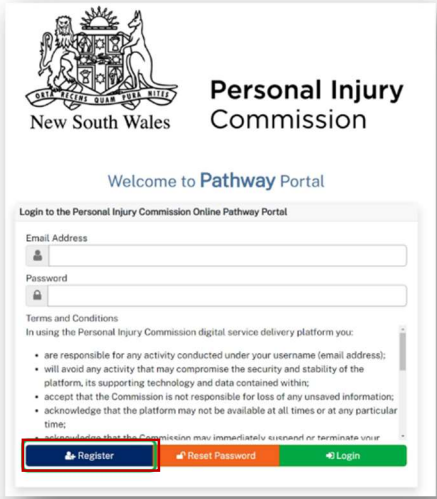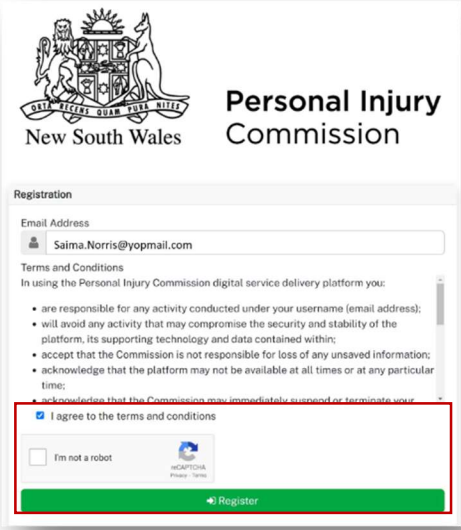- Navigate the Pathway Portal
- Lodge a form in the Pathway Portal
- Resubmit a rejected application
- Complete a reply request
- Review a received reply
- Send and receive messages
- View allocation details
- View outcome documents
- Lodge an Appeal
- Assign a barrister
- Understand the different levels of user access
- Self-Manage Users (Reassign matters, manage contacts and add new contacts)
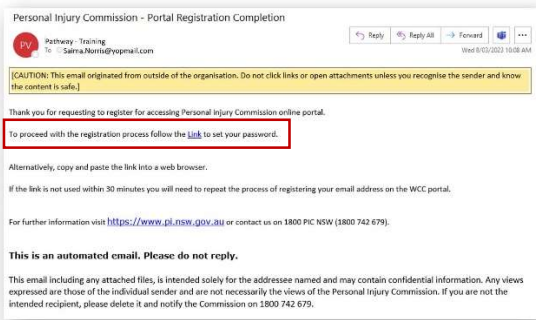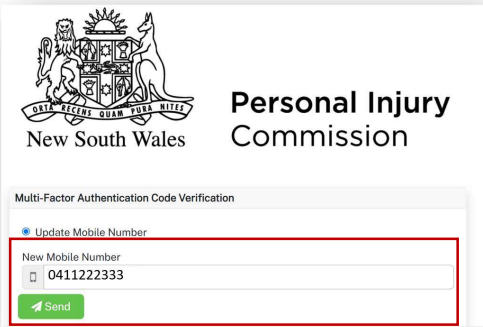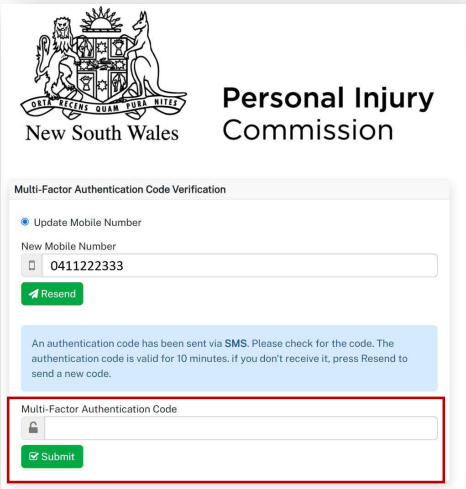
Get started

How to access and register for the Pathway Portal

All parties that need to submit, engage with or view matters they are involved in must register to use the Pathway Portal.
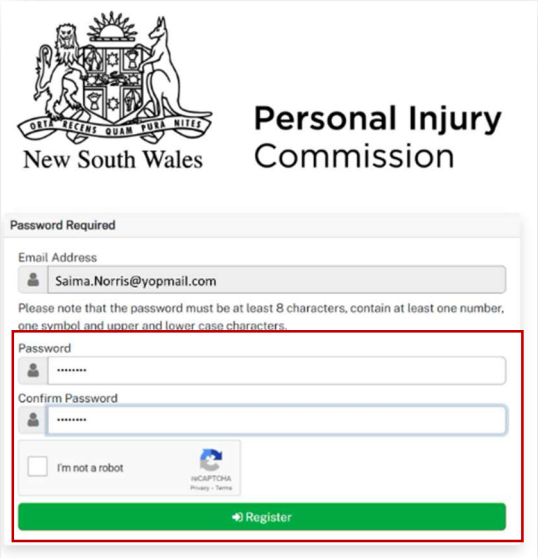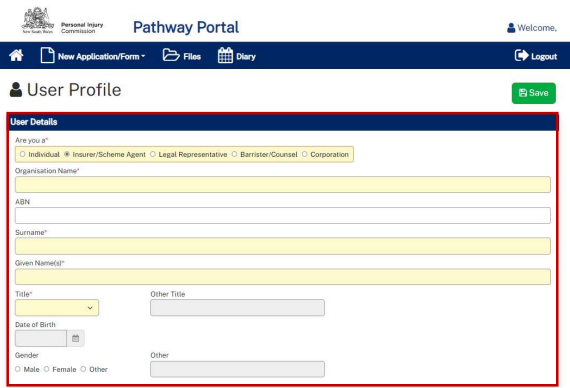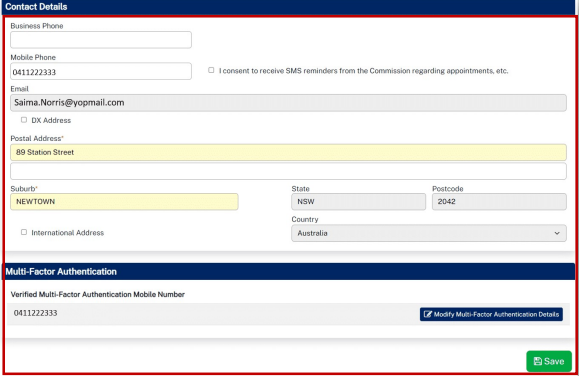
- If you are a Primary contact or Secondary contact on a Matter, you will register as an **Insurer/Scheme Agent**.

Instruction	Page
Access the Pathway Portal - You can access the 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. 1. Click the following link: https://pathwayportal.pi.nsw.gov.au 2. Click **Register**.	
Register your email address 3. Follow the prompts to register your email address. 4. Tick to **agree to the terms and conditions**. 5. Tick **I'm not a robot** and complete the **Select all squares with**… test. 6. Click **Register**. ➢ You will then receive an email to validate your email address.	
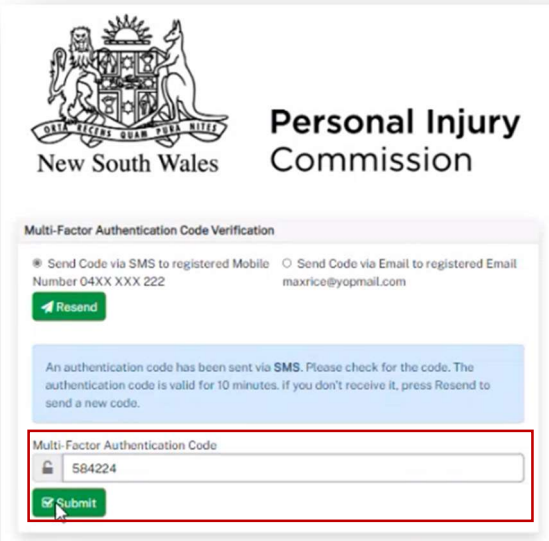
How to access and register for the Pathway Portal continued

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

How to access and register for the Pathway Portal continued

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

How to Login to Pathway Portal

Instruction	Page
1. Click the **Pathway Portal link** on the Personal Injury Commission website. 2. Populate the Email Address and Password. 3. Click **Login**. 4. Tick **I'm not a robot** and complete the **Select all squares with**… test and click **Next** until the test is completed. 5. Click **Login.** 6. Select where you would like the **Multi Factor Authentication Code (MFA)** sent (either your mobile or email). 7. Click **Send**.	
1. Populate the **Multi-Factor Authentication Cod**e from the SMS/email you were sent. 2. Click **Submit**.	

Navigation

Home page

After you login to the 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.

Click **New Application/Form** to lodge new applications or forms

User Profile displays your current contact details with the Commission

Home displays help text on welcome message

Files displays all your matters

Diary displays booked allocations/appointments

Logout when you are finished using the Pathway Portal

Pathway Portal

Welcome, Insurer Lemmington

Personal Injury Commission

New Application/Form   Files   Diary   Logout

Welcome to the Personal I   delivery platform

u can use the platform to   view the list of **Fil**   cific details of those Matters, view
Diary of Allocations and view your **User Profile.** The menu above provides access to these functions.

The **New Application/Form** provides for lodgment of applications and forms.

The **Files** menu provides a list of Matters in which you are a party or representative of a party. You can also select a file to view the Applications, Parties, Allocations and Documents in relation to the Matter.

The **Diary** menu allows you to view a monthly list of upcoming proceedings events (allocations).

The **User Profile** menu displays your current contact details recorded with the Commission. Contact the Commission to update your details.

eLearning and User Guides

Comprehensive supporting materials including eLearning modules and User Guides are available to help you learn how to use the Pathway Portal for motor accidents dispute applications.

Access the eLearning modules and User Guides here

Files page

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

Temporary Applications are:
- Drafts that have been saved
- Pending applications waiting to be registered by the Commission

Recent Activities
Recent Activities displays any new applications, documents or messages that have been added since you last logged into the Pathway Portal. The oldest activities display at the top of the list and the newest activities display at the bottom of the list.

Click **Refresh** to update, to reflect changes during this session

| New Application/Form ▾ | 📂 Files | 📅 Diary | | | | | | | 🡒 Logout |

Matter Summary

Activities **5** ▾
Insurer Lemmington **5** ▾

[×] [🔄 Refresh]

Temporary Applications **0** ▾   [🔄 Refresh]

Temporary Documents **0** ▾   [🔄 Refresh]

Unassigned Reply Requests **0** ▾

Unassigned Reply Requests are reply requests from the Commission to be assigned to someone in your organisation

[🔄 Refresh]

Assign To
[Insurer Lemmington ▾]   [👥 Assign]

Matter/Application Number	Application Type	Applicant	Respondent	Date Requested	Date Reply Due	Assign
There are no unassigned reply requests						

My Reply Requests **0** ▾

My Reply Requests are your assigned Reply Requests

[🔄 Refresh]

Active Files **2** ▾   [Advanced ▾]

Active Files are active disputes you are associated with

Insurer Lemmington **2** ▾   [👤 Reassign]

W47/24 Testing Worker v The Gunwale

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
23/04/2024	Form 2 - Application to Resolve a Dispute	Weekly benefits where liability in dispute				
		Weekly benefits where work capacity decision in dispute				
		Medical expenses (where the amount is more than $9,468.10)				
		Compensation for property damage				
		Lump sum compensation where liability in dispute				

W49/24 Testing Worker v The Gunwale

Date Filed	Application Type	Issue/Dispute Type	Next Allocation Type	Allocation Date	Allocation Time	Allocation Duration
30/04/2024	Form 11C - Application for Mediation to Resolve Work Injury Damages Claim	Application for Mediation to Resolve Work Injury Damages Claim	Mediation	1/05/2024	10:00 AM	3 Hours

Closed Files display for 42 days

Closed Files **1** ▾   [Advanced ▾]

Insurer Lemmington **1** ▾

Filter Active Files

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

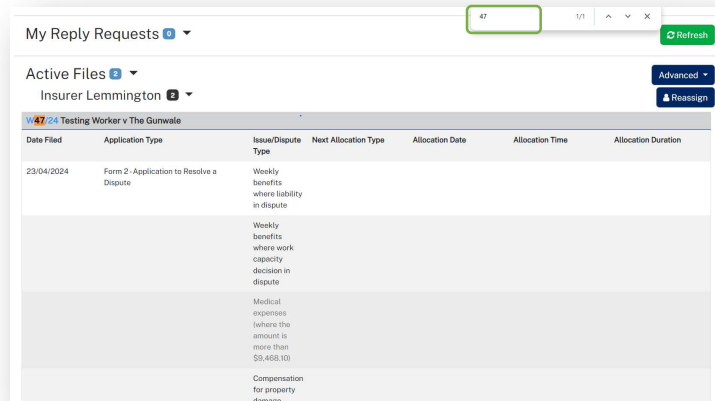- use **Ctrl+F**
- or use **Advanced** button.

Instruction	Screen
Use Ctrl+F **Ctrl+F** allows you to search for any text (i.e. letters or numbers) on the page, eg part of a party name or matter number. While on the **Files** page: 1. Hold down the **Ctrl** key and press the **F** key on your keyboard simultaneously. ➤ A search box displays.	
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): ➤ 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). *Party name example* ➤ In this example, we typed part of the surname of the party, which is **wale** (upper/ lower case doesn't matter with **Ctrl+F**). ➤ Can search for a partial name (eg type **work** to search for **Worker**)	

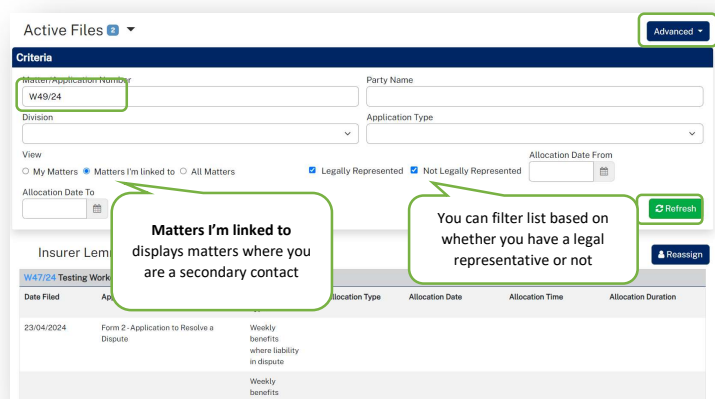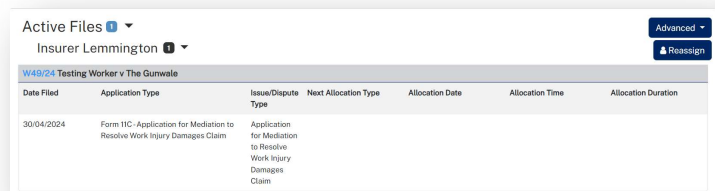| Instruction	Screen
Matter number example ➢ In this example, we typed part of the matter number, i.e. **47**.	

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 <u>full application number</u>, eg M49/24
   ➢ For **Party Name**, you type as:
     • Firstname (or part of the firstname)
     • Lastname (or part of the lastname)
     • Lastname, Firstname (i.e. Smith, Tom not Tom Smith).
3. Click **Refresh**.	

➢ The files that match your criteria display.	

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**.	Active Files 0 ▾ Advanced ▾

Matter Details

When you click on a blue matter number link anywhere in the **Files** page the **Matter Details** display.

Diary

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

Lodge a new application

Overview

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

The 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
- Form Details
- Worker Details and Legal Representative details
- Employer Details
- Insurer Details and Legal Representative details
- Supporting Documents (help text varies per application)
- Certification and Signature.

- The questions on each page will vary depending on the form 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.
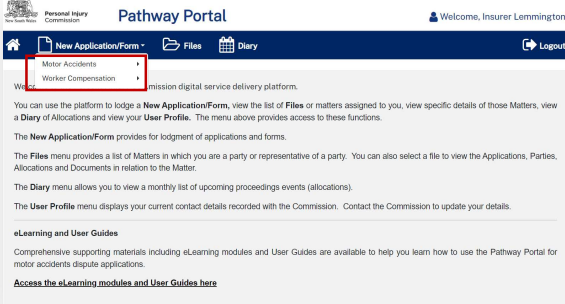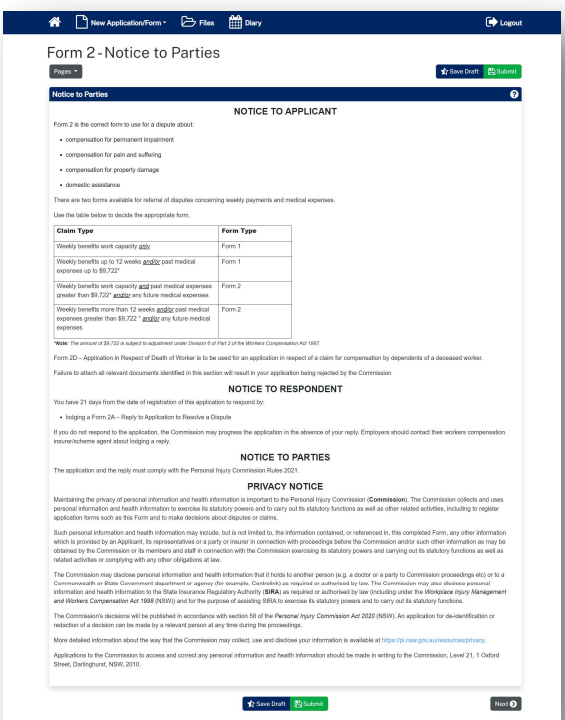
What application forms can be submitted?

Forms and Form Names

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

Code	Form name
Form 1	Application for an Expedited Assessment
Form 1A	Application to Revoke an Interim Payment Direction
Form 2	Application to Resolve a Dispute
Form 2D	Application in Respect of Death of a Worker
Form 6	Application to Resolve a Workplace Injury Management Dispute
Form 7	Application for Assessment by a Medical Assessor
Form 9	Application to Appeal against the Decision of a Member
Form 10	Application to Appeal against the Decision of a Medical Assessor
Form 11	Direction for Access to Information and Premises
Form 11B	Application to Cure a Defective Pre-Filing Settlement
Form 11C	Application for Mediation of a Work Injury Damages Claim
Form 11E	Application to Strike Out a Pre- Filing Statement
Form 15	Application for the Assessment of Costs
Form 15A	Application for the Assessment of Costs
Form 15B	Application for the Assessment of Costs
Form 20	Miscellaneous Application
Form 1B	Reply to Application for Expedited Assessment
Form 2A	Reply to an Application to Resolve a Dispute
Form 2C	Application to admit late Documents
Form 7A	Response to an Application for Medical Assessment
Form 9A	Notice of Opposition to Appeal Against the Decision of a Member
Form 10A	Notice of Opposition to Appeal Against the Decision of a Medical Assessor
Form 11D	Response to an Application for Mediation of a Worker Injury Damages Claim
Form 11F	Notice of Opposition to Strike Out a Pre-Filing Statement

How to lodge a new application

Instruction	Page
New Application Form 8. Click on the **New Application/Form** and select **Workers Compensation**. Then **choose the Form type from the dropdown**. In this instance, Form 2 - Application Resolve a Dispute has been used. ➢ The **Notice to Parties page** displays.	
Notice to Parties 9. Review, then click **Next** to proceed to begin completing the form. *Completing a Form* ➢ All forms are embedded in the Pathway Portal. ➢ Data fields enable you to enter free text or select from drop down lists or calendars to complete relevant information required for each form. ➢ When completing a form, **all fields with a yellow background are mandatory, and each form may have differing mandatory fields to input.** ➢ You will be unable to move onto the next page unless all mandatory fields have been filled. ➢ Supporting documents are uploaded as a single file (see separate section below).	

Instruction	Page
Supporting Documents The **Supporting Documents** page provides information about what you need to lodge for certain form types. This example is for a Form 2 – Application to resolve a Dispute. **Note:** Supporting evidence is to be submitted as a single indexed and paginated bundle. 10. Click **Upload** or drag and drop the documents onto the page.	
What are the document requirements?	See Appendix A – Document requirements for information on the acceptable file types and document requirements.
11. Select the **document** and click **Open**.	
12. Add in the Document Details: • **Document Category** – Choose **Cover Letter** or **Supporting Documents**. • **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.	
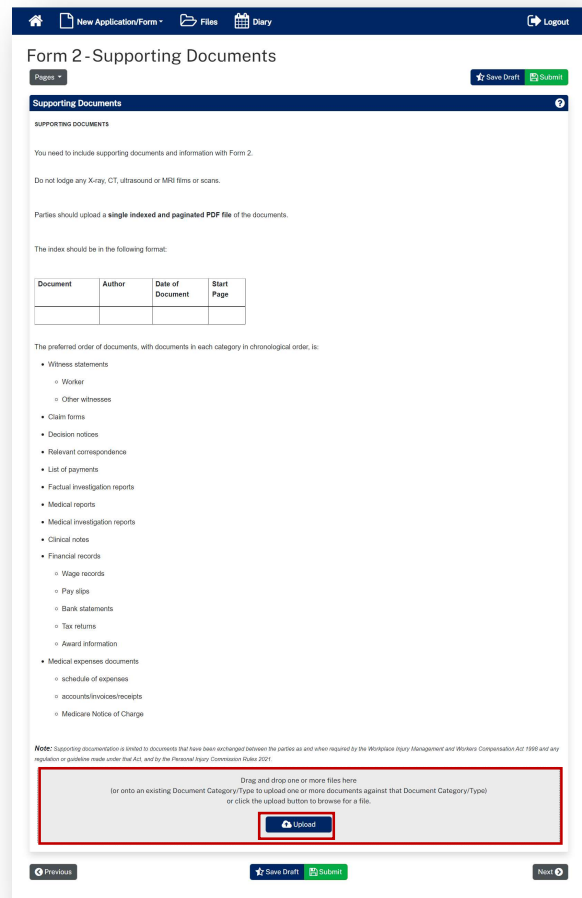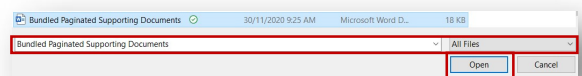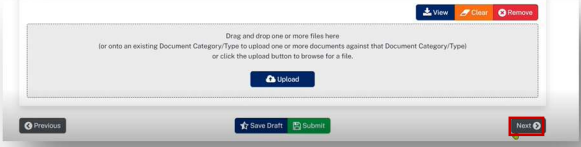
• **Author** – Type in your name. • **Document Details** – Add any details for the uploaded documents. • **Date of Document** – Type in the date of upload or select the date from the calendar.	
13. Add **another document** if required. 14. Click **Next**. ➢ The **Certification and Signature** page displays.	

Instruction	Page
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* 15. You can **Save Draft** so that the application can be reviewed before it is signed and submitted. • The draft application can be viewed in **Temporary Applications** with a status of **Draft.** • Click the **PDF icon** to view the draft. • Once the draft has been updated, you can submit the application by clicking on the **Matter Number** in **Temporary Applications**.	
• **Check/update** any details by navigating to the **relevant page**. • Once you are ready to submit the document, navigate to the **Certification and Signature page** and submit the document as shown below.	
Submit 16. Confirm your declaration, signature and date and click **Submit**.	
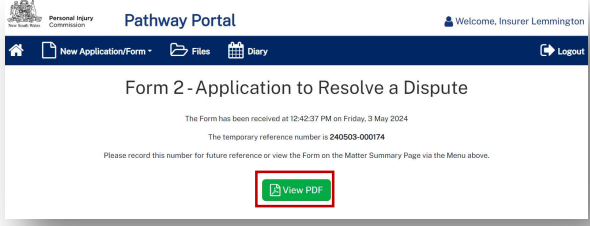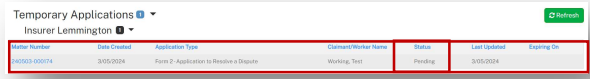
Once you have submitted the application, it will go to the **Commission Registry** as a **Temporary Application**, and it will appear on your **Temporary Applications List**.

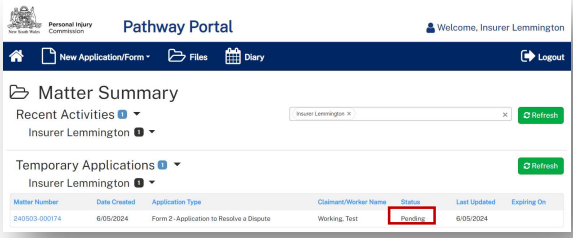| Instruction	Page
View PDF 17. Click **View PDF** to view and download the application.	
Temporary Applications 18. Go to **Files** and **Temporary Applications** to see the temporary application. You can download the PDF by clicking the blue temporary application link. **Note:** that the status is 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

- Only the filing party will be able to see the temporary application in the 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
Notification of rejected temporary application • If the Commission rejects a temporary application, you will receive an email notification with the reason. • In the **Files** tab the **Temporary Application** will have a **Status** of **Rejected**	
To resubmit rejected application: 1. Refer to the email notification to understand the rejection reason.	
2. In the **Files** tab, click the blue temporary Matter Number link of the rejected matter. This reopens the application.	
3. Navigate to **Supporting Documents** and make the required changes to the form (if this was the reason for rejection).	

Instruction	Page
1. Click **Upload** to upload the supporting document bundle (if this was the reason for rejection) and click **Next**.	
2. Once changes are made, sign and date the application on the last page and click **Submit**.	
➢ The **Status** updates to **Pending** in the Temporary Application list). **Note:** If the Commission accepts and registers the resubmitted application, the **Filed** date will be the date the application was resubmitted.	

Replies

How to complete a Reply – Respondent

A reply request arrives as **Unassigned** in the 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.

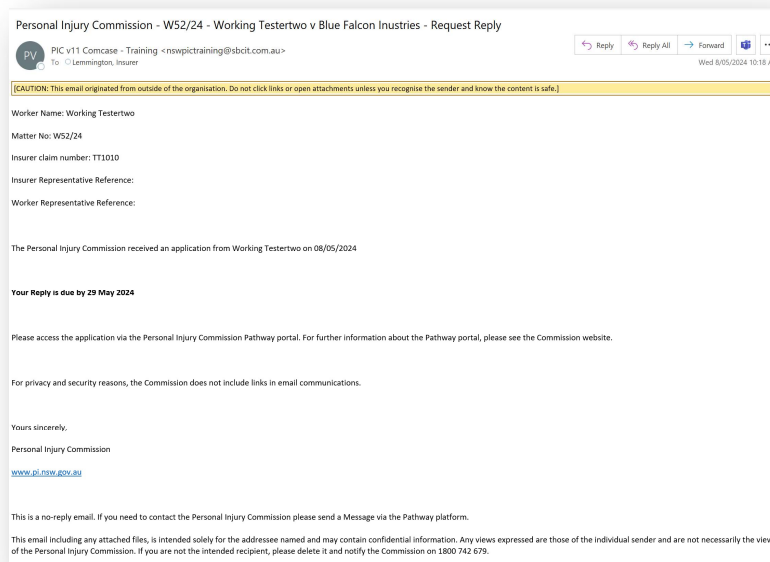When a reply is completed, it starts as a temporary application which**:**

- Displays in the **Temporary Applications** section of the 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.
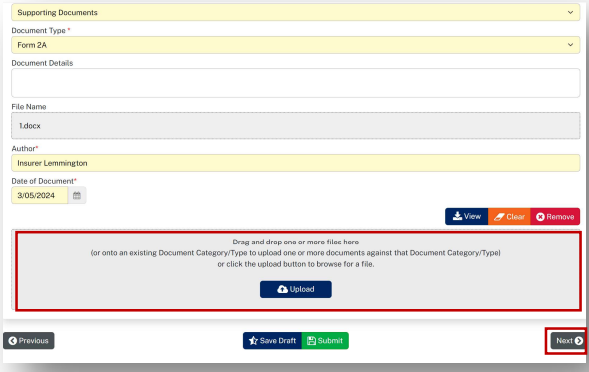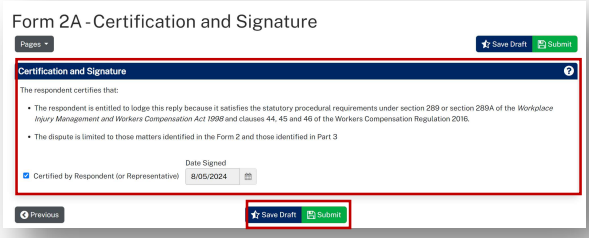
How to Assign the Reply Request

Instruction	Page
Unassigned Reply Requests must be assigned to someone in your organisation. All **Reply Requests** are **unassigned** initially, and **Unassigned Reply Requests** are visible to all users. Any user can assign a **Reply Request.** 1. To assign a **Reply Request**, complete the following: • Tick **Assign** box • Select a **User's name** from the **Assign To** drop down menu • Click **Assign**. **Note:** Be mindful of the **Date Reply Due.**	

How to complete a Reply

Instruction	Page
My Reply Requests are your assigned **Reply Requests** 1. To respond to the reply request, complete the following: • 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. ➢ This will generate the **Reply form** which you need to complete and submit. **Note:** Be mindful of the **Date Reply Due**	

Instruction	Page
2. Review the **Notice to Parties**, then click **Next** to proceed to begin completing the reply form. *Completing a Reply Form* ➢ Data fields enable you to enter free text or select from drop down lists or calendars to complete relevant information required for each form. ➢ When completing a reply form, **all fields with a yellow background are mandatory**, **and each form may have differing mandatory fields to input.** ➢ You will be unable to move onto the next page unless all mandatory fields have been filled. ➢ Supporting documents are uploaded as a single file (see separate section below).	
3. Upload **Supporting Documents** for the Reply, complete the Document Details as covered in **Supporting Documents** and click **Next**. **Note:** Supporting documents must be submitted as a single indexed and paginated bundle.	
4. **Sign and date** the application – **Submit** if ready or **Save Draft** and have someone else review the reply before it is submitted.	

➢ Here you can see confirmation that the Reply has been submitted.	
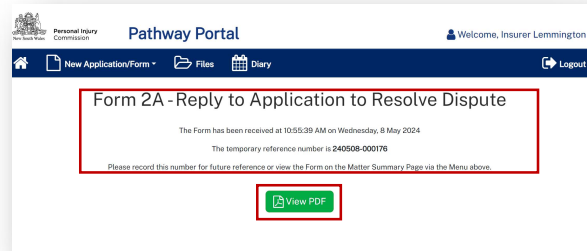
How to view the Reply

Reply registered email notification

When a reply is submitted, it will be reviewed and registered or rejected if it not compliant.

When a reply has been registered the Commission Registry team send an acceptance email to the:

- Applicant's Legal Representative
- Respondent's Legal Representative or
- Unrepresented parties.
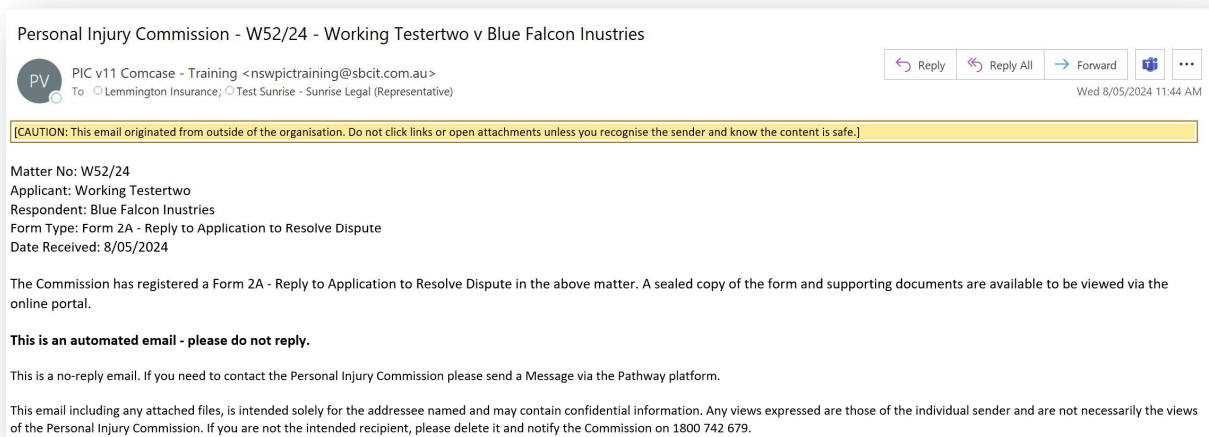
Instruction	Page

View the Reply
 	
The **Documents** section lists the:
 	
    • Sealed reply form
    • Reply document bundle
 	
1. Click the blue document date link to download and view the document.	

Messages

How to send a message

Instruction	Page
You can use the message function to communicate with the other party and the Personal Injury Commission. From the **Matter Details** page: 1. Click **New Message** on the top right corner of the application. **Note:** The **Application Owner** will always be copied automatically on the message.	
2. Type the **Subject**. 3. Select the **Participants**. • **Legal representative** (or self-represented party) receives email notification of new Portal message • **The Insurer** can see messages but not respond if they have a Legal Representative. 4. Type the **Message** body. 5. Click **Send.**	

How to view messages

You may receive new messages from the other party or the Commission.

You will also get an **email notification** which contains the message subject line only (for cyber security reasons), you need to view the message within the Portal.

A list of message threads displays in **Messages** section of the **Matter Details**.

New badge indicates a new message in the thread

Messages 2				View Open Messages
Application	Category	Subject	Sender	Date/Time Sent
Form 2 - Application to Resolve a Dispute	For Action	1 New Question for the Insurer	Nathan Johnson	3/05/2024 8:50 AM
Form 2 - Application to Resolve a Dispute	N/A	Message from The Insurer	Lemmington Insurance	3/05/2024 8:48 AM

Category for incoming messages will be:

- For Action
- For Noting
- For Review

N/A Category indicates thread was initiated by you

Click blue subject link to view and respond to the message

Click to toggle between:
View All Messages – Which includes closed threads.

View Open Messages – which only displays threads that are open

How to respond to messages

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

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

How to download a message thread

You can download message threads from the Pathway Portal.

Instruction	Page
1. From the **Matter Details** page click the blue subject link to view message thread.	
5. Click the **Print Message Thread** button.	

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 worker, for allocations that the worker 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.
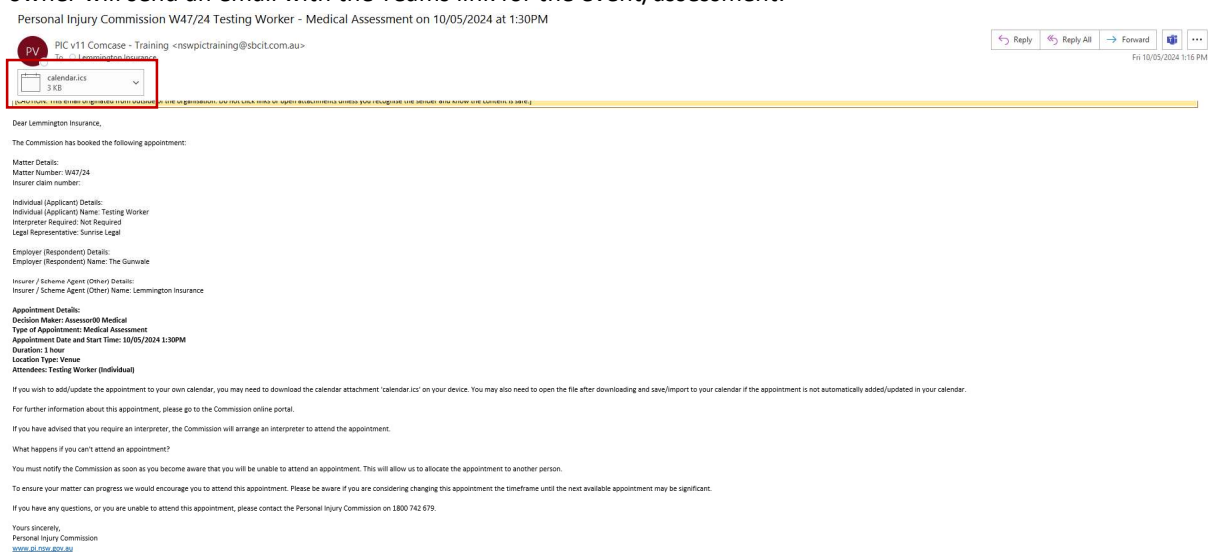
How to view allocation details

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

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

Allocation Type	Venue	Date and Time	Duration	Mode of Allocation	Attendees	Decision Maker	Language
New Preliminary Conference		8/05/2024 12:00 PM	1 hour 30 minutes	Video conference	Blue Falcon Inustries (Emp... ..), Lemmington Insurance (Insurer / Scheme Agent), Working Testertwo (Individual)		

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

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 the Pathway Portal.

Decision available email notification

How to view the Outcome Document

Instruction	Page
From the **Matter Details** page, scroll down to **Documents** 1. Click the blue Document Date link to download the document. 2. Click the **downloaded document** to view.	

How to lodge an Appeal

If you need to lodge an Appeal of a decision in the Pathway Portal, complete the following:

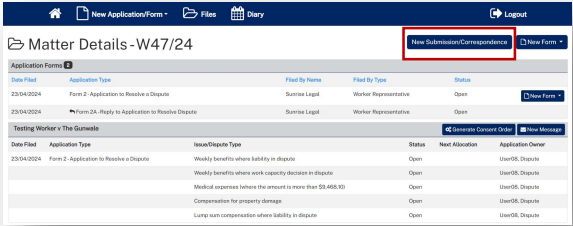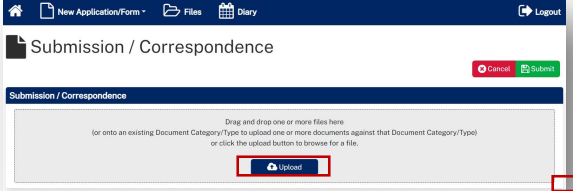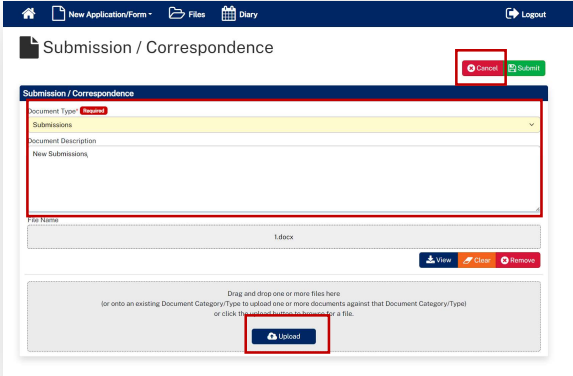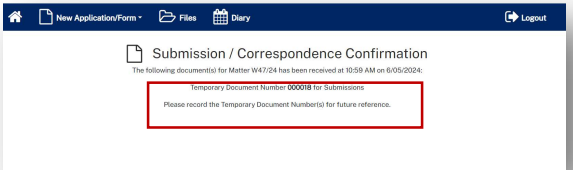| Instruction	Page
1. Click on **New Application/Form**, choose **Workers Compensation**, then click on the **form type**. 2. You can now follow the process covered in Lodge a new application to lodge your appeal.	

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
To lodge Submissions or other Correspondence: 1. From the **Matter Details** page, click **New Submissions/Correspondence**.	
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.**	
6. **Submissions/Correspondence Confirmation** screen will appear, which will show the **Temporary Document Number.**	

7. The document will now be visible under **Temporary Documents** drop down on the **Matter Summary** screen with a status of **Pending.** The Case owner will action the submitted correspondence.	

Generate Consent Orders

How to generate Consent Orders

It may be necessary to generate Consent Orders to lodge with the Commission.

Once generated and completed offline between the parties, this document is then submitted via the Matter Summary using the **New Submission/Correspondence** tab as outlined above.

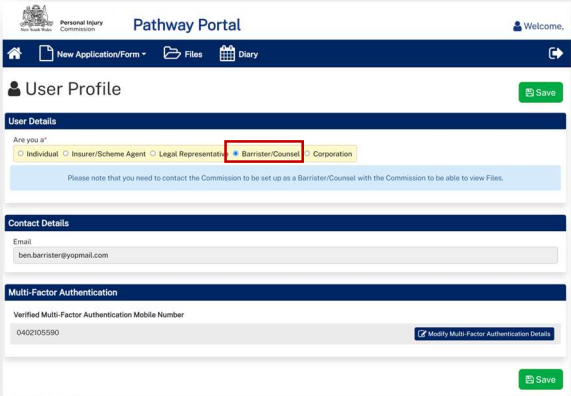|	
• Click on **Generate Consent Order,** which will prompt the download of the document. • Complete the document offline between the parties. • Lodge the Consent with The Commission using **New Submission/Correspondence** tab as outlined above.	
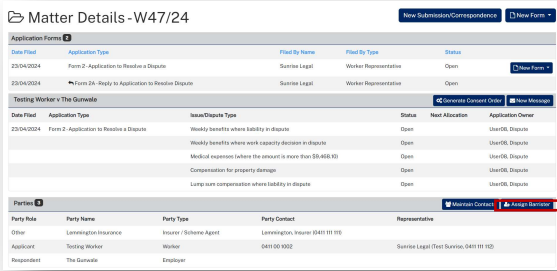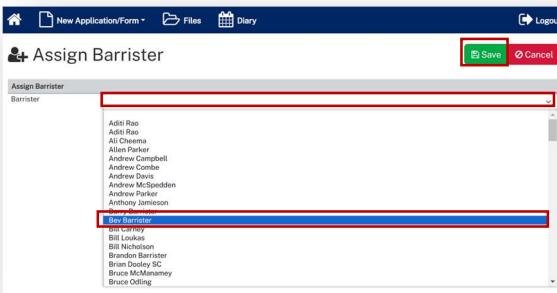
How to give a Barrister visibility to a dispute

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

Barrister registers as a Pathway Portal user

Instruction	Page
The barrister must first register as a Pathway Portal user. They will only need to do this once. At the end of registration, the **User Profile** displays: 1. Select Barrister/ Counsel 2. Click **Save** 3. The barrister then emails **wcsupport@pi.nsw.gov.au** asking for their email address be registered for barrister access.	

How to assign a Barrister

Instruction	Page
Assign a Barrister To give a barrister visibility of a dispute: 1. In the **Matter Details**, click **Assign Barrister**.	
2. Select the **Barrister** from the drop-down menu. 3. Click **Save**. *To change the barrister:* 1. Repeat above steps and select the new **Barrister** name. *To remove barrister:* 2. Select the blank line at the top of **Barrister** drop down menu.	

What does the Barrister see?

After a Barrister logs into the 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

Super Users 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	• Be registered as an Insurer User on the Pathway Portal • Application/Reply is lodged with you nominated as the primary contact • A Super User in your organisation adds you as a primary contact for a matter	• See that matter's details and documents • Send messages (if there is no legal representation for the matter) • Receive email notifications for the matter (if there is no legal representation for the matter)
Secondary contact for a matter	• Be registered as an Insurer User on the Pathway Portal, then … • A Super User in your organisation adds you as a secondary contact for a matter to grant matter visibility	If user filters **"Active Files** for **Matters I'm linked to"**: • Can see that matter details, documents and messages • Can send messages for that matter • Does NOT receive email notifications
Super user	• Be registered on the Pathway Portal as an Insurer User • Another super user can add / remove you as a Super User	• Can see and act on all matters • Can add/remove other Super Users (can't remove self) • Can assign any reply request to other Insurer Users • Can reassign matters • Can manage contacts for the matter • Can add a new contact • Do NOT receive email notifications for any matters unless you are the primary contact for such matters where there is no legal representative for the Insurer

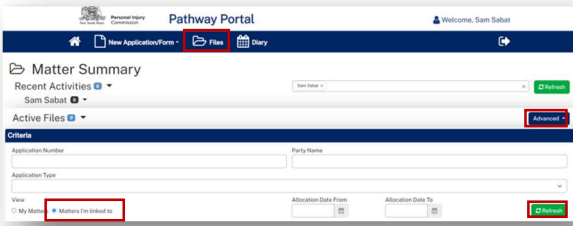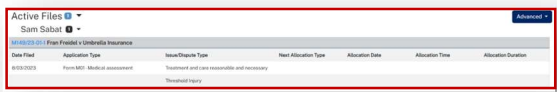## Primary contact and secondary contacts

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

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

After a Secondary contact is added

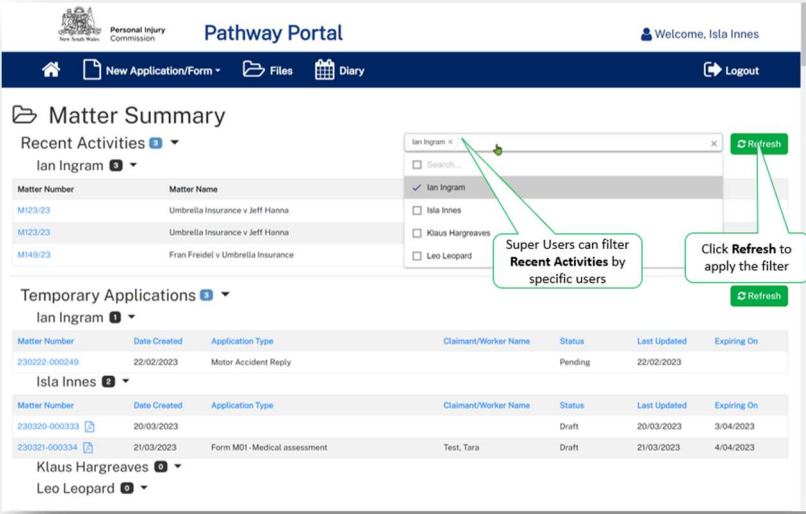| Instruction	Page
Secondary contact has been added For a secondary contact to view the matter: • Click the **Files** tab • Click **Advanced** in the **Active Files** section • Tick **Matters I'm linked to** • Click **Refresh**. *In this example Sam Sabat is a secondary contact on this matter*	
Secondary contact visibility The Secondary contact: ✓ Can see Matter Details ✓ Can view all documents ✓ Can view all messages ✓ Can send messages X Cannot see allocations in Diary	

Super Users

How to add/remove Super Users

Instruction	Page
Add/Remove a Super User A super user can add and remove other super users: • Click the **name of the Super User** in the top right corner • Tick or untick the **Super User** box • Click **Save.**	
In this example Isla Innes is now a Super User As a Super User Isla Innes can now: • Can see and act on all matters • Can add/remove other Super Users (can't remove self) • Add a Delegate.	

What can Super Users see – Files – Recent Activities

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

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

• Select users in the drop-down menu.

• Click Refresh.

Super Users - 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
To assign one or more Matters, complete the following: 1. Click on the **Files** tab. 2. Find the person you want to reassign Matter/s from. 3. Click the **Reassign** button. **Note:** The Reassign button is only available for Super Users and their delegates.	
➢ All Matters assigned to the selected person display. **There are 2 options:** **Option 1: Reassign All** ➢ Consider this option when someone is going away on holidays or has left your organisation and you need to reassign **all** of their Matters to one other person. **Option 2: Reassign some** ➢ Consider this option when you only need to reassign **some** of the Matters or you need to assign them to **more than one** person.	

To Reassign All 1. From the drop-down list **select a new person** to assign all Matters to **Note:** Tick **Deactivate Contact** if a person has left the organisation. This will deactivate their profile and they will no longer appear in drop down lists within the Portal. 2. Click **Reassign All** ➢ New Contact will auto populate for all Matters **Note:** The Phone field is a mandatory field. If it is blank, please add phone number. 3. Click **Save** ➢ All Matters will now be reassigned to the selected person.	
To Reassign some 1. From the drop-down list **select a person** to assign the Matter to. Continue this step for other Matters as needed. **Note:** The Phone field is a mandatory field. If it is blank, please add phone number. 2. Click **Save** ➢ The selected Matters will now be reassigned to the person selected.	

Super Users - How to Manage Primary and Secondary Contacts

There will be times when you need to manage contacts on a specific Matter.
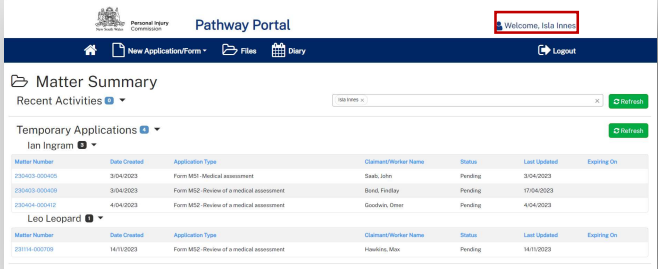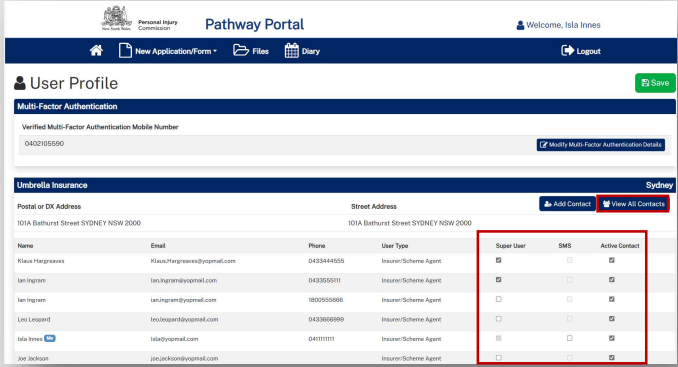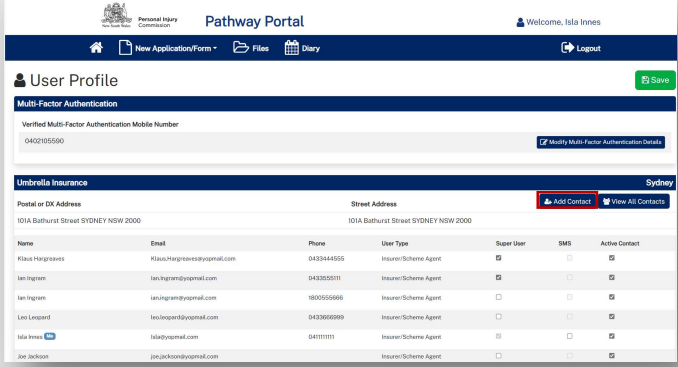
Instruction	Page
1. Click on the **Files** tab. 2. Click on the **blue Matter Number link.**	
➤ Matter Details page displays 3. Go to **Parties** section and Click on **Maintain Contacts**	
➤ **Maintain Contacts** page displays with current contacts. **To update Primary Contact:** 4. In the Primary Contact section, select the new Primary Contact's name from the New Contact drop-down menu. 5. Click **Save**	

If you need to add a Secondary Contact:

1. Click **Add Contact**

2. In the Secondary Contact section, select name from the New Contact drop down list

3. Click **Save**

Super Users - How to Add a new Contact or Deactivate Contact
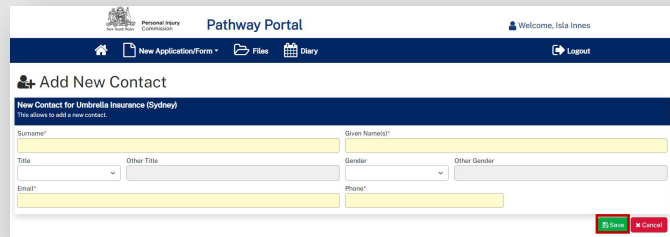
Instruction	Page
1. Click the **Welcome, name** in the top right corner **Note:** Only Super User can add a new contact.	
➢ **User Profile** page displays with a list of all **active users** for your organisation. **Note:** Before creating a new contact. Click on **View All Contacts** to check if there is an existing inactive account. **Super User:** Ticked box indicates the person has Super User access. **Active Contact:** Ticked box indicates this user is Active. *To deactivate user:* 1. Untick Active Contact check box. 2. Click Save	
To add a new user: 1. Click **Add Contact**	

2. Fill in all yellow mandatory fields

3. Click **Save**

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

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

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

Appendix A – Document requirements

What is the maximum document size and file types that can be uploaded to the Pathway Portal?

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 the 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 Worker but a different accident date or a different Worker 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 Mediator

Appendix C – Email Notifications – When and what happens

When	What happens
An application is lodged in the 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
1.1	7 May 2024	Nate Johnson	Initial version	Melissa Golfes