

File subcase on existing case

Portal User Guide

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| Purpose |
| User Guide shows how to: File subcase on existing case in CMS Portal |
| Icon  Description automatically generated | Resource:To view full list of lodgements and subcase types, visit **CMS** Help Centre > Forms **and Fees** > **Forms  (CMS Portal Forms)** > Filing Forms |
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1. Log in to Portal.

Home screen displays:



1. Click: File on One of My Cases

Search Case screen displays:



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| Icon  Description automatically generated | Note:List of cases that have permitted access displays at bottom of screen. If relevant case is visible in this list, click **Case Number** to access or link in **Actions** column to file on caseThis page enables to search by numerous filtersIf viewing is denied, requesting access to case is required |

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| Icon  Description automatically generated | Resource:See User Guide: Request access to a case |

1. Complete required panels and fields

| Panel: Search Case |
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| Field: | Action: |
| Case Number | Type full or partial Case Number.  |
| Case Name | Type full or partial Case Name.  |
| First Name | Type First Name of a party in case. |
| Last Name | Type Last Name of a party in case. |
| Organisation Name | Type Organisation Name. |
| Case Type | Select relevant option. |
| Court | Select relevant option. |
| Status | Select relevant option. |
| Filing Date | Select date (or range of dates) of filing. |
| Hearing Date | Select date (or range of dates) of hearing. |

1. Click: **Submit**

**Results** panel displays cases matching search criteria:



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| Icon  Description automatically generated | **Notes:**If relevant case does not display in list of results, adjust search criteria and click: **Submit** To reset all fields, click: **Clear** |

1. In Action column for relevant case, click: File a Subcase link.

Add Subcase screen displays:



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| Icon  Description automatically generated | Note:Panels and fields will vary depending on subcase type selected. |

1. Complete required panels and fields.

| Panel: My Reference |
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| Field: | Action: |
| My Reference | Type reference name or number to identify filing.  |

| Panel: Subcase Details |
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| Field: | Action: |
| Subcase Type | Type or select subcase name from menu.Note:* Subcase type is based on lodgement being filed

To view full list of lodgements and subcase types, visit **CMS** Help Centre > Forms **and Fees** > **Forms  (CMS Portal Forms)** > Filing Forms |
| Nature of Claim | The nature of claim displays. This cannot be changed. |

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| Icon  Description automatically generated | Note:Common fields are listed in tables below. These may not appear in all subcase types. |

| Panel: Subcase Initiating Document |
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| Field: | Action: |
| Code/Name | The relevant form will display. |
| Upload Document | Click: **Choose File** and add required PDF document to case.Note:All document uploads must be PDF |

| Additional Panels |
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| Field: | Action: |
| Filed By | Select party. |
| Representation | Select filing party’s legal representation if applicable.To add representation, click: **Add Representation** |
| Filed Against | Select party.To add representation, click: **Add** **Filed Against** then type the details of the new party in the fields provided. |
| Required Documents (1) | Document will be listed if required. Click: Choose File and add required PDF document to case.Note:All document uploads must be PDF.  |
| Additional Documents (1) | Select additional filed documents as required. |
| Fee Waiver Panel | Change to Yes if applying for a fee waiver. |

1. Click: Proceed

My Account screen displays:



1. Select item requiring payment. Click: Submit Payment

Process Payment screen displays:



1. In Payment Options panel, select payment method, click: Continue
2. If ePayment by Credit/Card is selected, a pop-up box displays. Type your payment details.
3. Click: Make Payment

Confirmation of Filing screen displays:



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| Icon  Description automatically generated | **Notes:**Acknowledgment for filing email is sent to Portaluser when document is filedAn additional email is sent once document is reviewed by registry staff |

1. Click: My Account

My Account screen displays indicating pending review, accepted or rejected:



1. To see record of filing, in the Action column, click: **View**

Case Summary screen displays:

