**View and action case**

This User Guide outlines the steps required to access a case your organisation already has access to in the CMS Portal.

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|  | Please see: For information on requesting access to a case your organisation does not have access to, please see User Guide: **Request Access to a Case** |

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| Step | Action | Result |
|  | Log in to the **CMS Portal** | The CMS Portal screen displays:  Graphical user interface, website  Description automatically generated |
|  | Click: **My Account**  **Screenshot of the My Account button.** | The **My Account** screen displays:  Screenshot of the Filings tab within the My Account screen, displaying the Search button and list of recent filings. |

| Step | Action | | Result | |
| --- | --- | --- | --- | --- |
|  | Click: **Cases**  **Cases tab** | | The **Search Case** screen displays: | |
| The Cases tab within the My Account screen. Search Case fields, Submit and Clear buttons and listing of a recent case display. | | | |
|  | **Hint**:  A list of cases your CMS Portal account has access to displays at the bottom of the screen. If the relevant case is visible in this list, click the **Case Number** to access the case, or a link in the **Actions** column to file on the case. | | |
|  | Complete the required panels and fields:  Fields marked with a red asterisk \* are mandatory.   |  |  | | --- | --- | | PANEL: Search Case | | | In this field … | Provide this information … | | Case Number | Type the relevant **Case Number** | | Case Name | Type the name of a party in the case. | | First Name | Type the **First Name** of the relevant party. | | Last Name | Type the **Last Name** of the relevant party. | | Organisation Name | Type your **Organisation Name** | | Case Type | Select the relevant **Case Type** | | Court | Select the relevant **Court** | | Status | Select the case **Status** | | Filing Date | Click the **Calendar** icon to select a date window. | | | | |
|  | Click: **Submit**  **Submit button** | | Cases matching the search criteria display:  A partial screenshot of a result showing after a case search. | |
|  | **Hint**:  If the relevant case does not display in the list of results, adjust the search criteria and click: **Submit**  To reset all fields, click: **Clear** |
|  | What action is required on the case?   |  |  | | --- | --- | | To perform this action … | Click this link …. | | Access case details | Click the link for the relevant case in the **Case Number** column:  Case Number column with a case highlighted | | File on the case | Click the link for the relevant filing type in the **ACTION** column:  Action column with link to actions - File a Subcase, File a document and File amended document | | | | |