# Request access to case

This User Guide outlines the process required to request access to a case, which your account does not have access to, in the **CMS Portal**.

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| Step | Action | Result |
|  | Log into the CMS Portal | The CMS Portal screen displays:  Graphical user interface, website  Description automatically generated |
|  | Select the relevant **jurisdiction:**  Magistrates' Court of Victoria button | Select the relevant **Case Type**:  CIVIL button |
|  | Click: **REQUEST CASE ACCESS**  **REQUEST CASE ACCESS button** | The **Case Access Search** screen displays:  Case Access Search screen with Search and Clear buttons. |

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| Step | Action | Result | |
|  | Enter at least one search criteria into the displayed fields:   |  |  | | --- | --- | | PANEL: Case Access Search | | | In this field … | Provide this information … | | Court Location | Select the relevant **Court Location** | | Case Number | Type the relevant **Case Number** | | Last Name | Type the **Last Name** of the relevant party. | | First Name | Type the **First Name** of the relevant party. | | Case Type | Select the relevant **Case Type** | | Organisation Name | Type the **Organisation Name** of the relevant party. | | Trading as Name | Type the **Trading Name** of the relevant party. | | | |
|  | Select: **I’m not a robot**  **reCaptcha test asking if user is a robot**  Select all images matching the request. Example:  Screenshot of reCAPTCHA  Click: **Search**  **Search icon** | Results matching the search criteria display:  Partial screenshot of result from case access search. | |
|  | **Hint**:  If the relevant case does not appear in the search results, return to step 4 and refine your search criteria. |

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| Step | Action | | Result |
|  | In the **Action** column for the relevant case, select: **Request Access**  Action column with the Request Access link highlighted | | The **Request Case Access** screen displays in a new tab:  Request Case Access screen with My Reference and Message fields. Also displays a terms and conditions tick box and Proceed button. |
|  | Complete the required panels and fields:  Fields marked with a red asterisk \* are mandatory.   |  |  | | --- | --- | | SCREEN: Request Case Access | | | In this field … | Provide this information … | | My Reference | Displays a system generated reference. Replace with unique reference to personally identify filing. | | Message | Type relevant information to support the case access request. | | | |
|  | Tick box iconIf appropriate, select the box to acknowledge you are an eligible user who should be able to access the case. | | Partial screenshot of the terms and conditions statement with tick box. |
|  | **Important:** Only select this box if you should have access to this case, in accordance with the **Case Management System End User License Terms and Conditions.**  View the terms of use in the **Quick Links** menu on the **CMS Portal** home page. | |

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| Step | Action | | Result |
|  | Click: **Proceed**  **Proceed button** | | The **Confirmation of Filing** screen displays a confirmation message:  Confirmation of Filing screen, with Home, My Account and Print This Page buttons. |
|  | Select the relevant button to continue using the CMS Portal:  Home, My Account and Print This Page buttons | | |
|  | **Important:** The email associated with your **CMS Portal** account is sent confirmation of case access:  Screenshot of Case Access Notification for CMS Portal email. | |

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| Step | Action | Result | |
|  | In the **Case Access Notification** email, click the link to activate case access. | A new tab displays a confirmation message in the **CMS Portal**  **Case Access Invitation notification** | |
|  | **Note**: The case is now accessible in the **Cases** tab on the **My Account** screen. |
|  | **Please see**: For information regarding the process to access a case in your **CMS Portal** account, please see User Guide: **Cases** |