Logo, icon

Description automatically generated

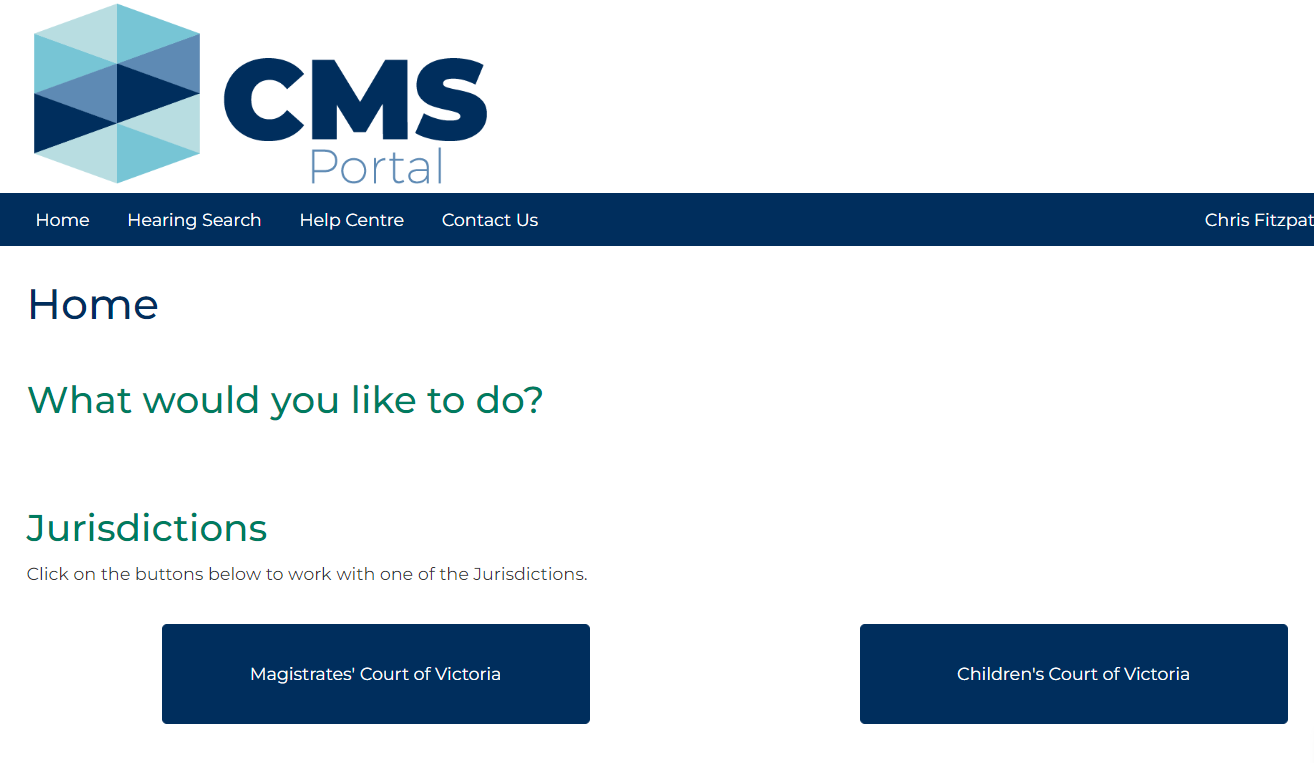
File subcase on existing case

Portal Quick Reference Guide

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| Purpose |
| Quick Reference Guide shows how to: File subcase on existing case in CMS Portal |

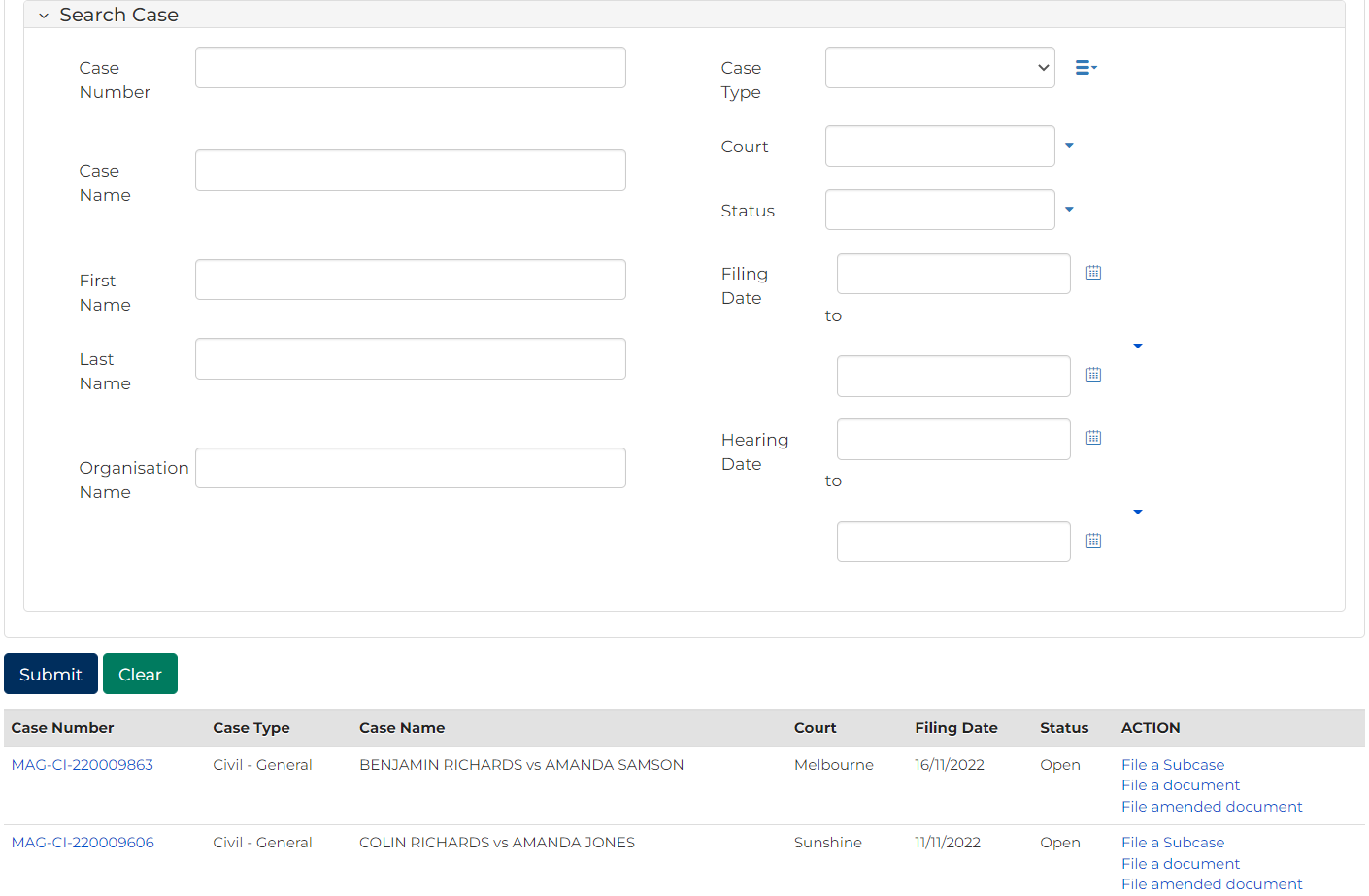
1. Log in to Portal.

Home screen displays:



1. Click: File on One of My Cases

Search Case screen displays:



|  |  |
| --- | --- |
| 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 case  This page enables to search by numerous filters  If viewing is denied, requesting access to case is required |

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

1. Complete required panels and fields

| Panel: Search Case | |
| --- | --- |
| 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**

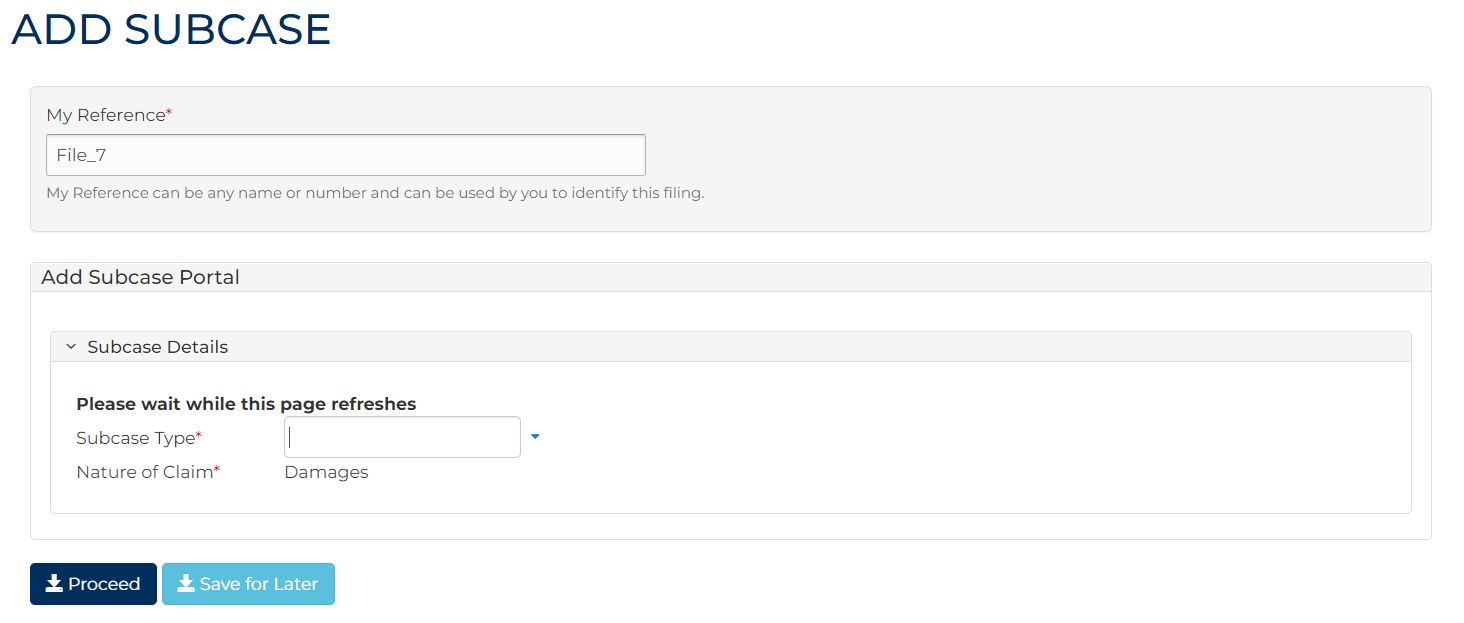
**Results** panel displays cases matching search criteria:



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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.

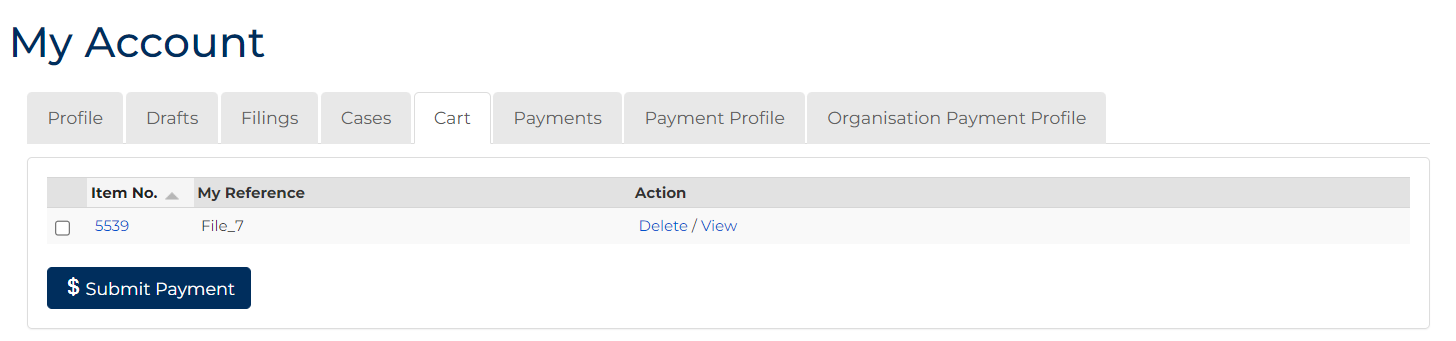
| Panel: My Reference | |
| --- | --- |
| Field: | Action: |
| My Reference | Type reference name or number to identify filing. |
| Panel: Subcase Details | |
| Field: | Action: |
| Subcase Type | Type subcase Code/Name and select option from list.  Note:  If unsure of subcase Code/Name click magnifying glass icon to open search functionality. |
| Nature of Claim | - |

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

| Panel: Subcase Initiating Document | |
| --- | --- |
| Field: | Action: |
| Code/Name | - |
| Upload Document | Click: **Choose File** and add required PDF document to case.  Note:  All document uploads must be PDF |
| Additional Panels | |
| 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 |
| 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. |

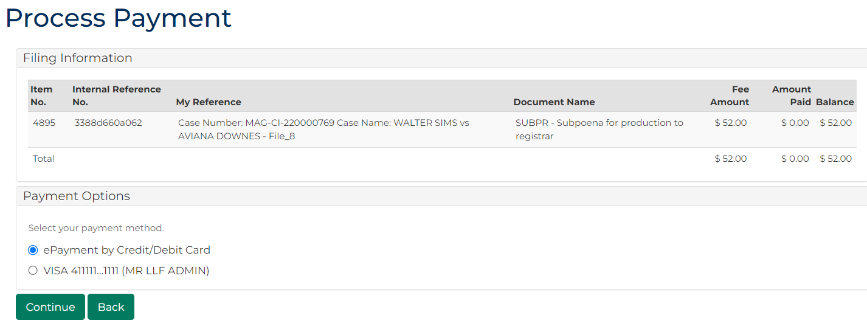
1. Click: Proceed

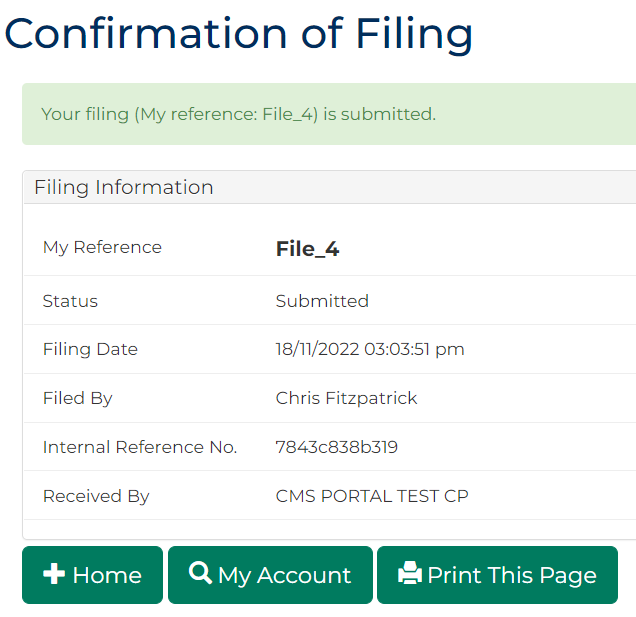
My Account screen displays:



1. Select item requiring payment. Click: Submit Payment

Process Payment screen displays:



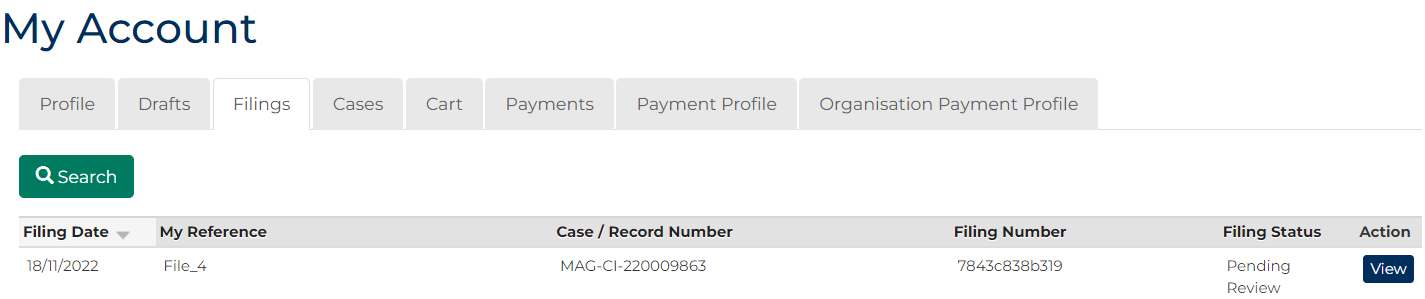
1. In Payment Options panel, select payment method, click: Continue

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 filed  An 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:

