

Request case access

Portal Quick Reference Guide

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| Purpose |
| User Guide shows how to: Request case access in CMS |

1. Log in to Portal.

Home screen displays:



1. Select relevant Jurisdiction

Case Type screen displays:



1. Select Case Type



1. Click: Request Case Access

Case Access Search screen displays:



1. Complete required panels and fields.

| Panel: Case Access Search |
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| Field: | Action: |
| Court Location | Select Court Location. |
| Case Number | Type Case Number. |
| Last Name | Type Last Name of party. |
| First Name | Type First Name of party. |
| Case Type | Select Case Type. |
| Organisation Name | Type Organisation Name of party. |
| Trading As Name | Type Trading As Name of party. |

1. Select: I’m not a robot
2. Click: Search

Case results displays:



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

1. In Action column for relevant case, select: Request Access

Request Case Access screen displays:



1. Complete required panels and fields.

| Panel: Request Case Access |
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| Field: | Action: |
| My Reference | Type reference name or number to identify filing.  |
| Message | Type information to support case access request. |
| CMS Portal User Declaration | Select box. |

1. Click: Proceed

Confirmation of Filing screen displays:



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| Icon  Description automatically generated | Note:* Case Access Notification email sent to email of user that requested case access
* Ensure the requesting user is logged in to Portal before actioning the token in the email.
* Ensure Google Chrome set as default browser for token to work.
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1. Log in to email and locate Case Access Notification for CMS Portal email.
2. Open email and click access token link.

Case Access Invitation message displays:



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| Icon  Description automatically generated | Note:* Token in email will only work for user that requested case access
* Do not forward or share email with another user
* Case is now available in Cases tab on My Account screen.
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| Icon  Description automatically generated | **Resource:**See User Guide: **View and action case** |