# File document to existing case

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|  | **Prerequisites:**Before completing the steps in this User Guide, ensure a case exists that meets the following criteria:* A claim or registration order has been made, and
* You have access to the case in the **CMS Portal.**
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|  | **Please see**:If you don’t have access to the case in the CMS Portal, please see User Guide: **Requesting access to a case**. |

| Step | Action | Result |
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|  | Log in to the **CMS Portal** | The C**MS Portal Home** screen displays:Graphical user interface, website  Description automatically generated |
|  | Click: **File on One of My Cases**File on One of My Cases button  | The **My Account** screen displays the **Cases** tab:The My Account Search Case screen displays with numerous fields to search with. |
|  | Type information in the **Search Case** fields to search for the relevant case, or locate the case in the list below the search fields:Search Case screen displays with First name and surname fields highlighted. A case at the bottom of screen is also highlighted. |
|  | **Hint:** If your case displays in the list at the bottom of the page, proceed to step 5. |
|  | Click: **Submit**Submit button | The **Results** section displays cases matching the search criteria:Screenshot of result matching the case search criteria |
|  | In the Action column, click: **File a document**Action column, with options to File a Subcase, File a document and File ammended document. File a document is highlighted. | The **Case Summary** screen displays: |
|  | In the **Action** column, click: **File a Document** within the relevant subcase | The **Add Filing** screen displays: |
|  | Complete the required panels and fields: Fields marked with a red asterisk \* are mandatory. |
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| PANEL: My Reference |
| In this field … | Provide this information … |
| My Reference | Any name or number which is used by you to identify this filing. |
| PANEL: Add Document |
| Code / Name | Start typing the document **Code/Name** and select relevant document from the list. |
|  | Magnifying glass/search icon**Hint**: If you are unsure of the document **Code/Name**, click the magnifying glass icon to open the search functionality. |

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| *Continued…* |
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| Important icon | **Important**:Panels and fields vary depending on Document type selected. Common fields are listed in the table below. These may not appear in all document types. |
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| PANEL: Add Document |
| In this field … | Provide this information … |
| Upload Document | Choose file buttonClick and add the required \*PDF document to the case.*\*All document uploads must be PDF.* |
| ADDITIONAL PANELS: |
| Filed by | Tick box iconSelect the party filing the application.  |
| Representation | Tick box iconSelect the legal representation of the filing party if applicable.* If your organisation has previously filed on this case, select it from the list of representatives, or

Add Representation for Filed By (Existing Representation) link* If the document you are filing is your organisation’s first appearance on the case, click:

Add Representation for Filed By (New Representation) link* Search for your organisation in the available fields and select it from the options provided.
 |
| Filed Against | Tick box iconSelect the party the application is filed against.To add representation, click: **Filed Against (New Party)** then type the details of the new party in the fields provided.Filed Against (New Party) link |
| Related Documents | Tick box iconSelect any related filed documents.  |
| Fee Waiver Panel | Displays: **No**. Change to **Yes** if required. |

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|  | Click: **Proceed**Proceed button | Is there a fee for filing the document?

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| If … | Then … |
| Yes | The **My Account** screen displays outstanding payments:Screenshot of the Cart tab within the My Account screen, with payment amount.  Go to step 8 |
| No | Go to step 10 |

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|  | Tick iconSelect the item requiring payment.Click**: Submit Payment**Submit Payment button | The **Process Payment** screen displays:The Process Payment screen displays with Filing Information and Payment Options, plus the Continue and Back buttons. ePayment by Credit/Debit Card is selected by default.  |
|  | Radio button selectedIn the **Payment Options** panel, select . a payment method, then click: **Continue****Continue button** |  | **Note**:If **ePayment by Credit/Debit card** is selected, a popup displays.Enter your payment details, then click: **Make Payment**Make payment button |
|  | **Please See**:Payment options can be added and removed from the **My Account** screen. For more information, please see User Guide: **My account features** |
|  | The document is filed. | The **Confirmation of Filing** screen displays:Screenshot of the Confirmation of Filing with Filing Information and Payment Information. Notifications display: Your filing is submitted, and Thank you for your payment.  |
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 | OPTIONAL:To view the status of the document, click: **My Account****My Account icon** | The **My Account** screen displays the **Filings** tab:The Filings tab within the y Account screen displays with a Search button and a list of recent filings. *Continued…* |
| *Continued…*

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| Field | Description |
| **Filing Date** | Shows filing date - the most recently filed document displays first. |
| **My Reference** | Displays the reference typed when filing the document. |
| **Case/Record Number** | Assists with locating filings. |
| **Filing Status** | Shows the filing’s live status. Documents in:* **Pending Review** status have not been reviewed by registry staff yet.
* **Accepted** status have been reviewed and approved, or automatically approved by the CMS Portal
* **Rejected** status have been rejected by registry staff.
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| Action/**View** | Allows you to view the **Case Summary** screen for the relevant case. |
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|  | **Note**:* An **Acknowledgment for filing** email is sent to the **CMS Portal** user when the document is filed.
* An additional email is sent once the document is reviewed by registry staff.
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