# 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.** |
|  | **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 | |
| --- | --- | --- | --- | --- | --- | --- |
|  | 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. | | | | | |
| |  |  |  | | --- | --- | --- | | 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. | | | | | | |
| *Continued…* | | | | | |
| *Continued…* | | | | | |
| 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. | | |
| 7 | |  |  |  | | --- | --- | --- | | 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. | | | | | | |
|  | Click: **Proceed**  Proceed button | | | | Is there a fee for filing the document?   |  |  | | --- | --- | | 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 | | |
|  | 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. | |
|  | 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…*   |  |  | | --- | --- | | 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. | | Action/**View** | Allows you to view the **Case Summary** screen for the relevant case. | |  |  | | | | | | |
|  | | **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. | | | | |