CaseBridge — Internal Platform Jira Epics & Detailed Stories

Scope: Internal Platform (Admin Manager, Case Manager, Associate Lawyer)
Governance: Derived strictly from the Internal Operations PRD
Excludes: Client Portal features

EPIC 1: Internal Authentication & Access Control

Goal: Secure, invitation-only access for internal users.

Story 1.1: Internal User Invitation (Admin)

As an Admin Manager
I want to invite internal users
So that they can access the firm workspace

Acceptance Criteria - Admin can invite users by email - Role selectable: Case Manager or Associate Lawyer - Invitation link expires after defined time - User status = pending until accepted

Tasks - Create invitations table - Build invite user UI - Generate secure invite token - Send invitation email via Supabase Auth

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Story 1.2: Internal User Onboarding (Invite Acceptance)

As a invited internal user
I want to activate my account
So that I can access the system

Acceptance Criteria - User can set password on first login - Profile status updates to active - User redirected to role-appropriate dashboard

Tasks - Build accept-invite flow - Validate token - Create/update profile record

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Story 1.3: Internal Login & Session Handling

As an internal user
I want to log in securely
So that I can perform my duties

Acceptance Criteria - Login via email/password - Inactive/suspended users denied access - Session persists across refresh

Tasks - Build login UI - Implement Supabase Auth login - Add protected routing

EPIC 2: Admin Manager — Firm & User Governance

Goal: Full control over firm configuration and access.

Story 2.1: Firm Profile Management

As an Admin Manager
I want to manage firm details
So that firm information stays current

Acceptance Criteria - Admin can view and edit firm profile - Changes saved immediately

Tasks - Build firm profile UI - Implement update logic

Story 2.2: Internal User Management

As an Admin Manager
I want to manage users
So that access is controlled

Acceptance Criteria - View all firm users - Suspend or deactivate users - Changes take effect immediately

Tasks - Build users table UI - Add suspend/deactivate actions - Update user status in DB

Story 2.3: System Audit Logs

As an Admin Manager
I want to view audit logs
So that all actions are traceable

Acceptance Criteria - All sensitive actions logged - Admin can filter logs

Tasks - Create audit_logs table - Build audit log viewer UI

EPIC 3: Case Manager — Case Intake & Oversight

Goal: Enable operational control of legal matters.

Story 3.1: Receive Client Matter Submissions

As a Case Manager
I want to see new client matters
So that I can review them

Acceptance Criteria - New matters appear in queue - Status defaults to Pending Review

Tasks - Build intake queue UI - Fetch client-submitted matters

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Story 3.2: Review & Update Case Status

As a Case Manager
I want to update case status
So that progress is tracked

Acceptance Criteria - Case Manager can change status - Status changes logged - Client notified

Tasks - Build status update UI - Update case record - Trigger notifications

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Story 3.3: Assign Cases to Associate Lawyers

As a Case Manager
I want to assign cases
So that work is delegated

Acceptance Criteria - Case Manager selects associate - Assignment recorded - Associate notified

Tasks - Build assignment UI - Update case assignment field

EPIC 4: Case Manager — Document Review

Goal: Validate and manage case documents.

Story 4.1: Review Client Documents

As a Case Manager
I want to review uploaded documents
So that evidence is validated

Acceptance Criteria - View documents per case - Preview & download supported files - Mark document as verified

Tasks - Build document review UI - Implement verification toggle - Log verification action

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EPIC 5: Associate Lawyer — Assigned Work

Goal: Allow associates to execute assigned work only.

Story 5.1: Associate Dashboard

As an Associate Lawyer
I want to see assigned cases
So that I know what to work on

Acceptance Criteria - Dashboard lists only assigned cases

Tasks - Build associate dashboard UI - Fetch assigned cases only

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Story 5.2: Case Execution by Associate

As an Associate Lawyer
I want to work on my cases
So that I can complete tasks

Acceptance Criteria - Associate can view case details - Associate can upload documents - Associate cannot change case status

Tasks - Build case detail view (restricted) - Enable document upload

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EPIC 6: Internal Notifications

Goal: Keep internal users informed.

Story 6.1: Internal Notification System

As an internal user
I want notifications
So that I don't miss important events

Acceptance Criteria - Notifications for: - New matters - Case assignments - Status changes - Unread count visible

Tasks - Create notifications table - Trigger notifications on events - Build notification bell UI

EPIC 7: Security & Compliance Enforcement

Goal: Enforce firm-level security.

Story 7.1: Enforce Firm-Scoped Access

As a system
I want strict RLS
So that no cross-firm access occurs

Acceptance Criteria - All queries scoped by firm_id - Cross-firm access impossible

Tasks - Define RLS policies - Validate with test accounts

Status: Internal Platform Jira backlog — ready for sprint planning