PACE Case Management System

User Guide for PACE Staff

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Getting Started

Login

1. **Open the application** in your web browser at `http://localhost:3000`
2. **Enter your credentials:**
   - Email: `admin@pace.org`
   - Password: `password123`
3. **Click the "Login" button**
4. You will be redirected to the Dashboard

Dashboard Overview

The Dashboard is your main hub for case management. Here is what you will find:

Dashboard Components

1. Statistics Cards (Top Section)

The top section displays key metrics at a glance:

- Total Cases - All cases in the system
- Active Cases - Currently ongoing cases
- Pending Cases - Cases awaiting action
- Resolved Cases - Completed cases
- Urgent Cases - Cases marked as urgent
- Disposed Cases - Closed cases

2. Upcoming Events Section

Displays case events for the next 7 days with the following features:

Event Cards

- Shows event date, title, case code, and beneficiary name
- Click any event card to navigate to the case details page
- Full event details available in the "Case Timeline and Events" section

Search and Filter Options

- Search Bar - Find events quickly by beneficiary name or case number
- Event Type Filter - Filter by:
  - Court Hearing
  - Counseling Session
  - Mediation Meeting
  - Document Submission
- Date Range Filter - View events for:
  - Next 7 days
  - Next 30 days
  - Custom date range

3. Top Navigation Bar

Quick access elements located at the top of every page:

- Logo/Home - Click to return to Dashboard
- Current User - Shows logged-in user (top right)
- Logout - Exit the application (top right)

4. Sidebar Navigation

Quick access to main sections:

- Dashboard - View overall statistics and upcoming events
- All Cases - Access the complete case list

- Beneficiaries - View and manage beneficiary records
- Add New Case - Button to create new case

5. Google Drive Integration

Connect your Google Drive account for centralized document storage:

- Location - "Documents" section
- Purpose - Connect your Google Drive account for secure document management
- Action - Click "Connect Google Drive" button to authorize

Managing Cases

View All Cases

1. Click **"All Cases"** in the sidebar
2. You will see a table with all cases sorted by newest to oldest
3. Use filters and search to find specific cases

Case Table Columns

Column	Description
Case Code	Unique identifier (e.g., CASE-001)
Beneficiary	Name of the person associated with the case
Case Type	Type of legal action or matter
Court	Court handling the case
Resolution Type	How the case is being resolved
Status	Current status of the case

Table 1: Case Table Columns and Descriptions

Filtering Cases

The system provides multiple filtering options to help you locate cases quickly.

Date Filter Options

- All Time - Show all cases in the system
- Last 6 Months - Cases filed in past 6 months
- Year-wise - Filter by 2025, 2024, 2023, or 2022

Case Type Filter

- Domestic Violence
- Child Custody
- Property Dispute
- Consumer Rights
- Labor Rights
- Other

Status Filter

- Active - Currently ongoing
- Pending - Awaiting action
- Urgent - Requires immediate attention
- Resolved - Case concluded

Resolution Type Filter

- Litigation
- Mediation
- Arbitration
- Legal Aid
- Counseling

Court Filter

- District Court Delhi
- High Court Delhi
- Family Court
- Consumer Court
- Other

Search Functionality

Use the search bar to find cases across multiple fields:

- Case code
- Beneficiary name
- Case title
- Case type

To clear all filters, click the "Clear Filters" button.

Update Case Status

Change case status without opening the full case details:

1. Find the case in the table
2. Click on the **Status Badge** (colored button)

3. A dropdown menu appears with the following options:
   - Active
   - Pending
   - Urgent
   - Resolved
   - Closed
4. Click your desired status
5. Status updates immediately without page reload

View Case Details

1. Click anywhere on the case row
2. You will be taken to the **Case Details Page** showing:
   - Complete case information
   - Case timeline with all events
   - Associated documents
   - Beneficiary information

Managing Beneficiaries

View All Beneficiaries

1. Click **"Beneficiaries"** in the sidebar
2. You will see beneficiary cards displaying basic information

Search Beneficiaries

Use the search bar to filter by:

- Name
- Phone number
- Email address
- Physical address
- Associated case codes

View Beneficiary Details

1. Click on any beneficiary card
2. A modal (popup) opens showing the following sections:

Contact Information

- Name
- Phone
- Email
- Address

Preferences

- Has smartphone (yes/no)
- Can read (yes/no)

Case Information

- Date of filing
- Associated cases

Action Buttons

- Edit beneficiary
- Add new case (with details pre-filled)

Add New Case from Beneficiary Page

1. Click "Add New Case" on the beneficiary card
2. The new case form opens with beneficiary details pre-filled
3. Fill in the remaining case details
4. Submit to create the case

Case Timeline and Events

View Case Timeline

1. Open a case by clicking it from All Cases
2. Scroll to the **"Case Timeline and Events"** section
3. Timeline displays all events in chronological order

Event Information

Each event in the timeline shows:

- Date and Time - When the event occurs
- Event Title - What the event is about
- Description - Detailed information about the event
- Location - Where the event takes place
- Event Type - Category (Hearing, Counseling, etc.)

- Notes - Additional notes and remarks
- Organizations - Organizations involved in the event

Event Status Indicators

Events display visual markers indicating their status:

- Completed - Event has occurred (checkmark filled)
- Scheduled - Event is upcoming (checkmark empty)

Manage Events

Add Event

1. Click the **"+ Add Event"** button on the case details page
2. Fill in the following information:
    - Event date and time
    - Event type
    - Event title
    - Description
    - Location
    - Notes (optional)
    - Organizations (optional)
3. Click "Create Event"

Edit Event

1. Click the **Edit icon** (pencil) next to the event
2. Update the details as needed
3. Click "Update Event"

Delete Event

1. Click the **Delete icon** (trash) next to the event
2. Confirm the deletion
3. Event is removed from the timeline

Document Management

Upload Documents

1. On the case details page, find the **"Documents"** section

2. **For first-time setup:** Click "Connect Google Drive" button
    - You will be redirected to Google login
    - Authorize the application to access your Drive
    - You will be redirected back to the application
3. Once connected, upload documents:
    - Click the upload area or drag files
    - Select files from your computer
    - Documents are automatically stored in Google Drive

View Documents

1. Go to **Case Details**
2. Scroll to the **"Documents"** section
3. You will see a list of uploaded documents with:
    - Document name
    - Upload date
    - Google Drive link
    - Delete option

Google Drive Folder Structure

Auto-created folder: When you create a new case with Google Drive enabled

- A dedicated Google Drive folder is automatically created for the case
- Case code is used as the folder name
- All uploaded documents are stored in that folder
- You can also upload documents directly from Google Drive

Access Case Folder

1. On the case details page
2. Click the **"Open Drive Folder"** button
3. Google Drive opens in a new tab with the case folder

Common Tasks and Workflows

Workflow 1: Create a New Case

Follow these steps to create a new case:

1. Click the **"+ New Case"** button (top-right of Dashboard)

2. **Select Beneficiary:**
    - Search or select an existing beneficiary
    - OR create a new beneficiary
3. **Fill Case Details:**
    - Case Code (auto-generated or custom)
    - Case Type (from dropdown)
    - Case Title
    - Case Description
    - Court
    - Resolution Type
    - Organizations involved
4. **Connect Google Drive (Optional):**
    - Check "Create Google Drive Folder"
    - Folder will automatically create when the case is saved
5. **Click "Create Case"**
6. You will be redirected to case details
7. Begin adding events and documents

Workflow 2: Track Case Progress

Daily or Weekly Activities:

1. Check Dashboard for upcoming events
2. Review the "Next 7 Days" section
3. Prepare for upcoming hearings or meetings
4. Update case status if needed

When an Event Occurs:

1. Edit the event to mark it as complete
2. Add notes about what happened
3. Upload any documents generated during the event

Workflow 3: Update Multiple Cases at Once

1. Go to "All Cases"
2. Use filters to find relevant cases
3. Click the status badge on each case to update
4. Status updates immediately without page reload

Workflow 4: Search for a Specific Beneficiary's Cases

1. Go to "Beneficiaries"
2. Search for the beneficiary
3. Click their card
4. View all associated cases in the modal

Workflow 5: Prepare for Court Date

1. Go to Dashboard or All Cases
2. Find the case with upcoming court date
3. View the case details to check case timeline for:
    - Previous court dates
    - Prior decisions
    - Documents needed
4. Upload any required documents before the date
5. Add notes about what documents and evidence is needed.

Document Information

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For Support: Contact your system administrator

This user guide is designed to help PACE staff effectively use the Case Management System. For updates or questions about this guide, please contact your system administrator.