Deadline Command Centre

Task + reminder engine built specifically for Canadian immigration matters. Upload a PFL, ADR, interview call-in, IAD appeal record, PRRA notice, or processing-delay confirmation and Claude Sonnet 4.6 extracts every operative date with evidence citations you confirm before anything is scheduled. Per-recipient reminder ladders, non-suppressible safety-net escalation on every hard deadline, four-layer reminder resolution, external mirror to Google Calendar or Outlook. Command Centre Landing all-tier; AI intake + scenario rules + external recipients + role dashboards Premium.

Up to date as of v1.32.0

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Overview

The Deadline Command Centre (DCC) is the platform's task + reminder engine built specifically for Canadian immigration matters. Every task carries an assignee, a deadline class (hard or soft), an optional reminder ladder, and a Command Centre entry so no important date falls through the cracks. Command Centre Landing + personal + firm task CRUD + reminders + kill switches are included on every tier as of v1.23.0 (2026-07-02). AI Deadline Intake, the Scenario Rule Library, external recipients (client + third-party reminders with CASL consent + redaction), Owner / RCIC / Assistant role dashboards, and the external calendar mirror are Premium.

What the module does. Personal tasks and firm-wide tasks. Auto-created tasks from Transfer Room outbound / inbound events, from Active File Review AI intake, and from expiry dates on the Transfer Room Information Card (passport, medical, biometrics). AI-extracted deadlines from uploaded IRCC / CBSA / IRB letters. Recurring tasks

with DST-correct wall-clock anchoring. Client meeting invites tied to tasks. External calendar mirror to Google Calendar or Outlook.

What it doesn't do. The AI never sets a deadline for you — every extracted date is a proposal you review and approve before anything is scheduled. The platform does not submit IRCC forms on your behalf. Reminders never go silent — if consent is missing on a client / third-party recipient, an internal follow-up task is created so a human closes the loop.

Onboarding checklist

Follow this checklist the first time you open DCC. Everything below is optional — the module works fine out of the box — but doing these makes the platform work harder for you.

- **Set your firing hour** (Reminder Policy Centre). Reminders honour a per-member firing hour so a 09:00 reminder actually fires at 09:00 in your timezone even if the offset math would have picked 02:00 UTC.
- **Pick your ladder defaults** per task type. The system default is 14 / 7 / 3 / 1 / 0 days-before-due for hard deadlines and 7 / 3 / 1 for soft. Customize per-type from your Reminder Policy Centre if you prefer a different cadence.
- **Set your weekend-shift rule**. If a reminder would fire on a Saturday or Sunday, shift to the prior Friday. On by default; turn off from your Reminder Policy Centre if your practice takes weekend reminders in stride.
- **Turn on the external calendar mirror** (Premium). Opt in per member to see your DCC tasks alongside your bookings + meetings on your Google or Outlook calendar. Only busy-blocks are pushed — no attendee list, no client detail.
- **Set kill switches from admin** (superadmin only). Global + per-tenant kill switches on every engine (intake, reminders, auto-sync, Transfer Room reconciliation, meeting invites) let you pause a specific engine without breaking the module.

- **Test the AI intake pipeline** (Premium). Upload a sample PFL or ADR letter and walk through the review + approve flow so you know exactly what you'll see on a real letter.

AI Deadline Intake

The keystone Premium feature. Upload an IRCC / CBSA / IRB letter and Claude Sonnet 4.6 reads it end-to-end + extracts every operative date with a page number + verbatim evidence quote from the source. Nothing is scheduled until you review + approve the extraction.

Supported letter types: PFL (Procedural Fairness Letter), ADR (Additional Documents Request), interview call-in notice, IAD appeal record acknowledgement (AOR), PRRA notice, processing-delay confirmation, and a free-form fallback that carries basic scenario metadata for anything else.

Review UI. The extraction lands on a page where you see the letter preview side-by-side with the highlighted quotes. Every proposed date shows the AI's proposed deadline class (hard or soft), the AI's confidence score, and a 'Jump to source' link that scrolls the preview to the extracted page. You can override the AI's classification per proposal, edit the date, edit the task title, or reject the proposal entirely.

Hard-deadline gate. Approving a hard-deadline proposal requires you to type-confirm the operative date and BOTH an evidence page + evidence quote must be present on the proposal. This is a hard rule — the platform will not let a hard deadline through without your explicit confirmation of the operative date + a citation you can trace back to the letter.

Content-hash idempotency. The extraction is content-hash idempotent, so re-uploading the same letter doesn't duplicate anything. If you accidentally upload the same PDF twice you get 'this letter has already been extracted' + a link to the previous bundle.

Extraction quota. Each tenant has a daily extraction quota (25 letters/day default; superadmin can raise). Failed extractions do not consume quota; successful extractions consume one unit regardless of the letter size.

Sample workflows — the five driving scenarios

Scenario 1 — PFL response. Upload the PFL. AI extracts the response deadline (14 days from the letter date is the IRCC default). You review the page + quote, type-confirm the deadline, and approve. Result: a hard_deadline task with the 14 / 7 / 3 / 1 / 0 reminder ladder + non-suppressible safety-net escalation, a calendar chip appears in the Command Centre, and a client-side reminder ladder is queued (with CASL consent check on the first send).

Scenario 2 — Interview call-in. Upload the interview notice. AI extracts the interview date + suggests prep tasks (client documents review 7 days before, prep call with client 3 days before). You review, approve. Result: multiple tasks land under one bundle — the interview date as a hard deadline, the prep tasks as soft deadlines counted backward from the interview. If you also send a client meeting invite from the interview task, the client can self-schedule a 15 / 30 / 45 / 60-minute working session on your calendar.

Scenario 3 — IAD appeal record (AOR). Upload the AOR. AI extracts the CBSA production window (60 days by default). You approve. Result: an expectation-watch task with blocked_by=cbsa, expected_by = AOR + 60 days, and manual state 'not_received'. Also created: a linked fallback task worded 'Review whether to follow up with, or complain to, the IAD' that ACTIVATES only if the watch task hasn't been marked 'received' by day 60. If you mark the watch task as received earlier, the fallback never activates.

Scenario 4 — Processing delay. Upload the processing-delay confirmation letter. AI extracts the enquiry date and creates a quarterly recurring task (FREQ=MONTHLY;INTERVAL=3). Every three months a fresh occurrence fires with a merge-field payload rendering IRCC's web-form info in a copyable block. Completing one occurrence records a 'web form sent' completion detail; the series continues so the next quarterly occurrence still fires.

Scenario 5 — PRRA two-date. Upload the PRRA notice. AI extracts BOTH the initial submission deadline AND the perfecting deadline as two independent hard_deadline proposals. Approving both creates two independent tasks under one intake_bundle_id, shown as linked siblings. Each carries its own ladder. Completing one does not cancel the other — they are decoupled by design.

Privacy and redaction

DCC's privacy posture is 'never leak client detail to outsiders by default'. Every external send goes through server-side redaction. Every recipient send is preceded by a per-recipient opt-out check. Every kill switch trips silently — an unavailable engine emits an audit event but never surfaces client detail in the failure mode.

Client reminders. Full task detail (title, notes, due date, ladder) is included in the email body for clients on Premium. Client is the subject of the matter, so this is expected. Consent is captured at recipient add time via the CASL attestation checkbox on the Add recipient form — you confirm you have the recipient's consent on file before they receive their first send. Every reminder carries a per-recipient unsubscribe link; if the recipient clicks it, only their DCC reminders stop, no other email you send them is affected.

Third-party reminders. Redacted server-side to firm name + due date + a public label you supply on the recipient row. No task title, no notes, no source module context. The recipient row's 'public label' field is the ONLY string that shows up in the email body — anything you type there is what the recipient sees.

Per-recipient opt-out registry. When a recipient clicks the unsubscribe link in a DCC reminder, an opt-out row is recorded in a dedicated per-(firm, email) registry. The reminder cron consults this registry before every external send. The opt-out is scoped to your firm alone — if the same email address is a recipient at another firm on the platform, that firm's reminders are unaffected. The tenant-level Investatech platform emails are also unaffected. Rescinding an opt-out requires the tenant to record fresh consent out-of-band.

External calendar mirror. Only busy-blocks are pushed — no attendee list, no client detail, no matter number. The primary calendar receives full detail; the mirror sits in your workspace only. If a family member has access to your Google account, they see the task title (which YOU control) but no client-side detail.

Audit ledger. Every mutation is journaled to an append-only ledger. IP addresses on client-facing endpoints are truncated to a /24 CIDR before logging. Unmasked personal info stays out of the ledger by construction.

PII lifecycle. Uploaded letters are stored temporarily under your tenant DEK during extraction; the raw bytes are purged from Supabase Storage as soon as the bundle is approved or 24h after upload — whichever comes first. Extracted data (dates, evidence quotes) persists on the DCC tables so a completed bundle can still be reconstructed for audit.

Audit export — PDF records + CSV/JSON history

Every task carries a plain-language 'Why am I seeing this?' provenance panel with source, scenario rule, tenant edits, and the responsible member. From the task modal you can export the full history as a PDF for a file handoff or as CSV/JSON for internal review + reconciliation.

PDF export (records). Formatted PDF that includes the task title, due date, class, ladder, recipients, every state transition, every reminder outcome (sent / failed / suppressed with reason), extension requests + decisions, completion basis + reason. Suitable for including in a matter's paper file or handing off to a covering RCIC.

CSV export (history). Row per event: timestamp, actor, event type, before-state, after-state, reason. Suitable for internal audit review, spreadsheet analysis, or handing to an accountant reconciling billable time against completion timestamps.

JSON export (machine-readable). Full task snapshot with every nested field including provenance, scenario_rule_version, intake_bundle metadata, and the full event ledger. Suitable for integrating with a downstream firm-wide analytics system or reconstructing the exact rule text in force at approval time.

Managing recipients and reminders

This section covers the day-to-day mechanics of a DCC task once it exists: adding recipients, editing the reminder ladder, deleting rows you no longer need, and understanding what shows up in the preview timeline.

Adding a recipient to the reminder list. Open the task, scroll to the Recipients section. Pick the Kind (Team member / Client / Third party). Team-member recipients need only the email — pick from your seat roster. Client and third-party recipients need the email, an optional display name, and (for third parties only) a public label — a generic descriptor the recipient will actually see in the email body. Never put PII in the public label — it's the ONLY string a third party will see, so keep it to categories like 'Sponsor family' or 'Employer HR'.

The CASL consent box. Client and third-party kinds require you to tick the CASL consent box before Add recipient becomes clickable. Ticking it is your attestation that the recipient has consented to receive service alerts from your firm. For most client relationships this is covered by the CASL section 10(9) existing-business-relationship carve-out — you're servicing an active matter and reminders on that matter are contextually implied. For third parties (opposing counsel, translators, sponsors' HR contacts, etc.) confirm you have their consent before ticking.

Preview email is optional. The Preview email button opens a modal showing the exact email body that will send — the redacted third-party preview or the full-detail client preview. Clicking Preview is optional and never gates Add. Use it when the recipient has an unusual template context you want to double-check; skip it once you're familiar with the standard shape.

Editing the reminder ladder. Above the Recipients section, the Reminder ladder editor shows the offsets before due (like '14d, 7d, 3d, 1d, 0d' or your own custom ladder). Empty ladder = the platform falls through to the next resolution layer (your personal reminder policy ’ firm scenario ’ system default per deadline class). The Preview timeline below shows exactly which sends will fire and when. The 'Chosen source' pill labels which resolution layer won.

Deleting a recipient. Click the trash icon on the recipient row. The row is soft-deleted (`revoked_at` stamped) so audit history survives. The reminder cron immediately stops considering the row on the next tick.

Deleting a task. Click the trash icon on the task card, next to the 'Edit / update task' pill. Soft-deadline and review-prompt tasks confirm inline and delete immediately — the task moves to Recently completed + cancelled at the bottom of My Tasks. Hard-deadline tasks route through the detail modal instead; §14 requires a completion basis (submitted / withdrawn / superseded / other) plus a reason before a hard deadline can close. Deleted a task by mistake? Open it from Recently completed + cancelled and click Reopen task.

Preview timeline safety-net block. On hard-deadline tasks, the preview timeline includes an amber 'Show N hard-deadline safety-net entries' collapsible block below your ladder. These entries fire regardless of your ladder settings — they're the assurance that a missed hard deadline never sits unnoticed. Click the block to expand the entries and see exactly when they'll fire (escalation sentinel + 1h / 1d / 2d past due). To turn the safety net off for a specific task, change its deadline class from Hard deadline to Soft or Review prompt.

What clients see when they click unsubscribe. Every reminder emailed to a client or third-party recipient carries a per-recipient unsubscribe link at the bottom. Clicking it lands on a public confirmation page at rcicapp.ca/dcc/unsubscribe. The opt-out is scoped to your firm alone — only that specific recipient's DCC reminders from your firm stop. Every other email you send them (signed agreement invitations, invoices, secure document transfers, booking confirmations) continues normally. The opt-out is effective immediately and cannot be silently overridden; if the recipient later re-consents out-of-band, an authorized member of your firm can rescind the opt-out from the recipient's row (surfacing surface ships in a follow-up slice).