

ES18-1621 Add product info on product sub-tasks

Thursday July 11, 2019



Current state of the sub-task editing screen:



Estate Case Manager

Next Case

Start a Case
(Non-CIBC Client)

My Cases

Team Work

Workbasket

Bulk Action

Search

SUCHIBRATA DEY
EC-18082500014

BOB DANIELS
EC-18121200038

My Worklist

Jessica Doe X

Estate Case (EC-19060600001)

Jessica Doe

1 First St Mainville AL CA A1B2C3

1234567890

Pending-ProductCompletion
(P-190606000021)

Prepare And Send Paperwork

Submit Cancel

Case Overview screen:

Case Information

Product Details

Case Details

Overview

Audit

Attachments

CASE CONTENTS

Show:
☒ Cases
☒ Open Assignments
☐ Completed Assignments

NAME
AML - Collect Beneficiaries Information
Establish Executors (Processing the Estate)
Prepare Estate Package
Estate Specialist Review (Processing the Estate)
Sign Estate Package (Processing the Estate)
CIBC Mortgage - 345687178 (P-18092600006)
Cancel Account
Credit Cards - 4538908765457867 (P-18092600003)
Letter of Credit - 1234567 (P-18092600002)
Cancel Account
Deposit Accounts - 6268196 (P-19052100012)
1 Prepare and Send Paperwork
Receive Paperwork
Submit Payout
Complete Payout

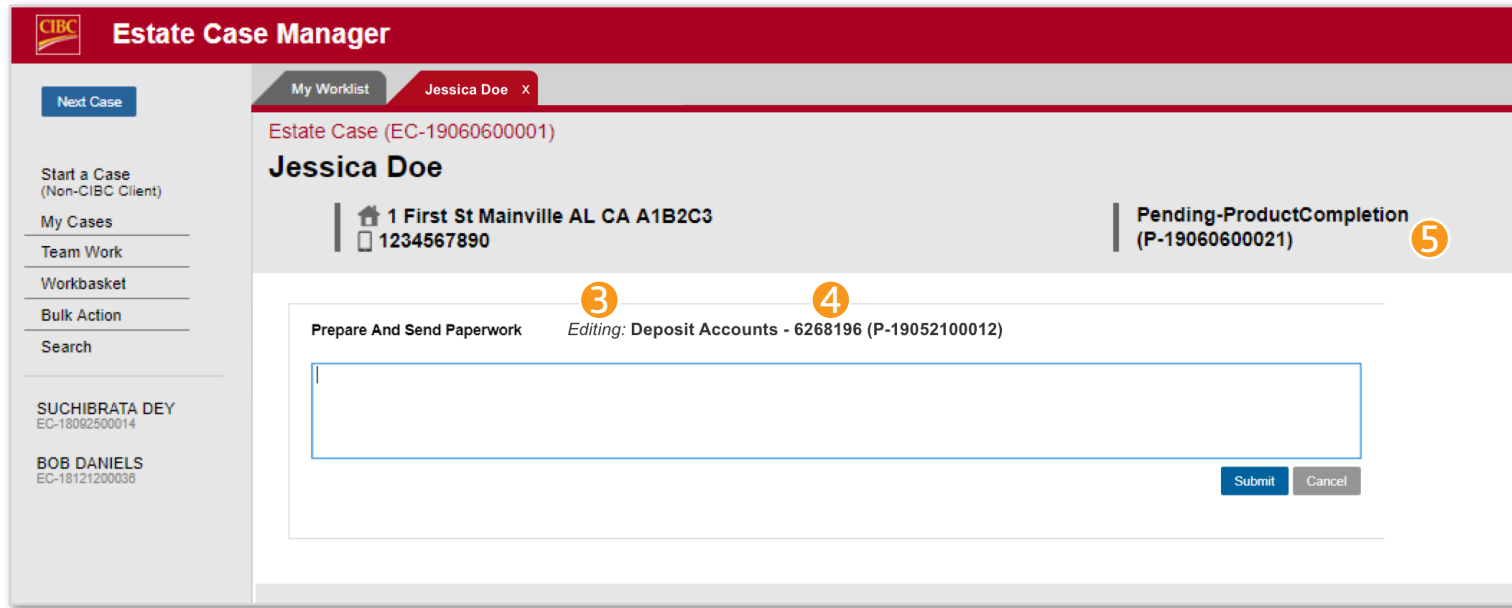
NEC Estate Specialists would like to see the product information once they open the sub-task.

Feedback was given during a visit to the NEC, where the Estates team informally interviewed and observed the Estate Specialists.

If a sub-task is selected [1] users are taken to a new screen, (shown on the following page) where they can add notes for the task.

The issue is the editing screen does not display product/account info [2]

Proposed revision with addition of product information:



The screenshot shows the 'Estate Case Manager' interface. The header is red with the CIBC logo and the title 'Estate Case Manager'. Below the header, there's a navigation bar with 'My Worklist' and 'Jessica Doe X'. The main content area displays 'Estate Case (EC-19060600001)' and 'Jessica Doe'. Below the name, there's an address '1 First St Mainville AL CA A1B2C3' and a phone number '1234567890'. To the right, there's a status 'Pending-ProductCompletion (P-19060600021)' with a circled '5'. The main task area is titled 'Prepare And Send Paperwork' and shows 'Editing: Deposit Accounts - 6268196 (P-19052100012)' with a circled '4'. Below this is a large text input field with a circled '3' above it. At the bottom right of the input field are 'Submit' and 'Cancel' buttons. On the left side, there's a sidebar with a 'Next Case' button and a list of actions: 'Start a Case (Non-CIBC Client)', 'My Cases', 'Team Work', 'Workbasket', 'Bulk Action', and 'Search'. Below the sidebar, there are two user profiles: 'SUCHIBRATA DEY EC-18062500014' and 'BOB DANIELS EC-18121200038'.

Estate Specialists are sometimes interrupted with questions from co-workers, phone calls, or may switch to another app on the same monitor for an extended period of time.

When they return to working on the opened sub-task, they cannot identify the related product by looking at the existing sub-task screen. They must cancel and return to the list in order to recall the task they were working on and open it again.

The solution is to display more information during the editing of the task.

[3] Addition of text showing the status of the task, that the user is 'editing' and any addition of notes need to be saved before leaving this screen.

[4] Addition of a product/account number, to be displayed with the product case number (that already appears in brackets).

[5] The 'Product Case Number' is always shown in the header [5], but for the scenario shown in this screen, the estate specialist also requires the product/account number [4].

Feedback from NEC staff was very positive to this mockup:

"This is helpful, especially with VISAs — so we know we're cancelling the correct card."

When there might be more than one VISA listed under a client's name, staff need to be certain they are closing the correct one.