

Name: As a Staff, I need a client dashboard to view and edit a client (1513)

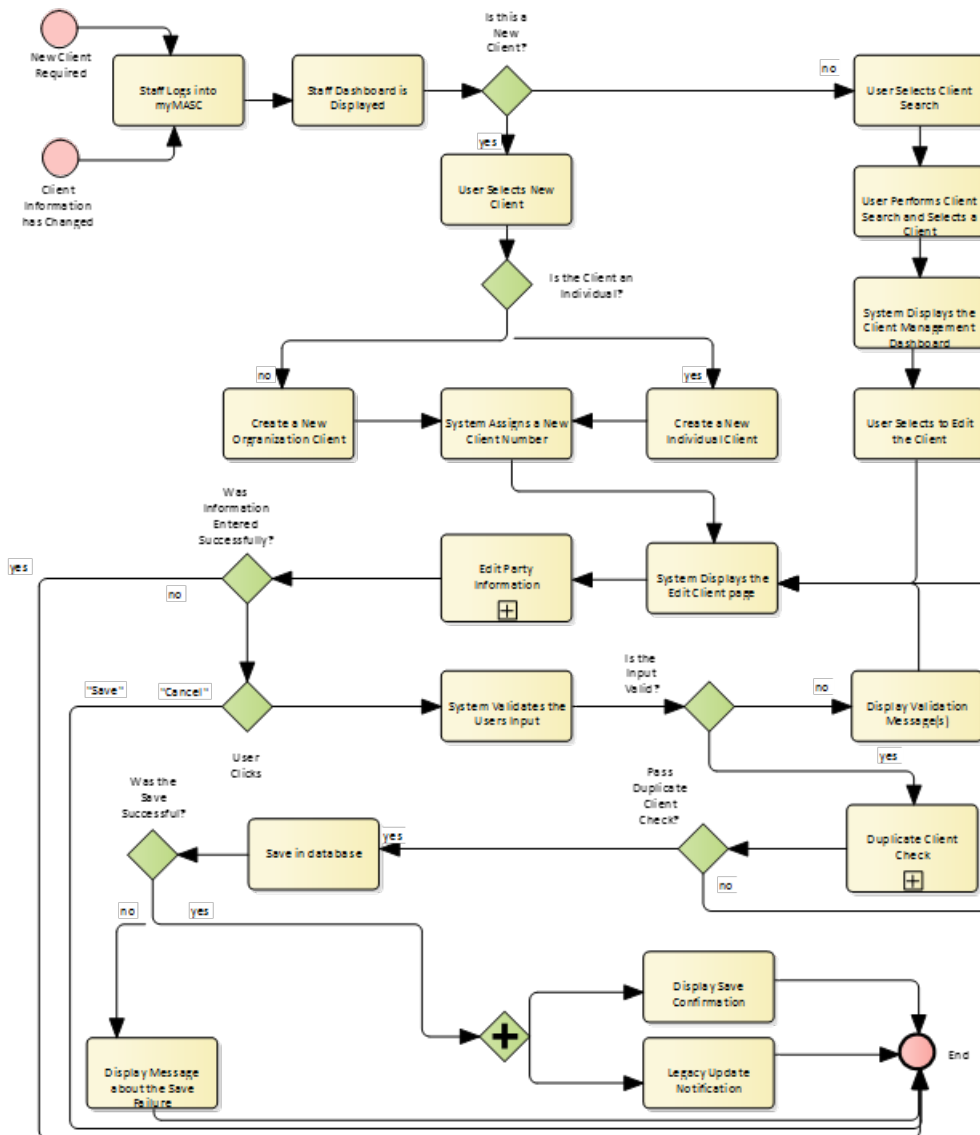
Description: The Staff Client Dashboard will be the first page that will be displayed when a staff searches and selects a client. Alternatively, this page may be displayed when a client is selected from the “Recently Viewed” page. It will also be the default page that is displayed when a new client is created in myMASC, unless the client is created as part of another process. (i.e. Application for Insurance)

Staff and Clients will no longer share the same page as staff will now have access to further information and in different formats.

Preconditions: User has successfully logged into myMASC

Basic Course

Client Setup / Edit (Level 4)

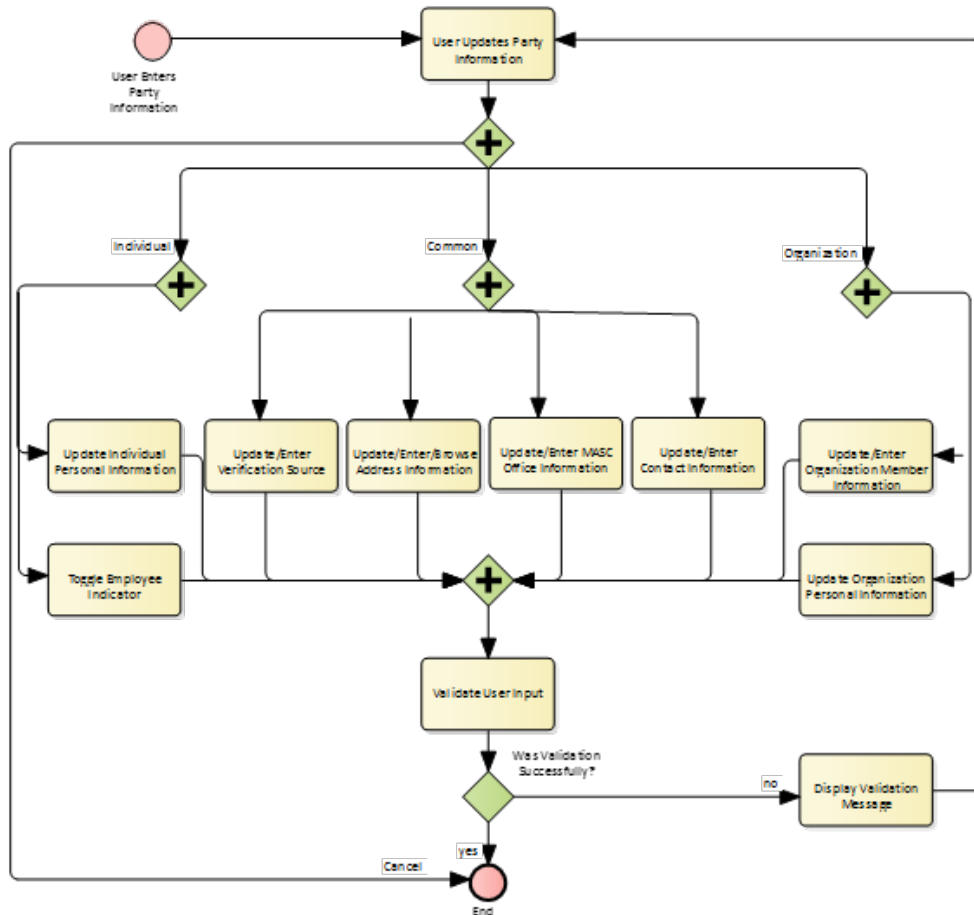


1.

Alternate Course A:

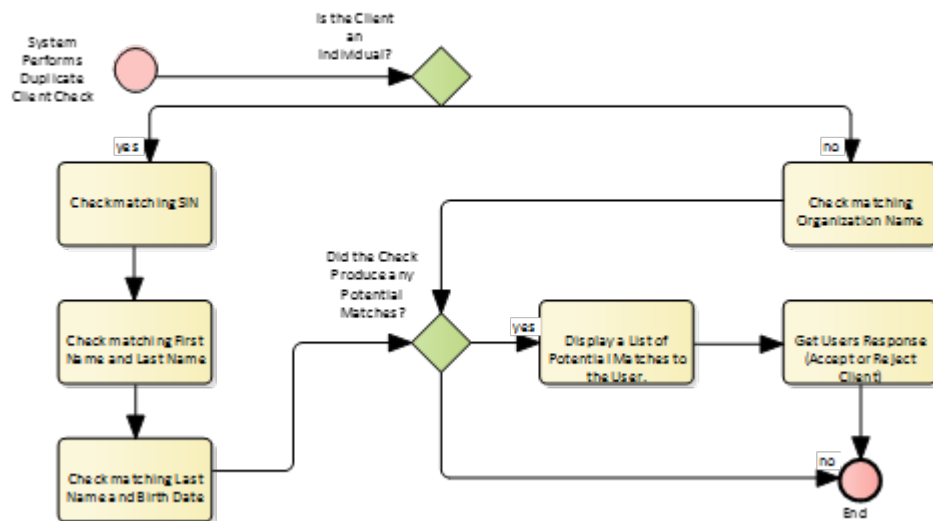
Condition:

Client Setup / Edit - Enter Party Information (Level 4)



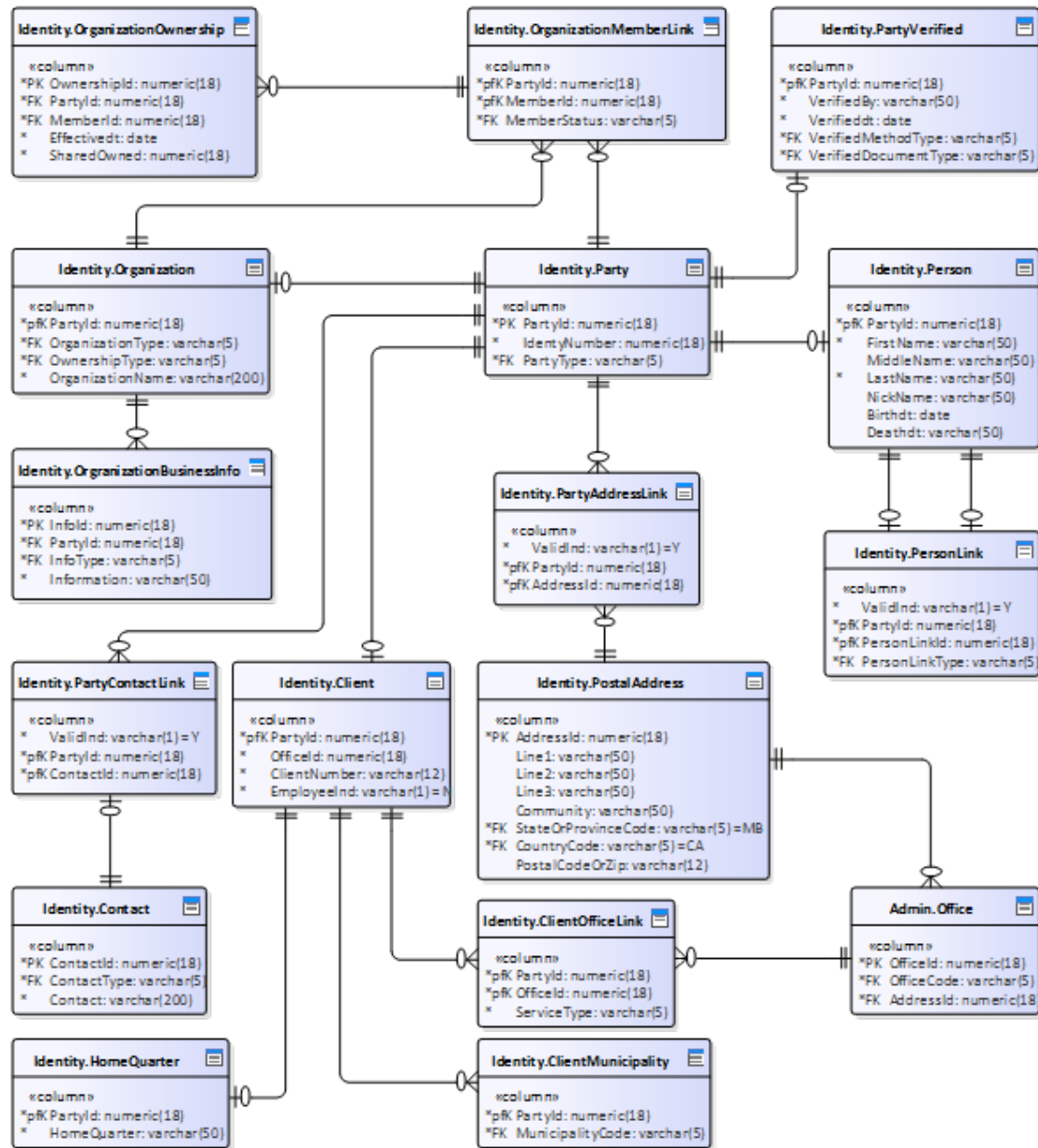
1.

Client Setup / Edit - Duplicate Client Check (Level 4)



2.

Database Diagram



Desktop

myMASC

DASHBOARD

CLIENT MANAGEMENT

Client Search

Recently Viewed

New Client

Hello Bob

Logout

Name

Address

Contact

MASC Information

Contact - [client number] [complete name]

Insurance Office

select

Lending Office

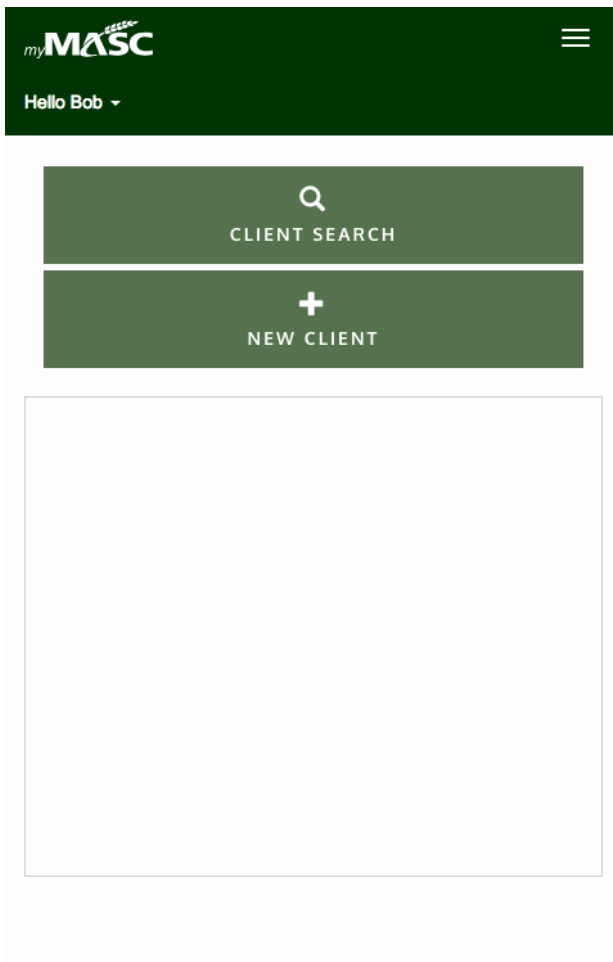
select

☐ Is currently employed by MASC?

SAVE

or Cancel

Version 2.0



myMASC

Hello Bob ▾

☰

Name

Address

Contact

MASC Information

Address - [client number] [complete name]

Address

Address 2

Province

select ▾

Country

select ▾

Postal

Date of Birth

YYYY MM DD

Date of Death

YYYY MM DD

Verification Method

select ▾

Document Type

select ▾

SAVE

or Cancel

myMASC

Hello Bob ▾

Name

Address

Contact

MASC Information

Address - [client number] [complete name]

Address

Address 2

Province

select ▾

Country

select ▾

Postal

Date of Birth

YYYY MM DD

Date of Death

YYYY MM DD

Verification Method

select ▾

Document Type

select ▾

SAVE

or Cancel

myMASC

≡

Hello Bob ▾

Name

Address

Contact

MASC Information

Contact - [client number] [complete name]

Email

Home Phone

Cell Phone

Business Phone

SAVE

or Cancel

Clickable Mockups

<https://testmascrml.azurewebsites.net/myMASCClient/sprint3/index.html>