

Pre-Checks for data in UAT

1) Client Data

To check whether the client is present in AMIGO DB ,execute the query –

```
select * from MST_Client where la_client_no ='Enter client number'
```

Check whether the data in below columns are present:

CLIENT_ID , PRI_EMAIL, MOBILE, CLIENT_DOB, CLIENT_TYPE_ID, LA_CLIENT_NO, STATUS

If any data is not present, please ask the user to update the same in Lifeasia post which the data will flow via Golden Gate to AMIGOLA { Staging} and ETL will process those records

Assumption: Golden Gate is in Sync and ETL is running

2) Policy Data

To check whether the policy is present in AMIGO DB, execute the query –

```
Select * from tbl_client_policy_dtl where la_policy_number='Enter 8 digit policy number'
```

Check whether the data in below columns are present:

Client_Policy_id, Client_Id, la_policy_number, policy_plan_id, Policy_status_id, policy_proposal_dt, policy_effective_date, policy_base_sum_assured, policy_sum_assured, policy_premium_amt, policy_premium_cycle, Policy_premium_next_dt, policy_dt_maturity, Policy_term_in_yrs, la_client_no, agent_id, policy_premium_bill_to_dt, policy_classification_code, policy_base_premium_amt, premium_stat_code, policy_inception_date, PREMIUM_PAYMENT_TERM, PREMIUM_PAID_TILL_DT, ANNUITY_PENSION_CLAIM_FREQ, ANNUITY_PENSION_CLAIM_AMT, ANNU_PEN_START_DT

If any data is not present, please ask the user to update the same in Lifeasia post which the data will flow via Golden Gate to AMIGOLA { Staging} and ETL will process those records

Assumption: Golden Gate is in Sync and ETL is running

3) Nominee Data

To check whether any nominee is present in AMIGO DB, execute the query –

```
Select * from tbl_policy_nominee where client_policy_id='Enter Client Policy ID' { You will get this from tbl_client_policy_dtl }
```

Check whether the data in below columns are present:

POLICY_NOMINEE_ID, LA_CLIENT_NO, CLIENT_POLICY_ID, NOMINATED_DT,
IS_ACTIVE, RELATION_ID, NOMINEE_SHARE_PERCENT

If any data is not present, please ask the user to update the same in Lifeasia post which the data will flow via Golden Gate to AMIGOLA { Staging} and ETL will process those records

Assumption: Golden Gate is in Sync and ETL is running

4) Client Role data

To check whether any role is present for the client in AMIGO DB, execute the query –

Select * from tbl_client_policy_role where client_policy_id='Enter Client Policy ID' {
You will get this from tbl_client_policy_dtl }

Check whether the data in below columns are present:

CLIENT_POLICY_ROLE_ID, CLIENT_POLICY_ID, ROLE_ID, CLIENT_ID, FORENUM,
IS_PEP

If any data is not present, please ask the user to update the same in Lifeasia post which the data will flow via Golden Gate to AMIGOLA { Staging} and ETL will process those records

Assumption: Golden Gate is in Sync and ETL is running

5) Life Assured Details

To check whether any life assured is present for the policy in AMIGO DB, execute the query –

Select * from tbl_policy_life_assured_dtl where la_policy_number='Enter Policy
Number'

Check whether the data in below columns are present:

POLICY_LIFE_ASSURED_ID, CLIENT_ID, LA_CLIENT_NO, CLIENT_POLICY_ID,
LA_POLICY_NUMBER, LIFE

If any data is not present, please ask the user to update the same in Lifeasia post which the data will flow via Golden Gate to AMIGOLA { Staging} and ETL will process those records

Assumption: Golden Gate is in Sync and ETL is running

6) Please note that we have currently built a limitation of 100 clients for a particular combination of email and mobile number as agreed by KLI IT team. Hence request you to please inform the same to team when creating a client or updating existing client with email and mobile number. If this is not taken care, those clients wont be visible on the multiple client screen

Please find the below steps to be performed for Major Revival scheme validation:

- 1) Age of the life insured should be ≤ 45 years from Today's date (T)

To check this, please execute the below query –

Select * from tbl_policy_life_assured_dtl where la_policy_number='Enter policy number'

- 2) Sum Assured - Should be ≤ 25 lacs from Today's date (T)

To check this, please execute the below query –

Select * from tbl_client_policy_dtl where la_policy_number='Enter 8 digit policy number'

- 3) Check if scheme is applicable

To check this, please execute the below query –

Select * from tbl_scheme_period;

- 4) If above is YES, then check whether the scheme is applicable for below premium status of the policy .. Refer the FRD for the list of Premium statuses

To check this, please execute the below query –

Select * from tbl_client_policy_dtl where la_policy_number='Enter 8 digit policy number'

- 5) Check the rider code if it is covered in scheme

To check this, please execute the below query –

Select * from tbl_client_policy_rider_dtl where client_policy_id='Enter Policy ID'

Refer the FRD for the list of rider codes

- 6) Check if Rate up is applicable to the policy

To check this, please execute the below query –

Select * from tbl_policy_rate_up where la_policy_number='Enter Policy number'

- 7) Check if any data is previously present in Amigo BOT table

To check this, please execute the below query –

Select * from Amigo_revival_BOT where policy_no='Enter Policy Number'

- 8) Check if the policy effective date is not null. This is required for guideline validations

To check this, please execute the below query –

Select * from tbl_client_policy_dtl where la_policy_number='Enter 8 digit policy number'



FRD Major
Revival1.9.2.docx