**User Story ID:** 13742

**User Story Title:** Insurance Score - Report Generation & Storing

**User Story:** This story talks about the generating Insurance Score report under various scenarios and storing the report in E-Folder.

**General Assumptions:**

* Functionality is based on Exigen 4.7 Base.
* Exigen error handling functionality is invoked. Errors that are thrown due to data type constraints, i.e., *money, numeric, date* are included in Exigen error handling. Error messages for data type errors cannot be configured.
* The Data Dictionary is the definitive source for data requirements and UI labels.
* Wireframes are the definitive source for UI components and layout.

**User Story Assumptions:**

1. Product, State, and Policy Type have been defined.
2. Errors that are thrown due to data type constraints, i.e., *money, numeric, date*, shall not be addressed in User Stories. Existing Exigen error handling is assumed.
3. Informational messages displayed in Wireframe might not have been referred in the user story. After Dev reviews and confirms that it is feasible to display the messages as depicted in the Wireframe, the User Story will be updated to include the messages.
4. Data dictionary attributes will continue to refer as 'FR Score' whereas stories will use the term 'Insurance Score'.
5. Insurance Score obtained from Lexis Nexis will be displayed only to Authorized users and user role/access management will be handled as part of separate stories.
6. Insurance Score report is ordered separately for each Named Insured when compared to Auto where Insurance Score is ordered together for all the Named Insureds.

**Supporting Info**:

|  |  |
| --- | --- |
| **State – Product** | Utah – HO3;HO4;HO6; DP3 |
| **Actor / Role** | Agent; <Role> |
| **Preceding User Story** | 74304 - 13359: US Insurance Score - Data Capture 74258 - 13176: US Order Insurance Score 74301 - 13300: US Insurance Score - No Hit - Capture SSN 74288 - 13148: US Insurance Score - Reset and Reorder |
| **Includes User Story** | N/A |
| **Extends User Story** | N/A |
| **Related User Story** | N/A |

**Acceptance Criteria:**

| **No** | **AC Title** | **Context or Precondition** | **Event** | **Outcome or Post Condition** |
| --- | --- | --- | --- | --- |
| 1 | BASIC 1:  When valid Insurance Score is returned | **Context:**  Generate Insurance Score report when valid Insurance Score is returned.  **Precondition:**  1. User has initiated the quote.  2. Insurance Score has already been ordered for the Named Insured and valid Insurance Score is returned from Lexis Nexis. | 1. Insurance Score Report generated is stored under the 'Insurance Score' folder in E-Folder.  2. Values present in the policy are populated for the fields in the report. If value is not present in the policy, then the field in the report is left blank.  *(Note: Map quote number when policy number is not present)*  3. User navigates to Reports tab.  4. User clicks on the 'View Report' link under the Insurance Score Report block and opens the Insurance Score report. Insurance Score Report is retrieved and displayed. | Insurance score report is displayed in the format as given in the sample report. Insurance Score has the value returned from the service.  *(Refer to Insurance\_Score\_Report pdf under Supporting Artifact in the link provided)* |
| 2 | ALTERNATE 1:  When No Hit is returned | **Context:**  Generate Insurance Score report when No Hit is returned.  **Precondition:**  1. User has initiated the quote.  2. Insurance Score has already been ordered for the Named Insured and No Hit is returned from Lexis Nexis. | 1. Insurance Score Report generated is stored under the 'Insurance Score' folder in E-Folder.  2. Values present in the policy are populated for the fields in the report. If value is not present in the policy, then the field in the report is left blank.  *(Note: Map quote number when policy number is not present)*  3. User navigates to Reports tab.  4. User clicks on the 'View Report' link under the Insurance Score Report block and opens the Insurance Score report. Insurance Score Report is retrieved and displayed. | Insurance score report is displayed in the format as given in the sample report. Insurance Score has the value '998'.  *(Refer to Insurance\_Score\_Report pdf under Supporting Artifact in the link provided)* |
| 3 | ALTERNATE 2:  When No Hit is returned and SSN is entered resulting in reorder. | **Context:**  Generate Insurance Score report when No Hit is returned and SSN is captured from the customer.  **Precondition:**  1. User has initiated the quote.  2. Insurance Score has already been ordered for the Named Insured and No Hit is returned from Lexis Nexis.  3. SSN is captured from the customer through the light box which results in reorder.  4. Insurance Score is reordered. | 1. Insurance Score Report generated is stored under the 'Insurance Score' folder in E-Folder.  2. Values present in the policy are populated for the fields in the report. If value is not present in the policy, then the field in the report is left blank.  *(Note: Map quote number when policy number is not present)*  3. User navigates to Reports tab.  4. User clicks on the 'View Report' link under the Insurance Score Report block and opens the Insurance Score report. Insurance Score Report is retrieved and displayed. | Insurance score report is displayed in the format as given in the sample report. Insurance Score has the value returned from the service.  *(Refer to Insurance\_Score\_Report pdf under Supporting Artifact in the link provided)* |
| 4 | ALTERNATE 3:  When no score is returned | **Context:**  Generate Insurance Score report when no score is returned.  **Precondition:**  1. User has initiated the quote.  2. Insurance Score has already been ordered for the Named Insured and no score is returned from Lexis Nexis. | 1. Insurance Score Report generated is stored under the 'Insurance Score' folder in E-Folder.  2. Values present in the policy are populated for the fields in the report. If value is not present in the policy, then the field in the report is left blank.  *(Note: Map quote number when policy number is not present)*  3. User navigates to Reports tab.  4. User clicks on the 'View Report' link under the Insurance Score Report block and opens the Insurance Score report. Insurance Score Report is retrieved and displayed. | Insurance score report is displayed in the format as given in the sample report. Insurance Score has the value '999'.  *(Refer to Insurance\_Score\_Report pdf under Supporting Artifact in the link provided)* |

**Data Requirements.** Refer to Data Dictionary for Attribute Details

| **Data Id** | **Entity** | **Attribute** |
| --- | --- | --- |
| NIFR-12 | Named Insured FR Score (0-4) | FR Report |

**Related Attributes.** Attributes that are referenced, consumed, impacted by this user story.

| **Data Id** | **Entity** | **Attribute** |
| --- | --- | --- |
| NIFR-24 | Named Insured FR Score (0-4) | FR Receipt Date |
| NIFR-09 | Named Insured FR Score (0-4) | FR Order Date |
| NIFR-08 | Named Insured FR Score (0-4) | FR Named Insured |
| NIFR-13 | Named Insured FR Score (0-4) | FR SSN Entered Indicator |
| NIFR-07 | Named Insured FR Score (0-4) | FR Score |
| NI-05 | Named Insured (1-4) | Named Insured Date of Birth |
| AG-14 | Agent | Agent Email |
| AG-15 | Agent | Agent Agency Phone |
| AG-09 | Agent | Agent Agency Name |
| AG-12 | Agent | Agent Agency Address |
| PO-07 | Policy | Policy Number |
| QU-01 | Quote | Quote Number |
| PO-01 | Policy | Policy State |
| DA-01 | Dwelling Address | Dwelling Address Line 1 |
| DA-02 | Dwelling Address | Dwelling Address Line 2 |
| DA-03 | Dwelling Address | Dwelling Address City |
| DA-04 | Dwelling Address | Dwelling Address State |
| DA-05 | Dwelling Address | Dwelling Address Zip Code |
| DA-06 | Dwelling Address | Dwelling Address County |
| DA-07 | Dwelling Address | Dwelling Address Territory |
| PA-01 | Named Insured Previous Address (0..1) | Previous Address Indicator |
| PA-02 | Named Insured Previous Address (0..1) | Previous Address Street 1 |
| PA-03 | Named Insured Previous Address (0..1) | Previous Address Street 2 |
| PA-04 | Named Insured Previous Address (0..1) | Previous Address City |
| PA-05 | Named Insured Previous Address (0..1) | Previous Address State |
| PA-06 | Named Insured Previous Address (0..1) |  |