|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | 28-Nov-22 | | | Tester Name | Shahabuddin Syed |
| Environment | Penfax - Test | | | Login used |  |
| Operating System | Windows | Version: | Update: | | |
| Software Used | Edge | Version: | Update: | | |
| Select Software | Version: | Update: | | |
| Release version | 22.4.1 | | | | |
| Title | SRB | | | | |
| Test Type | Regression | | | | |
| Test Scenario | Process a spousal breakdown to a VPB who is not currently a member | | | | |
|  |  | | | | |
| Expected Results |  | | | | |
| Pass/Fail | Pass | | | JIRA# | N/A |

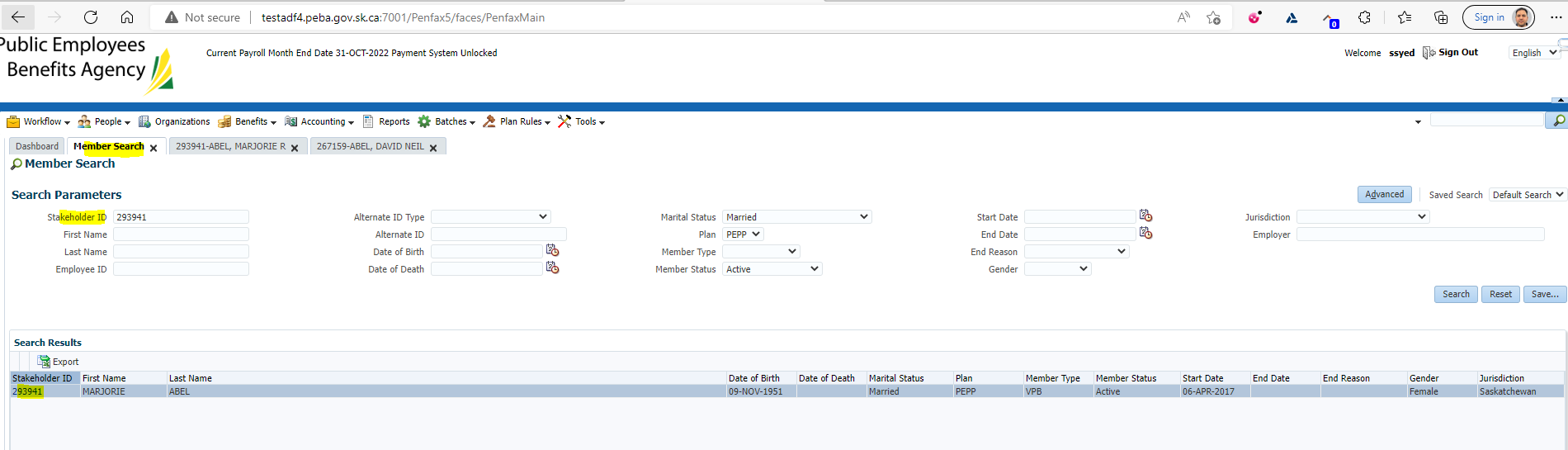
Describe your steps with screenshots:

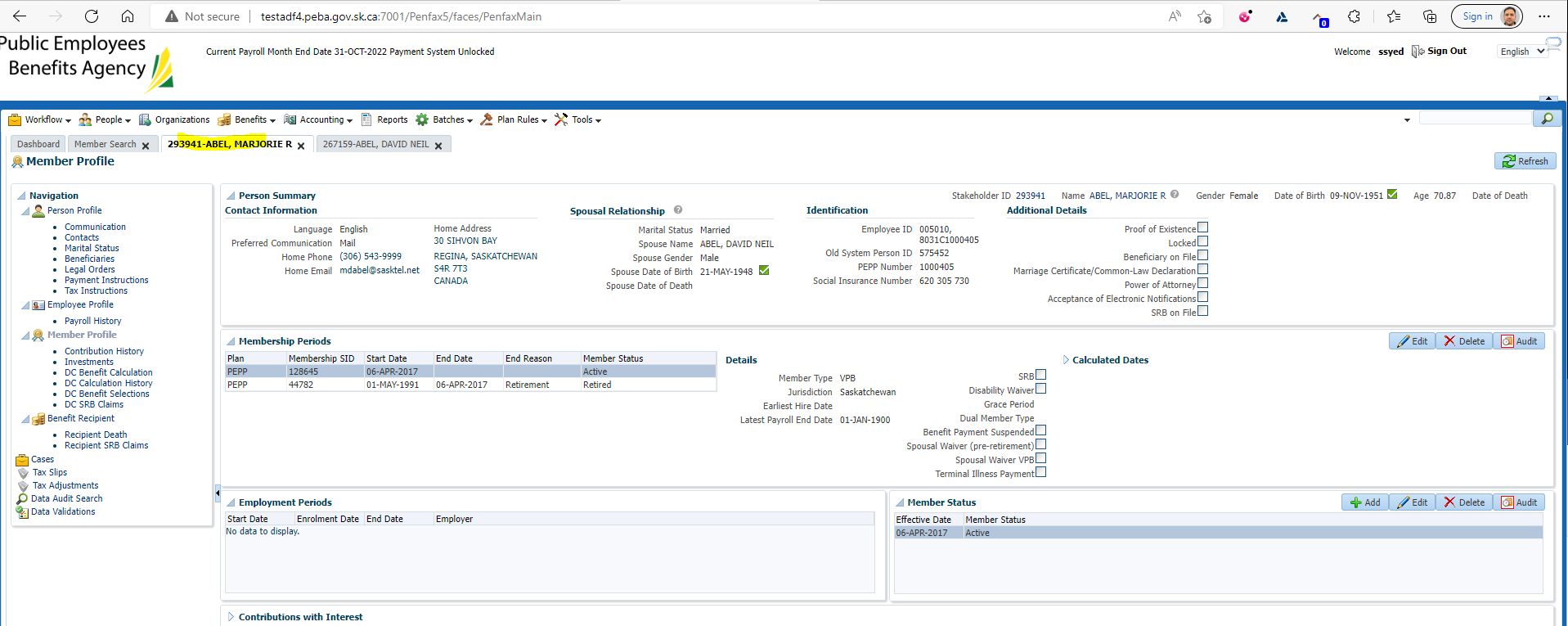
Search for the member

Click on their stakeholder ID: 293941

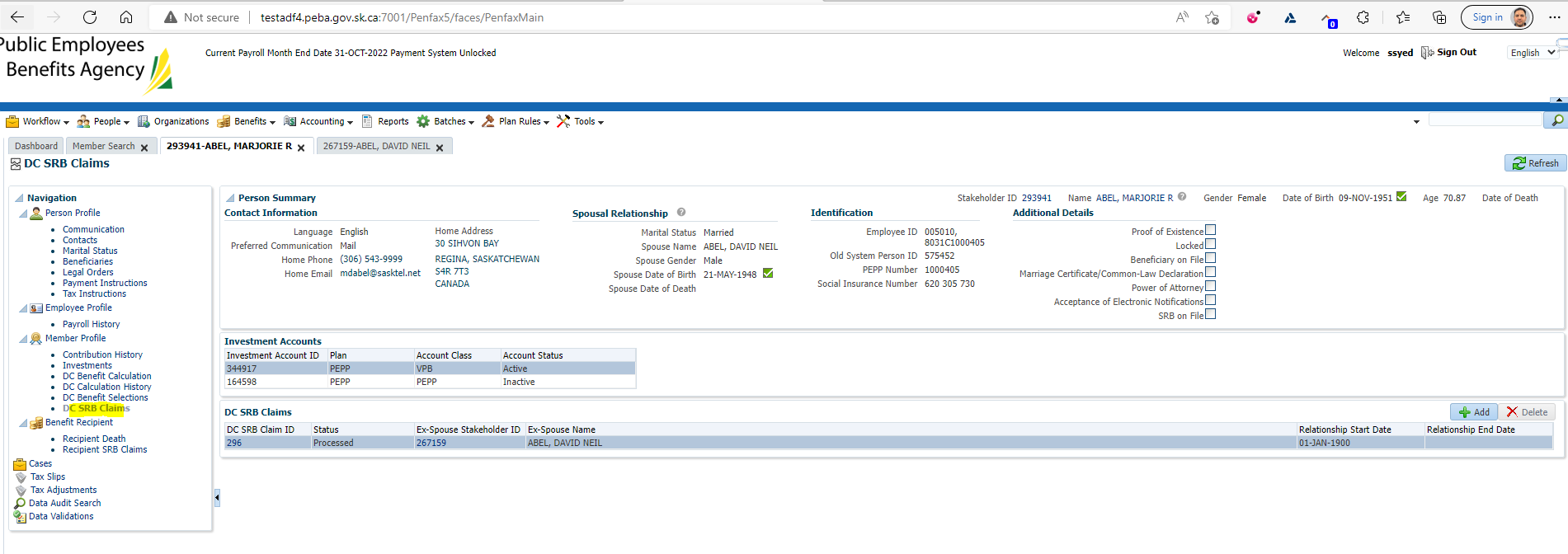
Precondition:

Member must be in Active or deferred status with PEPP and must have a spouse.   
The spouse must be at least 50 years old and qualify for a VPB account



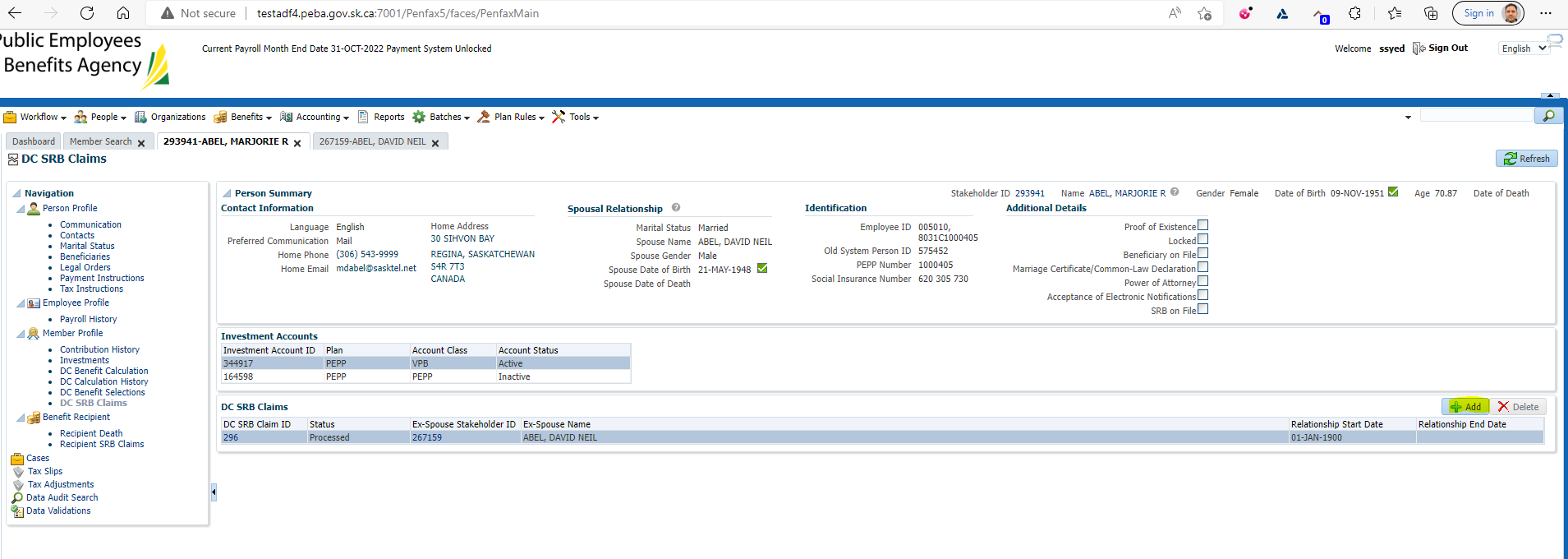


Click on DC SRB Claims



Click on Add under DC SRB Claims

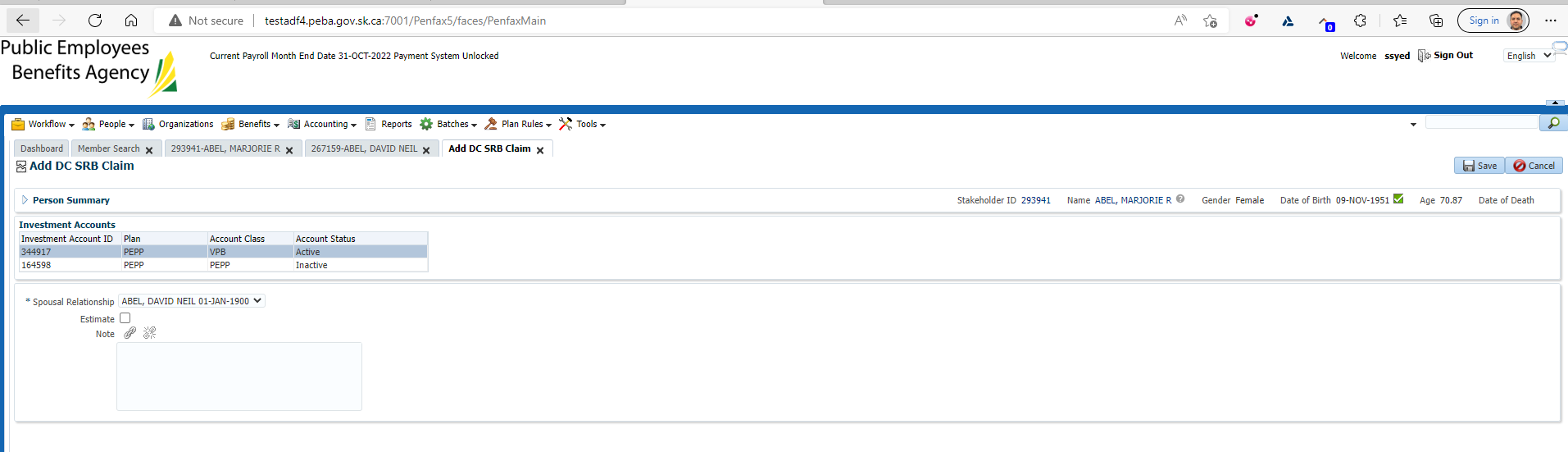
This will open up a new ADD DC SRC Claim Tab



Click on Save button

This will open a new screen with a DC SRB Claim ID

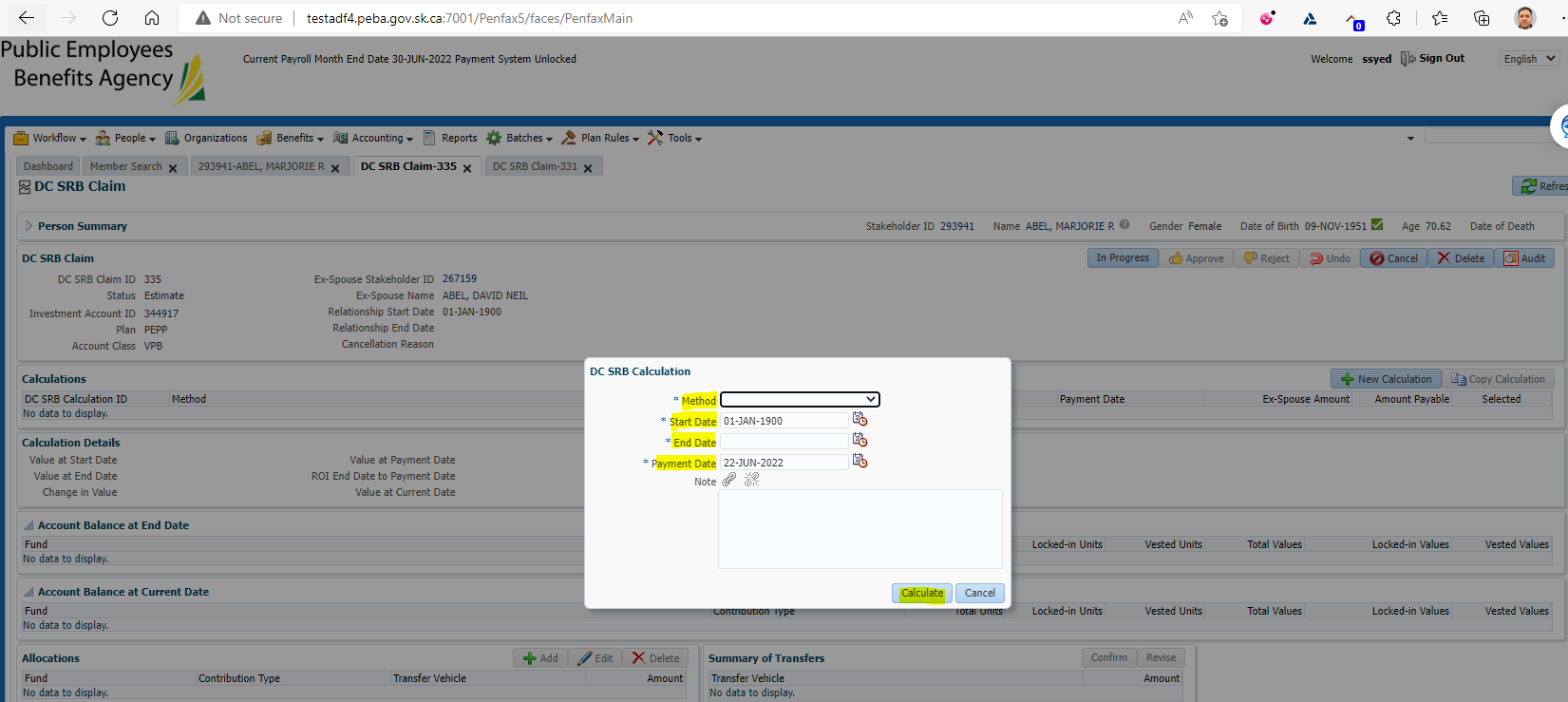
Make sure to uncheck the Estimate checkbox

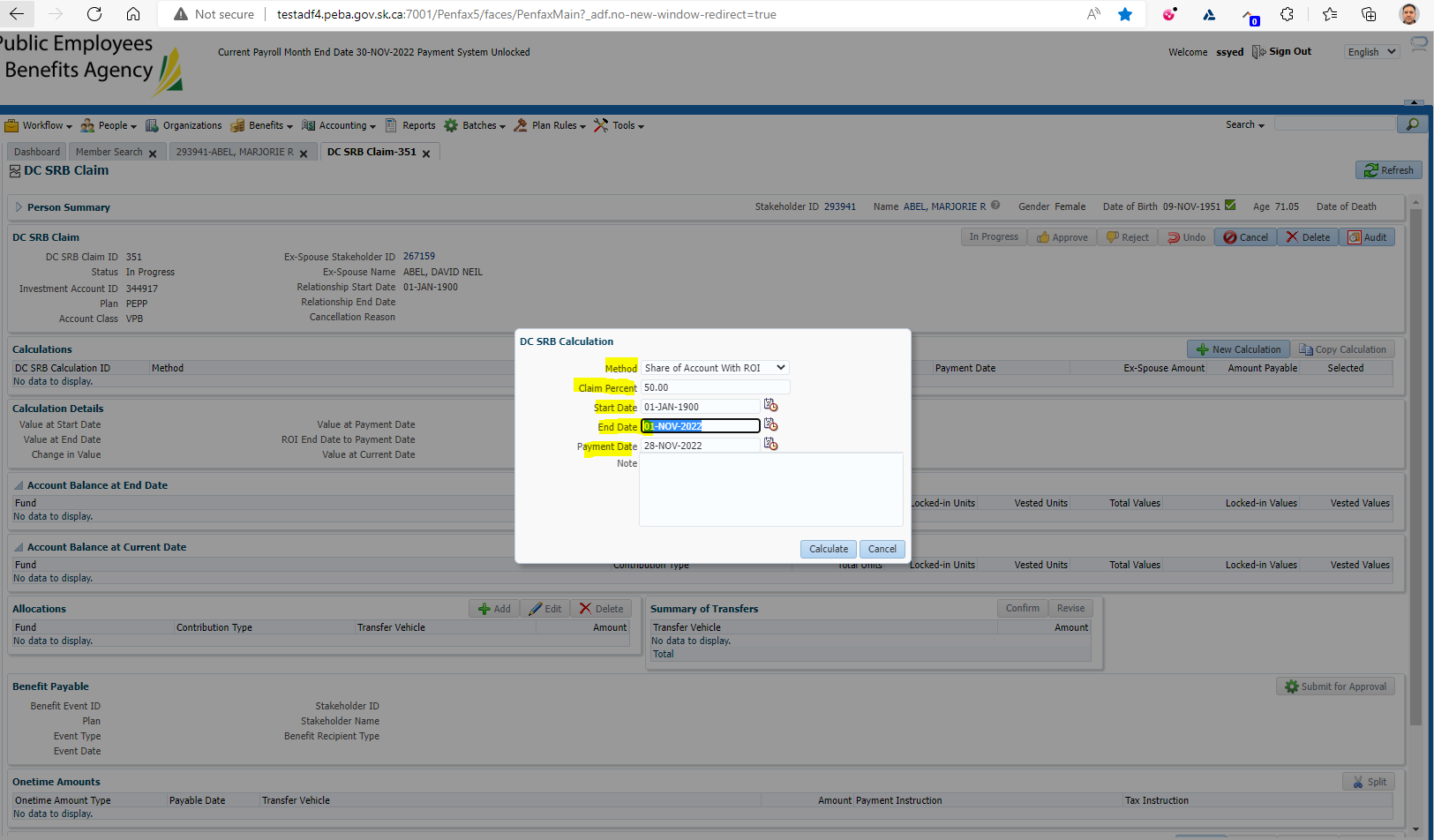


Need to enter the Method and the End Date

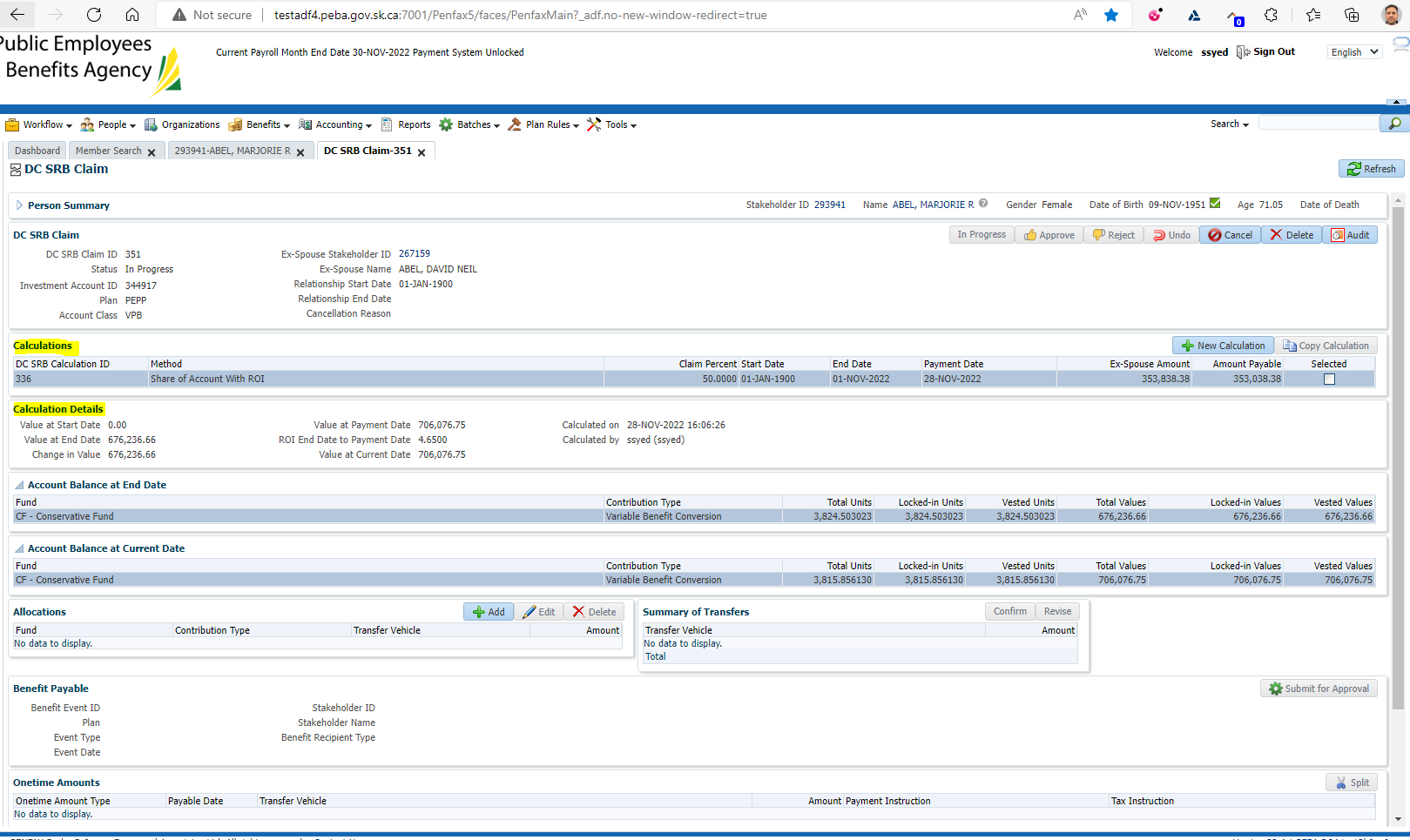
Under Method Select Share of Account with ROI

End Date select as current date

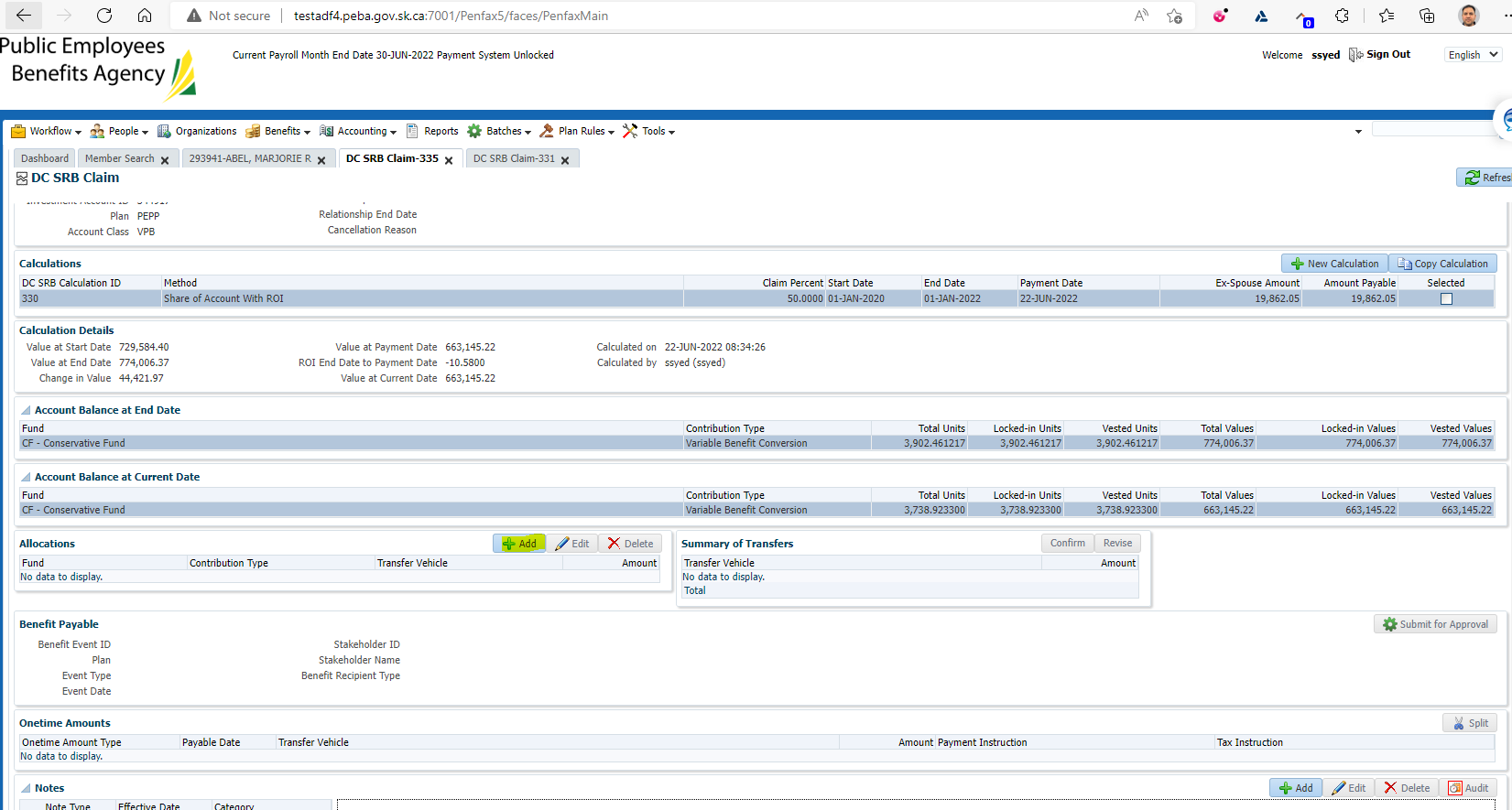


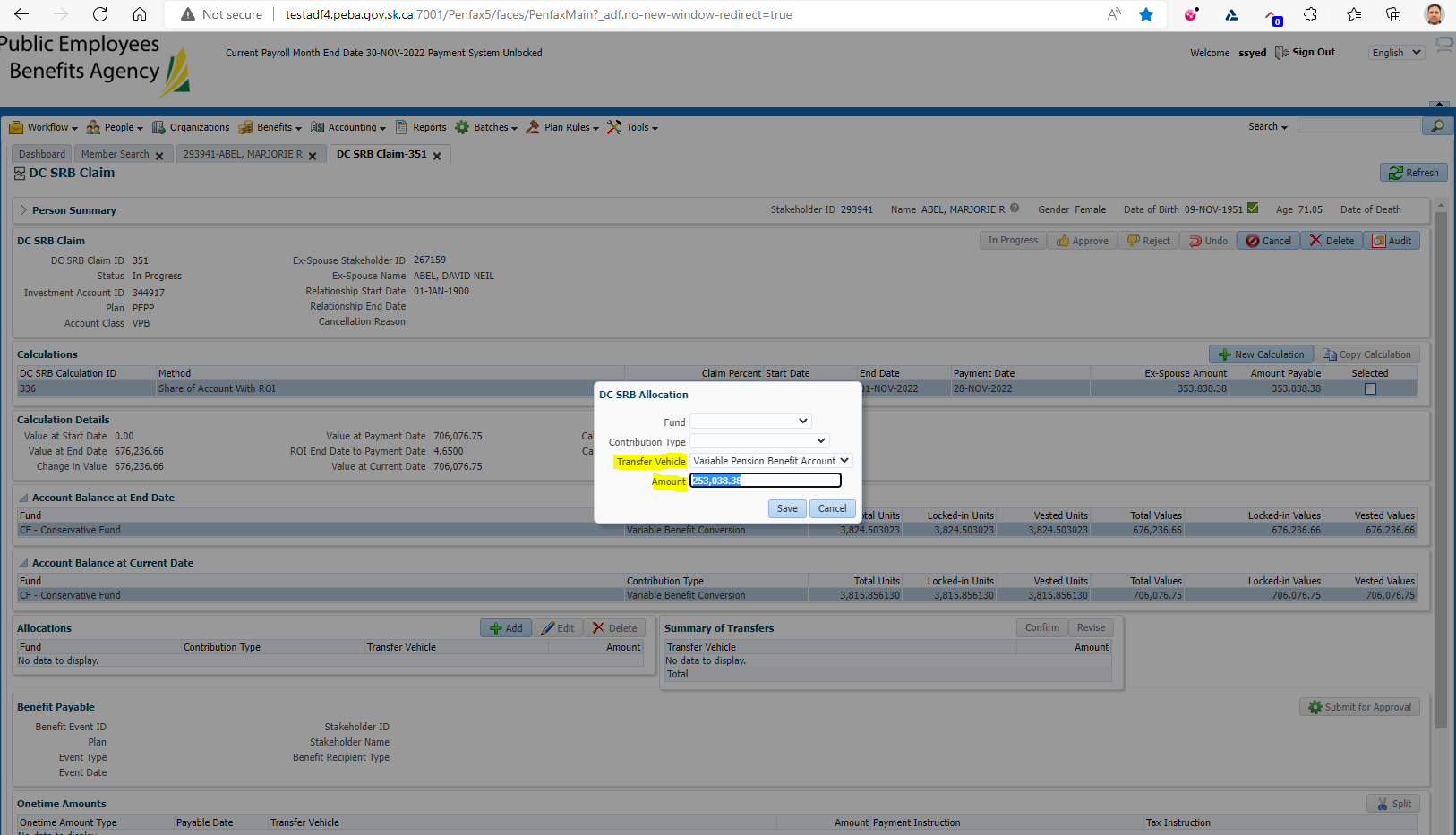


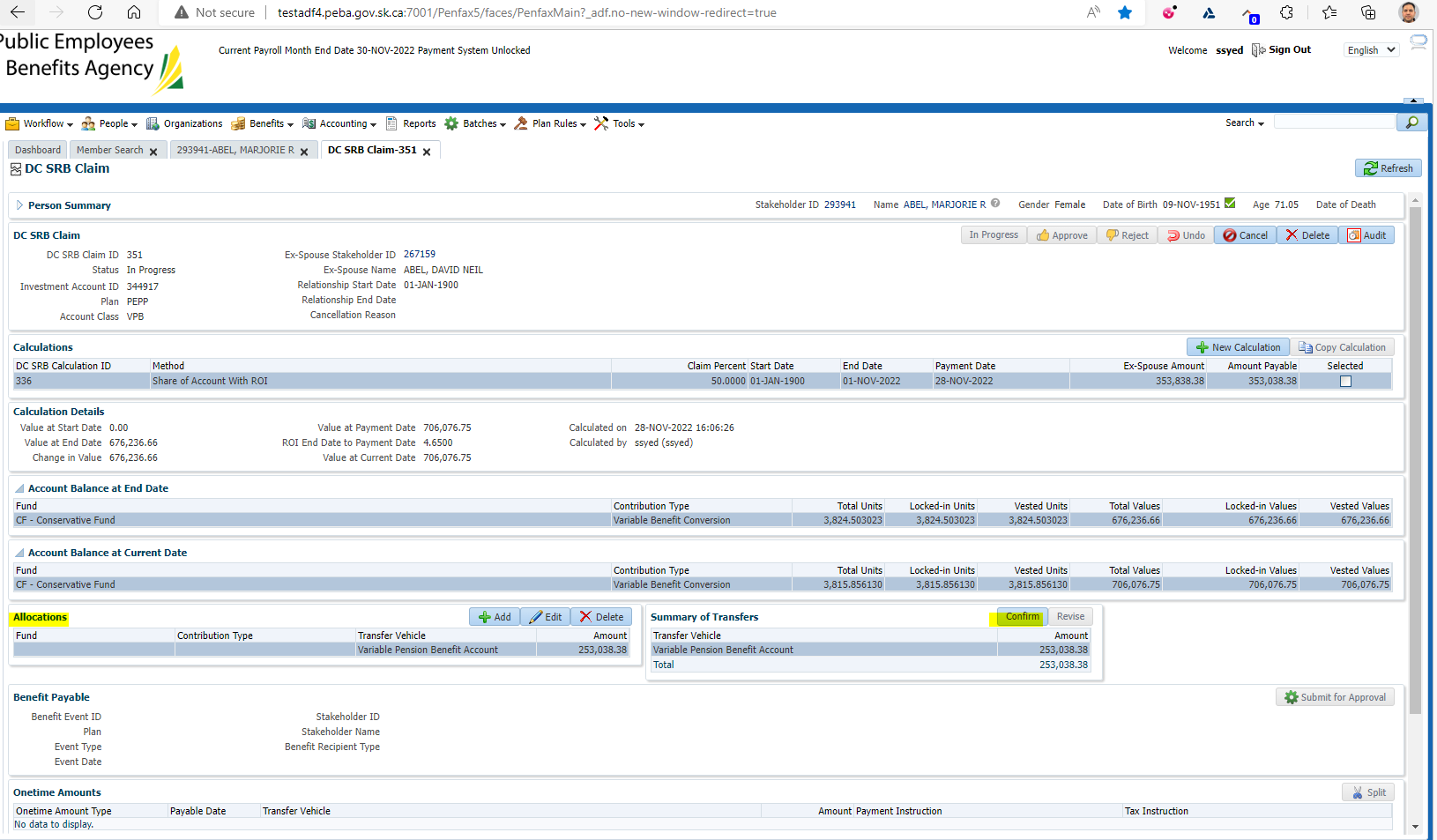
Under the Calculations you will see an Ex-spouse amount



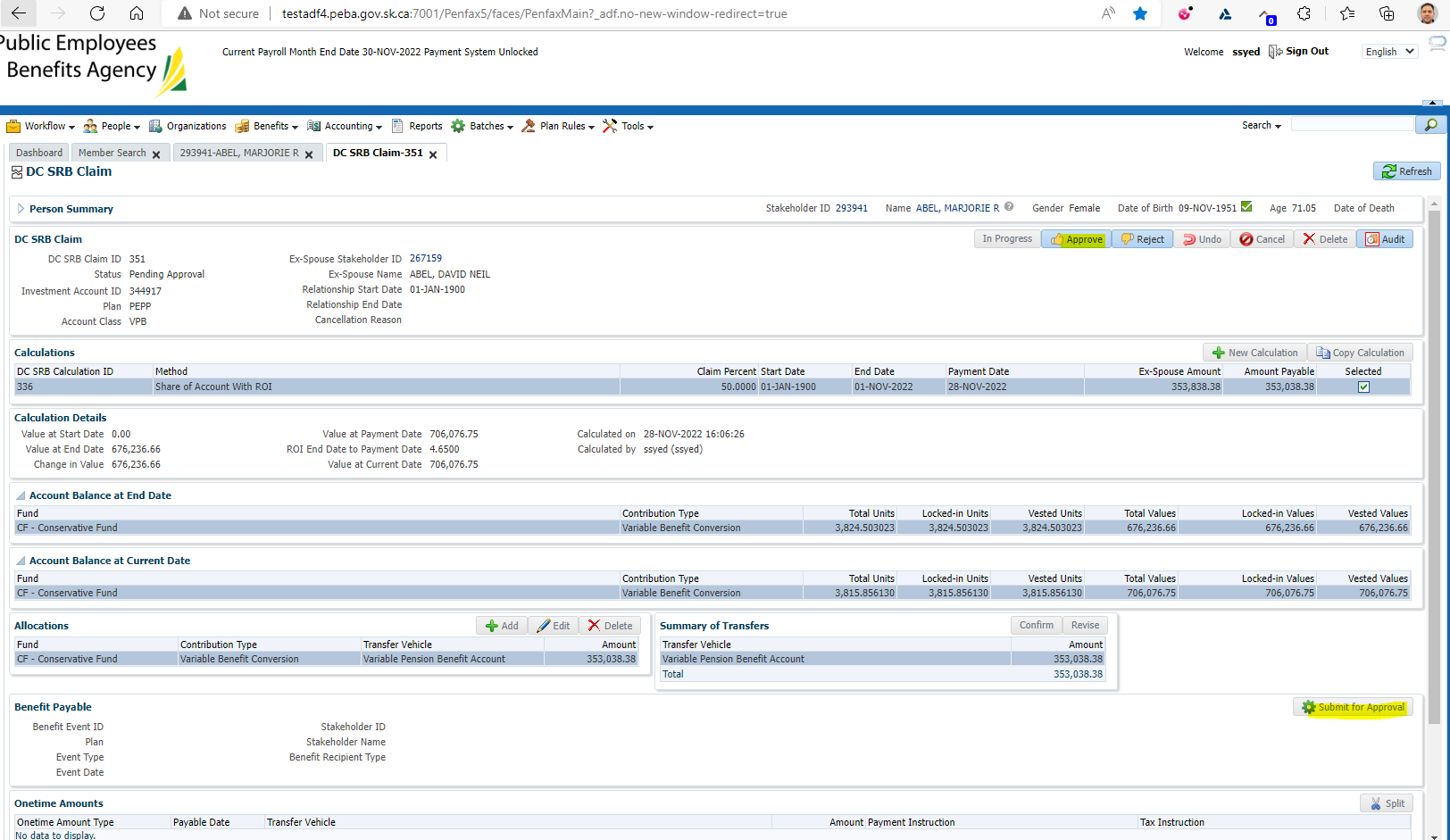
Under Allocations Click Add  
Under Transfer vehicle select Variable Pension Benefit Account  
Under amount input the Ex-Spouse Amount  
Click Save  
Under Summary of Allocations click Confirm

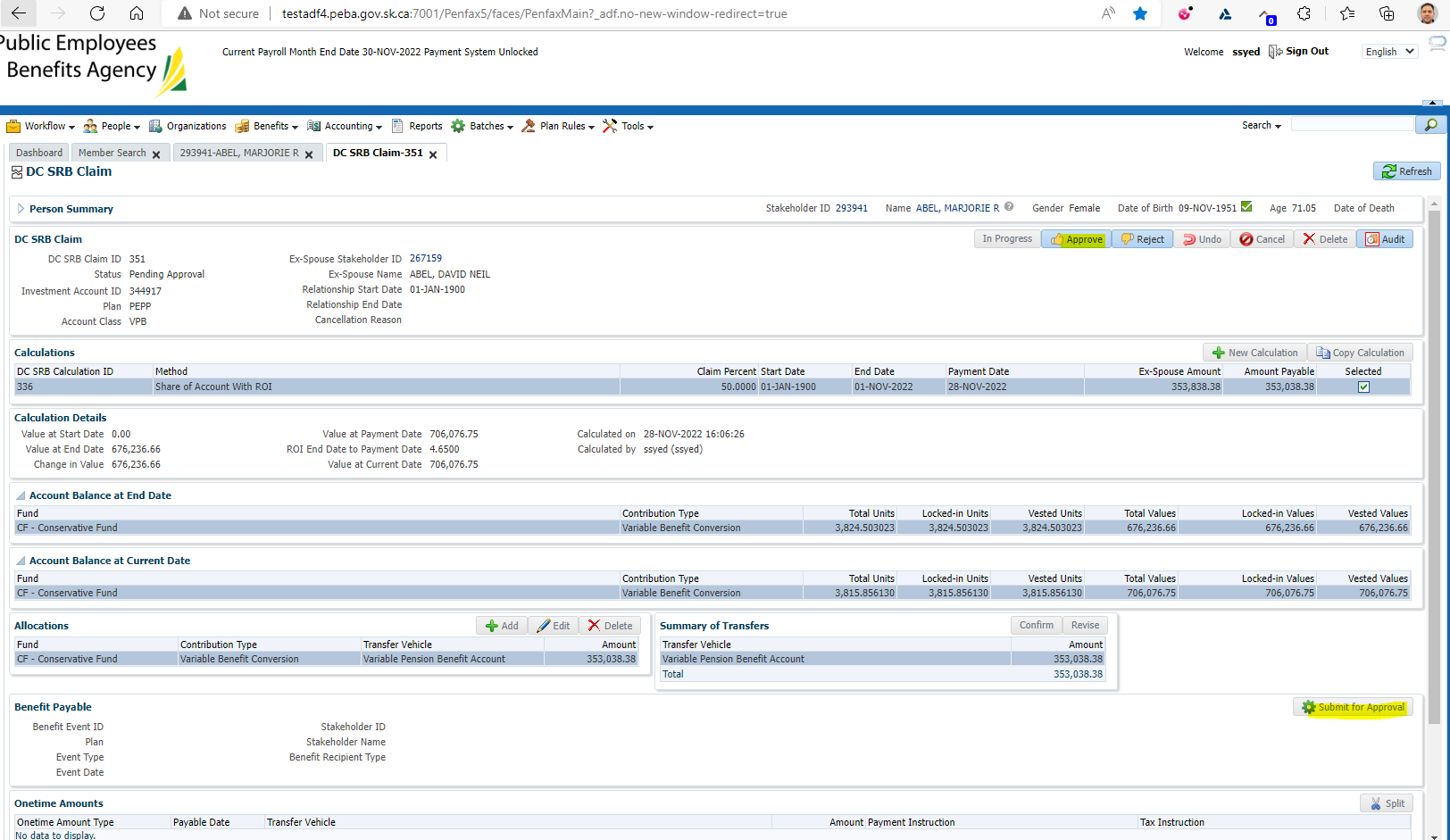


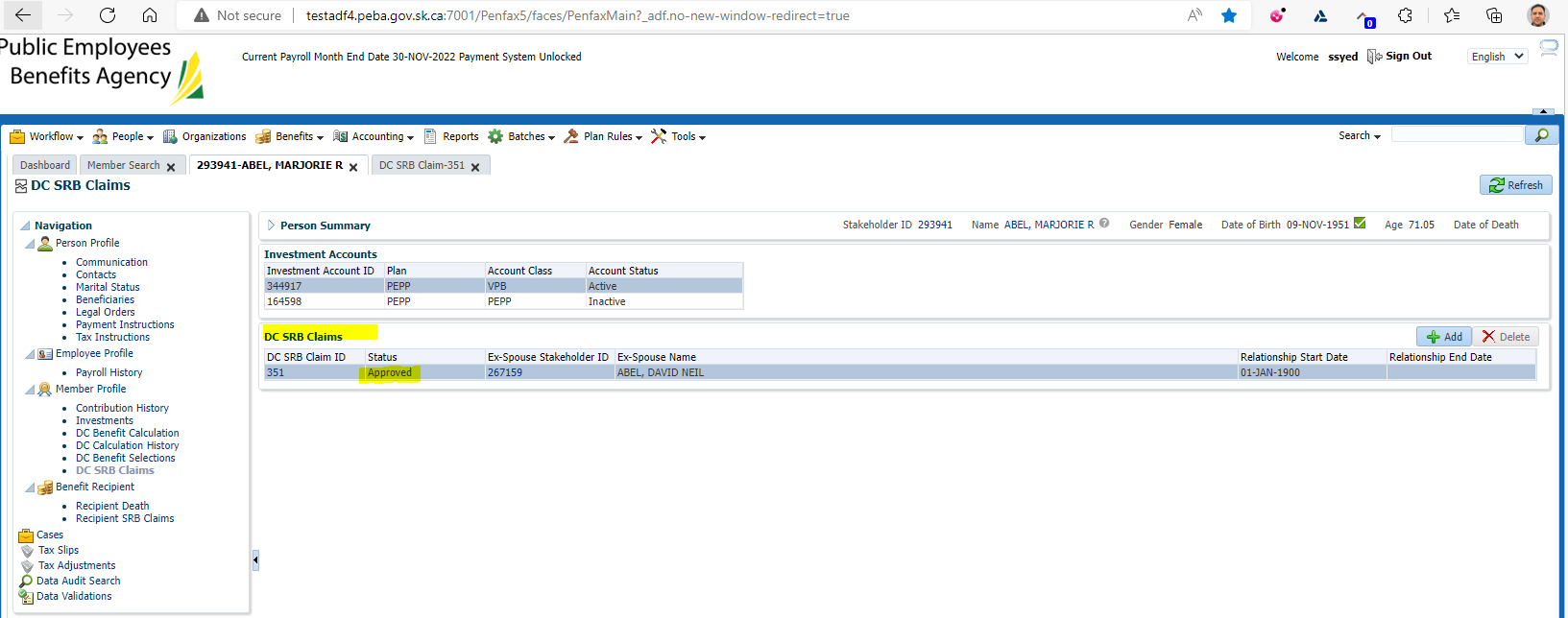




At the top of the screen under DC SRB Claim put In Progress  
Click Submit for Approval  
Approve the file





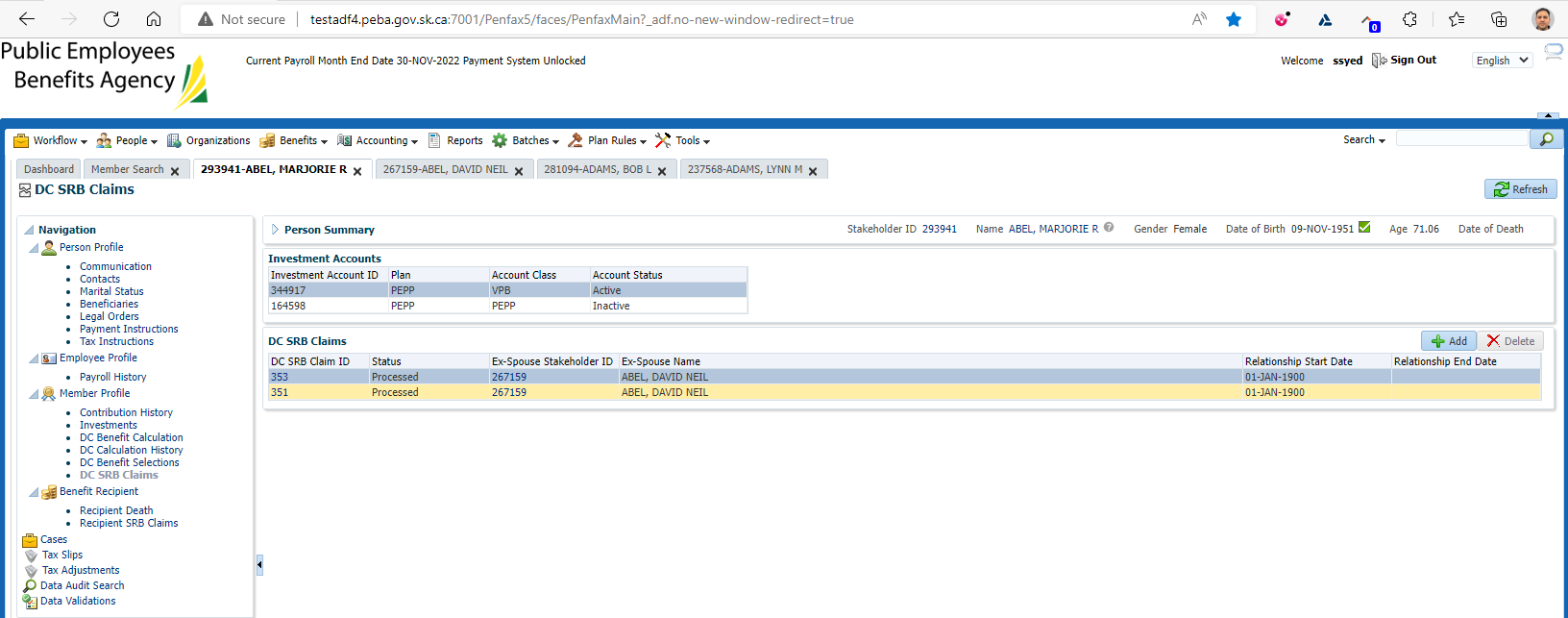


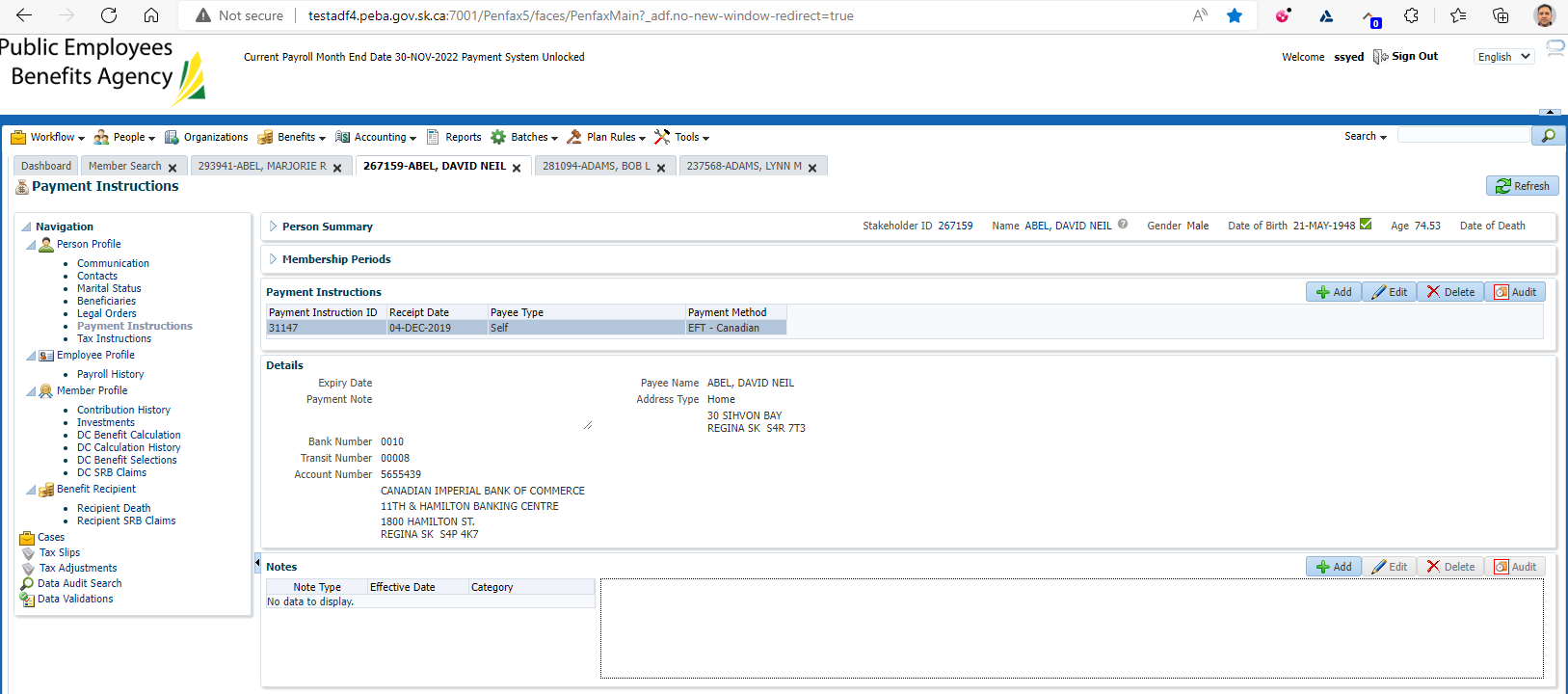
Wait for the overnight batches to run

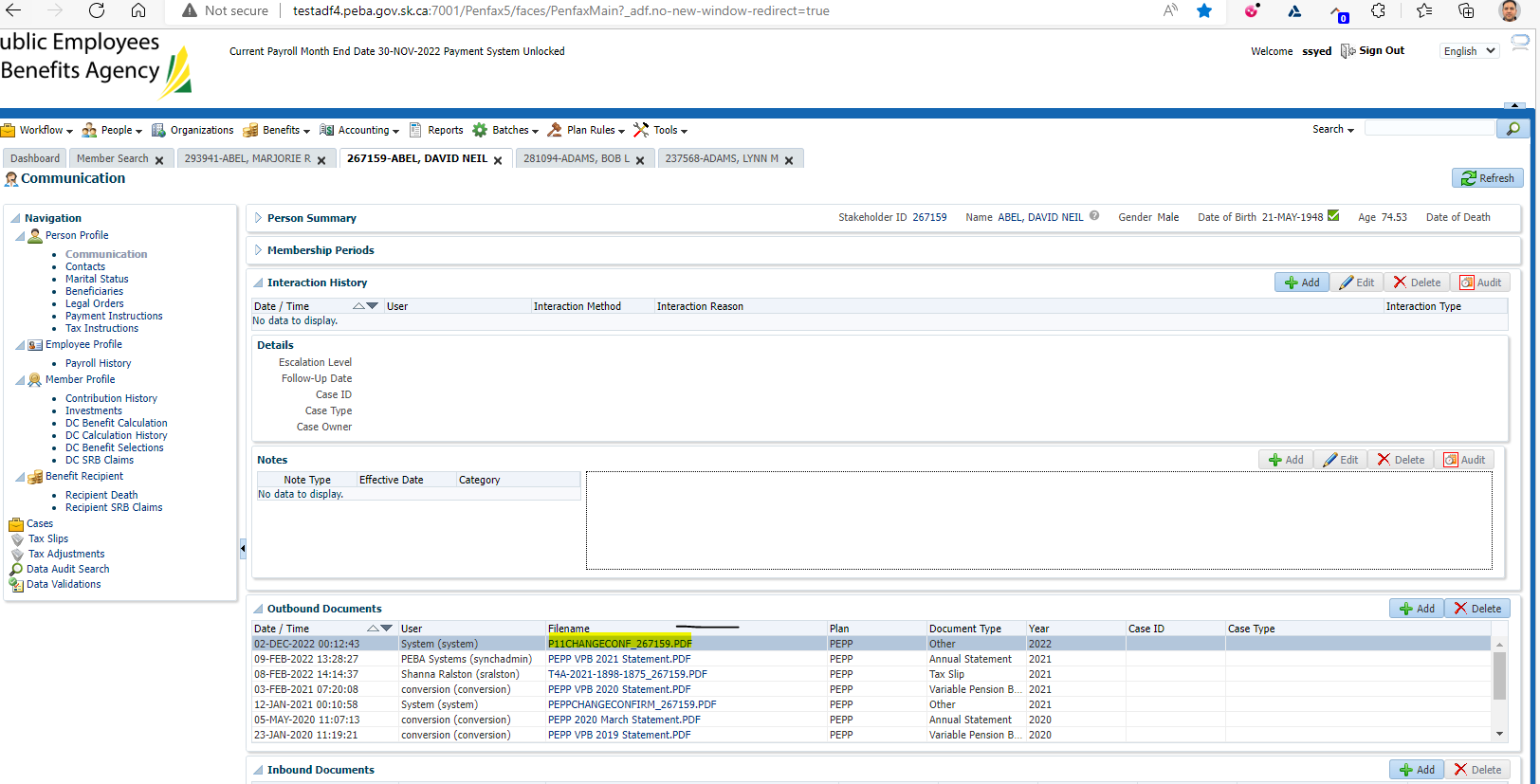
Verify the payment has been paid and that payment has been deposited into the ex-spouse's own VPB account

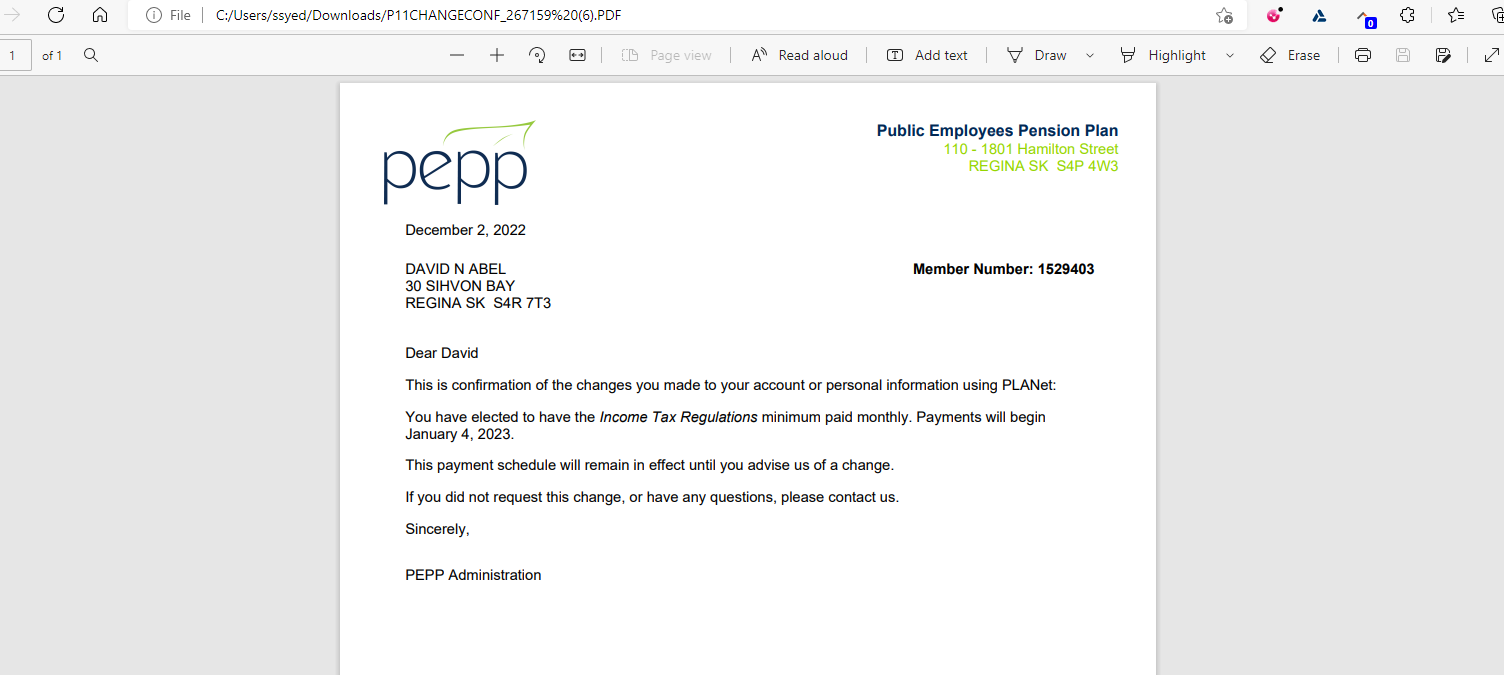
\*\*Note: Letter will not be generated if the money is transferred to an inside transfer vehicle, like a PEPP or VPB

\*\*Note: Letter will be generated only if the money is transferred to an outside transfer vehicle, like a LIRA or RRSP









Letter will not be generated if the money is transferred to an inside transfer vehicle, like a PEPP or VPB