Iteration Day 3

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Client Information

Quick Summary:

- **Client**: MoveHealth, Financial Health Insurance Advisory Agency
- **Purpose of Project**: Streamline document handling and enhance advisory efficiency by using AI.

Business Requirement

Enable Financial Advisors to better assist their clients with clear and easy to understand information about their health insurance.

- [BR1]
- The primary users of this product are Financial Advisors, who, in turn, serve their own clients. The goal is to support Financial Advisors in helping their clients understand the details of their health insurance. By developing new features and enhancing existing ones we can help Financial Advisors explain health insurance details in a clear, digestible manner for their clients. We believe that this is a business requirement because the goal is to improve client understanding of insurance plans, thus adding value to both Advisors and their clients. By creating tools to enable this we can build credibility in this domain and expand our user base with a trusted and valued service.

Bring customers an inviting and friendly product that is not difficult to utilize and provides valuable information.

- [BR2]
- It has been established that the client would like to tend to the demographic of user that is utilizing the product. With that we would like to deliver something that creates a inviting space for the user where they can thrive in using the service. We believe that this is a business requirement because if we can achieve our goal of improving accessibility for the client they are more likely to refer someone or come back to use the service again.

Feature: Onboarding Tutorial made conditional

Purpose: Improves user onboarding by dynamically displaying relevant section information.

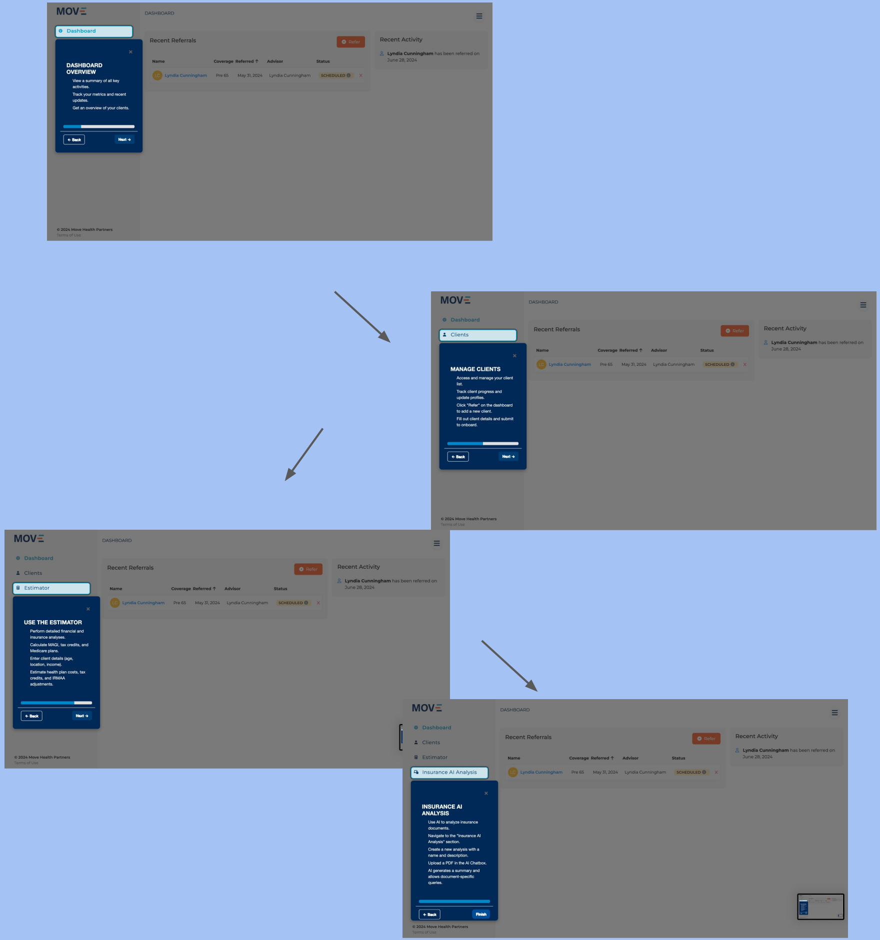
Steps:

1. Navigate to the onboarding tutorial.
2. Click on a section (Dashboard, Clients, Estimator, Insurance, AI).
3. See an explanation for the selected section.

Screenshot: Display onboarding tutorial highlighting section-specific pop-ups.

Business Requirement: [BR2]

Bring customers an inviting and friendly product that is not difficult to utilize and provides valuable information.



Reasoning: This feature enhances user onboarding by dynamically displaying relevant section information, making the product easier to navigate and understand. It improves accessibility and usability, ensuring that new users can effectively learn the system

Feature: AI Chat Box Enhancements

Purpose: Allows advisors to query uploaded PDFs through an AI chat box for quick insights and analysis.

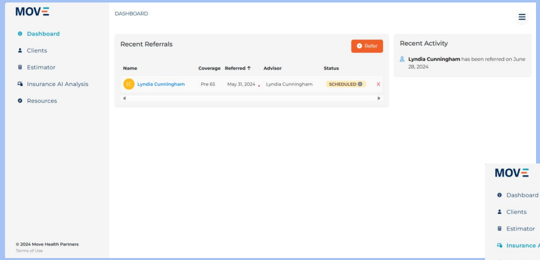
Steps:

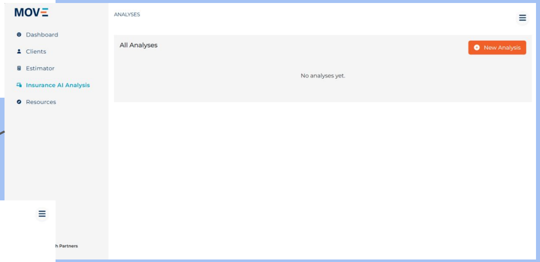
1. Navigate to the Insurance AI Analysis page.
2. Upload a PDF (filename will now display).
3. Type a question—text remains in chat instead of disappearing.
4. Screenshot: Show AI chatbox with persistent text and display file name.

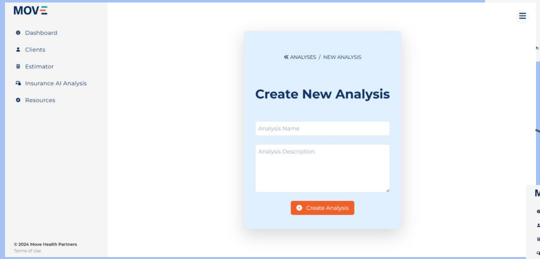
Screenshot: Show AI chatbot with persistent text and displayed file name.
Business Requirement: [BR1]

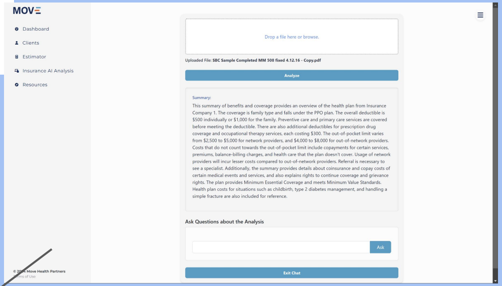
<u>Enable Financial Advisors to better assist their clients with clear and easy-to-understand information about their health insurance.</u>

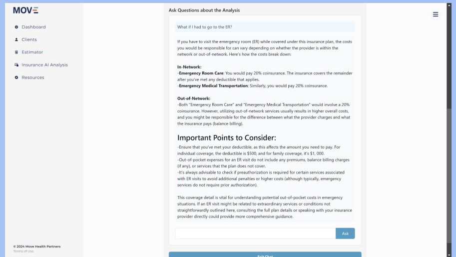
Reasoning: This enhancement allows advisors to query uploaded PDFs and receive insights directly through the AI chat box. It simplifies complex health insurance data, making it easier for financial advisors to explain details to their clients.











Feature: Roth Conversion Comparison Tool

Purpose: Implements backend functionality for advisors to compare Roth conversion options.

Steps:

1. Open the Roth Conversion Tool.
2. Enter relevant financial details.
3. Compare results based on the provided calculations.

Screenshot: Display a sample Roth conversion comparison result

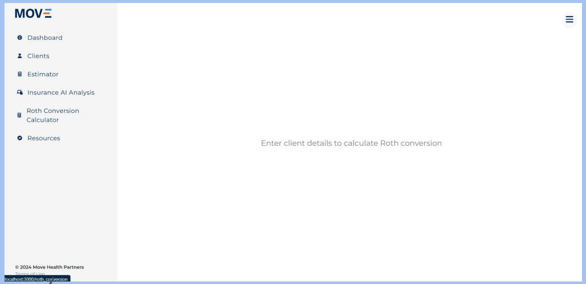
Business Requirement: [BR2]

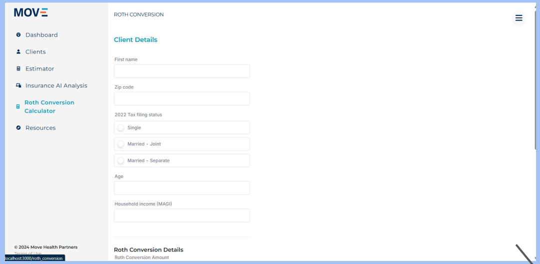
Feature: Roth Conversion Comparison Tool

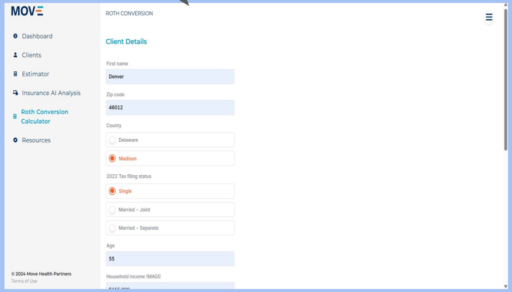
Business Requirement: [BR1]

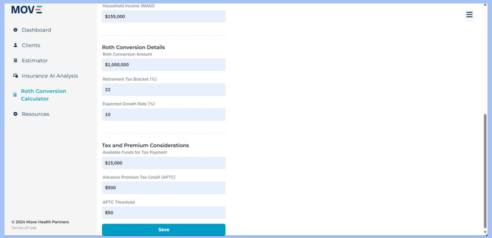
Enable Financial Advisors to better assist their clients with clear and easy-to-understand information about their health insurance.

Reasoning: *This tool provides financial advisors with a comparison of Roth conversion options, helping them present clear financial scenarios to their clients. It supports better decision-making and improves client understanding of financial planning.*









Client and Mentor FeedBack

Mentor Feedback:

- Said we are doing great and working in the right direction.
- Likes our approach for the features and the implementation.

Client Feedback:

- Very satisfied with what we accomplished especially with the onboarding and roth conversion features
- Wants us to enhance the UI features next iteration to make it more presentable.

Planned Iteration 4 Features

Plans for iteration 4: .

1. **AI Chat Box Guard Rails.**
- Strengthen the guardrails into the AI chat box for more accurate and reliable responses.
2. **New Analyst Page Enhancements:**
- Expand functionality to allow users to perform more actions on analyst pages.
- Update design for improved usability and navigation.
- Update so users are allowed to manage analytics data more effectively by enabling page deletions.
3. **Roth Conversion vs. ACA Comparison Tool:**
- Add the front in UI so that it looks pretty. And works on the front end as well as the back end.
- Enhance it more so that it runs more efficiently.

Teamwork/Retrospection

What we did and Lessons each member Learned

Mia: This iteration I focused on enhancing the chabot feature so that it will display the entire chat history and doesn't disappear. I also added a feature so that it displays the pdf file name.My environment crashes every iteration. It crashed towards the end of this iterations so i sent Solomon the code. It was full functioning though. :(So I learned how to troubleshoot computer issues as well ad enhance the ai chat box. :)

Tobi: I learned a lot about the models purpose in the code when creating the roth conversion calculator.

Caleb: I learned a lot about Roth Conversions and retirement planning in general.

Cyarina: This iteration, I worked on making the onboarding tutorial conditional and learned how to use the Intro.js library to create a step-by-step tutorial box that guides first-time users through the interface by highlighting key icons and features.

Solomon: I worked on the getting a new and cleaner output for the chat box. I also worked on a simple guardrail for the pdf analysis part. I also worked on testing and fixing merge errors. I learned that with pull requests merging can be tricky sometimes.

FUN SLIDE :)


When you recompile your code for the 74th time and you finally get a different error
I see this as an absolute win!


ME AT 4 AM TRYING TO FIGURE OUT WHAT'S WRONG WITH MY CODE WITHOUT CHANING ANYTHING


THE TWO STATES OF EVERY PROGRAMMER
I AM A GOD.
I HAVE NO IDEA WHAT I'M DOING.


(LAUGHING)
Looking at programming memes
(CRYING)
Actually coding


me in my natural state