Iteration Day 4

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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: Analysis page enhancements

Purpose: Enhances user experience by allowing seamless navigation between the Analyst AI Insurance Analyst page and its corresponding Summary page, ensuring that users can easily access relevant analysis details.
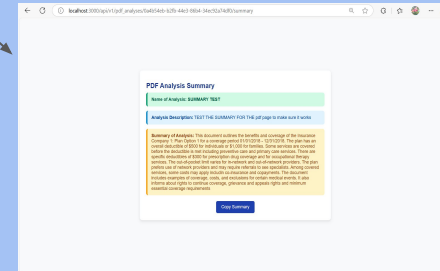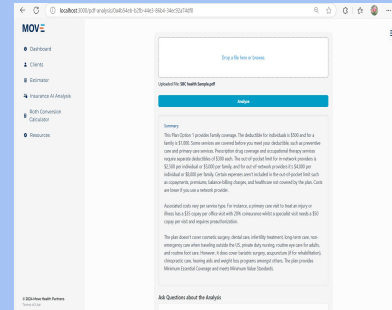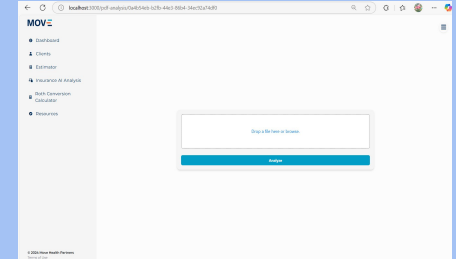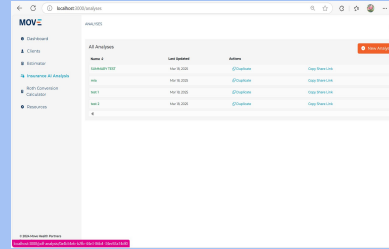
Steps:

1. Navigate to the A**nalyst AI Insurance Analyst** page.
2. Click on an **Analyst name** to be redirected to the **Analyst pag**e, with the Analyst ID displayed in the browser link.
3. Click on the **Copy Share link** to open the **Summary page.**
4. View the Summary page, which displays:
   - The Analyst Name
   - The Analyst Description
   - The Summary of the Analysis

Screenshot: Display of the Analyst page navigation, highlighting the Summary page layout and its key details.

Business Requirement: [BR2]

Ensure that users have an intuitive experience when accessing and sharing analysis details, making the system user-friendly and informative.

Reasoning: This feature improves user accessibility by enabling direct navigation between Analysts and their summaries. It provides a clearer structure for viewing analysis information, making it easier for users to understand and share relevant data. By streamlining this process, the feature enhances the overall usability and engagement of the system.

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.
4. Displays results of the conversions.

**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.*
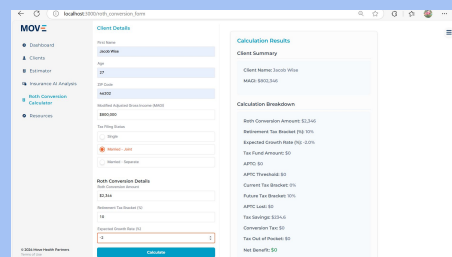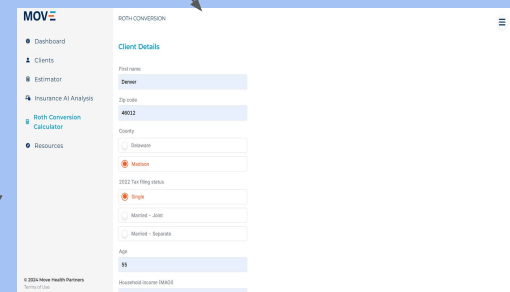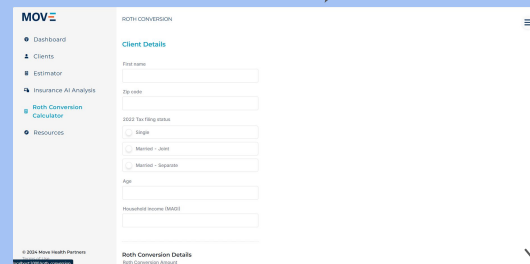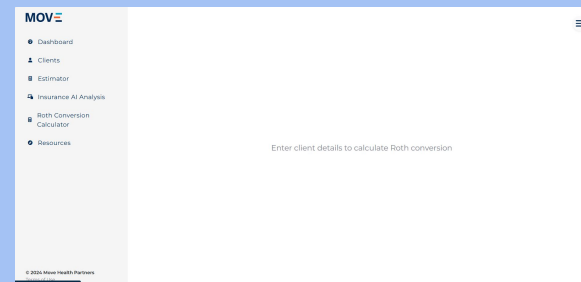
Client and Mentor FeedBack

Mentor Feedback:

- Gave us feedback on the analysis summary page to make it look cleaner.
- Like the way the roth conversion is and our approach.

Client Feedback:

- Liked the layout of the roth conversion summary and analysis summary.
- Wanted us to tweak the conversions abit.

Planned Iteration 5 Features

Plans for iteration 5: .

1. **More Analyst Page Enhancements:**
   - Expand functionality to allow users to perform more actions on analyst pages.
   - Update the design of the analysis summary page.
2. **Roth Conversion Visual Graph**
   - Update the front in UI so that it looks more pretty.
   - Add a feature to show the graph of the users roth conversion estimates.

Teamwork/Retrospection

What we did and Lessons each member Learned

Mia: I set up the Analyst AI Insurance Analyst page so when you click on the Copy Share link shows the summary with all the details. Of the current analysis. Working with the database was a pain because it's super picky, and one small mistake can mess everything up. I learned a lot about handling data properly and making sure everything pulls the right info without breaking.

Tobi: I learned more about Roth Conversions and I had a good discussion with the client about what was expected which also helped me learn more about healthy communication between client and programmer.

Caleb: I learned a lot more about the database and the interactions between the js pages and the database. Also a lot about the routing and what routing file does what when it comes to creating and managing.

Cyarina: I learned a lot more about the roth conversion and how it works when adding the roth conversion results page that displays the conversion outputs.

Solomon: I learned that it's hard to come up with new features once you get the big ones that your client wants. From there it's mostly tweaking things here and there.
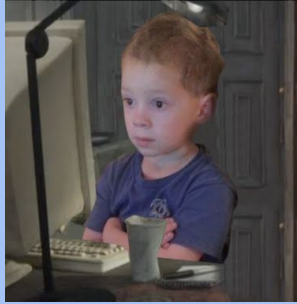
FUN SLIDE :)