



Iteration Day 1

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MoveHealth Insurance Ai Analysis

Quick Summary:

- **Client:** MoveHealth, a platform focused on providing tools for financial advisors.
- **Project Goal:** Develop an Insurance AI Analyst feature that allows advisors to upload insurance documents (PDFs) and interact with an AI to analyze and answer questions about the document.
- **Purpose:** Streamline document handling and enhance advisory efficiency by using AI for quick document analysis and insights.

Mentor FeedBack

- Keep moving forward
- We weren't completely at a functional code point when meeting with him so he gave us tips on wrapping up an iteration

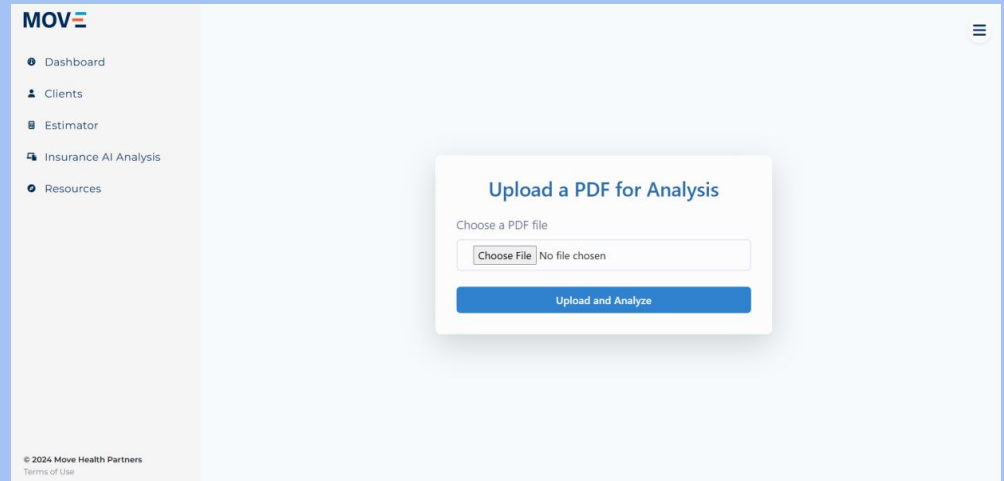
Client FeedBack

- Positive, excited to see work down
- Had some suggestions when we get the chat feature working

Iteration 1 Features Overview

Overview:

- This iteration focused on core features needed to support the added Insurance AI Analysis, including user authentication, dashboard navigation, document upload, and AI-driven analysis.
- Each feature was developed to enhance functionality while maintaining ease of use.



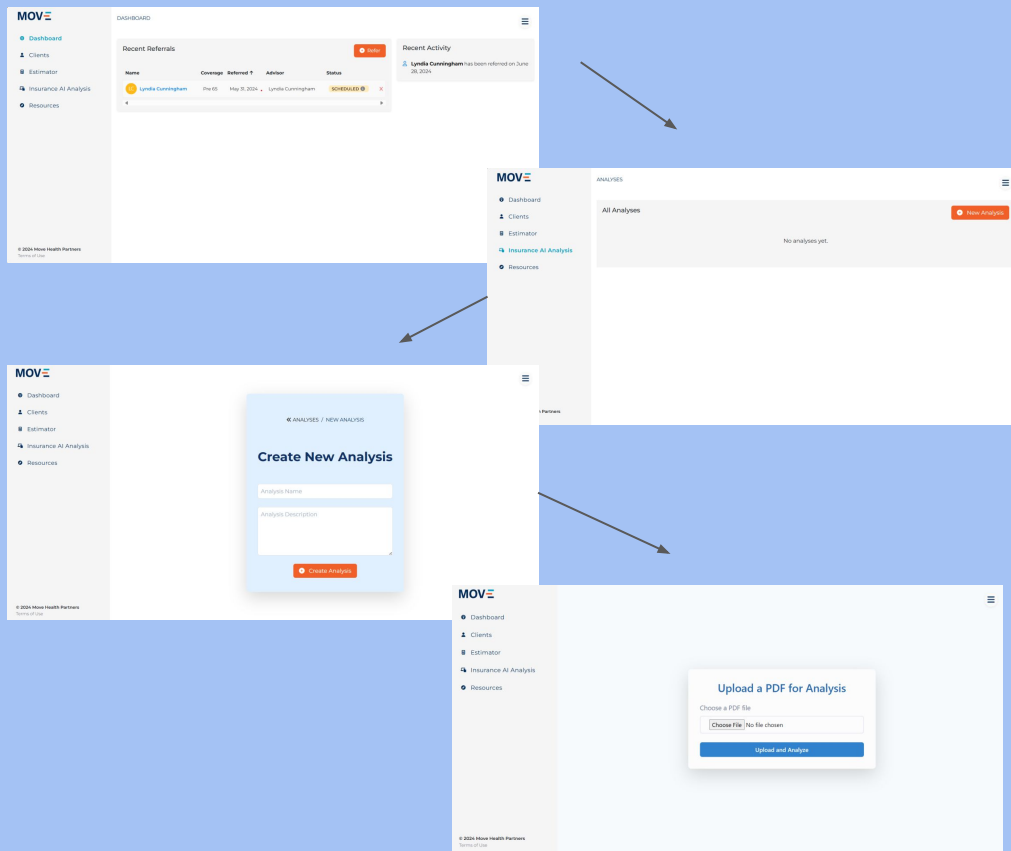
Feature: Ai Insurance Analysis Functionality

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. Open the AI chat box after uploading a PDF.
3. Type questions related to the document for instant responses.

Screenshot: Display the AI chat box with a sample question and response.



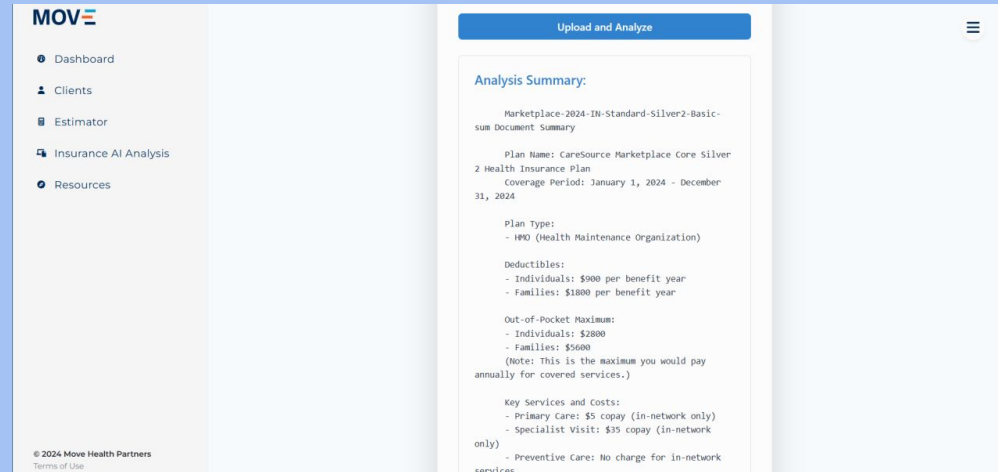
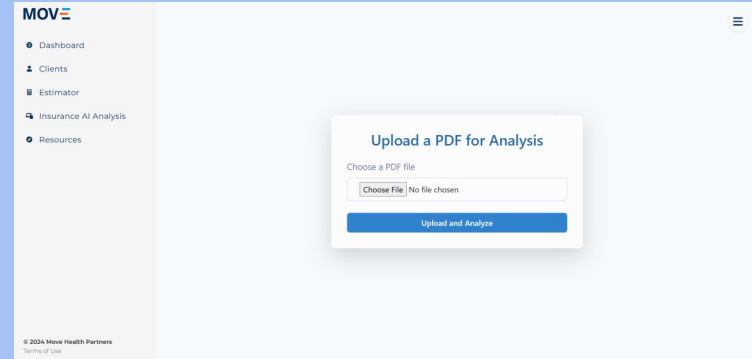
Feature: Document Upload System

Function: Supports uploading of PDF documents related to insurance policies or client information.

Steps:

1. Click the “Upload Documentation” button.
2. Select a PDF file and upload it to the AI chat box interface to get a summary of the document.

Screenshot: Show the document upload dialog or an example of a successfully uploaded file.



Planned Iteration 2 Features

Plans for iteration:

Unassisted User Onboarding

- Adding in instructional / navigational type tips for "first time users" as they use the platform for the first time.

Creating the chat function, more than just the summary of the pdf

Retrospection

Lessons each member Learned

Mia: I learned how to fix ruby on my computer because i was having an issue with ruby lsp randomly not wanting to work. So I had to go into the files. I also learned a lot about how specific certain coding languages are when using different computer platforms.

Tobi: I learned how to make migrate files with ruby and learned a lot about react.

Caleb: I learned a lot about ruby API handling, open AI API handling, and backend file handling.

Cyarina: I learned a lot about using React and working with Ruby on Rails

Solomon: I learned that it's easier to think about features than implementing them.

Retrospection

Quality vs. Functionality

Quality:

- Keeping things organized, there were times that we considered sacrificing the organization of the project to just get the project to work.
 - We maintained this as much as possible and prioritized to functionality at times to prevent messes in future iterations.

Functionality:

- Obviously a priority for the class, lots of time sacrificed to working, quality may have gone down the later we stayed the library but we have a pretty functional, and we are proud with the breakthroughs we have had.

Retrospection

Plan for Iteration 2

- We plan on improving areas from this first iterations
- We are still going to have similar issues with the client communication, but hopefully getting other members of the client company caught up with what we are doing and why will be a help.

FUN SLIDE :)

