Iteration Day 2

Tobi Lott, Mia Lacey, Cyarina Amatya, Solomon Siang, Caleb Reyes

Client Information

Quick Summary:

- **Client**: MoveHealth, Financial Health Advisor Agency

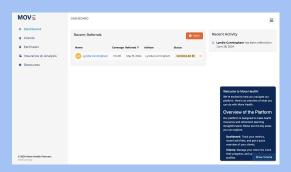- **Purpose of Project**: Streamline document handling and enhance advisory efficiency by using AI.
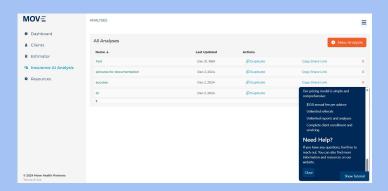
Feature: Onboarding Tutorial for First Time User

Function :Provides instructions to first-time users on how to navigate and use the platform.

Steps:

1. Detect when a user logs in for the first time.
2. Display a tutorial box at the bottom of the screen that provides a notification explaining the features displayed on the dashboard.
3. Allow users to minimize or close the tutorial box.
4. Enable users to reopen the tutorial box at any time through a designated option on the dashboard..

Screenshot:Include a screenshot of the tutorial box at the bottom of the screen with an example notification, showing the minimize and close options.
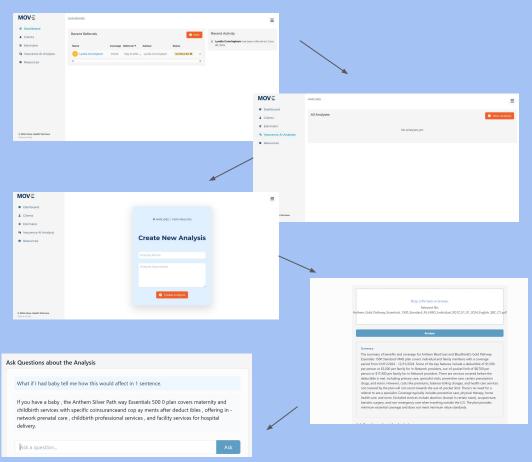
Feature: AI Chat Box

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.

ANALYSES

All Analyses

No analyses yet.

New Analysis

« ANALYSES / NEW ANALYSIS

Create New Analysis

Analysis Name

Analysis Description

Create Analysis

Drop a file here or browse.
Selected file:
Anthem_Gold_Pathway_Essentials_1500_Standard_IN_HMO_Individual_9Q1Z_01_01_2024_English_SBC_CY.pdf

Analyze

Summary:
The summary of benefits and coverage for Anthem BlueCross and BlueShield's Gold Pathway Essentials 1500 Standard HMO plan covers individual and family members with a coverage period from 01/01/2024 - 12/31/2024. Some of the key features include a deductible of $1,500 per person or $3,000 per family for In-Network providers, out-of-pocket limit of $8,700 per person or $17,400 per family for In-Network providers. There are services covered before the deductible is met, including primary care, specialist visits, preventive care, certain prescription drugs, and vision. However, costs like premiums, balance-billing charges, and health care services not covered by the plan will not count towards the out-of-pocket limit. There's no need for a referral to see a specialist. Coverage typically includes preventive care, physical therapy, home health care, and more. Excluded services include abortion (except in certain cases), acupuncture, bariatric surgery, and non-emergency care when traveling outside the U.S. The plan provides minimum essential coverage and does not meet minimum value standards.

Ask Questions about the Analysis

What if I had baby tell me how this would affect in 1 sentence.

If you have a baby , the Anthem Silver Path way Essentials 500 0 plan covers maternity and childbirth services with specific coinsuranceand cop ay ments after deduct ibles , offering in - network prenatal care , childbirth professional services , and facility services for hospital delivery.

Ask a question...   Ask

Feature: New Analyst Page Updates:

Function :Allows users to save new analyst pages to the database and view a history of all previously created analyst pages

Steps:

1. Navigate to the New Analyst Page section of the platform.
2. Create and save an analyst page by filling out the required fields.
3. View the saved analyst page in the database.
4. Access the history of all previously created analyst pages through the History tab.

Screenshot:Include a screenshot of the New Analyst Page interface, showing the fields for creating a page and the history section displaying saved pages.

Client and Mentor FeedBack

Mentor Feedback:

- Clean up chat box output
- Implement guard rails

Client Feedback:

- Clean up chat box output
- Make tutorial box stand out more

Planned Iteration 3 Features

Plans for iteration:

1. **Unassisted User Onboarding Conditional Based on Page:**
   - Changing from one long box to a short box based on what page the user is on with hyperlinks.
2. **AI Chat Box Guard Rails.**
   - Add guardrails into the AI chat box for more accurate and reliable responses
   - Continue refining the streaming feature for improved interaction with uploaded documents.
3. **New Analyst Page Enhancements:**
   - Expand functionality to allow users to perform more actions on analyst pages.
   - Update design for improved usability and navigation.
4. **Roth Conversion vs. ACA Comparison Tool:**
   - Begin development to provide detailed insights into tax credit options.

Retrospection

Lessons each member Learned

Mia: Always plan for a crisis but stay positive no matter what.

Tobi: Databases are very sensitive. :(

Caleb: Writing tests is a lot more in-depth then just 1 or 2 unit tests

Cyarina: learned how to make an onboarding tutorial for first time users. It's not easy.

Solomon: Planning ahead relieves a little bit of stress
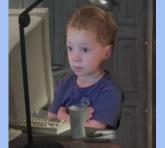
Retrospection

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.
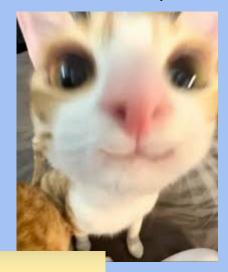
Functionality:

- 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.

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

FUN SLIDE :)

THE TWO STATES OF EVERY PROGRAMMER

I AM A GOD.

I HAVE NO IDEA WHAT I'M DOING

I got the job!!! I start removing catalytic converters tonight at midnight!!!

me in my natural state