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

Fun Fact from Each Team Member

Caleb: My favorite drink is the coke zero oreo

Cyarina: I love dancing.

Mia: I'm a fast reader. I once read 3 800 page books in a day. .> <

Solomon: Fall is my favorite season.

Tobi: I am President of the Crochet and Crafts Club here at Ball State :)

Client Information

- Health Insurance Agency

- Evansville, Indiana

- Founded 2023

- Main POC

- BSU Alumni

Business Requirements

[BR1] - *Improve MVP to bring a more effective utilization loop to advisors and staff.*

- Time is an Asset

- Accessibility will boost productivity

[BR2] - *Bring customers an inviting and friendly product that is not difficult to utilize and provides valuable information.*

- More likely to come back and utilize service

- More likely to refer to friends/family

TechStack

Frontend:

1. **React:**
   - Component-based for modular, reusable UI
   - Strong community and library support

Backend:

1. **Ruby on Rails:**
   - Full-stack framework
   - Rapid development, built-in security
2. **PostgreSQL:**
   - Reliable relational database
   - Handles complex financial data

AI & Infrastructure:

OpenAI (ChatGPT):

- Summarizes financial documents

Heroku:

- Simplifies deployment and scaling

GitHub:

- Version control and collaboration

Postmark & cal.com:

- Postmark: Transactional email service
- cal.com: Scheduling appointments

ZenGuard:
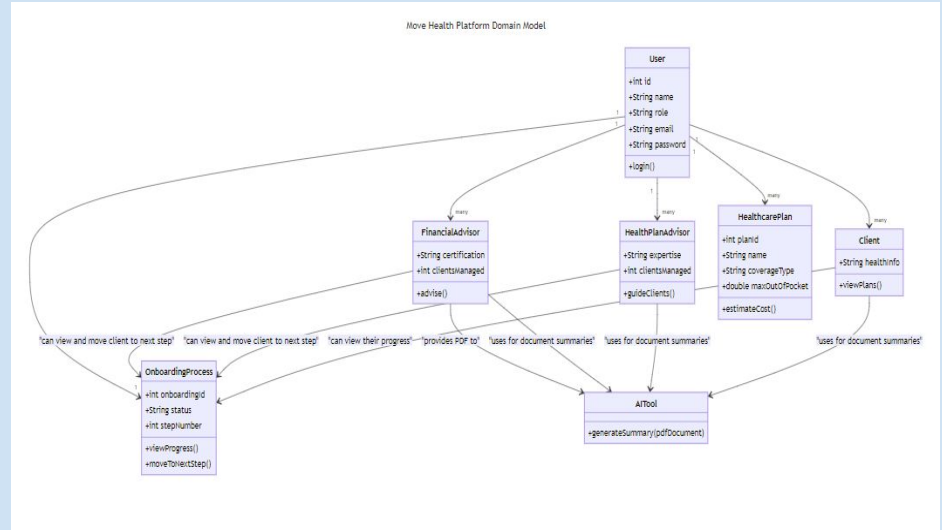
- Provides added security for API and website

Domain model

Key Entities:

1. **User:**
   - ○ ID, name, role, email, password
   - ○ Can be Financial Advisor, Client, or Health Plan Advisor
2. **Financial Advisor:**
   - ○ Manages clients
   - ○ Provides financial and healthcare advice
3. **Health Plan Advisor:**
   - ○ Helps clients choose healthcare plans
   - ○ Specializes in healthcare coverage

Additional Entities:

1. **Client:**
   - ○ Receives advice on healthcare and financial planning
   - ○ Views healthcare plans
2. **Healthcare Plan:**
   - ○ Plan ID, name, coverage type, max out-of-pocket
   - ○ Estimates healthcare costs
3. **AITool:**
   - ○ Summarizes financial PDFs for advisors and clients
4. **Onboarding Process:**
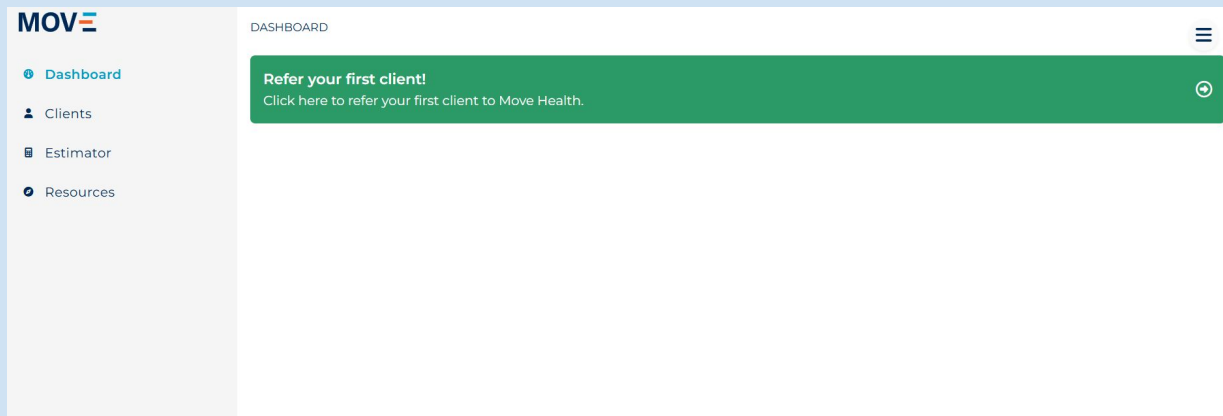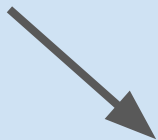   - ○ Tracks user progress through registration

Move Health Platform Domain Model

Prototype

[Figma Prototype](#)

Our focus is on enhancing the current product, so making the prototype I was able to direct inspiration from their current website features.
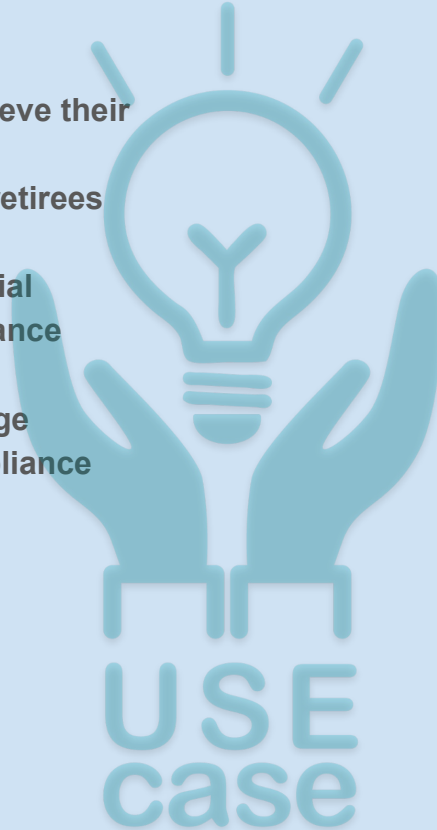
Current Product
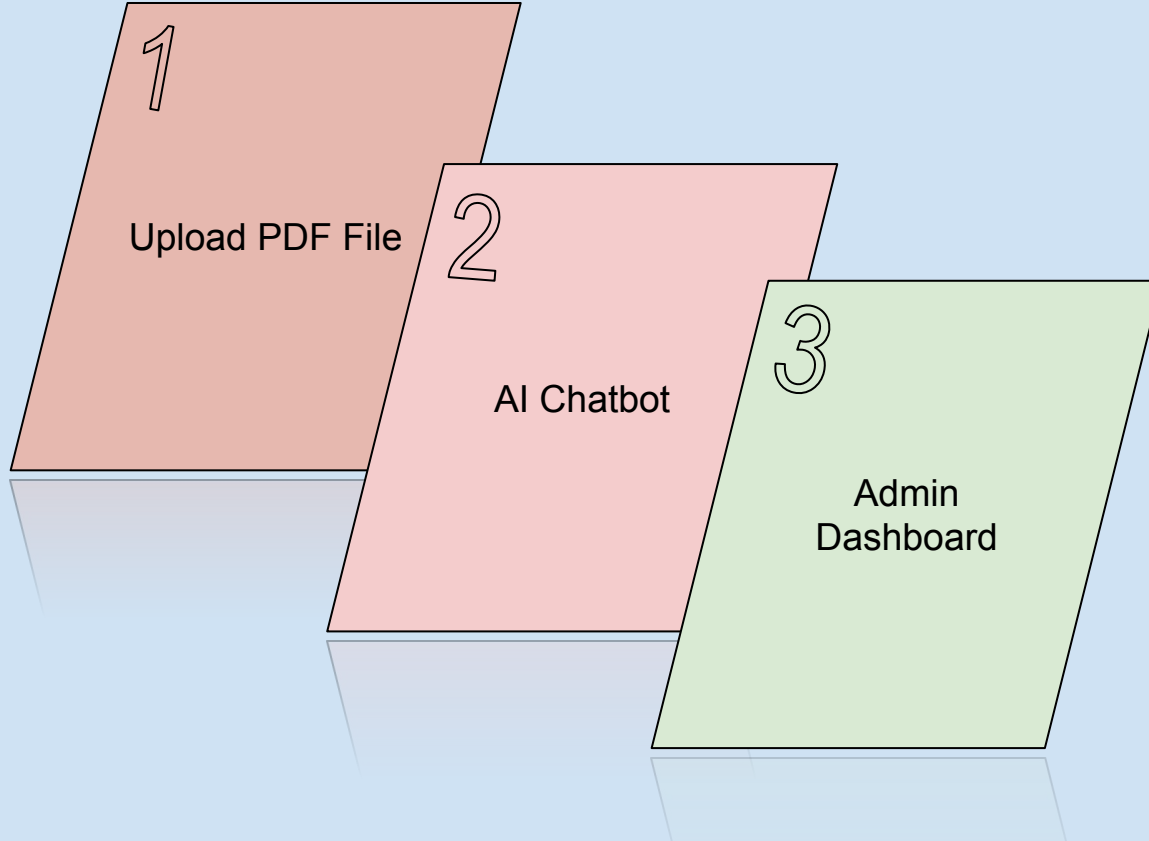
Use Cases

Actors:

- **Financial Advisors: Help clients achieve their financial goals.**
- **Clients of Financial Advisors: Early retirees between 55-64 years old.**
- **Health Plan Advisors: Assists financial advisors and their clients with insurance planning.**
- **Admin: Monitors user activity, manage document uploads and ensure compliance with system rules.**

Use Cases:

- Upload PDF Document
- Summarize Uploaded PDF
- Ask AI about Document
- Edit Document via AI prompt
- Admin Monitoring

First Iteration Features

1

Upload PDF File

2

AI Chatbot

3

Admin Dashboard

Requirements

Functional Requirements:

- The system will accept only a pdf file to be uploaded. (High)
- The system will be able to give a summary of the uploaded document. (High)
- The system will be able to answer questions or take prompts relating to the document. (High)
- The system will be able to edit the document through prompts. (Low)
- The system will have an admin dashboard to allow admins to see what users are uploading. (Med)

Non-functional Requirements:

- The system will have daily limits for its use depending on the tier of subscription. (Low)
- The system will only accept documents and prompts relating the health insurance planning. (High)
- If users attempt to upload documents that are not related to health insurance planning, it will notify them. (High)
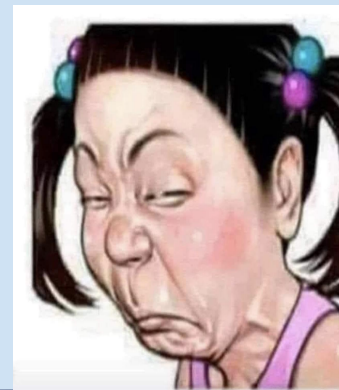
Feedback

Mentor Feedback:

- adding prompt injection which puts limits on the ai so that it doesn't wastes the companies money.
- Dashboard to view the responses and monitor if its being used correctly.

Client Feedback:

- Cole had some feedback on the prototype design.
  - Originally we had the chat box first with a place to upload a file, but he wanted the chat box to not appear until after the file is uploaded to avoid the AI being used for anything other than what it is intended for.

Interesting Slide

MoveHealth Team