| **Story ID** | **Title** | **User Story** | **Acceptance Criteria** | **Result of test** |
| --- | --- | --- | --- | --- |
| 1 | User Login Information | As a user I want to enter my name and location before starting so that responses can be personalised. | Given a user is starting a chat, when they enter their name and location, then the responses are personalized using that information |  |
| 2 | Personalized Greeting | As a user I want an immediate personalized greeting using my entered name so the chat feels tailored | Given a user has entered their name, when they start the chat, then the bot greets them immediately using their name |  |
| 3 | Correct Name on Login | As a user who accidentally entered their name incorrectly, I want to be able to exit the chatbot and return to the login screen so that I can re-enter my correct name before starting the conversation | TERAH must allow the user to press the close button (X) in the chatbot window and be taken back to the login screen. On returning, the chatbot should prompt the user again for their name and location, with their previously entered incorrect name automatically appearing in the name field. It is then up to the user to edit this field and correct the spelling before starting the chat |  |
| 4 | Start Chat | As a user, I want to start a conversation with the chatbot so that I can begin asking retirement-related questions | Given a user accesses the chatbot, when they initiate a chat session, then the chatbot is ready to accept and respond to questions. The chatbot opens successfully and displays a ready-to-use input field, allowing the user to type and submit questions | The chatbot opens successfully and displays a ready-to-use input field, allowing the user to type and submit questions. |
| 5 | Persistent Chat While Browsing | As a website visitor, I want to start a conversation with the chatbot, continue scrolling through the website, and then return to the chatbot later without losing my progress, so that I can explore the site freely while still keeping my conversation intact | TERAH must maintain the user’s conversation history while the visitor scrolls through the website, allowing the chatbot to remain visible and active on the page. As the user continues to browse, the chatbot should stay in place so they can return to it at any time, with the conversation still available to continue without interruption |  |
| 6 | Full-Page Conversation View | As a user, I want to view the conversation on a single full-page interface so that I can follow the discussion easily without navigating between screens | Given a user opens the chatbot, when they interact with it, then the entire conversation is displayed in a single full-page interface. The conversation displays entirely on a single full-page interface, with no need for navigation between screens, and all messages are visible and scrollable | The conversation displays entirely on a single full-page interface, with no need for navigation between screens, and all messages are visible and scrollable. |
| 7 | Close Chatbot | As a user, I want to close the chatbot while I’m in a conversation so I can stop the chat and return to the full screen of the main page | Given a user is in a conversation, when they choose to close the chatbot, then the chat is closed and the chatbot returns to an icon. The chatbot is minimized into an icon in the bottom righthand corner | The chatbot is minimized into an icon in the bottom righthand corner |
| 8 | Ignore Blank Input | As a user, I want whitespace only inputs ignored so that accidental empty messages are not sent | Given a user types a message, when the input contains either nothing or just whitespace, then the message is ignored and not sent. No messages are sent if blank | No messages are sent if blank |
| 9 | Clear Input After Send | As a user I want the input cleared after I send so I can type the next question immediately | Given a user sends a message, when the message is submitted, then the input field is cleared for the next question. The message field is empty after a message is sent | The message field is empty after a message is sent |
| 10 | Auto-Scroll and Input Focus | As a user I want the chat to auto-scroll to newest messages and focus the input so I can continue typing without manual scrolling | Given a conversation is ongoing, when a new message is added, then the chat auto-scrolls to the newest message and the input is focused. The chatbot message screen auto scrolls to the new message | The chatbot message screen auto scrolls to the new message |
| 11 | Bot Thinking Indicator | As a user, I want an indicator to represent when the bot is thinking, so that I know the response is generating | Given the bot is generating a reply, when the user is waiting, then an indicator is shown to represent that the bot is thinking |  |
| 12 | Simulated Typing Effect | As a user I want the bot reply to appear gradually so it feels like a live typed response | Given a bot reply is generated, when it appears in the chat, then the reply is displayed gradually to simulate typing. The chatbot responds as though typed in real time | The chatbot responds as though typed in real time |
| 13 | Factual Information Only | As a user seeking retirement information, I do not want to be misled by financial advice, but instead I want to receive only factual information that cannot negatively impact me, so that I can make my own informed decisions without being given personal advice | TERAH must avoid providing personal or tailored financial advice and instead deliver factual, general information sourced from trusted government or reputable sources. All responses should include a disclaimer reminding users that the chatbot does not provide financial advice and that they should consult a licensed financial adviser for decisions specific to their circumstances |  |
| 14 | Updated Information | As a user, I want to be sure that the model is updated with current information so that I can be sure the responses are not out of date | Terah needs to be able to scrape new data from reputable websources on a regular basis to keep its data up to date. Scraper.py is able to accomplish this whenever it is run | [Scraper.py](http://scraper.py) is able to accomplish this whenever it is run |
| 15 | AI Hallucination Mitigation | As a middle aged user who has experience with AI models, I want to know that there are mitigation protocols against AI hallucinations, so that I can be sure responses are true | TERAH must use strategies to ensure that the model is not overloaded with context, a proven strategy to reduce AI hallucinations |  |
| 16 | Double-Check Accuracy | As an older user, I want the information to be double checked for accuracy, so that I can be sure that the responses are factual | TERAH must double check responses for validity, and correct any that do not meet accuracy standards |  |
| 17 | Out-of-Scope Detection | As a user, I want the chatbot to recognise when my query is outside its scope so that I’m not given misleading information | Given a user submits a question beyond the chatbot’s knowledge, when the chatbot cannot provide a definitive answer, then it informs the user that the query is outside its scope. When a user submits a question beyond the chatbot’s knowledge, the chatbot responds with a message indicating that the query is outside its scope and does not provide misleading information | When the user submits a question beyond the chatbot’s knowledge, the chatbot responds with a message indicating that the query is outside its scope and does not provide misleading information. |
| 18 | Submit Retirement Question | As a user, I want to input a retirement-related question so that I can receive relevant information | Given a user is in a chat session, when they submit a retirement-related question, then the chatbot provides a relevant response based on the query. When the user submits a retirement-related question, the chatbot responds with accurate and relevant information based on the query | When the user submits a retirement-related question, the chatbot responds with accurate and relevant information based on the query. |
| 19 | Follow-Up Context Retention | As a user wanting specific examples, I want to ask TERAH “When can I access my super?” and then follow up with “Can you give me an example of how this works for someone born in 1965?” so that I can confirm it retains context and provides accurate, sourced information | TERAH must answer the initial question with a general preservation age explanation, then correctly respond to the follow-up by providing the preservation age for someone born in 1965, including a supporting reference such as ABS |  |
| 20 | Display Source Name | As a retiree using the chatbot, I want to clearly see the name of the source referenced in TERAH’s response without needing to click the link, so that I immediately know where the information is coming from | TERAH must display references in a transparent way, showing the source name directly in the response. Users should be able to identify the source of the information at a glance, without needing to click with the link |  |
| 21 | Clickable Reference Links | As a user reading TERAH’s responses, I want to be able to click on a reference link provided in the chatbot so that I can view the original source website and explore the information that TERAH has drawn from | TERAH must display reference links that are clickable, taking the user directly to the original source website (e.g., Australian Bureau of Statistics, ATO, Services Australia). The user should be able to open and explore the referenced page in their browser to confirm and read more about the information provided |  |
| 22 | Official Resource Links | As a user, I want to receive links to official resources so that I can verify information independently | Given the chatbot provides information, when a response references external data, then links to official resources are included and clickable. All responses referencing external data include clickable links to official sources, which open correctly in a new browser tab | All responses referencing external data include clickable links to official sources, which open correctly in a new browser tab. |
| 23 | Redo Bot Reply | As a user I want to redo a specific bot reply so that I can get an alternative answer to the same prompt | Given a user views a bot reply they are unhappy with, when they select the redo option, then an alternative answer to the same prompt is generated |  |
| 24 | Copy Bot Reply | As a user, I want to copy bot replies to my clipboard and see confirmation so that I can reuse responses | Given a user views a bot reply they are happy with, when they select the copy option, then the reply is copied to the clipboard and a confirmation is shown | “Retirement is leaving the workforce. It involves planning when to access your super and understanding the tax implications. There are options for transitioning to retirement, such as reducing your working hours.” |
| 25 | Hover Controls Display | As a user I want copy and redo controls to appear only when I hover a bot message so the UI stays uncluttered | Given a user hovers over a bot message, when they view the message, then copy and redo controls are displayed only on hover to keep the UI uncluttered |  |
| 26 | Controls Only on Bot Replies | As a user I want copy and redo controls only on bot replies so I don’t see actions for my own messages | Given a user views the chat, when they check a message of their own, then copy and redo controls are not displayed. The user message box remains consistent | The user message box remains consistent |
| 27 | Accessible Chat Window | As an older user in my 80s with poor eyesight, I want to be able to enlarge the chatbot window so that I can clearly see the responses without straining my eyes | TERAH must support an accessible interface that allows the chatbot to be viewed in a larger format, making text easier to read. Users should be able to switch between a compact view and an expanded view, with responses displayed in a way that accommodates low-vision needs |  |
| 28 | Toggle Larger Chat View | As a user I want to be able to toggle a larger chat view so I can read longer replies comfortably | Given a user is using the chatbot, when they toggle the larger chat view, then the chat display expands for easier reading of longer replies |  |
| 29 | Chat Privacy | As a user, I want to be sure that my chats are private to me and not shared with other users | TERAH must keep chats separate between users so that no information is accessible between them |  |