



Alpha Presentation

Insurance Quoting Assistant

The Capstone Experience

Team Delta Dental IQA

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*From Students...
...to Professionals*

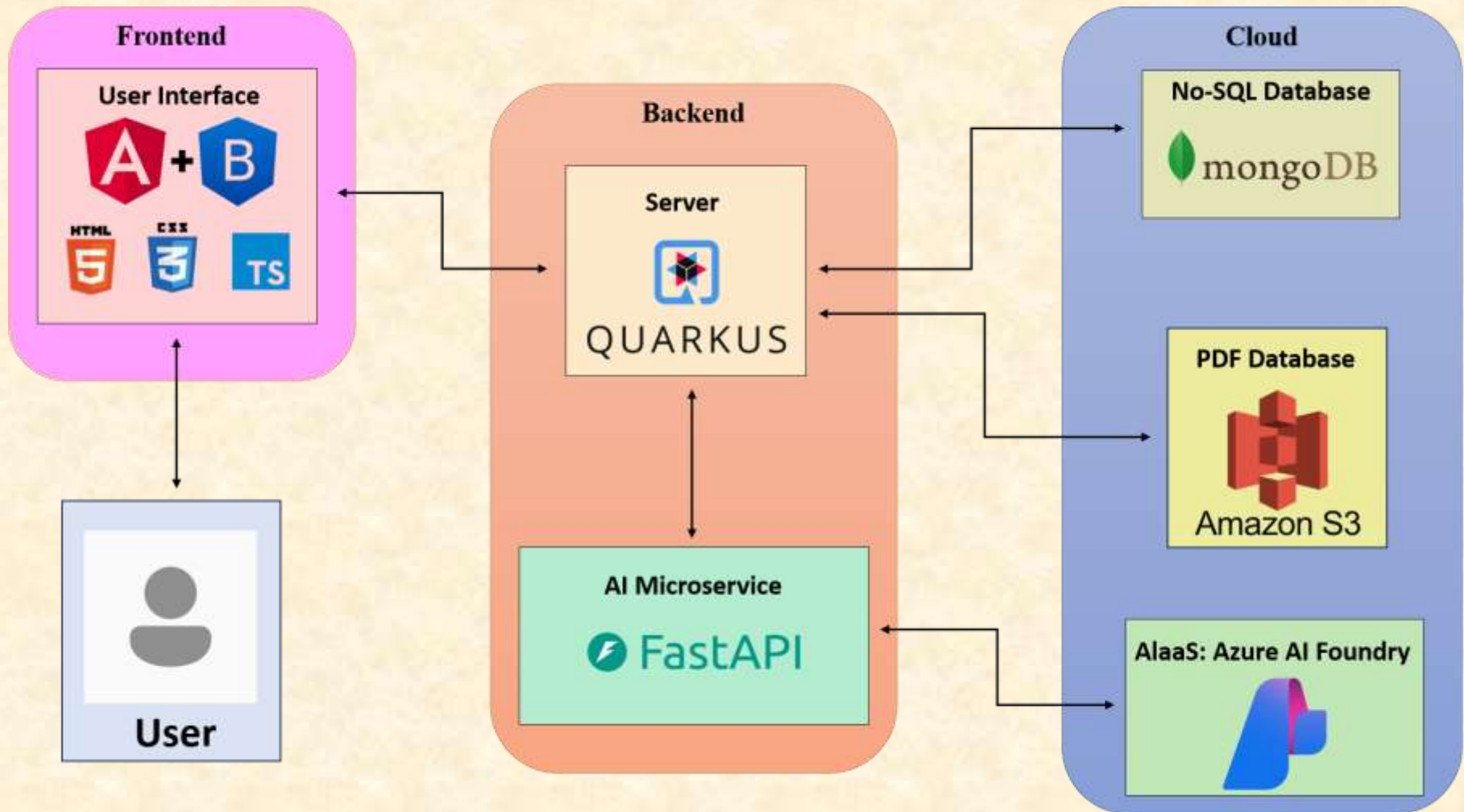
Fall 2025

Project Overview

- Manual data entry is tedious and time consuming
- Data is gathered across various mediums
- Our goal is to automate process through AI
- Allows for efficient and accurate quote generation



System Architecture



File Upload

The screenshot shows a web browser window with the address bar displaying "deltadental.com/iqa". The page has a green sidebar on the left with the "DELTA DENTAL" logo and two menu items: "Create Quote" and "View All Quotes". The main content area is titled "File Upload" in green. It features a light blue header for the "Benefits" section, which contains a large dashed box with the text "Drag and drop files here, or click to upload". Below this is a green "Upload" button. Underneath the button, it says "Files uploaded:" followed by "No files have been uploaded yet". At the bottom of the main area is a white header for the "Census" section. A green "Next" button is located at the bottom right of the page.

Delta Dental IQA

deltadental.com/iqa

DELTA DENTAL

+ Create Quote

View All Quotes

File Upload

Benefits

Drag and drop files here, or click to upload

Upload

Files uploaded:

No files have been uploaded yet

Census

Next



Review Quote Information

The screenshot shows a web browser window with the URL `deltadental.com/iqa/review`. The page title is "Review Quote". On the left is a green sidebar with the Delta Dental logo and two buttons: "Create Quote" and "View All Quotes". The main content area has three tabs: "Basic Info" (selected), "Group", and "Census". The "Basic Info" tab contains several input fields arranged in a grid:

Assigned Underwriter	Effective Date	Effective Time	Internal Owner Email
Enter text here...	mm/dd/yyyy	--:-- --	Enter text here...
Internal Owner First Name	Internal Owner Last Name	Internal Owner Phone	Name
Enter text here...	Enter text here...	Enter text here...	Enter text here...
Next Proposal Number	Payer Acronym	Payer Id	Quote Id
Enter text here...	Enter text here...	Enter text here...	Enter text here...
Quote Type	Quote Workflow		
Enter text here...	Enter text here...		

Below the form, a note states: "This information was gathered by Insurance Quoting Assistant". At the bottom are two buttons: "Back" and "Next".



Review Proposal Information

The screenshot shows a web browser window with the address bar displaying 'deltadental.com/iqa/review-proposals'. The page has a green sidebar on the left with the Delta Dental logo and two buttons: 'Create Quote' and 'View All Quotes'. The main content area is titled 'Review Proposal' and features a tabbed interface with 'Proposal 1' selected. Below the tabs, there are three rows of input fields. The first row contains 'Participation Type*' (set to 'Non-contributory (employer paid — CFTC pays fu)'), 'Employer Contribution Emp*' (set to '100'), and 'Employee Opt Out' (set to 'Enter employee opt out'). The second row contains 'Dental Tied To Medical*' (set to 'False') and 'Employer Contribution Dep*' (set to '100'). The third row is a dropdown menu for 'Benefit Plan'. At the bottom left, there is a 'Back' button, and at the bottom right, there is a green 'Generate Proposal' button. A small disclaimer at the bottom left states: '*This information was gathered by Insurance Quoting Assistant'.

Delta Dental IQA

deltadental.com/iqa/review-proposals

DELTA DENTAL

Create Quote

View All Quotes

Review Proposal

Proposal 1 ✕ Proposal 2 ✕ Proposal 3 ✕ +

Participation Type*

Non-contributory (employer paid — CFTC pays fu

Employer Contribution Emp*

100

Employee Opt Out

Enter employee opt out

Dental Tied To Medical*

False

Employer Contribution Dep*

100

Benefit Plan

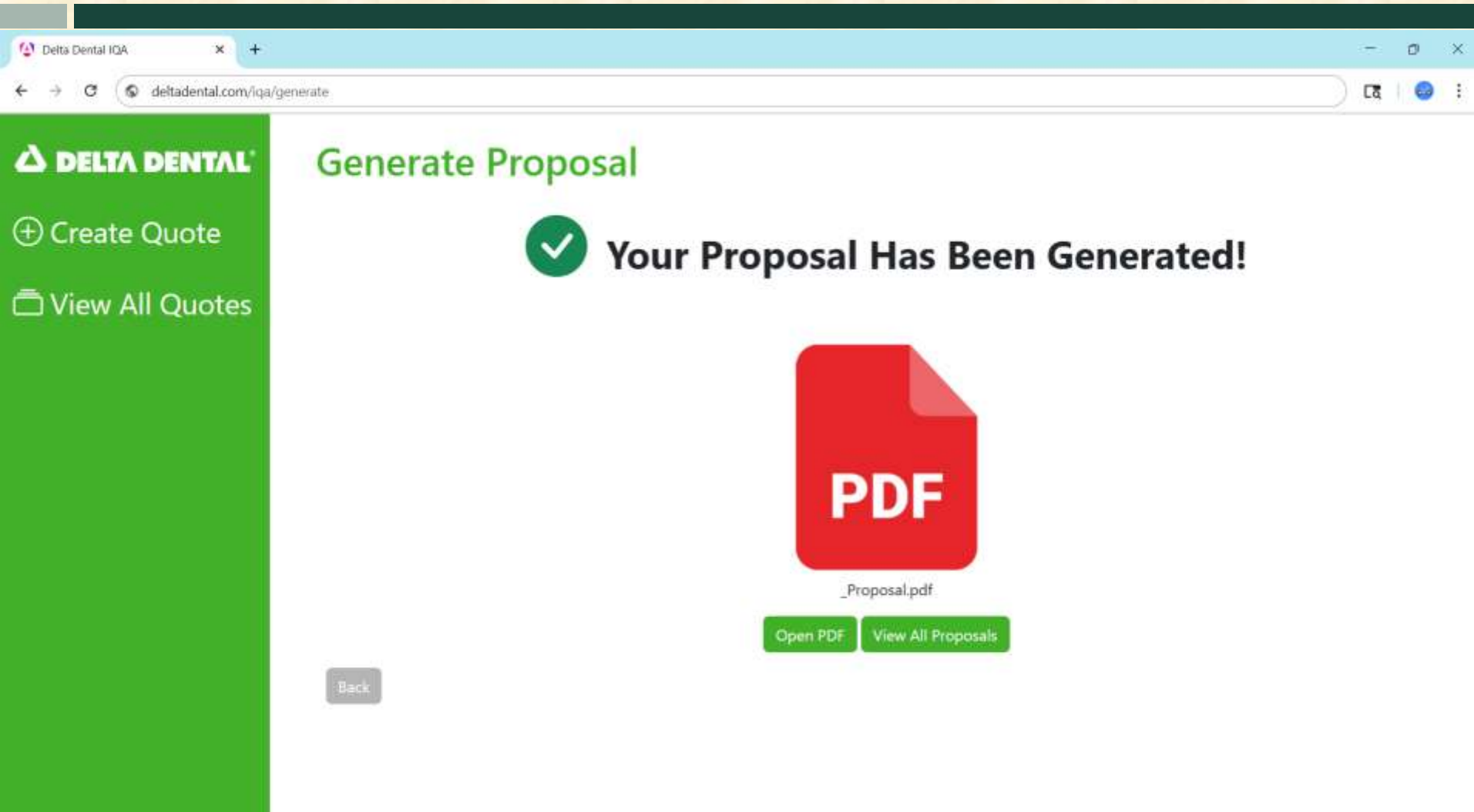
*This information was gathered by Insurance Quoting Assistant

Back

Generate Proposal



Generate Proposal



View All Proposals



[+ Create Quote](#)

[View All Quotes](#)

All Proposals

File Name	Last Modified	Status	
Tomatki Inc_1.pdf	2022-07-14	Failed	View Edit Download Delete
CFTC Dental_1.pdf	2021-01-03	Processing	View Edit Download Delete
CFTC_1.pdf	2021-01-03	Processing	View Edit Download Delete
CFTC Dental_2.pdf	2021-01-03	Completed	View Edit Download Delete
CFTC Dental_3.pdf	N/A	Processing	View Edit Download Delete
CFTC Dental_4.pdf	N/A	Processing	View Edit Download Delete
Unknown Group_1.pdf	N/A	Completed	View Edit Download Delete
CFTC_2.pdf	2021-01-03	Completed	View Edit Download Delete
CFTC_3.pdf	2021-01-03	Completed	View Edit Download Delete

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What's left to do?

- Proposals Comparison
- Asynchronous user flow
- PDF generation with desired language and quality
- LLM models comparison
- Adjust to client schema changes



Questions?

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