

FEATURE SHEET · AI ASSISTANT

Ask Kyra

An AI assistant for underwriting, eApp, suitability, and product questions — one tap from any screen, answering from your carrier underwriting guides and citing its sources.

WHERE IT LIVES

Green K button, bottom-right of every screen

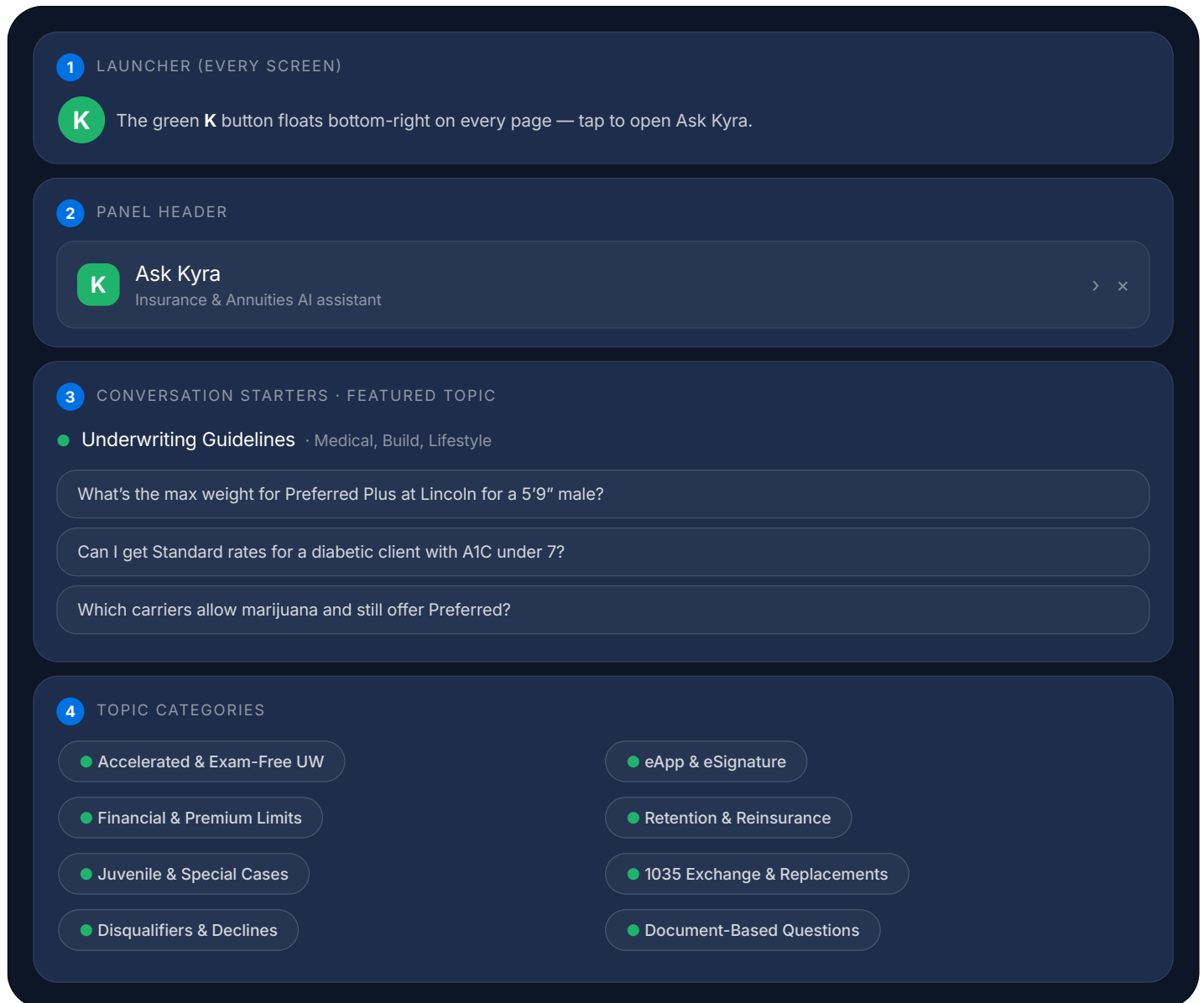
WHAT IT ANSWERS FROM

Your carrier underwriting guides, with sources cited

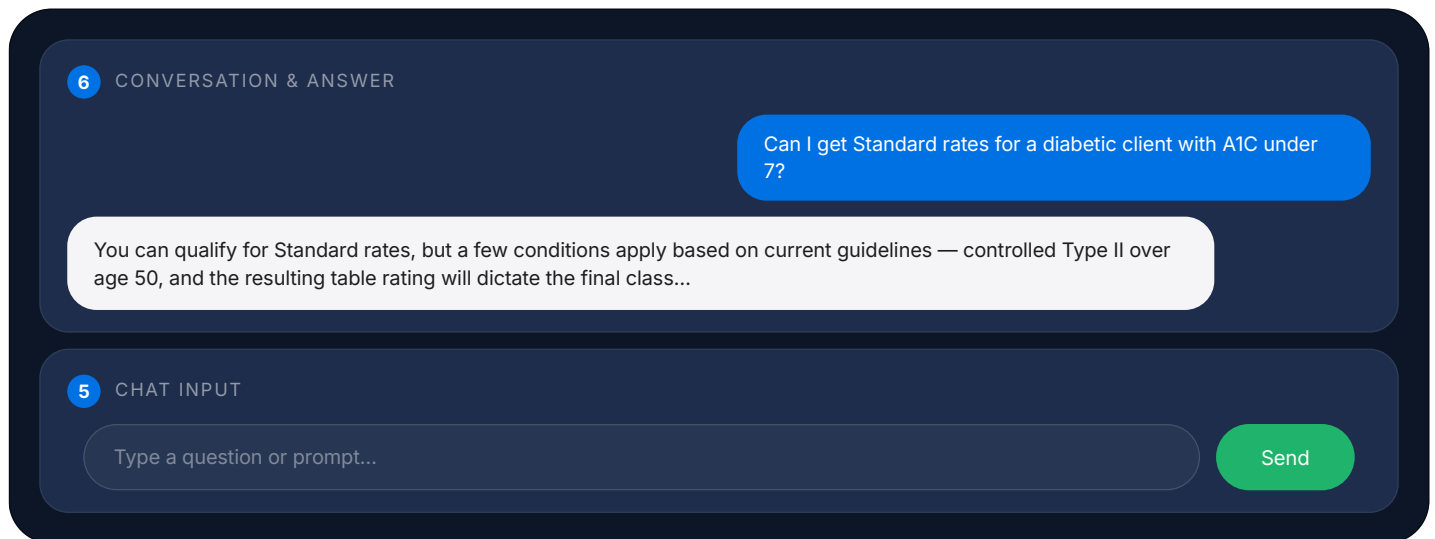
WHAT TO ASK

Underwriting · eApp · suitability · product

INTERFACE MAP · OPENING THE PANEL



Representative UAT data · dark navy is the live PulseConnect surface



FEATURE KEY

- 1 Launcher**
The green “K” button floats in the bottom-right corner of every screen. Tap it to open Ask Kyra without leaving what you’re working on.
- 2 Panel header**
Ask Kyra — Insurance & Annuities AI assistant. Expand the panel to full screen, or close it, from the header controls.
- 3 Conversation starters**
Ready-made questions grouped by topic. The featured **Underwriting Guidelines** set covers medical, build, and lifestyle — tap any starter to ask it instantly.
- 4 Topic categories**
Eight areas across the new-business workflow: Accelerated & Exam-Free UW, eApp & eSignature, Financial & Premium Limits, Retention & Reinsurance, Juvenile & Special Cases, 1035 Exchange & Replacements, Disqualifiers & Declines, and Document-Based Questions.
- 5 Chat input**
Type any underwriting, eApp, suitability, or product question and hit **Send** — no starter required.
- 6 Conversation & answer**
Your question shows as a blue bubble; Kyra shows **Thinking...** then answers from your carrier underwriting guides — reasoning through the case and citing sources. **Start a new conversation** resets the thread anytime.

GOOD TO KNOW

You don’t need a starter

Starters are shortcuts, not limits — type any question in the chat input instead.

Answers cite their source

Kyra reasons through the case and cites the carrier underwriting guide behind the answer, so you can verify before you quote it.

Reset when the case changes

Use **Start a new conversation** so a prior case’s context doesn’t carry into the next question.

It stays with you

The launcher is on every screen — you never have to leave the case you’re working to ask.

ABOUT THIS SHEET

Layout and typography rebuilt for Pulse101 in the iOS/Apple business style; all screen labels, topic names, starter questions, and feature descriptions are carried over unchanged from the source Ask Kyra feature sheet. The interface map is a faithful redraw of that sheet’s panel replica — not a live screen capture. Interaction details not shown in the source (full-screen expand behaviour, response time, conversation history retention) are **not documented here** and should be confirmed against the live UAT environment before training.