

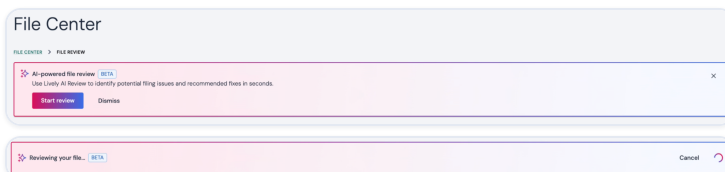
# Lively AI Review

## Fix file errors faster and save time on repetitive values

Lively AI Review helps you understand file errors, review suggested fixes, and finalize your file with confidence. You decide what to change. Nothing is updated without your approval.

## How to use AI Review to update and finalize your file

- 1 Upload your file**  
 Upload your enrollment or contribution file in the File Center as usual.
- 2 Open files that need attention**  
 If Lively finds errors, your file will move to **Action Needed**. Select **Review and Finalize** to open it.
- 3 Start AI Review**  
 Select **Start review** in the banner.



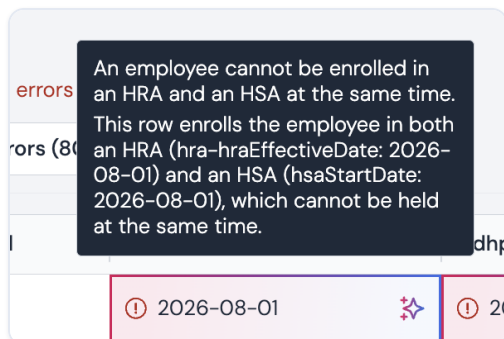
While the review runs, the file is read-only. You can cancel the review at any time.

- 4 Review suggested fixes**  
 When the review is complete, Lively shows suggested fixes where they are needed.

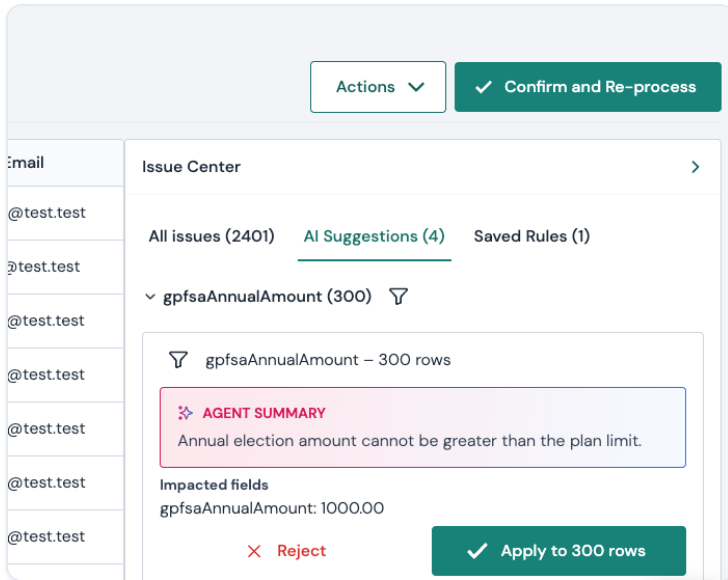
- In the data grid, look for the Lively AI icon next to a highlighted cell.

| benefitCoverageLevel | hsaStartDate   | hdhpStartDate  |
|----------------------|----------------|----------------|
| Individual           | ⓘ 2026-08-01 ✨ | ⓘ 2026-08-01 ✨ |
| Individual           | ⓘ 2026-08-01 ✨ | ⓘ 2026-08-01 ✨ |

- Hover over the cell to see the error, the suggested fix, and why Lively is recommending it.



- To review suggestions across several rows at once, open **AI Suggestions** in the Issue Center expandable panel on the right-hand side.

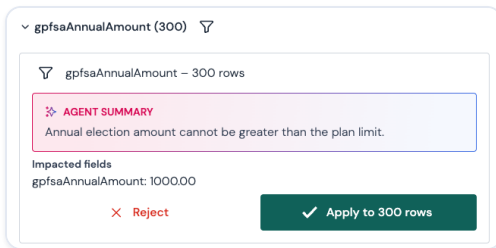


The screenshot shows the 'Issue Center' panel with tabs for 'All issues (2401)', 'AI Suggestions (4)', and 'Saved Rules (1)'. The 'AI Suggestions' tab is active, showing a filter for 'gpfsaAnnualAmount (300)'. A summary box indicates 'gpfsaAnnualAmount - 300 rows' and 'AGENT SUMMARY: Annual election amount cannot be greater than the plan limit.' Below this, 'Impacted fields' are listed as 'gpfsaAnnualAmount: 1000.00'. At the bottom, there are two buttons: 'Reject' (with a red X icon) and 'Apply to 300 rows' (with a green checkmark icon).

## 5 Choose what to do

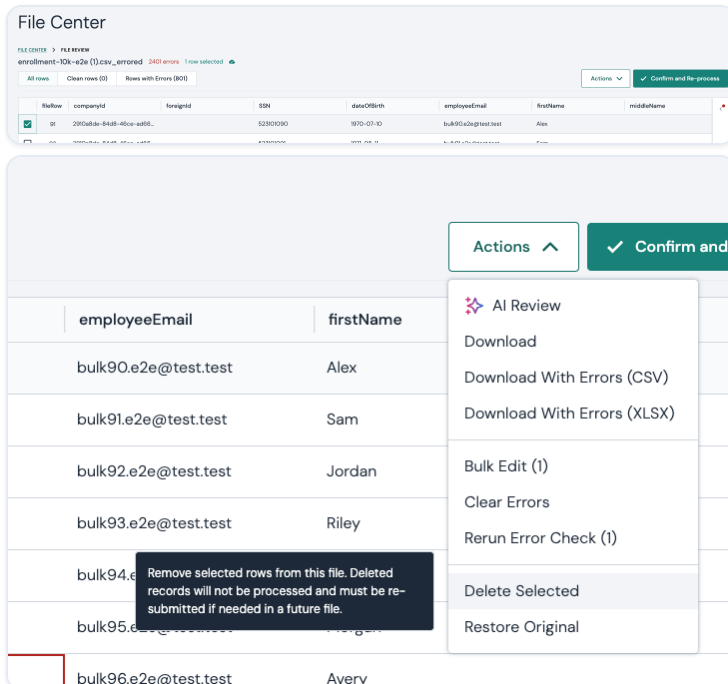
For each suggestion, you can:

- Apply automatically to all matching rows** when the same fix is right for every affected row.
- Reject** the suggestion if you do not want to use it. Or ignore it and manually fix the row.



This is a close-up of the summary box from the previous screenshot. It shows the filter 'gpfsaAnnualAmount (300)', the 'AGENT SUMMARY' box with the message 'Annual election amount cannot be greater than the plan limit.', the impacted field 'gpfsaAnnualAmount: 1000.00', and the 'Reject' and 'Apply to 300 rows' buttons.

- Delete** the row entirely and remove any suggestions along with it.



The screenshot shows the 'File Center' interface with a table of employee data. The table has columns: 'id', 'firstName', 'companyid', 'lastName', 'SSN', 'dateOfBirth', 'employeeEmail', 'firstName', and 'middleName'. A row is selected, and a context menu is open over it. The menu options are: 'AI Review', 'Download', 'Download With Errors (CSV)', 'Download With Errors (XLSX)', 'Bulk Edit (1)', 'Clear Errors', 'Rerun Error Check (1)', 'Delete Selected', and 'Restore Original'. A tooltip message is visible over the 'Delete Selected' option: 'Remove selected rows from this file. Deleted records will not be processed and must be re-submitted if needed in a future file.'

Regardless of the approach taken, the changes will reflect on the file, the row(s) is re-validated for any remaining errors, error counts are updated instantly with all actions recorded under your admin name for future tracking and confirmation.

## 6 Resolve any remaining errors

Some errors need a manual update or a closer look.

| If you see...                       | What to do                                   |
|-------------------------------------|----------------------------------------------|
| A suggested value                   | Review it, then apply it if it looks right.  |
| An explanation only                 | Update the file manually.                    |
| An issue that needs further review* | Contact your Lively representative for help. |

\*Situations where an issue is present that cannot be fixed on File Center directly such as missing columns or incorrect templates.

## 7 Finalize your file

Once all remaining errors are resolved, finalize your file by selecting **✓ Confirm and Re-process**.

If AI Review is ever unavailable or can't be completed (typically due to errors that are clear and concise already), you can still correct the file manually on the same **Review and Finalize** page.

## Fix recurring errors once

Seeing the same error in file after file? When you apply a suggestion, select **Remember this rule for future files**.

payrollFrequency - 3 rows

AGENT SUMMARY

'Biweekly' is not one of the company's configured payroll schedules. Sets payrollFrequency to Every other week on Fridays.

Impacted fields

payrollFrequency: Every other week on Fridays

☒ Remember this rule for future files

✗ Reject

✓ Apply to 3 rows

Lively saves that correction as a reusable rule for your company and file type—so your next review has less repeat work.

Use the **Saved Rules** tab to review, edit, turn rules on or off, or export them.

Issue Center

All issues (9)

AI Suggestions (7)

Saved Rules (2)

Search rules

Q

Neo payroll frequency mapping (Monthly -> MonthlyLast)

payrollFrequency is Monthly ->

Set payrollFrequency to MonthlyLast

☒

Invalid payroll schedule

Created by Carl Malone

payrollFrequency is Biweekly ->

Set payrollFrequency to Every other week on Fridays

☒

Neo payroll frequency mapping (Monthly -> MonthlyLast)

Rule name \*

Neo payroll frequency mapping (Monthly -> MonthlyLast)

Created by

Rules

WHEN

Field \*

Condition \*

Value \*

payrollFrequency

is

Monthly

+ AND condition

THEN

Field \*

Condition \*

Value \*

payrollFrequency

Set value

MonthlyLast

+ AND condition

Cancel

Update

## You stay in control

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- **Your data stays protected.** Employee data is not stored for AI training. Sensitive identifiers, including Social Security numbers, are masked before processing.
- **You choose when to apply changes.** Lively AI never changes your file unless you choose to apply those specific suggestions.
- **Changes are checked.** Lively validates suggested updates against its core rules before you see them.

## Quick answers

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### Do I have to use AI Review?

No. You can dismiss the banner and correct the file manually.

### How do I reopen AI Review?

In Review and Finalize, open **Actions** and select **AI Review**.

### Why did my Review and Finalize email arrive later than usual?

Lively waits for the review to finish before showing the file, so you do not open a partially reviewed version.

### Can I edit rows while a review is running?

No. The file is read-only until the review finishes or you cancel it.