



FEEDBACK BEST PRACTICES

Making the most of your ALEX Review!

While you're taking advantage of our tools, here are some best practices for review!

Divide and Conquer

If you have multiple reviewers, it's best practice to assign team members specific module/s to review. This reduces the reporting of duplicate feedback, which in turn helps to keep your implementation timeline on track!

One & Done when Giving Feedback

When we configure for things like logos, vendors, deductibles, premiums, etc., there is **one field in our back end system that feeds the ALEX conversation**. This means that if you see a configurable amount is incorrect, you only have to report that once. For example, if you see that the \$5,000 HDHP Family Deductible should be \$6,000 - you can provide that corrected amount once (you don't have to find every instance, as it's pulling from one field that we update).

Ch-Ch-Changes: Focus on what you can actually change!

The ALEX conversation is built to configure a wide variety of benefit plan designs. During review, it will save you time and effort knowing what's **EDITABLE CONTENT** (configurable without additional cost) vs. what's **CORE CONTENT** (can only be changed with a paid customization).

EDITABLE CONTENT

Plan design features we configure for you on the backend using toggles, drop downs, and text fields (things like premiums, deductibles, copays, and configurable Text Notes).

CORE CONTENT

Plan design features we configure for you on the backend that are **not** configurable (things like base educational content, audio, graphics, and anything else that's not specific to your plans).

IRS PLAN LIMITS: Jellyvision makes automatic updates approximately two weeks after the IRS announces next year's contribution limits for the following: HSA, HDHP, EBHRA, and FSA (we know FSA timing can be *untimely*, so talk to your IM if you need a manual update). Retirement Plan limits are automatically updated at the beginning of the year to ensure current contribution limits are displayed.

Have questions? Talk to your Implementation Team and they'll be happy to help!