

Transcript: Chris Sofield

(deactivated)-5295394341306368-6594145685127168

Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Card, this is Chris. How can I help you today? Hello, Chris. My name is Kevin. Um, I work with Partners Personnel. I was told to give you a call to set up benefits or inquire more. Okay. Um, yeah, we are the plan administrator for the health insurance benefits for Partners Personnel. Um, let me see... Let me, uh, pull up your file and see what you're eligible for. What's the last four of your social? Uh, 4309. Thank you. And your last name, Kevin? Luong, L-U-O-N-G. Thank you. Can you please verify your address and date of birth? 316 Naylor Street, San Francisco, California 94112. The date of birth is February 27, 1997. Thank you. We got a phone number on file for you at 415-971-9623. Is that correct? Yes. Okay. Let's see here. All right, yep. I am showing that you're currently eligible to enroll into benefits. Um, looks like your window... your 30-day window just started, so you do have a good, good amount of time to make any final decisions. Um, did you already have an idea of what you wanted to enroll into or did you just need some, like, information on what was available? Uh, kind of both. Okay, um, let me see here. All right. So, as far as the plans available, um, so obviously there's medical, dental and vision, uh, but additionally Partners also offers, um, benefits for life insurance, short-term disability, critical illness, accident coverage, mental health services, identity protection, and then a standalone prescription policy and a standalone virtual primary care policy as well. Um, was there anything that you wanted more information on in particular or did you already, like I said, have some idea of what kind of insurance you're looking for? Um, kind of had an idea for which one, but I guess, uh, we could go... we could go down the list and, um, I can select the... Do I select the options with you or... Uh, yeah, you can- I don't know. You can, uh, if you know what you want, you can let me know and I can go ahead and set that up for you and, and answer any questions you may have about those plans. Gotcha. Um, okay. Yeah, usually with all those plans like health, dental, vision, I choose like the more, the more premium ones. Um, but I don't... Maybe, maybe it might be easier actually if, um, you could email me or is, is, is a resource available somewhere for- Uh, yeah. ... the plans and stuff? Um, because I know it's- Yeah, I can- ... kind of a lot. Yeah, I can email you an information packet that goes over the plans. Um, can you confirm we have your email in file as kevinluong88@gmail.com? Yes. Okay. Yeah, I'll, I'll email over the benefits guide for Partners Personnel. This will come from our email address here, info@benefitsinacard.com. Um, if you don't see this in your inbox, just check your spam folder. It might have gotten filtered there. Uh, give this a read through and, um, once you have an idea of what you want to enroll into, just give us a call back and we can set that up. Okay. Yeah, yeah, I think that'll, that'll be a good idea. All right. Um, I did- Okay. ... have one actual... one last question. Um, do they offer 401? Uh, that's a question for Partners. We wouldn't have anything to do with that. Oh, gotcha, gotcha. Okay. Yeah, that sounds good. Yeah, I'll look

forward to the email and then I'll give- Awesome. ... a ring back once I have everything settled, um, which should be soon too. All right. And, uh, yeah, like I said, your deadline or your, uh, 30-day window just started. Your deadline is going to be Wednesday, February the 19th. Okay? Okay. Great. Great. Yes. Definitely want to get that info before then. All right then. Was there anything else I could help with for now? No, that should be it. Thank you for the info. No problem. Thanks again for calling and have a wonderful day. You as well. Take care. You too. Bye now. Bye.

Conversation Format

Speaker speaker_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker_1: Thank you for calling Benefits in a Card, this is Chris. How can I help you today?

Speaker speaker_2: Hello, Chris. My name is Kevin. Um, I work with Partners Personnel. I was told to give you a call to set up benefits or inquire more.

Speaker speaker_1: Okay. Um, yeah, we are the plan administrator for the health insurance benefits for Partners Personnel. Um, let me see... Let me, uh, pull up your file and see what you're eligible for. What's the last four of your social?

Speaker speaker_2: Uh, 4309.

Speaker speaker_1: Thank you. And your last name, Kevin?

Speaker speaker_2: Luong, L-U-O-N-G.

Speaker speaker_1: Thank you. Can you please verify your address and date of birth?

Speaker speaker_2: 316 Naylor Street, San Francisco, California 94112. The date of birth is February 27, 1997.

Speaker speaker_1: Thank you. We got a phone number on file for you at 415-971-9623. Is that correct?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. Let's see here. All right, yep. I am showing that you're currently eligible to enroll into benefits. Um, looks like your window... your 30-day window just started, so you do have a good, good amount of time to make any final decisions. Um, did you already have an idea of what you wanted to enroll into or did you just need some, like, information on what was available?

Speaker speaker_2: Uh, kind of both.

Speaker speaker_1: Okay, um, let me see here. All right. So, as far as the plans available, um, so obviously there's medical, dental and vision, uh, but additionally Partners also offers, um, benefits for life insurance, short-term disability, critical illness, accident coverage, mental

health services, identity protection, and then a standalone prescription policy and a standalone virtual primary care policy as well. Um, was there anything that you wanted more information on in particular or did you already, like I said, have some idea of what kind of insurance you're looking for?

Speaker speaker_2: Um, kind of had an idea for which one, but I guess, uh, we could go... we could go down the list and, um, I can select the... Do I select the options with you or...

Speaker speaker_1: Uh, yeah, you can-

Speaker speaker_2: I don't know.

Speaker speaker_1: You can, uh, if you know what you want, you can let me know and I can go ahead and set that up for you and, and answer any questions you may have about those plans.

Speaker speaker_2: Gotcha. Um, okay. Yeah, usually with all those plans like health, dental, vision, I choose like the more, the more premium ones. Um, but I don't... Maybe, maybe it might be easier actually if, um, you could email me or is, is, is a resource available somewhere for-

Speaker speaker_1: Uh, yeah.

Speaker speaker_2: ... the plans and stuff? Um, because I know it's-

Speaker speaker_1: Yeah, I can-

Speaker speaker_2: ... kind of a lot.

Speaker speaker_1: Yeah, I can email you an information packet that goes over the plans. Um, can you confirm we have your email in file as kevinluong88@gmail.com?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. Yeah, I'll, I'll email over the benefits guide for Partners Personnel. This will come from our email address here, info@benefitsinacard.com. Um, if you don't see this in your inbox, just check your spam folder. It might have gotten filtered there. Uh, give this a read through and, um, once you have an idea of what you want to enroll into, just give us a call back and we can set that up.

Speaker speaker_2: Okay. Yeah, yeah, I think that'll, that'll be a good idea.

Speaker speaker_1: All right.

Speaker speaker_2: Um, I did-

Speaker speaker_1: Okay.

Speaker speaker_2: ... have one actual... one last question. Um, do they offer 401?

Speaker speaker_1: Uh, that's a question for Partners. We wouldn't have anything to do with that.

Speaker speaker_2: Oh, gotcha, gotcha. Okay. Yeah, that sounds good. Yeah, I'll look forward to the email and then I'll give-

Speaker speaker_1: Awesome.

Speaker speaker_2: ... a ring back once I have everything settled, um, which should be soon too.

Speaker speaker_1: All right. And, uh, yeah, like I said, your deadline or your, uh, 30-day window just started. Your deadline is going to be Wednesday, February the 19th. Okay?

Speaker speaker_2: Okay. Great. Great. Yes. Definitely want to get that info before then.

Speaker speaker_1: All right then. Was there anything else I could help with for now?

Speaker speaker_2: No, that should be it. Thank you for the info.

Speaker speaker_1: No problem. Thanks again for calling and have a wonderful day.

Speaker speaker_2: You as well. Take care.

Speaker speaker_1: You too. Bye now.

Speaker speaker_2: Bye.