

Transcript: Estefania

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Full Transcript

Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Hi, Stephanie. My name is Ivan. Um, we... my company just started doing benefits with you guys, and, um, it, it was effective a few days ago. But when I log in and everything, I already, um, changed to my benefits, changed it to the family, it says it's pending. But anyways, um, I need to use, um, my insurance today, but I can't seem to get the actual card online, and it hasn't been- I can send it to you. ... sent to my house. Mm-hmm. Okay. I can send it to you. What staffing agency? Is it the STT one? STT, yes. Um, Superior Skilled Trades. Okay. And what are the last four of your Social? 0012. And is it Ivan Lopez? Yes. Ivan Lopez Garza. Can you verify your address and date of birth? 12007 Osage Park Drive, Houston, Texas 77065. Date of birth, August 5th, 1998. Okay, thank you. And then I have 832-929-6035 as your phone number. Correct. And then I don't have a email. Um, what's your email? It's Gli. Mm-hmm. 98. Mm-hmm. @outlook.com. Okay, thank you. All right. Let's see. All right. I'm gonna put you in a brief hold, and email that to the emails that you just, um... Okay. Sounds good. Thank you. Excuse me. Um, I was gonna tell you that for your... Well, first let me send that, and then I'll tell you when I get back on the phone. I'll be right back. Okay. I'm gonna put you in a brief hold. Thank you. Okay. Thank you for hold. I was gonna tell you that, um, for your vision plan, I didn't have the card, so I just wrote your policy number for your vision. And then for- Okay. That's good. ... your actual plan, I actually did send that one 'cause that one was available. I was gonna tell you, um, that, um, those cards right now that I sent to you are for... Let's see. Since you changed your, um, coverage, it does take seven to 10 days for any changes to process. So right now, those cards are only for, um, yourself. Once you see that new deduction- Yeah. ... of the 129.07, once you see that very first deduction of the 129 and 7 cents, the following Monday is when your-... new coverage level goes into effect with your family. Um, and I was gonna tell you, we don't have your family's information. Do you wanna go ahead and provide it to me? 'Cause we don't have their names, their social, nothing. We don't have anything. Neither don't we have their, the beneficiary as well. Um, do you wanna go ahead and give that to me? Yes, please. Yeah. I tried to do it online. Okay. I had to let everything go. Once I clicked save, it just wouldn't save. Hey. Okay. Yeah, that's fine. I can do it for you. Um, what's your spouse name? Uh, her name is Jordan. J-O-R-D-A-N. And the last name? Middle name Ashley. Okay. Ashley. Um, last name is Beadle. Last name is Beadle. B-E-A-D-L-E. You said B-E-A-D-L-E? Correct. Okay. And then, what's her birthday? Her birthday is 12/15/1996. And then, do you have her social? If you don't, we can put zeros for now and then you're welcome to call back. Um, hold on. Give me a second. Mm-hmm. What's your social? 275-02-7797. Mm-hmm. Okay, thank you. All right. And then, the child's information. All right. Um, I have two children. Mm-hmm. Uh, first one is Mia Lopez Beadle. Mm-hmm. And her birthday is March 11th, 2021. Okay. And then, social? Uh, social is 781-

Mm-hmm. ... 46-0683. Okay. And then, the second child. Her name is Lea, L-E-I-A. Mm-hmm. Lopez Beadle. Mm-hmm. Date of birth is... Oh my God. Uh, November 12th, 2024. And then, the social. 898-65-4834. All right. Thank you. Oh, give me one second. My computer's slow. No worries. Oh my God. Okay. I'm sorry. You're gonna have to give me Lea's information again 'cause it did not- No worries. ... save. Give me one second. Lopez. Child, female. You said her birthday was November? November 12th. 2024, you said? Mm, correct. Okay. And then, her social is 898-65-4834. And then, spell her first name again for me. L-E-I-A. All right. Thank you. Did you need any of their middle names for all three of them? Um, was it Lopez or was that their like second or last name? Uh, yeah. Those are their last names. They have two last names. Gotcha. Okay, let me change that then. What was Mia's middle name? Rose. R-O-S-E. That's it, O-R-S-E? Yeah. Mia Rose Lopez Beadle. Mm-hmm. Okay. And then, what about Lea's? Lea's middle name is Marie, M-A-R-I-E. Okay, thank you. And then, is your wife still Jordan Ashley? Her middle name Ashley? Yeah, her name is, uh, Jordan Ashley but it's, uh, it's like spelled Ashleigh. Okay. A-S-H-L-E-I-G-H. Okay, thank you. And then, her second middle name is Marie. Okay. So, it's Jordan Ashley Marie Beadle. Thank you. There you go. Okay, that's in there correctly. Okay. And then, for your beneficiary, did you wanna put the three of them down or just one down, or who did you want to put down? You can just put Jordan. Jordan? Okay. Mm-hmm. All right. I have Jordan in there. Okay. So, it looks like you have all your information in there and like I said, um, whenever you see that new deduction of the 1/29/07, the following Monday is when your plan becomes active. So, for example, if they were to deduct that, let's say, tomorrow, that means next Monday your family would go into effect. So, once you see that new deduction, so the following Monday, your plan becomes active. And then by that first or second week, you should be getting your new cards that include your family in it. Okay. Um, I was gonna tell you that for your VIP plan, um, the VIP that you currently have and then the VIP Pro that you selected with your family, for those cards, they normally don't send that, those VIP cards out. So, um, if you do want a physical one, once you become active, you're welcome to call this number and we can put in a request for the carrier to send it out to you physically. Um, I don't know if you just wanna wait 'til your family goes into effect. Yeah, probably. Yeah. Yeah, I think that would be better, to be honest, since... 'Cause I mean, it usually just takes one or two weeks. So, whenever that 1/29/07 goes into effect, the following Monday, you can call in to request your VIP Pro, which is your medical plan, and we'll request that. But you, for sure, should be getting vision first and then you should be getting the medical one after it's requested. Okay. That sounds good. And then, the same thing. If you have a doctor's appointment or one of the kids or your spouse, you can just call us and we'll just do the same thing we did right now, email them to you. Okay. Sounds good. All right. Well, you're all set. If you wanna add anything in the future, your last day to do so, make changes, is on May 30th. That's the last day for company open enrollment for Superior Service Credit Union. Okay. Sounds perfect. Thank you so much for your help. You're welcome. Have a nice day. Thank you. You too. Bye-bye.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you?

Speaker speaker_1: Hi, Stephanie. My name is Ivan. Um, we... my company just started doing benefits with you guys, and, um, it, it was effective a few days ago. But when I log in and everything, I already, um, changed to my benefits, changed it to the family, it says it's pending. But anyways, um, I need to use, um, my insurance today, but I can't seem to get the actual card online, and it hasn't been-

Speaker speaker_0: I can send it to you.

Speaker speaker_1: ... sent to my house.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: Okay.

Speaker speaker_0: I can send it to you. What staffing agency? Is it the STT one?

Speaker speaker_1: STT, yes. Um, Superior Skilled Trades.

Speaker speaker_0: Okay. And what are the last four of your Social?

Speaker speaker_1: 0012.

Speaker speaker_0: And is it Ivan Lopez?

Speaker speaker_1: Yes. Ivan Lopez Garza.

Speaker speaker_0: Can you verify your address and date of birth?

Speaker speaker_1: 12007 Osage Park Drive, Houston, Texas 77065. Date of birth, August 5th, 1998.

Speaker speaker_0: Okay, thank you. And then I have 832-929-6035 as your phone number.

Speaker speaker_1: Correct.

Speaker speaker_0: And then I don't have a email. Um, what's your email?

Speaker speaker_1: It's Gli.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: 98.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: @outlook.com.

Speaker speaker_0: Okay, thank you. All right. Let's see. All right. I'm gonna put you in a brief hold, and email that to the emails that you just, um...

Speaker speaker_1: Okay. Sounds good. Thank you.

Speaker speaker_0: Excuse me. Um, I was gonna tell you that for your... Well, first let me send that, and then I'll tell you when I get back on the phone. I'll be right back.

Speaker speaker_1: Okay.

Speaker speaker_0: I'm gonna put you in a brief hold.

Speaker speaker_1: Thank you.

Speaker speaker_0: Okay. Thank you for hold. I was gonna tell you that, um, for your vision plan, I didn't have the card, so I just wrote your policy number for your vision. And then for-

Speaker speaker_2: Okay. That's good.

Speaker speaker_0: ... your actual plan, I actually did send that one 'cause that one was available. I was gonna tell you, um, that, um, those cards right now that I sent to you are for... Let's see. Since you changed your, um, coverage, it does take seven to 10 days for any changes to process. So right now, those cards are only for, um, yourself. Once you see that new deduction-

Speaker speaker_2: Yeah.

Speaker speaker_0: ... of the 129.07, once you see that very first deduction of the 129 and 7 cents, the following Monday is when your-... new coverage level goes into effect with your family. Um, and I was gonna tell you, we don't have your family's information. Do you wanna go ahead and provide it to me? 'Cause we don't have their names, their social, nothing. We don't have anything. Neither don't we have their, the beneficiary as well. Um, do you wanna go ahead and give that to me?

Speaker speaker_1: Yes, please. Yeah. I tried to do it online.

Speaker speaker_0: Okay.

Speaker speaker_1: I had to let everything go. Once I clicked save, it just wouldn't save.

Speaker speaker_0: Hey. Okay. Yeah, that's fine. I can do it for you. Um, what's your spouse name?

Speaker speaker_1: Uh, her name is Jordan. J-O-R-D-A-N.

Speaker speaker_0: And the last name?

Speaker speaker_1: Middle name Ashley.

Speaker speaker_0: Okay. Ashley.

Speaker speaker_1: Um, last name is Beadle. Last name is Beadle. B-E-A-D-L-E.

Speaker speaker_0: You said B-E-A-D-L-E?

Speaker speaker_1: Correct.

Speaker speaker_0: Okay. And then, what's her birthday?

Speaker speaker_1: Her birthday is 12/15/1996.

Speaker speaker_0: And then, do you have her social? If you don't, we can put zeros for now and then you're welcome to call back.

Speaker speaker_1: Um, hold on. Give me a second.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: What's your social? 275-02-7797.

Speaker speaker_0: Mm-hmm. Okay, thank you. All right. And then, the child's information.

Speaker speaker_1: All right. Um, I have two children.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: Uh, first one is Mia Lopez Beadle.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: And her birthday is March 11th, 2021.

Speaker speaker_0: Okay. And then, social?

Speaker speaker_1: Uh, social is 781-

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: ... 46-0683.

Speaker speaker_0: Okay. And then, the second child.

Speaker speaker_1: Her name is Lea, L-E-I-A.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: Lopez Beadle.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: Date of birth is... Oh my God. Uh, November 12th, 2024.

Speaker speaker_0: And then, the social.

Speaker speaker_1: 898-65-4834.

Speaker speaker_0: All right. Thank you. Oh, give me one second. My computer's slow.

Speaker speaker_1: No worries.

Speaker speaker_0: Oh my God. Okay. I'm sorry. You're gonna have to give me Lea's information again 'cause it did not-

Speaker speaker_1: No worries.

Speaker speaker_0: ... save. Give me one second. Lopez. Child, female. You said her birthday was November?

Speaker speaker_1: November 12th.

Speaker speaker_0: 2024, you said?

Speaker speaker_1: Mm, correct.

Speaker speaker_0: Okay.

Speaker speaker_1: And then, her social is 898-65-4834.

Speaker speaker_0: And then, spell her first name again for me.

Speaker speaker_1: L-E-I-A.

Speaker speaker_0: All right. Thank you.

Speaker speaker_1: Did you need any of their middle names for all three of them?

Speaker speaker_0: Um, was it Lopez or was that their like second or last name?

Speaker speaker_1: Uh, yeah. Those are their last names. They have two last names.

Speaker speaker_0: Gotcha. Okay, let me change that then. What was Mia's middle name?

Speaker speaker_1: Rose. R-O-S-E.

Speaker speaker_0: That's it, O-R-S-E?

Speaker speaker_1: Yeah. Mia Rose Lopez Beadle. Mm-hmm.

Speaker speaker_0: Okay. And then, what about Lea's?

Speaker speaker_1: Lea's middle name is Marie, M-A-R-I-E.

Speaker speaker_0: Okay, thank you. And then, is your wife still Jordan Ashley? Her middle name Ashley?

Speaker speaker_1: Yeah, her name is, uh, Jordan Ashley but it's, uh, it's like spelled Ashleigh.

Speaker speaker_0: Okay.

Speaker speaker_1: A-S-H-L-E-I-G-H.

Speaker speaker_0: Okay, thank you.

Speaker speaker_1: And then, her second middle name is Marie.

Speaker speaker_0: Okay.

Speaker speaker_1: So, it's Jordan Ashley Marie Beadle.

Speaker speaker_0: Thank you. There you go. Okay, that's in there correctly. Okay. And then, for your beneficiary, did you wanna put the three of them down or just one down, or who did you want to put down?

Speaker speaker_1: You can just put Jordan.

Speaker speaker_0: Jordan? Okay.

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: All right. I have Jordan in there. Okay. So, it looks like you have all your information in there and like I said, um, whenever you see that new deduction of the 1/29/07, the following Monday is when your plan becomes active. So, for example, if they were to deduct that, let's say, tomorrow, that means next Monday your family would go into effect. So, once you see that new deduction, so the following Monday, your plan becomes active. And then by that first or second week, you should be getting your new cards that include your family in it.

Speaker speaker_1: Okay.

Speaker speaker_0: Um, I was gonna tell you that for your VIP plan, um, the VIP that you currently have and then the VIP Pro that you selected with your family, for those cards, they normally don't send that, those VIP cards out. So, um, if you do want a physical one, once you become active, you're welcome to call this number and we can put in a request for the carrier to send it out to you physically. Um, I don't know if you just wanna wait 'til your family goes into effect.

Speaker speaker_1: Yeah, probably.

Speaker speaker_0: Yeah. Yeah, I think that would be better, to be honest, since... 'Cause I mean, it usually just takes one or two weeks. So, whenever that 1/29/07 goes into effect, the following Monday, you can call in to request your VIP Pro, which is your medical plan, and we'll request that. But you, for sure, should be getting vision first and then you should be getting the medical one after it's requested.

Speaker speaker_1: Okay. That sounds good.

Speaker speaker_0: And then, the same thing. If you have a doctor's appointment or one of the kids or your spouse, you can just call us and we'll just do the same thing we did right now, email them to you.

Speaker speaker_1: Okay. Sounds good.

Speaker speaker_0: All right. Well, you're all set. If you wanna add anything in the future, your last day to do so, make changes, is on May 30th. That's the last day for company open enrollment for Superior Service Credit Union.

Speaker speaker_1: Okay. Sounds perfect. Thank you so much for your help.

Speaker speaker_0: You're welcome. Have a nice day.

Speaker speaker_1: Thank you. You too. Bye-bye.