

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, um, I was calling to see if, by chance, I can get, um, my policy number. Okay, yeah. Um, what staff and agency are you with? I'm with Priscilla. Okay. And then what are the last four of your Social? Uh, 19... 17 18. I'm sorry. You said 17 18? Yes. Your first and last name? Jocelyn Beltran. Okay. For security purposes, can you verify your address and date of birth? Yeah. Um, 1944 West Thunderbird Road, Phoenix, Arizona 85023, Apartment W2-19. And it's 0204 2004. Okay. 602-651-4001 is your phone number? Yes. And then I have Jocy, with a Y, so two Y's, um, period, four @icloud.com? Yes. Okay. All right. Um, if you want, I can just go ahead and send you your cards to that email. Um, do you want your dental, VIP standard and vision? Uh, yeah. Uh, whatever's on file would like. Okay. Yeah, that's fine. Um, I'm gonna put you in a brief hold and go ahead and send those then get you to verify that you received them. Okay? Okay. And then- Sounds good. You should probably be receiving them, um... Since these just became active last week, you probably should be getting them sometime this week or next week. But I'm gonna go ahead and email them to you. Sounds good. Okay. I went ahead and emailed them to you. Do you mind verifying that you received them? It should come from an email that says info@benefitsinacard.com. Okay. Um... Yes, I did receive them. Okay. And I was gonna let you know that normally for your VIP standard card, which is your medical card that says APL, that card, um, they normally don't mail it out to you. So, if you do want a vi- a physical one, I can go ahead and request it, um, 'cause that one you normally don't get. But if you do want a physical one, we can put a request in and you'll receive that one later on within seven to 10 business days. So, you should definitely get dental and vision first. Did you want me to request it or did you just want it via email? Uh, yeah, request it as well. Okay. All right. I'll put that request in, and then, um, we should be fine now. Did you have any other questions for me? No, it was just that. Thank you. You're welcome. I hope you have a great day. Um, oh, yeah. You as well. Before you c- I was gonna tell you that we're also, we're missing a beneficiary from you. Since you selected term life, um, we would just need a beneficiary. If something was to happen to you, who do you want to put down? Um... You can be a parent, a sibling. Am I add, am I able to add it later? Yeah, that's fine. Mm-hmm. Okay, sounds good. I'll, I'll most likely do that then. All right. Well, I hope you have a great day. Thank you for your time. Thank you. You as well. Thank you.

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, um, I was calling to see if, by chance, I can get, um, my policy number.

Speaker speaker_0: Okay, yeah. Um, what staff and agency are you with?

Speaker speaker_1: I'm with Priscilla.

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

Speaker speaker_1: Uh, 19... 17 18.

Speaker speaker_0: I'm sorry. You said 17 18?

Speaker speaker_1: Yes.

Speaker speaker_0: Your first and last name?

Speaker speaker_1: Jocelyn Beltran.

Speaker speaker_0: Okay. For security purposes, can you verify your address and date of birth?

Speaker speaker_1: Yeah. Um, 1944 West Thunderbird Road, Phoenix, Arizona 85023, Apartment W2-19. And it's 0204 2004.

Speaker speaker_0: Okay. 602-651-4001 is your phone number?

Speaker speaker_1: Yes.

Speaker speaker_0: And then I have Jocy, with a Y, so two Y's, um, period, four @icloud.com?

Speaker speaker_1: Yes.

Speaker speaker_0: Okay. All right. Um, if you want, I can just go ahead and send you your cards to that email. Um, do you want your dental, VIP standard and vision?

Speaker speaker_1: Uh, yeah. Uh, whatever's on file would like.

Speaker speaker_0: Okay. Yeah, that's fine. Um, I'm gonna put you in a brief hold and go ahead and send those then get you to verify that you received them. Okay?

Speaker speaker_1: Okay.

Speaker speaker_0: And then-

Speaker speaker_1: Sounds good.

Speaker speaker_0: You should probably be receiving them, um... Since these just became active last week, you probably should be getting them sometime this week or next week. But I'm gonna go ahead and email them to you.

Speaker speaker_1: Sounds good.

Speaker speaker_0: Okay. I went ahead and emailed them to you. Do you mind verifying that you received them? It should come from an email that says info@benefitsinacard.com.

Speaker speaker_2: Okay. Um... Yes, I did receive them.

Speaker speaker_0: Okay. And I was gonna let you know that normally for your VIP standard card, which is your medical card that says APL, that card, um, they normally don't mail it out to you. So, if you do want a vi- a physical one, I can go ahead and request it, um, 'cause that one you normally don't get. But if you do want a physical one, we can put a request in and you'll receive that one later on within seven to 10 business days. So, you should definitely get dental and vision first. Did you want me to request it or did you just want it via email?

Speaker speaker_2: Uh, yeah, request it as well.

Speaker speaker_0: Okay. All right. I'll put that request in, and then, um, we should be fine now. Did you have any other questions for me?

Speaker speaker_2: No, it was just that. Thank you.

Speaker speaker_0: You're welcome. I hope you have a great day. Um, oh, yeah.

Speaker speaker_2: You as well.

Speaker speaker_0: Before you c- I was gonna tell you that we're also, we're missing a beneficiary from you. Since you selected term life, um, we would just need a beneficiary. If something was to happen to you, who do you want to put down?

Speaker speaker_2: Um...

Speaker speaker_0: You can be a parent, a sibling.

Speaker speaker_2: Am I add, am I able to add it later?

Speaker speaker_0: Yeah, that's fine. Mm-hmm.

Speaker speaker_2: Okay, sounds good. I'll, I'll most likely do that then.

Speaker speaker_0: All right. Well, I hope you have a great day. Thank you for your time.

Speaker speaker_2: Thank you. You as well.

Speaker speaker_0: Thank you.