

## Transcript: Francesca

**Baez-6043726854012928-5493589110996992**

### Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Medical National Card. My name is Francesca. How can I assist you today? Uh, hello? Hello? Yes, sir. How can I help you? Um, I just got a call from, um, one of your, uh, representatives regarding my enrollment. You can, you... So I can give you my name. Okay. What staffing company do you work with, and what are the last four of your social? 2853, it's Terra Staffing. And your last name, please? Kataria. Can you spell that for me please? K-A-T-A-R-I-A. Okay. And for security purposes, please verify your mailing address and date of birth. 09/18/75. 6617 Northeast Marina Court. Hillsboro, Oregon 97124. We have the best number to reach you down as 503-704-9972. That's right. We have your email done as your first and last name, letter r at gmail.com. qr, yeah, qr at gmail.com. That's right. Okay. So we're giving you a call 'cause we have an enrollment processing for employee and child- Mm-hmm. ... for free our x, VAC plus, dental, term life and vision. However, you didn't provide the dependents' information. So, you can put it now, whatever I have. Um, I mean, I don't have, uh, you know, the Social Security number, of course, uh, is there. It's just, uh, not on my hand right now. But at least you can put in the names. I put in the names already yesterday. So, there was no name saved when you went into your account yesterday. The only thing that you put was beneficiaries for the life insurance, but you didn't add any dependent information. Um, so what do you want me to do? I mean, we go, go in again? No, sir. I can change it on my side. I just need you to provide me the information- Okay. ... for the child. Okay. Okay. So, the names are not, not recorded from yesterday? No, sir. The only thing that you changed, I mean, that you saved itself yesterday was the beneficiaries. There was no dependent information saved. Oh, okay. The same... So, okay, the dependents are the same, Arnav Kataria and Anya Kataria. And the other- The only thing is you could... G-E-E-T-A, I believe that's Geetanya. You put her down as if she was your parent. Um, so what, wha- what do you think I should do then? If you could clarify the information for us. Is Geetanya your daughter, or is her, your mom? That, that, that's... I mean, as a beneficiary, I can make it my, uh, my, my son then. Uh, Arnav is my son. No. You guys... Well, that and my mother as a beneficiary, if something happened to me. Oh. Okay, so, so you're just not understanding what I'm trying to convey to you. I'm verifying due to the fact that you're saying I can put down the beneficiaries of your dependents- Okay. ... you selected benefit coverage for yourself and your children. One of the two beneficiaries that you put down here is labeled as a parent. Was that not what you did for your daughter and your mother down as beneficiaries? That's right. Okay. That's right. Now you put both of them to have 100%. They can't do that. They have to either be 50/50 or- Uh-huh. ... a good amount that will come and total to 100. Do you want me to just put 50 for each of them? Yeah, that's fine then. Okay, give me one moment. Okay. And then you said Anya's supposed to be your daughter as a beneficiary in the policy? That's right, Anya. And what is her date of birth?

0- uh, 11/26/2013. November 26, 2013. Okay. And then to my understanding, you have another daughter you want to put on the policy, correct? Or that's not- No, the son, the son. The other, other, other- The son. ... is sorry, that's my son. Okay. What is the son's first name? Arnav, A-R-N-A-V. Arnav. Okay. Well, this should be at the end, right? Uh, what's that? Yes. The last letter of his name will be V as in Victor, right after the letter A? Yes, yes. V, V. A-R-N-A-V. Yes. A-R-N-A-V. V as in Victor. That's right. Same last name.... and last name. No social for him either, right? Yes. Okay. And then lastly, his date of birth. It's, um, 09, September 1st. 09/01/2010. 2010. All right, and then was it only those two children you wanted on the policy or did you want to add another child? No, that's the two children I have. Okay, and then bear with me one moment. Thank you. So I can delete the other correction we did. Yeah. I apologize, it's taking a little bit longer for it to process through. Yeah, yeah, yeah, no problem. At least you called me very quickly, that's nice. Yeah. Uh, and all information for me should be good, you know? I think. Yes, sir. The only thing we're missing was the children's information. Yeah, okay. And they are also enrolled in the benefits? There we go. Um, yes, sir. The only thing that they are currently not enrolled into, um, is short-term disability 'cause it's only offered for employees, and then you also selected the identity theft protection, the ID Expert for just yourself. So the children should have- Yeah, but I- Hmm? Uh-huh, right, that's more monitoring of the, you know, uh, fraud and stuff, right? I don't think that would be required, but I would require that. Yes, sir, that's correct, so you selected them to be on the Free Rx Medication Membership, um, the Medical VIP+ Bundled- Uh-huh. ... the Term Life which is life insurance, and the Vision Plan- Sure. ... for yourself and the children. Sure. That's right. All right, so you are all set, sir. Thank you so much for giving us a call back. So we already corrected the information on your policy. This will be effective January 6th, 2025. Okay. And by the 10th, which will be Friday of that week, will be when your carriers will send out those benefit cards. Now, the medical one for that VIP+, that carrier- Uh-huh. ... which is American Public Life, that company only sends you a digital copy to your email that we have on file. Okay. If you want a physical copy, the one that they send to your house, give us a call after- I do. ... the 6th so we can put the request for you, okay? Okay, I, I, yeah, I would like a, you know, physical copy, it's important. So, um, you know, uh, if I want to use the benefit, I would have to re- u- u- for next year because I was using a different insurance, more expensive. So I would have to, um, um, wait for, uh, you know, of course, a couple of weeks looks like, right? Yes, sir. So you'll have to wait 'til January 6th to be able to use it. Okay. After January 6th, you'll be able to use it. It'll be active since that day. Active, okay, that should be fine. I, I don't have anything urgent going on, so, okay, and then they'll send me all the information, uh, in, in, in my mail? Yes? Yes, sir. They'll send you the benefit card for the medical in your mail. In your email, sorry. Okay. Okay, thank you so much. And if there's anything, I'll call you back, um, right? Understood. Okay, all right. Thank you so much for helping me. Thank you. Have a good one. I appreciate it. Thank you. Bye.

## Conversation Format

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Medical National Card. My name is Francesca. How can I assist you today?

Speaker speaker\_2: Uh, hello? Hello?

Speaker speaker\_1: Yes, sir. How can I help you?

Speaker speaker\_2: Um, I just got a call from, um, one of your, uh, representatives regarding my enrollment. You can, you... So I can give you my name.

Speaker speaker\_1: Okay. What staffing company do you work with, and what are the last four of your social?

Speaker speaker\_2: 2853, it's Terra Staffing.

Speaker speaker\_1: And your last name, please?

Speaker speaker\_2: Kataria.

Speaker speaker\_1: Can you spell that for me please?

Speaker speaker\_2: K-A-T-A-R-I-A.

Speaker speaker\_1: Okay. And for security purposes, please verify your mailing address and date of birth.

Speaker speaker\_2: 09/18/75. 6617 Northeast Marina Court. Hillsboro, Oregon 97124.

Speaker speaker\_1: We have the best number to reach you down as 503-704-9972.

Speaker speaker\_2: That's right.

Speaker speaker\_1: We have your email done as your first and last name, letter r at gmail.com.

Speaker speaker\_2: qr, yeah, qr at gmail.com. That's right.

Speaker speaker\_1: Okay. So we're giving you a call 'cause we have an enrollment processing for employee and child-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... for free our x, VAC plus, dental, term life and vision. However, you didn't provide the dependents' information.

Speaker speaker\_2: So, you can put it now, whatever I have. Um, I mean, I don't have, uh, you know, the Social Security number, of course, uh, is there. It's just, uh, not on my hand right now. But at least you can put in the names. I put in the names already yesterday.

Speaker speaker\_1: So, there was no name saved when you went into your account yesterday. The only thing that you put was beneficiaries for the life insurance, but you didn't add any dependent information.

Speaker speaker\_2: Um, so what do you want me to do? I mean, we go, go in again?

Speaker speaker\_1: No, sir. I can change it on my side. I just need you to provide me the information-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... for the child.

Speaker speaker\_2: Okay. Okay. So, the names are not, not recorded from yesterday?

Speaker speaker\_1: No, sir. The only thing that you changed, I mean, that you saved itself yesterday was the beneficiaries. There was no dependent information saved.

Speaker speaker\_2: Oh, okay. The same... So, okay, the dependents are the same, Arnav Kataria and Anya Kataria. And the other-

Speaker speaker\_1: The only thing is you could... G-E-E-T-A, I believe that's Geetanya. You put her down as if she was your parent.

Speaker speaker\_2: Um, so what, wha- what do you think I should do then?

Speaker speaker\_1: If you could clarify the information for us. Is Geetanya your daughter, or is her, your mom?

Speaker speaker\_2: That, that, that's... I mean, as a beneficiary, I can make it my, uh, my, my son then. Uh, Arnav is my son.

Speaker speaker\_1: No.

Speaker speaker\_2: You guys... Well, that and my mother as a beneficiary, if something happened to me.

Speaker speaker\_1: Oh. Okay, so, so you're just not understanding what I'm trying to convey to you. I'm verifying due to the fact that you're saying I can put down the beneficiaries of your dependents-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... you selected benefit coverage for yourself and your children. One of the two beneficiaries that you put down here is labeled as a parent. Was that not what you did for your daughter and your mother down as beneficiaries?

Speaker speaker\_2: That's right.

Speaker speaker\_1: Okay.

Speaker speaker\_2: That's right.

Speaker speaker\_1: Now you put both of them to have 100%. They can't do that. They have to either be 50/50 or-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: ... a good amount that will come and total to 100. Do you want me to just put 50 for each of them?

Speaker speaker\_2: Yeah, that's fine then.

Speaker speaker\_1: Okay, give me one moment. Okay. And then you said Anya's supposed to be your daughter as a beneficiary in the policy?

Speaker speaker\_2: That's right, Anya.

Speaker speaker\_1: And what is her date of birth?

Speaker speaker\_2: 0- uh, 11/26/2013. November 26, 2013.

Speaker speaker\_1: Okay. And then to my understanding, you have another daughter you want to put on the policy, correct? Or that's not-

Speaker speaker\_2: No, the son, the son. The other, other, other-

Speaker speaker\_1: The son.

Speaker speaker\_2: ... is sorry, that's my son.

Speaker speaker\_1: Okay. What is the son's first name?

Speaker speaker\_2: Arnav, A-R-N-A-V. Arnav.

Speaker speaker\_1: Okay. Well, this should be at the end, right?

Speaker speaker\_2: Uh, what's that?

Speaker speaker\_1: Yes. The last letter of his name will be V as in Victor, right after the letter A?

Speaker speaker\_2: Yes, yes. V, V. A-R-N-A-V. Yes. A-R-N-A-V. V as in Victor. That's right. Same last name.

Speaker speaker\_1: ... and last name. No social for him either, right?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. And then lastly, his date of birth.

Speaker speaker\_2: It's, um, 09, September 1st. 09/01/2010.

Speaker speaker\_1: 2010. All right, and then was it only those two children you wanted on the policy or did you want to add another child?

Speaker speaker\_2: No, that's the two children I have.

Speaker speaker\_1: Okay, and then bear with me one moment.

Speaker speaker\_2: Thank you.

Speaker speaker\_1: So I can delete the other correction we did.

Speaker speaker\_2: Yeah.

Speaker speaker\_1: I apologize, it's taking a little bit longer for it to process through.

Speaker speaker\_2: Yeah, yeah, yeah, no problem. At least you called me very quickly, that's nice. Yeah. Uh, and all information for me should be good, you know? I think.

Speaker speaker\_1: Yes, sir. The only thing we're missing was the children's information.

Speaker speaker\_2: Yeah, okay. And they are also enrolled in the benefits?

Speaker speaker\_1: There we go. Um, yes, sir. The only thing that they are currently not enrolled into, um, is short-term disability 'cause it's only offered for employees, and then you also selected the identity theft protection, the ID Expert for just yourself. So the children should have-

Speaker speaker\_2: Yeah, but I-

Speaker speaker\_1: Hmm?

Speaker speaker\_2: Uh-huh, right, that's more monitoring of the, you know, uh, fraud and stuff, right? I don't think that would be required, but I would require that.

Speaker speaker\_1: Yes, sir, that's correct, so you selected them to be on the Free Rx Medication Membership, um, the Medical VIP+ Bundled-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: ... the Term Life which is life insurance, and the Vision Plan-

Speaker speaker\_2: Sure.

Speaker speaker\_1: ... for yourself and the children.

Speaker speaker\_2: Sure. That's right.

Speaker speaker\_1: All right, so you are all set, sir. Thank you so much for giving us a call back. So we already corrected the information on your policy. This will be effective January 6th, 2025.

Speaker speaker\_2: Okay.

Speaker speaker\_1: And by the 10th, which will be Friday of that week, will be when your carriers will send out those benefit cards. Now, the medical one for that VIP+, that carrier-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: ... which is American Public Life, that company only sends you a digital copy to your email that we have on file.

Speaker speaker\_2: Okay.

Speaker speaker\_1: If you want a physical copy, the one that they send to your house, give us a call after-

Speaker speaker\_2: I do.

Speaker speaker\_1: ... the 6th so we can put the request for you, okay?

Speaker speaker\_2: Okay, I, I, yeah, I would like a, you know, physical copy, it's important. So, um, you know, uh, if I want to use the benefit, I would have to re- u- u- for next year because I was using a different insurance, more expensive. So I would have to, um, um, wait for, uh, you know, of course, a couple of weeks looks like, right?

Speaker speaker\_1: Yes, sir. So you'll have to wait 'til January 6th to be able to use it.

Speaker speaker\_2: Okay.

Speaker speaker\_1: After January 6th, you'll be able to use it. It'll be active since that day.

Speaker speaker\_2: Active, okay, that should be fine. I, I don't have anything urgent going on, so, okay, and then they'll send me all the information, uh, in, in, in my mail? Yes?

Speaker speaker\_1: Yes, sir. They'll send you the benefit card for the medical in your mail. In your email, sorry.

Speaker speaker\_2: Okay. Okay, thank you so much. And if there's anything, I'll call you back, um, right?

Speaker speaker\_1: Understood.

Speaker speaker\_2: Okay, all right. Thank you so much for helping me.

Speaker speaker\_1: Thank you. Have a good one.

Speaker speaker\_2: I appreciate it. Thank you. Bye.