

## Transcript: Justin

**Mills-4573726988615680-5093488093085696**

### Full Transcript

Thank you for calling Benefits and Occur. This is Justin. How can I help you today? Uh, yeah, I was, uh, sent a text message to call you guys about enrolling in my benefits. Okay. What's the staffing agency you work for? Carlton Staffing. And the last four of your Social? 7039. And what was your first and last name? Joseph Crespo. And for security purposes, could you verify your home address, including city, state and zip code addresses? Uh, 402 Oak Vista Drive, Friends of Texas 77546. And your date of birth? Uh, 09-17-1996. And a good telephone number I have is 493-5816. Yes, that is correct. And the email it has joeycrespo6 at gmail? Yes. Okay. Um, now did you have an idea of what you wanted to be enrolled into through Carlton or no? No, not really. Um, I know... Um, well, I mean, honestly, probably just the standard plan. Like, that, that's one of the plans, correct? Um, I do know that they automatically enroll their new hires into the MEC TeleRX which covers preventative healthcare services, usually 30 days after their first paycheck. Okay. Okay. Uh, so preventative services are like physicals, diabetes screenings, vaccinations, pretty much things that generally make you stay healthy. Right. Okay. Okay, so do you want to accept the auto enrollment? Yes, please. Okay. Now I do know that they offer other things like FreeRx which gives out free or discounted prescription coverage, uh, dental, short-term disability, term life which is life insurance, vision, critical illness, group accident, and behavioral health. Um, I know that I need, I need dental, vision and then, um, the prescription. Okay. Let's see. So the MEC TeleRX does include the FreeRx subscription as well, um, so I'll go ahead and leave that one as well. So dental, vision and the MEC TeleRX for an employee only. Anything else? No, that'd be it. Okay, so doing those three would make your total deductions \$21.84 a week. Do you authorize Carlton Staffing to make the deduction for you? Yes, please. Okay. Um, so I do want to let you know that this pending enrollment will take one to two weeks to go through. Then whenever you witness your first payroll deduction of the \$21.84 come off your paycheck, coverage begins the Monday we receive that deduction from Carlton Staffing. Okay. Seven to 10 business days later you'll receive all of your policy and ID card information in the mail. However, I do see that Carlton is a Section 125 client. So a Section 125 is, it's an IRS code which means employees can pay their premiums with pre-tax dollars, but that also means you must stay in these elections until the next company open enrollment period, or if you experience a qualified life event. However, a qualified life event would be considered as marriage or divorce, birth or adoption of a child, or gaining coverage elsewhere. Other than that, is there anything else I can assist you with today, Joseph? No, I think that's it. Awesome. Well, thank you for calling Benefits and Occur. And I hope you have a wonderful day, all right? All right, I appreciate it. You have a good one now. You have-

## Conversation Format

Speaker speaker\_0: Thank you for calling Benefits and Occur. This is Justin. How can I help you today?

Speaker speaker\_1: Uh, yeah, I was, uh, sent a text message to call you guys about enrolling in my benefits.

Speaker speaker\_0: Okay. What's the staffing agency you work for?

Speaker speaker\_1: Carlton Staffing.

Speaker speaker\_0: And the last four of your Social?

Speaker speaker\_1: 7039.

Speaker speaker\_0: And what was your first and last name?

Speaker speaker\_1: Joseph Crespo.

Speaker speaker\_0: And for security purposes, could you verify your home address, including city, state and zip code addresses?

Speaker speaker\_1: Uh, 402 Oak Vista Drive, Friends of Texas 77546.

Speaker speaker\_0: And your date of birth?

Speaker speaker\_1: Uh, 09-17-1996.

Speaker speaker\_0: And a good telephone number I have is 493-5816.

Speaker speaker\_1: Yes, that is correct.

Speaker speaker\_0: And the email it has joeycrespo6 at gmail?

Speaker speaker\_1: Yes.

Speaker speaker\_0: Okay. Um, now did you have an idea of what you wanted to be enrolled into through Carlton or no?

Speaker speaker\_1: No, not really. Um, I know... Um, well, I mean, honestly, probably just the standard plan. Like, that, that's one of the plans, correct?

Speaker speaker\_0: Um, I do know that they automatically enroll their new hires into the MEC TeleRX which covers preventative healthcare services, usually 30 days after their first paycheck.

Speaker speaker\_1: Okay.

Speaker speaker\_0: Okay. Uh, so preventative services are like physicals, diabetes screenings, vaccinations, pretty much things that generally make you stay healthy.

Speaker speaker\_1: Right. Okay.

Speaker speaker\_0: Okay, so do you want to accept the auto enrollment?

Speaker speaker\_1: Yes, please.

Speaker speaker\_0: Okay. Now I do know that they offer other things like FreeRx which gives out free or discounted prescription coverage, uh, dental, short-term disability, term life which is life insurance, vision, critical illness, group accident, and behavioral health.

Speaker speaker\_1: Um, I know that I need, I need dental, vision and then, um, the prescription.

Speaker speaker\_0: Okay. Let's see. So the MEC TeleRX does include the FreeRx subscription as well, um, so I'll go ahead and leave that one as well. So dental, vision and the MEC TeleRX for an employee only. Anything else?

Speaker speaker\_1: No, that'd be it.

Speaker speaker\_0: Okay, so doing those three would make your total deductions \$21.84 a week. Do you authorize Carlton Staffing to make the deduction for you?

Speaker speaker\_1: Yes, please.

Speaker speaker\_0: Okay. Um, so I do want to let you know that this pending enrollment will take one to two weeks to go through. Then whenever you witness your first payroll deduction of the \$21.84 come off your paycheck, coverage begins the Monday we receive that deduction from Carlton Staffing.

Speaker speaker\_1: Okay.

Speaker speaker\_0: Seven to 10 business days later you'll receive all of your policy and ID card information in the mail. However, I do see that Carlton is a Section 125 client. So a Section 125 is, it's an IRS code which means employees can pay their premiums with pre-tax dollars, but that also means you must stay in these elections until the next company open enrollment period, or if you experience a qualified life event. However, a qualified life event would be considered as marriage or divorce, birth or adoption of a child, or gaining coverage elsewhere. Other than that, is there anything else I can assist you with today, Joseph?

Speaker speaker\_1: No, I think that's it.

Speaker speaker\_0: Awesome. Well, thank you for calling Benefits and Occur. And I hope you have a wonderful day, all right?

Speaker speaker\_1: All right, I appreciate it. You have a good one now.

Speaker speaker\_0: You have-