

Transcript: Pamela

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Car. This is Pamela speaking. How may I help you? Hello, um, I was directed, um, to sign up to enroll in benefits to call this number. Who do you work for? Freedom Circle. May I have the last three digits of your Social so I can pull up your file? Yes. Four, zero, zero, seven. Your first and last name? Shaylin Vitale. Ms. Vitale, for security reasons, just to make sure we are in the correct file, can you please verify your complete address and date of birth? Yes. It's 26 Flume Road, Gloucester, Massachusetts, 01930. And date of birth is 08-26-1996. That's not the address we have on file. Is it 114 Marlborough Street, Boston? Yes. Oh, it's my original address when I, um, signed on. Okay, so, um, can you verify that complete address and then we can make the changes? Yeah. It's 114 Marlborough Street, Boston, Massachusetts, 02116. Thank you. We have a telephone number on file. Um, nine... Oh, sorry. 978-879-8094. And your email is your first name.last name at gmail.com? Yes. Email is correct. Um, can you repeat the phone number again for me? 978-879-8094. Yes. That's correct. I didn't hear that right. No problem. So let's, uh, first, uh, change the address. Yes. What is your new address, ma'am? You can put 26 Flume, F-L-U-M-E, Road. Can you spell the, the street name one more time for me? I'm sorry about that. It's okay. F-L-U-M-E. Okay. Road. And what's the city? In Gloucester. Still Massachusetts zip code. 01930. Right. And do you know what plan would you like to enroll in? Yes. It was the Ensure Plus basic, plus the MEC. Ensure Plus basic. Is this employee only? Yes. All right. Anything else besides that, like vision or dental? There's dental, critical illness, accident, um, Telex and the free RX. Okay. So if you choose the Stay Healthy, it will come- Oh. ... automatically with the free RX so you don't have to... Okay. ... purchase it separately. Now the dental, it comes in a bundle with the vision and the life insurance. Okay. Did you mention, um, the behavioral health as well? Or... No. Okay. I just want to make sure. So you have the Ensure Plus basic, the dental, life insurance, vision, critical illness, accident and Stay Healthy w- and the free RX which come in the same plan. Yes. And is that including the MEC as well? Yes, ma'am. Okay. Yes, that's accurate. Okay. So the total will be \$45.21. Your premium will be taken before taxes, uh, for... I'm so sorry. That's not what I meant to say. Your benefits will start the following Monday after we receive the first premium from your employer. Okay. Now for the Stay Healthy plan, that plan, it's under Section 125, which is an IRS regulation. They will take the premium before taxes for that specific plan. Okay. Now, you can cancel any of the plans that you have except for the MEC because of regulation from the IRS. You could change or cancel it, um, on open enrollment or a qualified life event. Okay. Okay? And let's see. 22, 22, hire dates on the 31st. You do have, uh, to the 29th of November to make any changes or cancellation when it comes to the MEC. Okay. The Stay Healthy plan. So if you get the life insurance, would you like to name your beneficiary now or will you call back for that information? Um, you could put,

um, Rick Vitale. Rick? Yep. R-I-C-K and then V-I-T-A-L-E. Shh. Dog. And then... Oh, my goodness. Sorry, um- And what's the relationship? Um, parent. Okay. And then you can put, um- All right. Oh, you want two person, I'm so sorry. I shouldn't have... It was Yeah. You're good. Okay. Go ahead. I need to put Grant Gilbert, G-R-A-N-T G-I-L-B-E-R-T. Okay. And the relationship? Partner. Okay. So it's 50 and 50, or you're adding one more person? Single. Oh my God, I'm so sorry. So we, uh... Let's see. Grant Gilbert. We're almost done. Okay. Got to change the parts to finished. All right. So is there any questions, concern at this time? Nope. All right. So, um, thank you for giving us a call today. Have a great rest of the day. Thank you as well. Bye-bye. Take care. 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 Car. This is Pamela speaking. How may I help you?

Speaker speaker_2: Hello, um, I was directed, um, to sign up to enroll in benefits to call this number.

Speaker speaker_1: Who do you work for?

Speaker speaker_2: Freedom Circle.

Speaker speaker_1: May I have the last three digits of your Social so I can pull up your file?

Speaker speaker_2: Yes. Four, zero, zero, seven.

Speaker speaker_1: Your first and last name?

Speaker speaker_2: Shaylin Vitale.

Speaker speaker_1: Ms. Vitale, for security reasons, just to make sure we are in the correct file, can you please verify your complete address and date of birth?

Speaker speaker_2: Yes. It's 26 Flume Road, Gloucester, Massachusetts, 01930. And date of birth is 08-26-1996.

Speaker speaker_1: That's not the address we have on file.

Speaker speaker_2: Is it 114 Marlborough Street, Boston?

Speaker speaker_1: Yes.

Speaker speaker_2: Oh, it's my original address when I, um, signed on.

Speaker speaker_1: Okay, so, um, can you verify that complete address and then we can make the changes?

Speaker speaker_2: Yeah. It's 114 Marlborough Street, Boston, Massachusetts, 02116.

Speaker speaker_1: Thank you. We have a telephone number on file. Um, nine... Oh, sorry. 978-879-8094. And your email is your first name.last name at gmail.com?

Speaker speaker_2: Yes. Email is correct. Um, can you repeat the phone number again for me?

Speaker speaker_1: 978-879-8094.

Speaker speaker_2: Yes. That's correct. I didn't hear that right.

Speaker speaker_1: No problem. So let's, uh, first, uh, change the address.

Speaker speaker_2: Yes.

Speaker speaker_1: What is your new address, ma'am?

Speaker speaker_2: You can put 26 Flume, F-L-U-M-E, Road.

Speaker speaker_1: Can you spell the, the street name one more time for me? I'm sorry about that.

Speaker speaker_2: It's okay. F-L-U-M-E.

Speaker speaker_1: Okay. Road. And what's the city?

Speaker speaker_2: In Gloucester.

Speaker speaker_1: Still Massachusetts zip code.

Speaker speaker_2: 01930.

Speaker speaker_1: Right. And do you know what plan would you like to enroll in?

Speaker speaker_2: Yes. It was the Ensure Plus basic, plus the MEC.

Speaker speaker_1: Ensure Plus basic. Is this employee only?

Speaker speaker_2: Yes.

Speaker speaker_1: All right. Anything else besides that, like vision or dental?

Speaker speaker_2: There's dental, critical illness, accident, um, Telex and the free RX.

Speaker speaker_1: Okay. So if you choose the Stay Healthy, it will come-

Speaker speaker_2: Oh.

Speaker speaker_1: ... automatically with the free RX so you don't have to...

Speaker speaker_2: Okay.

Speaker speaker_1: ... purchase it separately. Now the dental, it comes in a bundle with the vision and the life insurance.

Speaker speaker_2: Okay.

Speaker speaker_1: Did you mention, um, the behavioral health as well? Or...

Speaker speaker_2: No.

Speaker speaker_1: Okay. I just want to make sure. So you have the Ensure Plus basic, the dental, life insurance, vision, critical illness, accident and Stay Healthy w- and the free RX which come in the same plan.

Speaker speaker_2: Yes. And is that including the MEC as well?

Speaker speaker_1: Yes, ma'am.

Speaker speaker_2: Okay. Yes, that's accurate.

Speaker speaker_1: Okay. So the total will be \$45.21. Your premium will be taken before taxes, uh, for... I'm so sorry. That's not what I meant to say. Your benefits will start the following Monday after we receive the first premium from your employer.

Speaker speaker_2: Okay.

Speaker speaker_1: Now for the Stay Healthy plan, that plan, it's under Section 125, which is an IRS regulation. They will take the premium before taxes for that specific plan.

Speaker speaker_2: Okay.

Speaker speaker_1: Now, you can cancel any of the plans that you have except for the MEC because of regulation from the IRS. You could change or cancel it, um, on open enrollment or a qualified life event.

Speaker speaker_2: Okay.

Speaker speaker_1: Okay? And let's see. 22, 22, hire dates on the 31st. You do have, uh, to the 29th of November to make any changes or cancellation when it comes to the MEC.

Speaker speaker_2: Okay.

Speaker speaker_1: The Stay Healthy plan. So if you get the life insurance, would you like to name your beneficiary now or will you call back for that information?

Speaker speaker_2: Um, you could put, um, Rick Vitale.

Speaker speaker_1: Rick?

Speaker speaker_2: Yep. R-I-C-K and then V-I-T-A-L-E. Shh. Dog. And then... Oh, my goodness. Sorry, um-

Speaker speaker_1: And what's the relationship?

Speaker speaker_2: Um, parent.

Speaker speaker_1: Okay.

Speaker speaker_2: And then you can put, um-

Speaker speaker_1: All right. Oh, you want two person, I'm so sorry. I shouldn't have... It was

Speaker speaker_2: Yeah. You're good.

Speaker speaker_1: Okay. Go ahead.

Speaker speaker_2: I need to put Grant Gilbert, G-R-A-N-T G-I-L-B-E-R-T.

Speaker speaker_1: Okay. And the relationship?

Speaker speaker_2: Partner.

Speaker speaker_1: Okay. So it's 50 and 50, or you're adding one more person?

Speaker speaker_2: Single.

Speaker speaker_1: Oh my God, I'm so sorry. So we, uh... Let's see. Grant Gilbert. We're almost done. Okay. Got to change the parts to finished. All right. So is there any questions, concern at this time?

Speaker speaker_2: Nope.

Speaker speaker_1: All right. So, um, thank you for giving us a call today. Have a great rest of the day.

Speaker speaker_2: Thank you as well.

Speaker speaker_1: Bye-bye.

Speaker speaker_2: Take care. Bye.