

Transcript: Pamela

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits 10-4. This is Pamela speaking. How may I help you? Um, yes. I'm calling, yes, I'm calling to, um, cancel my young person's plan because I already have my own benefits. Okay. And who do you work for, ma'am? Carlton Package, the, the agency. Can I have the last four digits of your Social? 9478. 9478? Yes. Your first and last name? Jacqueline Porter. Okay, there's a star here. For security reasons and to make sure we are in the correct file, can you please verify your complete address and date of birth? Um, 6/19/2000, 14219 Orlando Lane, Chisolm Texas, 77498. Okay. Thank you for the information. We have a telephone number on file, 832-837-5399. You can send your email, I mean, your email is your first name, last name, 2000 at gmail.com. You got that correct. Okay. So, you said you got new benefits, right? I have my own, my personal. I've been having it. I just had to call the office to cancel it. Okay, so Carlton is under Section 125, which is an IRS regulation. In order for you to cancel, you have to, um, have a qualified live event. How long has, have you had the new benefit? I've been having it since June. I'd like to requalify this year. Okay. So in that case, you said June, right? Mm-hmm. That case, you're gonna have to wait for company open enrollment in order to cancel. Um- But why, 'cause I'm not using it? Well, because like I said, Carlton is under Section 125, which is the IRS regulation. Um, the deductions are pre-tax, and, um, and you are required to stay with the benefits and do your company open enrollment or a qualified live event. When is, when is the qualify, when is the open enrollment? I will check that for you. Let me see if we have the date already. Give me one second. So Carlton... so they did it in December, mid-December last year. Most likely, it will be at the, around the same time this year, which I just don't have the exact date yet. Okay. Um, you will receive texts and emails regarding open enrollment. But if you wanna give us a call, I would say the first week of December, most likely we will have the exact date for open enrollment. Okay, let me call Carlton back then because I'm getting \$16 taken out every week and I don't even use their benefits. I have my own. 'Cause when you get the job, you have the option to opt out because that was a, uh, it was a auto enrollment. And, um, and they do give you 30 days after your first paycheck. No, actually they auto enroll you right after your first paycheck. So, um, if you wanna talk to them, it's fine, but it's, it is the regulation. So if you, like I said, you could give us a call like the first week of December in which you'll have the company open enrollment, um, deadline by then. Okay. Thank you. All right. Thank you for giving us a call. Have a great rest of the day, ma'am.

Conversation Format

Speaker speaker_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker_1: Thank you for calling Benefits 10-4. This is Pamela speaking. How may I help you?

Speaker speaker_2: Um, yes. I'm calling, yes, I'm calling to, um, cancel my young person's plan because I already have my own benefits.

Speaker speaker_1: Okay. And who do you work for, ma'am?

Speaker speaker_2: Carlton Package, the, the agency.

Speaker speaker_1: Can I have the last four digits of your Social?

Speaker speaker_2: 9478.

Speaker speaker_1: 9478?

Speaker speaker_2: Yes.

Speaker speaker_1: Your first and last name?

Speaker speaker_2: Jacqueline Porter.

Speaker speaker_1: Okay, there's a star here. For security reasons and to make sure we are in the correct file, can you please verify your complete address and date of birth?

Speaker speaker_2: Um, 6/19/2000, 14219 Orlando Lane, Chisolo Texas, 77498.

Speaker speaker_1: Okay. Thank you for the information. We have a telephone number on file, 832-837-5399. You can send your email, I mean, your email is your first name, last name, 2000 at gmail.com.

Speaker speaker_2: You got that correct.

Speaker speaker_1: Okay. So, you said you got new benefits, right?

Speaker speaker_2: I have my own, my personal. I've been having it. I just had to call the office to cancel it.

Speaker speaker_1: Okay, so Carlton is under Section 125, which is an IRS regulation. In order for you to cancel, you have to, um, have a qualified life event. How long has, have you had the new benefit?

Speaker speaker_2: I've been having it since June. I'd like to requalify this year.

Speaker speaker_1: Okay. So in that case, you said June, right?

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: That case, you're gonna have to wait for company open enrollment in order to cancel. Um-

Speaker speaker_2: But why, 'cause I'm not using it?

Speaker speaker_1: Well, because like I said, Carlton is under Section 125, which is the IRS regulation. Um, the deductions are pre-tax, and, um, and you are required to stay with the benefits and do your company open enrollment or a qualified life event.

Speaker speaker_2: When is, when is the qualify, when is the open enrollment?

Speaker speaker_1: I will check that for you. Let me see if we have the date already. Give me one second. So Carlton... so they did it in December, mid-December last year. Most likely, it will be at the, around the same time this year, which I just don't have the exact date yet.

Speaker speaker_2: Okay.

Speaker speaker_1: Um, you will receive texts and emails regarding open enrollment. But if you wanna give us a call, I would say the first week of December, most likely we will have the exact date for open enrollment.

Speaker speaker_2: Okay, let me call Carlton back then because I'm getting \$16 taken out every week and I don't even use their benefits. I have my own.

Speaker speaker_1: 'Cause when you get the job, you have the option to opt out because that was a, uh, it was a auto enrollment. And, um, and they do give you 30 days after your first paycheck. No, actually they auto enroll you right after your first paycheck. So, um, if you wanna talk to them, it's fine, but it's, it is the regulation. So if you, like I said, you could give us a call like the first week of December in which you'll have the company open enrollment, um, deadline by then.

Speaker speaker_2: Okay. Thank you.

Speaker speaker_1: All right. Thank you for giving us a call. Have a great rest of the day, ma'am.