

Transcript: Sara

Marulanda-6097996299059200-5185582841937920

Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Cart. My name is Sarah. May I have your name, please? Yes. Hello, Sarah. My name is Joshua Davis. Hello, Mr. Davis. How may I help you? Uh, I need to make a small adjustment, uh, to my benefits for next year during the open enrollment period. Sure, I can help you with that. May I have the name of the agency that you are working with and the last four of your Social? Yes. Oxford Global, um... I forget if it's Global Resources or Global Solutions. Uh, my, my last four digits of my Social is 8906. Okay. Just a minute, please. Okay, Mr. Davis, and just for security purposes, sir, can you please verify your address and date of birth? Yes. My date of birth is July 31st, 1977. My address is 114 Mason Drive, Scottdale, Pennsylvania, 15683. Email joshuar davis001@gmail.com? That me, yes. Okay. And is your phone number 713-487-8713? Correct, yes. Thank you very much. Okay. What changes would you like to do? Okay. Um, the only thing I need to do is to remove dental. That's it. Dental for employee plus family. Keep, uh, term disability for employee only, term life and vision for employee plus family. Is that correct? I'm sorry, could you repeat that, please? Okay. You want to keep vision and term life for employee plus family, short-term disability for employee only and you want to remove dental? Yes, I want to remove dental and keep, uh, the, everything else. Oh. Which I think also includes vision, correct? Yes, vision and term life for employee plus family. Yes. And short-term- Yes, that's- ... disability for employee only. Yes, absolutely. Thank you. Okay. So please allow one to two weeks for, uh, your employer to start making deductions. Once you s-... I mean, to start making the new deductions, so to become active with the cancellation. Okay. Okay. Um, other than that, sir, is there anything else that I can help you with? No, that's all. Thank you. All right. You're more than welcome. Have a wonderful day and thank you for calling Benefits in a Cart. You too. Thank you. Thank you, sir. Bye-bye.

Conversation Format

Speaker None: Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Cart. My name is Sarah. May I have your name, please? Yes. Hello, Sarah. My name is Joshua Davis. Hello, Mr. Davis. How may I help you? Uh, I need to make a small adjustment, uh, to my benefits for next year during the open enrollment period. Sure, I can help you with that. May I have the name of the agency that you are working with and the last four of your Social? Yes. Oxford Global, um... I forget if it's Global Resources or Global Solutions. Uh, my, my last four digits of my Social is 8906. Okay. Just a minute, please. Okay, Mr. Davis, and just for security purposes, sir, can you please verify your

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