

Transcript: Sara

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Full Transcript

Thank you for calling, thank you for calling Benefits in a Card. My name is Sarah. May I have your name, please? Roxanne Bartholomew. Hello, Ms. Roxanne. How may I help you? Um, the temp agency that I worked for, uh, sent me a message saying that I needed to contact you guys to, uh, list a beneficiary on my life insurance. And there's also another text about, I, which I'm already enrolled in, like, medical and different stuff, so I don't know if that has to be updated through you guys, too, or... Let me check that for you. May I have the name of the agency and the last part of your social? Uh, it's Workforce Strategies, and the last part of my social is 4710. Thank you very much. Ms. Roxanne Bartholomew, just for security purposes, can you please verify your address and date of birth? 58695 Silvergrass Avenue, Metalwen, Michigan, 49071, and my date of birth is 4-23-68. Email wells9653@gmail.com? Yes, ma'am. And phone number 269-547-8682? Correct. Thank you very much. Okay. You are enrolled in short-term disability, term life, vision and VIP Classic, which is a medical. That plan is for employee only, but yes, we are missing the de- the, the, um, how do you call, the beneficiary information. Yeah. Like, who would need to receive the, the, the term life benefit in case something happened to you? Uh, yeah. I- I have one quick question for you, 'cause I- I went there today, this morning. Mm-hmm. 'Cause I got that, that text message. And did it, did the information not transfer when you guys took over? Or is it, is it that they just didn't list my beneficiaries? Hmm. Well, we don't have any beneficiary here. They di- they didn't transfer any, that information to us. Okay. Um, I would like my daughter listed as my beneficiary. Okay, sure. What is your, your daughter's name? Roxanne. R-O-X-A-N-N. Last name of Swank, S-W-A-N-K. I'm sorry, I'm sorry. Can you repeat that for me? S-W...? A-N-K. Swank? Okay. Do you need her contact phone number first? No, give me just a minute. I'm waiting for the system to download. Okay. Okay, so we got Roxanne, R-O-A, R-O-X-A-N-N, right? Swank- Two Ns. ... is, who else? A little- Her first name has... Okay. And last name, like- This line looks like it's breaking up. I'm sorry, go ahead. It's breaking up. Go ahead, ma'am. I'm sorry. You know what? Let, let me go upstairs, honey. Maybe I just have a bad connection being down in the basement. Maybe it won't cut out so much if I run up the stairs. Sorry. No, it's okay. Take your time. 'Cause som- sometimes in the basement when the floor is crappy, it goes in and out. Okay, so- Okay. ... her, her first name is R-O-X-A-N-N, two Ns, like my name. And then her last name is S-W-A-N-K. Okay. And she's a child, or your daughter? And you want 100% for her, right? Correct. Can I list both of my daughters, or does it have to go to one person? Yes. No, you can... Uh, there is 100% and you can divide that percentage for as many people as you want. Okay, then 50% for her, and 50% to my other daughter, which her name... Are you ready for it? Yes. Is Davia, D-A-V-I-A. Davia? Okay. Her last name is Wilson, W-I-L-S-O-N. Okay. And it's another child, and it's 50% for her. Yep. Yes. We got Roxanne Swank, 50%, and- Yep. ... Davia Wilson? Yep. 50% as well. Correct, ma'am. Okay, so right

now we're just waiting for your company to start making deductions. Once you see the first deduction, that means the following Monday, that's when the co-benefits become active. Uh, you should receive that because by the end of that same week. Um. If you have not received them... Ma'am? Ma- Sorry. I, I got a question for you. Y- you said you're waiting for my company to start making deductions for it? Yes, ma'am. Wait, I gotta look on my pay stub really quick. I'm sorry. Yeah, sure. Hold on. Sorry. How long ago did you take over the account? Okay, let me check that for you. Give me just a minute. The system is super slow today, I'm so sorry. No, it's okay, honey. I think it's the weather. Oh, my goodness, but it's- Too cold. Yeah. It- isn't, isn't that it? It was snowing last year, so everything's confused. Okay. Let me check this. I, I'm gonna look at something while I'm talking to you, only 'cause I really want to understand what's going on here. Sure, ma'am. Um, I got to go look up what my elective coverage was. Okay, so this is, this is for actually for term life? Is that what you said? I'm sorry, ma'am? So is this classified as the term life that I listed the beneficiary for? Yes. The beneficiary you just add to the account is for the term life coverage. Okay. And I'm just waiting. Did you... Were you able to look up how long you guys have had my account? I'm opening the information right now. I'm still waiting for the information to show up on my system. I'm sorry. Oh, your computer's going slow, right? It is so crazy. I'm so sorry. No, don't be. I'm not trying to rush you, honey. I just want to make... wanted to make sure that it wasn't me causing the delay. Yes. It's super, ugh, super slow. Goodness. Can you explain to me like on, on here, like... 'Cause it doesn't say on here what the... About what? What the term life actually is, like in the event that- Like how much it covers? Yes, ma'am. Okay. Let me check that. If the term life will cover... I'm sorry? No. You go ahead. I'll ask my next question after you're done. I got 100 questions for here, okay? No. It is okay. Okay. It will be covering \$5,000 for employee to age 64. Okay. And then is that only in the event that you should be, uh, killed on the job? Is that what... Or is that killed at all? Okay. The term life is going to be paid to you, I mean, to your depend- um, to your beneficiaries if you're working with the company by the moment something happen. Got you. Okay. I just wanted to clarify because I didn't know. Did the information come up yet? You said that you guys were- Yes. ... waiting for a payment. Yes. It says that, um, it should roll over but I don't see that here on the screen. May I put you on hold for a minute? I'm going to have to find that out with my supervisor because the system is not working at this moment. Okay. Thank you. Okay. I'll be right back with you. Please don't disconnect the call. I won't. Thank you, honey. Thank you, ma'am. Okay. Hello, Ms. Roxanne? Yes, ma'am. Thank you for waiting, ma'am. Okay. I just saw the information here. There was some of the, of the files that came back showing no deductions. And there is an investigation on, already going on about that, uh, because we already, we are aware of the situation and your company is aware of the situation as well. So we have to wait until, uh, they communicate us what's going on with the investigation, what point are we right now. Okay. Um- And we don't- And I do ha- Go ahead. Sure, ma'am. I do have another question for you. Yes, ma'am? So, you said that the term life benefit is a maximum of \$5,000 with your company? Yes, ma'am. It is. Okay. So the coverage that they used to have that I filled out paperwork on was term life benefit for \$10,000. I'll talk, I'll talk with the company about that. Okay. All right. So they're, they're, uh, uh, they're going to get paid or, I mean, I've been working for them for 10, over 10 months and they've taken that, that cost out every, every single week out of my paycheck. So I've paid it as far as I... Why you guys haven't got it, I don't know, but you guys are checking into that, so If I need to do- Yeah, we're just... We're

aware of that, so I'm assuming... Well, I know they're doing, they're making an investigation on it, but we're waiting for the, any information about what it, what has come up with the investigation. At this moment, we haven't received any update yet. Okay. Okay. All right. But, but I still have that though that I'm paying into it, even though you guys are... If I was to die tomorrow on my job, my children would still get paid. Correct? Um, I'm assuming, but I cannot tell you yes, because it's not showing in my system. That's why we need the update from your company. I don't know. I cannot tell you yes or not. Not even- Okay. Well, I- ... information from my end is going to be correct because it's not showing on the system, and I don't have any knowledge. Hold, hold on one sec. I, I, I'm going to write down something because I'm going to call the company right now and find out what's the delay. Yeah, sure. Um, what was your name, ma'am? Sarah. Sarah? S-A-R-A-H. Yes, no H. No H, okay. Um, and you're from the Benefit 800 number. Okay. So I'm, I'm going to call them and, and talk to whoever I need to talk to to find out why you guys aren't getting paid and why it doesn't show that we have coverage when they take the amount out. And I think it's probably just a matter of them transitioning from the old company to you, but I don't know- That's it. ... if I- Yes. That's what I know. ... ask more. We are, uh, we're aware of the deductions issue, but it's not showing on my system. So I cannot tell you 100%, "Oh yes, we have the money, or the money's there, or where is the money?" The money is somewhere, but because of the transition- Yeah. ... because of this rollover process, yes, I have to wait until it shows- Okay. ... in my system and I can't give you my word, "Oh, Ms. Roxanne, this is the way it works." But at this moment- Yeah. I, um- ... I cannot. Everything is pending investigation. Right. How, how long have you guys ha- had the accounts? Like, how long ago did the, did the coverage, or like supposed coverage change to you guys? When did you guys take our accounts? Like- Well, the only ones that really know that information is the main office. Uh, we're just the, like, uh, the customer service. We don't have all that information. That's something between the heads of the, your company and this company. Okay. So I don't really know how long. I know, I know it will be effective for, uh, from April 7th, 2025. Uh, then you came on board with us, I mean, your company, not you. Your company. But I'm, I'm still, we're still waiting for those, um, rollover. I think it was supposed to be scheduled for the, uh, March the 17th, but, um, I cannot give you my word on that until I see that here on the system. Okay. All right, honey. That's what I needed. All right. I just wanted to make sure my, my portion was taken care of. Okay, Ms. Roxanne. Sure, I understand that. If you want, as soon as we get any information back, I will be giving you a call and, uh, giving you the update. Would you like me to do that for you? Yeah, if you don't mind, that would be wonderful. I won't mind at all. Sure, I will be giving you a call. Let me add the note here on the system. And as soon as I know anything, I will be giving you a call, ma'am. Okay. Thank you so much, Sarah. You have a wonderful day. I appreciate the time. You a- you as well, Ms. Roxanne, and have a wonderful day, and thank you for calling Benefits in a Cart. Thank you. Bye-bye. Mm-hmm. Bye-bye.

Conversation Format

Speaker None: Thank you for calling, thank you for calling Benefits in a Card. My name is Sarah. May I have your name, please? Roxanne Bartholomew. Hello, Ms. Roxanne. How may I help you? Um, the temp agency that I worked for, uh, sent me a message saying that I

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