

## Transcript: VICTORIA

**Taylor-4864097622376448-4966950143737856**

### Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Card, this is Victoria. How can I help you? Hi. I am interested... I'm, I'm an Axtford employee, um, and I'm interested in signing up for Benefits in a Card. I have never done this before, so I don't know what, um, to expect. Or what you need. But, um, I'm interested in vision, um, and, and I guess term life. Okay. Um, let me pull up your file. What's the last four of your- Oh, also, um... Sorry, also, uh, short-term disability. That looks good too. Okay. Um, what is the last four of your Social? 6030. And your first and last name? Michael Brehm. So last name is B as in boy, R-E-H, M as in Mary. Okay. Do you mind verifying your address and date of birth? My address is 40W420 Apache Lane in Huntley, Illinois. The ZIP code is 60142. And your date of birth? January 31, 1968. Okay. And then, let's see, phone number is 224-430-4533? That's right. All right. And then email's gonna be, uh, mjyourlastname@gmail.com. That's right. Okay, give me just a few seconds. Okay. So it was vision, term life and the short-term disability? That's right. Yeah. Okay. And are you just wanting to do that for employee only? Uh, employee plus spouse. Okay. So I can do the term life and the vision for employee plus spouse, but the short-term disability would just be for employee only. Is that okay? Yeah, that's fine. Okay. Um, and is that everything? That's it, yeah. Okay. So- So is possible that, um... If I change my mind about dental, is it possible to call back and add it later within the enrollment period? Yeah, as long as the company is still within the, uh, open enrollment period you should be able to add it on. Okay. Thanks. Yeah. Um, so it looks like in total it would be \$10.85 a week. Okay. Um, so if... With this, uh, the coverage would be effective the earliest the 6th of January. All right. As long as the deduction is made out of your check the week before. All right. That's good. Yeah. Um, let's see. I imagine, right, these are automatic deductions? I won't have to worry about it, it's just gonna happen and then the plan's effective on the 6th? Yep. Um, I was just letting you know, uh, sometimes, depending on the situation, the coverage becomes, uh, active sooner. But, um- Okay. ... with us just being open enrollment, the earliest it would be effective is the 6th of, uh, January. Okay. Um, let's see. And then let me go ahead and get your spouse's information so I can get them listed. Uh, what's their first and last name? First and last name is Deborah, D-E-B-O-R-A-H. And their last name is same as mine, Brehm. Let me make sure I spell the first name correctly. D-E-B-O-R... Oh, I'm sorry, R-O-A-H. Yeah, D-E-B-O-R-A-H, yep. Deborah. Oh, okay. Sorry about that. D-E-B-O-R-A-H. That's correct. All right, and then date of birth? Date of birth is January 7, 1970. And then full Social. Right, 383-84-7734. And then who did you want to name as the beneficiary for the term life? Uh, Deborah. All right. All righty. So I went ahead and submitted the request to have you enrolled. And then was there anything else you might need help with? Um, that's all for today, thank you. You're welcome. Um, and then just... I remembered one thing. Um, so once the coverage does become active,

specifically for the vision, your ID card will be made and sent to you within seven to ten business days. All right. Sounds good. Yes, sir. You have a wonderful day. Thank you. This is great. It's super easy. Thank you so much for your help. Yes, sir. Have a good day. 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 Card, this is Victoria. How can I help you?

Speaker speaker\_2: Hi. I am interested... I'm, I'm an Axtford employee, um, and I'm interested in signing up for Benefits in a Card. I have never done this before, so I don't know what, um, to expect. Or what you need. But, um, I'm interested in vision, um, and, and I guess term life.

Speaker speaker\_1: Okay. Um, let me pull up your file. What's the last four of your-

Speaker speaker\_2: Oh, also, um... Sorry, also, uh, short-term disability. That looks good too.

Speaker speaker\_1: Okay. Um, what is the last four of your Social?

Speaker speaker\_2: 6030.

Speaker speaker\_1: And your first and last name?

Speaker speaker\_2: Michael Brehm. So last name is B as in boy, R-E-H, M as in Mary.

Speaker speaker\_1: Okay. Do you mind verifying your address and date of birth?

Speaker speaker\_2: My address is 40W420 Apache Lane in Huntley, Illinois. The ZIP code is 60142.

Speaker speaker\_1: And your date of birth?

Speaker speaker\_2: January 31, 1968.

Speaker speaker\_1: Okay. And then, let's see, phone number is 224-430-4533?

Speaker speaker\_2: That's right.

Speaker speaker\_1: All right. And then email's gonna be, uh, mjyourlastname@gmail.com.

Speaker speaker\_2: That's right.

Speaker speaker\_1: Okay, give me just a few seconds. Okay. So it was vision, term life and the short-term disability?

Speaker speaker\_2: That's right. Yeah.

Speaker speaker\_1: Okay. And are you just wanting to do that for employee only?

Speaker speaker\_2: Uh, employee plus spouse.

Speaker speaker\_1: Okay. So I can do the term life and the vision for employee plus spouse, but the short-term disability would just be for employee only. Is that okay?

Speaker speaker\_2: Yeah, that's fine.

Speaker speaker\_1: Okay. Um, and is that everything?

Speaker speaker\_2: That's it, yeah.

Speaker speaker\_1: Okay. So-

Speaker speaker\_2: So is possible that, um... If I change my mind about dental, is it possible to call back and add it later within the enrollment period?

Speaker speaker\_1: Yeah, as long as the company is still within the, uh, open enrollment period you should be able to add it on.

Speaker speaker\_2: Okay. Thanks.

Speaker speaker\_1: Yeah. Um, so it looks like in total it would be \$10.85 a week.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Um, so if... With this, uh, the coverage would be effective the earliest the 6th of January.

Speaker speaker\_2: All right.

Speaker speaker\_1: As long as the deduction is made out of your check the week before.

Speaker speaker\_2: All right. That's good. Yeah.

Speaker speaker\_1: Um, let's see.

Speaker speaker\_2: I im- I imagine, right, these are automatic deductions? I won't have to worry about it, it's just gonna happen and then the plan's effective on the 6th?

Speaker speaker\_1: Yep. Um, I was just letting you know, uh, s- sometimes, depending on the situation, the coverage becomes, uh, active sooner. But, um-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... with us just being open enrollment, the earliest it would be effective is the 6th of, uh, January.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Um, let's see. And then let me go ahead and get your spouse's information so I can get them listed. Uh, what's their first and last name?

Speaker speaker\_2: First and last name is Deborah, D-E-B-O-R-A-H. And their last name is same as mine, Brehm.

Speaker speaker\_1: Let me make sure I spell the first name correctly. D-E-B-O-R... Oh, I'm sorry, R-O-A-H.

Speaker speaker\_2: Yeah, D-E-B-O-R-A-H, yep. Deborah.

Speaker speaker\_1: Oh, okay. Sorry about that. D-E-B-O-R-A-H.

Speaker speaker\_2: That's correct.

Speaker speaker\_1: All right, and then date of birth?

Speaker speaker\_2: Date of birth is January 7, 1970.

Speaker speaker\_1: And then full Social.

Speaker speaker\_2: Right, 383-84-7734.

Speaker speaker\_1: And then who did you want to name as the beneficiary for the term life?

Speaker speaker\_2: Uh, Deborah.

Speaker speaker\_1: All right. All righty. So I went ahead and submitted the request to have you enrolled. And then was there anything else you might need help with?

Speaker speaker\_2: Um, that's all for today, thank you.

Speaker speaker\_1: You're welcome. Um, and then just... I remembered one thing. Um, so once the coverage does become active, specifically for the vision, your ID card will be made and sent to you within seven to ten business days.

Speaker speaker\_2: All right. Sounds good.

Speaker speaker\_1: Yes, sir. You have a wonderful day.

Speaker speaker\_2: Thank you. This is great. It's super easy. Thank you so much for your help.

Speaker speaker\_1: Yes, sir. Have a good day.

Speaker speaker\_2: Bye.