

Transcript: VICTORIA

Taylor-5280631311482880-6178752593838080

Full Transcript

Thank you for calling Benefits on a Card. This is Victoria. How can I help you? Yes, my name's Leonard Schultz. Uh, it said I had 30 days to opt ou- opt out of the benefit plan, the health insurance, and I'd like to do that. Okay. Uh, what's the name of the agency you work for? Surge. All right. And the last four of your Social? 6843. And your first and last name, again? Leonard Schultz. L-E-O-N-A-R-D S-C-H-U-L-T-Z. Do you mind verifying your address and date of birth? 423 Sunshine Lane, Fernley, Nevada 89408 and 6-24-1966. And phone number is 775-741-1909? Correct. Okay. Email is l-e-n-s-30@sbcglobal.net. Correct. All righty. I will go ahead and decline it and you're good to go from here. All right, I appreciate it. Thank you. I, I guess I have one other question. Yes, sure. Like, so I'm covered under my wife's, but if for some reason she would be let go, I'm able to, you guys have that special, uh, uh, ch- life event that I could add everybody if I had to? Um, so we do have a, a process called a qualifying life event. Um, that is something that you would have to report to us within 30 days of the event. Um- Okay. ... and I know that one of the events is, um, involuntary loss of benefits, which in that case, um, let me see if I could pull it up. Okay. So with the loss of benefits, it must be involuntary. Um, so we would need a letter of credible coverage or any document showing the start and the end date of the coverage along with the involuntary reason why you're no longer covered. And that would come, that would be something that you would have to get from the previous insurance carrier. Um- Okay. ... and we have a, I can go ahead and just send you the email so you have it for future reference, you know, if something like that- Okay. ... does occur. I'm, I'm not for- You- How do I wanna say? I'm not expecting it, but, you know, where she's worked, they've been doing layoffs lately and just wanna make sure- Okay. ... that, that is an option for us. All right. Well, thank you very much- Yes, um- ... for your time. You're welcome. So- I'm gonna go ahead and send it to you. Um, if that is something that, you know, pops up, just reply back to the email with the documentation that it's asking for. It would then be reviewed, um, and either, you know, who, either I or someone else would follow up with you to let you know if it's been approved or not. Okay. All right. Thank you. You're welcome. Have a good day. You too. Bye. Bye-bye.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits on a Card. This is Victoria. How can I help you?

Speaker speaker_1: Yes, my name's Leonard Schultz. Uh, it said I had 30 days to opt ou- opt out of the benefit plan, the health insurance, and I'd like to do that.

Speaker speaker_0: Okay. Uh, what's the name of the agency you work for?

Speaker speaker_1: Surge.

Speaker speaker_0: All right. And the last four of your Social?

Speaker speaker_1: 6843.

Speaker speaker_0: And your first and last name, again?

Speaker speaker_1: Leonard Schultz. L-E-O-N-A-R-D S-C-H-U-L-T-Z.

Speaker speaker_0: Do you mind verifying your address and date of birth?

Speaker speaker_1: 423 Sunshine Lane, Fernley, Nevada 89408 and 6-24-1966.

Speaker speaker_0: And phone number is 775-741-1909?

Speaker speaker_1: Correct.

Speaker speaker_0: Okay. Email is l-e-n-s-30@sbcglobal.net.

Speaker speaker_1: Correct.

Speaker speaker_0: All righty. I will go ahead and decline it and you're good to go from here.

Speaker speaker_1: All right, I appreciate it. Thank you. I, I guess I have one other question.

Speaker speaker_0: Yes, sure.

Speaker speaker_1: Like, so I'm covered under my wife's, but if for some reason she would be let go, I'm able to, you guys have that special, uh, uh, ch- life event that I could add everybody if I had to?

Speaker speaker_0: Um, so we do have a, a process called a qualifying life event. Um, that is something that you would have to report to us within 30 days of the event. Um-

Speaker speaker_1: Okay.

Speaker speaker_0: ... and I know that one of the events is, um, involuntary loss of benefits, which in that case, um, let me see if I could pull it up. Okay. So with the loss of benefits, it must be involuntary. Um, so we would need a letter of credible coverage or any document showing the start and the end date of the coverage along with the involuntary reason why you're no longer covered. And that would come, that would be something that you would have to get from the previous insurance carrier. Um-

Speaker speaker_1: Okay.

Speaker speaker_0: ... and we have a, I can go ahead and just send you the email so you have it for future reference, you know, if something like that-

Speaker speaker_1: Okay.

Speaker speaker_0: ... does occur.

Speaker speaker_1: I'm, I'm not for-

Speaker speaker_0: You-

Speaker speaker_1: How do I wanna say? I'm not expecting it, but, you know, where she's worked, they've been doing layoffs lately and just wanna make sure-

Speaker speaker_0: Okay.

Speaker speaker_1: ... that, that is an option for us. All right. Well, thank you very much-

Speaker speaker_0: Yes, um-

Speaker speaker_1: ... for your time.

Speaker speaker_0: You're welcome.

Speaker speaker_1: So-

Speaker speaker_0: I'm gonna go ahead and send it to you. Um, if that is something that, you know, pops up, just reply back to the email with the documentation that it's asking for. It would then be reviewed, um, and either, you know, who, either I or someone else would follow up with you to let you know if it's been approved or not.

Speaker speaker_1: Okay. All right. Thank you.

Speaker speaker_0: You're welcome. Have a good day.

Speaker speaker_1: You too. Bye.

Speaker speaker_0: Bye-bye.