

## **Transcript: VICTORIA**

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### **Full Transcript**

Thank you for calling Benefits on Guard. This is Victoria. How can I help you? Hi, I was just calling, um, I was trying to figure out how, like, I can apply, if there's a website or do I just talk to someone. I want to look at, like, your plans and all that. Okay. What's the name of the agency you work for? Uh, Partners Personnel right now. Okay, uh, give me one second. Yeah, I'm not sure if I'm in time still but it's 'cause I, uh, I just turned 26 in January so I have to get my own..... and all that. Okay, I know you could definitely do it over the phone with us. Okay. Um, and it looks like you can do it online as well. Um, now are you a new hire with Partners Personnel? Um, I've worked with them a couple years ago and then recently I, I got hired again through them back in, I believe October is when I started again, of last year. Okay, so let me pull up your file. What's the last four of your Social? 5924. And your first and last name? Daniel D-N-Levin. All right. Do you mind verifying your address and date of birth? Yeah. 2565 Robb Street, Palmdale, California 92332. Okay. And, uh, my birthday is January 26th, 1999. All right. Phone number 559-596-8636? Yes. And then email is just gonna be danielv126.bv@gmail.com? Yes. Okay. So, it looks like you would need to, um, if you decide to enroll with us, you would need to submit what we call a Qualifying Life Event. Yes, yeah. Um, which I believe a loss of benefits is one of those. Um, you only have 30 days from that event to submit the QLE. Mm. Mm. Um, so I will send you some instructions to your email about the Qualifying Life Event and, uh- Okay. ... the documentation you'll need. And then I'm also gonna send you a copy of the Benefits Guide to your email. Okay. Yeah. J- just let me know, um, where I can find that pretty much and get it going. Yeah. Like I said, you can go online and I can give you the website. Okay. Yeah. It's probably gonna be easier for you to call us though because like I said, you're gonna have to submit a- Mommy. ... Qualifying Life Event, so I'm not sure if you'll even be able to, to do it online because the system is showing you're not eligible. No, you should have somebody else answer the computer if you're interested. Okay. Travis says that you have- So, it might be better for you just to call us back once you know what you want to enroll into. And that will be on the website? I'm sorry? And all the, like, your, uh, plans pretty much will be on the website? Well, I'm gonna send the, the Benefits Guide to your email. Oh, okay. The guide. Yeah. The, what I was saying about the website is because since you're technically out of your personal open enrollment period as well as the company's open enrollment period, you're gonna have to submit a Qualifying Life Event. And because of that- Yeah. ... I think that cancel out the option of you being able to enroll online 'cause I don't know that the- Oh. ... online system will show you- So, like a special- ... back up.... eligibility. Yeah. Yeah. I see what you do. Okay. So, I'm gonna send all this information to your email and then like I said, um, follow the instructions for the Qualifying Life Event, submit the documentation it's asking for. Um, and then once we review that, we will follow up with you to let you know if it's been approved or not. Okay. All right. Thank you.

All right. I'll be waiting for that email then. Thank you so much for your time. Yes, sir. You have a wonderful day. You too. Thank you. Bye-bye. Bye-bye.

## Conversation Format

Speaker speaker\_0: Thank you for calling Benefits on Guard. This is Victoria. How can I help you?

Speaker speaker\_1: Hi, I was just calling, um, I was trying to figure out how, like, I can apply, if there's a website or do I just talk to someone. I want to look at, like, your plans and all that.

Speaker speaker\_0: Okay. What's the name of the agency you work for?

Speaker speaker\_1: Uh, Partners Personnel right now.

Speaker speaker\_0: Okay, uh, give me one second.

Speaker speaker\_1: Yeah, I'm not sure if I'm in time still but it's 'cause I, uh, I just turned 26 in January so I have to get my own..... and all that.

Speaker speaker\_0: Okay, I know you could definitely do it over the phone with us.

Speaker speaker\_1: Okay.

Speaker speaker\_0: Um, and it looks like you can do it online as well. Um, now are you a new hire with Partners Personnel?

Speaker speaker\_1: Um, I've worked with them a couple years ago and then recently I, I got hired again through them back in, I believe October is when I started again, of last year.

Speaker speaker\_0: Okay, so let me pull up your file. What's the last four of your Social?

Speaker speaker\_1: 5924.

Speaker speaker\_0: And your first and last name?

Speaker speaker\_1: Daniel D-N-Levin.

Speaker speaker\_0: All right. Do you mind verifying your address and date of birth?

Speaker speaker\_1: Yeah. 2565 Robb Street, Palmdale, California 92332.

Speaker speaker\_0: Okay.

Speaker speaker\_1: And, uh, my birthday is January 26th, 1999.

Speaker speaker\_0: All right. Phone number 559-596-8636?

Speaker speaker\_1: Yes.

Speaker speaker\_0: And then email is just gonna be danielv126.bv@gmail.com?

Speaker speaker\_1: Yes.

Speaker speaker\_0: Okay. So, it looks like you would need to, um, if you decide to enroll with us, you would need to submit what we call a Qualifying Life Event.

Speaker speaker\_1: Yes, yeah.

Speaker speaker\_0: Um, which I believe a loss of benefits is one of those. Um, you only have 30 days from that event to submit the QLE.

Speaker speaker\_1: Mm. Mm.

Speaker speaker\_0: Um, so I will send you some instructions to your email about the Qualifying Life Event and, uh-

Speaker speaker\_1: Okay.

Speaker speaker\_0: ... the documentation you'll need. And then I'm also gonna send you a copy of the Benefits Guide to your email.

Speaker speaker\_1: Okay. Yeah. J- just let me know, um, where I can find that pretty much and get it going.

Speaker speaker\_0: Yeah. Like I said, you can go online and I can give you the website.

Speaker speaker\_1: Okay. Yeah.

Speaker speaker\_0: It's probably gonna be easier for you to call us though because like I said, you're gonna have to submit a-

Speaker speaker\_2: Mommy.

Speaker speaker\_0: ... Qualifying Life Event, so I'm not sure if you'll even be able to, to do it online because the system is showing you're not eligible.

Speaker speaker\_3: No, you should have somebody else answer the computer if you're interested.

Speaker speaker\_1: Okay.

Speaker speaker\_3: Travis says that you have-

Speaker speaker\_0: So, it might be better for you just to call us back once you know what you want to enroll into.

Speaker speaker\_1: And that will be on the website?

Speaker speaker\_0: I'm sorry?

Speaker speaker\_1: And all the, like, your, uh, plans pretty much will be on the website?

Speaker speaker\_0: Well, I'm gonna send the, the Benefits Guide to your email.

Speaker speaker\_1: Oh, okay. The guide.

Speaker speaker\_0: Yeah. The, what I was saying about the website is because since you're technically out of your personal open enrollment period as well as the company's open enrollment period, you're gonna have to submit a Qualifying Life Event. And because of that-

Speaker speaker\_1: Yeah.

Speaker speaker\_0: ... I think that cancel out the option of you being able to enroll online 'cause I don't know that the-

Speaker speaker\_1: Oh.

Speaker speaker\_0: ... online system will show you-

Speaker speaker\_1: So, like a special-

Speaker speaker\_0: ... back up.... eligibility.

Speaker speaker\_1: Yeah. Yeah. I see what you do. Okay.

Speaker speaker\_0: So, I'm gonna send all this information to your email and then like I said, um, follow the instructions for the Qualifying Life Event, submit the documentation it's asking for. Um, and then once we review that, we will follow up with you to let you know if it's been approved or not.

Speaker speaker\_1: Okay. All right. Thank you. All right. I'll be waiting for that email then. Thank you so much for your time.

Speaker speaker\_0: Yes, sir. You have a wonderful day.

Speaker speaker\_1: You too.

Speaker speaker\_0: Thank you. Bye-bye.

Speaker speaker\_1: Bye-bye.