

Transcript: VICTORIA

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Full Transcript

Thank you for calling Benefits on a Card, this is Victoria. How can I help you? Hi, my name is Brandon Roy. Um, I am calling to add a little bit to my plan. Um- Okay. ... it's due by tomorrow, so I just wanted to add, um, I think it was the S- the Standard some sort of Health Care Plan on top of what I already have. Okay. What's the name of the agency you work for? Creative Circle. And the last four of your Social? 3118. Okay. Do you mind verifying your address and date of birth? 97 Barrett Street, Apartment 4C, Brooklyn, New York, 11206, and 1395. Okay, it looks like I have a different address on file. Uh, Spring, Texas- It could be these... Yeah, 38 Compton Manor Drive. Okay, is that a good mailing address? It is. I, I forgot I changed it yesterday for that. Okay. Phone number 281-450-3749? Yes. And then email is first initial at it's a C-A-V-A-L-I-E-R.com? That's right. Okay. Give me one second. Okay, so I see you have the dental, the term life vision, and the MEC TelRx. What were you wanting to add on to that? Um, I'm looking at this plan benefit summaries, and it says like VIP Standard... I think it was called like Ensure something, though. Yeah, we don't offer, uh, VIP plans for them. It, it would be either the Ensure Plus Basics, the Ensure Plus Enhanced or the Ensure Plus Premier. Those are the three different Ensure plans. Um... Let's see. I think they emailed me something yesterday. I don't know why I have that document if it's not right. Um... Let's see. Insure... Oh, here we go. One second, let me just figure out which one I want to do. Okay. Okay, I'd like to do the Ensure Plus. All right. And then, uh, the dental term life and vision bundle and the MEC TelRx? Um, yeah, that's right. All of this being for employee only? Yes. Okay. So you're looking at a total of \$40.74 a week. Sorry, how much? \$40.74 a week. Okay. Um, now did the priv- previous representative go over Section 125 with you? Possibly. Okay. So, Section 125 is basically in the IRS code, um, that allows you to pay your share of the premium with pre-tax dollars. Because of that, they do put stipulations on when you're able to change or cancel plans under that code, um, which the MEC TelRx is the only plan that's under that code. Mm-hmm. So, of course you have the remainder of your personal open enrollment period which does end, uh, by the end of this week, March 7th, Friday. Um, so you have until then to make any changes or cancellations. After that time is up, the only time you'll be able to change or cancel the MEC TelRx is during the company's open enrollment period that they have yearly. Mm-hmm. Unless you experience- Yeah, I'm aware of this in December. Okay. Um, yeah, so the, the only other time would be during the company's open enrollment period unless you experience a qualifying life event. Mm-hmm. All righty. Well, I will go ahead and make the changes needed. Uh, was there anything else maybe that you had questions on? Um, can I add beneficiaries, like more than one? Yes. Um, the way that we would do that is it would all have to come out to 100%. So like if you did two, I would have to do 50% for one and 50% for the other. Um... Okay. Um... Yeah, I mean, it's just like my mom and dad. Like I don't know what people usually do. Okay. I mean, like I said, if you want to add both, I can do

50/50. Um, eh, I mean, you can just... I mean... You can just leave it how it is. Okay. Was there anything else? Um, that's it. All righty. You have a wonderful day. Thank you. Thank you. 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: Hi, my name is Brandon Roy. Um, I am calling to add a little bit to my plan. Um-

Speaker speaker_0: Okay.

Speaker speaker_1: ... it's due by tomorrow, so I just wanted to add, um, I think it was the S-the Standard some sort of Health Care Plan on top of what I already have.

Speaker speaker_0: Okay. What's the name of the agency you work for?

Speaker speaker_1: Creative Circle.

Speaker speaker_0: And the last four of your Social?

Speaker speaker_1: 3118.

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

Speaker speaker_1: 97 Barrett Street, Apartment 4C, Brooklyn, New York, 11206, and 1395.

Speaker speaker_0: Okay, it looks like I have a different address on file. Uh, Spring, Texas-

Speaker speaker_1: It could be these... Yeah, 38 Compton Manor Drive.

Speaker speaker_0: Okay, is that a good mailing address?

Speaker speaker_1: It is. I, I forgot I changed it yesterday for that.

Speaker speaker_0: Okay. Phone number 281-450-3749?

Speaker speaker_1: Yes.

Speaker speaker_0: And then email is first initial at it's a C-A-V-A-L-I-E-R.com?

Speaker speaker_1: That's right.

Speaker speaker_0: Okay. Give me one second. Okay, so I see you have the dental, the term life vision, and the MEC TelRx. What were you wanting to add on to that?

Speaker speaker_1: Um, I'm looking at this plan benefit summaries, and it says like VIP Standard... I think it was called like Ensure something, though.

Speaker speaker_0: Yeah, we don't offer, uh, VIP plans for them. It, it would be either the Ensure Plus Basics, the Ensure Plus Enhanced or the Ensure Plus Premier. Those are the three different Ensure plans.

Speaker speaker_1: Um... Let's see. I think they emailed me something yesterday. I don't know why I have that document if it's not right. Um... Let's see. Insure... Oh, here we go. One second, let me just figure out which one I want to do.

Speaker speaker_0: Okay.

Speaker speaker_1: Okay, I'd like to do the Ensure Plus.

Speaker speaker_0: All right. And then, uh, the dental term life and vision bundle and the MEC TelRx?

Speaker speaker_1: Um, yeah, that's right.

Speaker speaker_0: All of this being for employee only?

Speaker speaker_1: Yes.

Speaker speaker_0: Okay. So you're looking at a total of \$40.74 a week.

Speaker speaker_1: Sorry, how much?

Speaker speaker_0: \$40.74 a week.

Speaker speaker_1: Okay.

Speaker speaker_0: Um, now did the previous representative go over Section 125 with you?

Speaker speaker_1: Possibly.

Speaker speaker_0: Okay. So, Section 125 is basically in the IRS code, um, that allows you to pay your share of the premium with pre-tax dollars. Because of that, they do put stipulations on when you're able to change or cancel plans under that code, um, which the MEC TelRx is the only plan that's under that code.

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: So, of course you have the remainder of your personal open enrollment period which does end, uh, by the end of this week, March 7th, Friday. Um, so you have until then to make any changes or cancellations. After that time is up, the only time you'll be able to change or cancel the MEC TelRx is during the company's open enrollment period that they have yearly.

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: Unless you experience-

Speaker speaker_1: Yeah, I'm aware of this in December.

Speaker speaker_0: Okay. Um, yeah, so the, the only other time would be during the company's open enrollment period unless you experience a qualifying life event.

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: All righty. Well, I will go ahead and make the changes needed. Uh, was there anything else maybe that you had questions on?

Speaker speaker_1: Um, can I add beneficiaries, like more than one?

Speaker speaker_0: Yes. Um, the way that we would do that is it would all have to come out to 100%. So like if you did two, I would have to do 50% for one and 50% for the other.

Speaker speaker_1: Um... Okay. Um... Yeah, I mean, it's just like my mom and dad. Like I don't know what people usually do.

Speaker speaker_0: Okay. I mean, like I said, if you want to add both, I can do 50/50.

Speaker speaker_1: Um, eh, I mean, you can just... I mean... You can just leave it how it is.

Speaker speaker_0: Okay. Was there anything else?

Speaker speaker_1: Um, that's it.

Speaker speaker_0: All righty. You have a wonderful day.

Speaker speaker_1: Thank you.

Speaker speaker_0: Thank you. Bye-bye.