

## **Transcript: VICTORIA**

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### **Full Transcript**

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits and a Card. This is Victoria. How can I help you? Hi, Victoria. Um, I was calling to know about upgrading my, um, current pay- uh, current plan. Okay. Uh, what's the name of the agency you work for? Uh, I work for Surge. And, uh, the last four of your Social? That would be 7694. And your first and last name? Uh, first name, Craig, last name Gilmour. Do you mind verifying your address and date of birth? Sure. It's, uh, 211 Wilson Street as the address, Newark, Ohio. And, um, my date of birth is October 25th, 1996. Phone number is 740-281-6484? Yep, yep. Okay. And then email is G-R-Y-A-N-T-2-9@gmail.com? That'd be correct. Okay. Um, so I don't see that you're eligible at this time to upgrade. Um, it looks like you're outside of your personal open enrollment period. Um, and currently, Surge Staffing is not in a open enrollment period. They typically have that, uh, during August of every t- year. Yeah. Okay. Um... Okay. I gotcha. Um, so once the open enrollment starts, you'll definitely be able to make upgrades to your plan. The only other way that you can do so, um, is if you've recently experienced a qualifying life event within the last 30 days. Well, I'm going under, um... They're gonna put me in the hospital, and they're gonna put me under, so they can, like, put a camera down my throat if that, like, qualifies. Um, so the different life events- I don't know if that would. ... that would qualify, um, is, I know, uh, involuntary loss of benefits. Um... Give me one second. I'm trying to pull it up. Okay. So involuntary loss of benefits, marriage, divorce, death, then being named as a legal guardian, qualifying of government assistance, loss of government assistant benefits, and being eligible for new benefits are the different life events. Um, okay. Well, I definitely appreciate the help. Yes, sir. You have a wonderful day. Thank you.

### **Conversation Format**

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Benefits and a Card. This is Victoria. How can I help you?

Speaker speaker\_2: Hi, Victoria. Um, I was calling to know about upgrading my, um, current pay- uh, current plan.

Speaker speaker\_1: Okay. Uh, what's the name of the agency you work for?

Speaker speaker\_2: Uh, I work for Surge.

Speaker speaker\_1: And, uh, the last four of your Social?

Speaker speaker\_2: That would be 7694.

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

Speaker speaker\_2: Uh, first name, Craig, last name Gilmour.

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

Speaker speaker\_2: Sure. It's, uh, 211 Wilson Street as the address, Newark, Ohio. And, um, my date of birth is October 25th, 1996.

Speaker speaker\_1: Phone number is 740-281-6484?

Speaker speaker\_2: Yep, yep.

Speaker speaker\_1: Okay. And then email is G-R-Y-A-N-T-2-9@gmail.com?

Speaker speaker\_2: That'd be correct.

Speaker speaker\_1: Okay. Um, so I don't see that you're eligible at this time to upgrade. Um, it looks like you're outside of your personal open enrollment period. Um, and currently, Surge Staffing is not in a open enrollment period. They typically have that, uh, during August of every t- year.

Speaker speaker\_2: Yeah. Okay. Um... Okay. I gotcha.

Speaker speaker\_1: Um, so once the open enrollment starts, you'll definitely be able to make upgrades to your plan. The only other way that you can do so, um, is if you've recently experienced a qualifying life event within the last 30 days.

Speaker speaker\_2: Well, I'm going under, um... They're gonna put me in the hospital, and they're gonna put me under, so they can, like, put a camera down my throat if that, like, qualifies.

Speaker speaker\_1: Um, so the different life events-

Speaker speaker\_2: I don't know if that would.

Speaker speaker\_1: ... that would qualify, um, is, I know, uh, involuntary loss of benefits. Um... Give me one second. I'm trying to pull it up. Okay. So involuntary loss of benefits, marriage, divorce, death, then being named as a legal guardian, qualifying of government assistance, loss of government assistant benefits, and being eligible for new benefits are the different life events.

Speaker speaker\_2: Um, okay. Well, I definitely appreciate the help.

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

Speaker speaker\_2: Thank you.