

Transcript: Chris Sofield

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Card. This is Chris. How can I help you today? Well, I was calling for, uh, the... enrolling benefits for me and my daughter. Okay. What staffing company do you work with? Uh, Partners Personnel out of Chattanooga, Tennessee. Okay. And the last four of your Social? 4045. All right. Your first and last name? Christopher Roll. All right, Mr. Roll. Could you verify your address and your date of birth for me, please? My address is 158 Roxbury Circle, Dickson, Tennessee. The zip code is 37343. All right. And your date of birth? August the 7th, 1982. Thank you. Phone on file I have is 876-3153. Is that correct? Correct. All right. And did you have an idea of what kind of insurance you wanted to enroll into, sir? Uh, it was just medical insurance for me and my daughter. That's it. Just medical, nothing else? Nothing else. All right. You've got a couple of options for medical. Um, there's, uh, five plans available. There's the StayHealthy TeleRX plan, which covers preventative care services only, so things like physicals, vaccines, cancer screenings, and the like. But, like, doctor's visits if you're sick or anything like that are not covered by the plan. Um, and this also includes a membership to the FreeRx program for prescription coverage. Uh, then there's the VIP plans. There's three levels of this plan: Standard, Plus, and Prime. Um, these plans will cover doctor's visits if you're sick, or hospitalizations if you're injured or anything like that, um, with the higher level you select giving you higher coverage on the... on the services rendered. However, these plans will not cover those preventative care services, so, like, vaccines and cancer screenings and physicals and things like that are not covered by those plans. Um, finally, there's the StayHealthy Enhanced plan, which is kind of a combination plan. This plan will cover, uh, more along, like... This will cover the, uh, m- preventative care bi-... uh, services that StayHealthy TeleRX will cover, so like the physicals, vaccines, et cetera, on top of the re-standard, uh, doctor's visits if you get sick, or hospitalizations if you're injured or need surgery or anything like that. Uh, I just need, uh... I guess just the basic level for right now, to be honest with you. Okay. So that would be... That could be either the StayHealthy TeleRX preventative only, or the VIP Standard, uh, which is doctors and hospitals but no preventative care. Um, either one of those could be considered a basic-level plan. Well, uh, preventative care is fine. Preventative care? Okay. All right. Yeah. So that plan for you and your daughter is \$22.39 per week. Do you authorize Partners to make those deductions? Yes. All right. Let's go ahead and get your daughter's information onto the system. What's her first and last name? Her first name is Evelyn, E-V-E-L-Y-N. Mm-hmm. Her middle name is Aubrey, A-U-B-R-E-Y. And her last name is Williams-Rowle. Williams... Is it hyphenated or spaced? Yeah, it's hyphenated. Hyphenated. Just wanted to make sure. Williams, one word, and then... and then the, uh, other hyphen is Rowle. No, I- I understand. I just wanted to make sure, 'cause I know some people hyphenate- Mm-hmm. ... hyphenate combined last names,

some people don't. Um, do you by chance have her Social? Yeah, I do. I got it in my hand right now. All right. It is- Go ahead with that. 024-41-9823. All right. And what's her date of birth? Her date of birth or my date of birth? Uh, hers. Oh, okay. It's August the 28th, 2020. All right. All right, so it's going to take about one to two weeks for the enrollment to process. Once processing is complete- Mm-hmm. ... you should start seeing, uh, you should start seeing those deductions coming out of your checks. Monday following the f- Okay. Uh, Monday following us receiving that first deduction information is when policy becomes effective. ID cards will typically arrive about one to two weeks after the effective date. Please be aware that this plan is known as a Section 125 plan. This is an IRS regulation that allows Partners to make the deduction for the plan pre-tax. Because they allow this to happen, they then require that you stay enrolled into this plan as long as you're an account through Partners. As such, you're only allowed to make changes, uh, during the enrollment windows, either your new hire first 30 days after your first check, or open enrollment once a year, which Partners typically holds in October. Um, outside of those- Okay. ... you are locked to these plans. You're not allowed to make any changes or cancel them unless you have a qualifying life event, something like getting married, having another child, or getting... or getting an insurance policy from another insurance company entirely. Any questions regarding that? Nope, that's all. All right. Well, I've got everything I needed to set up for your enrollment. We've got that taken care of. Was there anything else I can help you with? That's all. Thank you. You're very welcome. Thanks again for calling, and have a wonderful day. You, too. Bye. Bye, now.

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 Chris. How can I help you today?

Speaker speaker_2: Well, I was calling for, uh, the... enrolling benefits for me and my daughter.

Speaker speaker_1: Okay. What staffing company do you work with?

Speaker speaker_2: Uh, Partners Personnel out of Chattanooga, Tennessee.

Speaker speaker_1: Okay. And the last four of your Social?

Speaker speaker_2: 4045.

Speaker speaker_1: All right. Your first and last name?

Speaker speaker_2: Christopher

Speaker speaker_3: Roll.

Speaker speaker_1: All right, Mr. Roll. Could you verify your address and your date of birth for me, please?

Speaker speaker_2: My address is 158 Roxbury Circle, Dickson, Tennessee. The zip code is 37343.

Speaker speaker_1: All right. And your date of birth?

Speaker speaker_2: August the 7th, 1982.

Speaker speaker_1: Thank you. Phone on file I have is 876-3153. Is that correct?

Speaker speaker_2: Correct.

Speaker speaker_1: All right. And did you have an idea of what kind of insurance you wanted to enroll into, sir?

Speaker speaker_2: Uh, it was just medical insurance for me and my daughter. That's it.

Speaker speaker_1: Just medical, nothing else?

Speaker speaker_2: Nothing else.

Speaker speaker_1: All right. You've got a couple of options for medical. Um, there's, uh, five plans available. There's the StayHealthy TeleRX plan, which covers preventative care services only, so things like physicals, vaccines, cancer screenings, and the like. But, like, doctor's visits if you're sick or anything like that are not covered by the plan. Um, and this also includes a membership to the FreeRx program for prescription coverage. Uh, then there's the VIP plans. There's three levels of this plan: Standard, Plus, and Prime. Um, these plans will cover doctor's visits if you're sick, or hospitalizations if you're injured or anything like that, um, with the higher level you select giving you higher coverage on the... on the services rendered. However, these plans will not cover those preventative care services, so, like, vaccines and cancer screenings and physicals and things like that are not covered by those plans. Um, finally, there's the StayHealthy Enhanced plan, which is kind of a combination plan. This plan will cover, uh, more along, like... This will cover the, uh, m- preventative care bi-... uh, services that StayHealthy TeleRX will cover, so like the physicals, vaccines, et cetera, on top of the re-standard, uh, doctor's visits if you get sick, or hospitalizations if you're injured or need surgery or anything like that.

Speaker speaker_2: Uh, I just need, uh... I guess just the basic level for right now, to be honest with you.

Speaker speaker_1: Okay. So that would be... That could be either the StayHealthy TeleRX preventative only, or the VIP Standard, uh, which is doctors and hospitals but no preventative care. Um, either one of those could be considered a basic-level plan.

Speaker speaker_2: Well, uh, preh- preventative care is fine.

Speaker speaker_1: Preventative care? Okay. All right.

Speaker speaker_2: Yeah.

Speaker speaker_1: So that plan for you and your daughter is \$22.39 per week. Do you authorize Partners to make those deductions?

Speaker speaker_2: Yes.

Speaker speaker_1: All right. Let's go ahead and get your daughter's information onto the system. What's her first and last name?

Speaker speaker_2: Her first name is Evelyn, E-V-E-L-Y-N.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: Her middle name is Aubrey, A-U-B-R-E-Y. And her last name is Williams-Rowle.

Speaker speaker_1: Williams... Is it hyphenated or spaced?

Speaker speaker_2: Yeah, it's hyphenated.

Speaker speaker_1: Hyphenated. Just wanted to make sure.

Speaker speaker_2: Williams, one word, and then... and then the, uh, other hyphen is Rowle.

Speaker speaker_1: No, I- I understand. I just wanted to make sure, 'cause I know some people hyphenate-

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: ... hyphenate combined last names, some people don't. Um, do you by chance have her Social?

Speaker speaker_2: Yeah, I do. I got in my hand right now.

Speaker speaker_1: All right.

Speaker speaker_2: It is-

Speaker speaker_1: Go ahead with that.

Speaker speaker_2: 024-41-9823.

Speaker speaker_1: All right. And what's her date of birth?

Speaker speaker_2: Her date of birth or my date of birth?

Speaker speaker_1: Uh, hers.

Speaker speaker_2: Oh, okay. It's August the 28th, 2020.

Speaker speaker_1: All right. All right, so it's going to take about one to two weeks for the enrollment to process. Once processing is complete-

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: ... you should start seeing, uh, you should start seeing those deductions coming out of your checks. Monday following the f-

Speaker speaker_2: Okay.

Speaker speaker_1: Uh, Monday following us receiving that first deduction information is when policy becomes effective. ID cards will typically arrive about one to two weeks after the effective date. Please be aware that this plan is known as a Section 125 plan. This is an IRS regulation that allows Partners to make the deduction for the plan pre-tax. Because they allow this to happen, they then require that you stay enrolled into this plan as long as you're an account through Partners. As such, you're only allowed to make changes, uh, during the enrollment windows, either your new hire first 30 days after your first check, or open enrollment once a year, which Partners typically holds in October. Um, outside of those-

Speaker speaker_2: Okay.

Speaker speaker_1: ... you are locked to these plans. You're not allowed to make any changes or cancel them unless you have a qualifying life event, something like getting married, having another child, or getting... or getting an insurance policy from another insurance company entirely. Any questions regarding that?

Speaker speaker_2: Nope, that's all.

Speaker speaker_1: All right. Well, I've got everything I needed to set up for your enrollment. We've got that taken care of. Was there anything else I can help you with?

Speaker speaker_2: That's all. Thank you.

Speaker speaker_1: You're very welcome. Thanks again for calling, and have a wonderful day.

Speaker speaker_2: You, too. Bye.

Speaker speaker_1: Bye, now.