

## Transcript: Chris Sofield

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### Full Transcript

Thank you for calling Benefits on a Card. This is Chris. How can I help you today? Hi. You guys are, you guys work with Partner Personnel, right? Uh, yes, ma'am. Okay. I was just making sure they gave me the right number. Um, I, I wanted to, uh, enroll in some benefits. Okay. What, uh, what's the last four of your Social? 7433. And your first and last name? Victoria Matthews. Thank you, Ms. Matthews. Could you verify your address and your date of birth for me? Address is 2605 Meridian Ave, E, S- 204... Sorry, Edgewood, Washington 98371. And my birthdate is 09/21/1992. Thank you. We have a phone number on file of 270-331-2576. Is that correct? Yes. Yes, sir. Okay. And then we have an email on file of vmatthews123456 at Gmail? Yes. Okay... Okay. And did you have an idea of what you wanted to enroll into? Um, just, uh, dental and, uh, vision. But I wanted it- Oh. ... to do it for me and my partner. Oh, okay. For you and your partner. All right, so dental and vision under... All right, so at the employee and spouse level, that is dental is 6.99 and vision is 4.35 for a total of \$11.34 per week. Do you authorize partners to make those deductions? Yes. Okay. And then let's get their information on here. What's their first and last name? Uh, their first and last name is Felicity, F-e-l-i-c-i-t-y. Mm-hmm. Um, and last name Aaron, A-a-r-o-n. Okay. Do you by chance have her Social? I'm trying to get it, um, through text. Okay. Um, if you need- Um- ... to you can give us a call back with that information. Okay. All right, and then, uh, date of birth? 09/21/1992. All right. Thank you. So it's going to take about one to two weeks for the enrollment process. Once processing is complete, you should start seeing those deductions coming out of your checks. The Monday following us receiving that deduction information is when policy becomes effective. ID cards will typically arrive about a week or two after that effective day, okay? Okay. Um, and then I just- All right. ... need to call back with her, um, date of birth and Social? Uh, just her Social. I was able to get the date of birth from you. Um, but yeah, just give us a call back with her Social, uh, whenever you can. Um, we're here Monday through Friday, 8:00 AM to 8:00 PM Eastern. Oh, she just sent it to me. Sorry. Oh, okay. One moment. Let me get back to that screen, and what is it? It is, uh, 647- Mm-hmm. ... uh, 32- Mm-hmm. ... 7050. Thank you. All right. So then we're good to go. Uh, anything else? Uh, no, that'll be it. Okay. I do apologize real quick. One other thing I do need to make sure you're aware of. Yeah. Um, the dental and vision policies under Partners Personnel are known as Section 125 plans. This is an IRS regulation that allows partners to make the deductions for the plans pre-tax. Um, however, because they allow this, they do then require if you select these plans, you have to stay enrolled into them as long as you're account through Partners. You're only allowed to make any changes to these plans during open enrollment windows. So you're, as a new hire, you have until February 12th to make any final decisions. After February 12th, you're locked into these plans, um, until either open enrollment, which is typically in October, or you, um... No, it's in August, sorry. Typically in August or you have a,

uh, you have a qualifying life event, something like, um, getting, uh, getting divorced, having a child, getting an insurance company pro- or insurance policy from another insurance company, something like that. Um, any questions regarding that? No. All right then. Well, with that said, now, now that I've gone over all of that as well, was there anything else I can help with? Um, th- that, that insurance, the, the dental and the vision, you guys just offer the one plan? There's no, like, basic or, uh, you know, any couple of options? Yes, correct. Unfortunately, there's only a single dental and a single vision plan available. Okay. I just always want to ask because, uh, some companies they have multiple. So I- Right. ... just want to know that. Yeah. No, uh, unfortunately, it's not the case here. There's only the single of each type. But, but I do know that, yeah, some- some places do have options. That's just not the case here. Yeah. A- anything's better than a- nothing, you know? I'm good with it. All right then. Well, that's everything, Ms. Matthews. Thanks again for calling. You have a wonderful day. You too. Thank you. You're welcome. Bye now.

## Conversation Format

Speaker speaker\_0: Thank you for calling Benefits on a Card. This is Chris. How can I help you today?

Speaker speaker\_1: Hi. You guys are, you guys work with Partner Personnel, right?

Speaker speaker\_0: Uh, yes, ma'am.

Speaker speaker\_1: Okay. I was just making sure they gave me the right number. Um, I, I wanted to, uh, enroll in some benefits.

Speaker speaker\_0: Okay. What, uh, what's the last four of your Social?

Speaker speaker\_1: 7433.

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

Speaker speaker\_1: Victoria Matthews.

Speaker speaker\_0: Thank you, Ms. Matthews. Could you verify your address and your date of birth for me?

Speaker speaker\_1: Address is 2605 Meridian Ave, E, S- 204... Sorry, Edgewood, Washington 98371. And my birthdate is 09/21/1992.

Speaker speaker\_0: Thank you. We have a phone number on file of 270-331-2576. Is that correct?

Speaker speaker\_1: Yes. Yes, sir.

Speaker speaker\_0: Okay. And then we have an email on file of vmatthews123456 at Gmail?

Speaker speaker\_1: Yes.

Speaker speaker\_0: Okay... Okay. And did you have an idea of what you wanted to enroll into?

Speaker speaker\_1: Um, just, uh, dental and, uh, vision. But I wanted it-

Speaker speaker\_0: Oh.

Speaker speaker\_1: ... to do it for me and my partner.

Speaker speaker\_0: Oh, okay. For you and your partner. All right, so dental and vision under... All right, so at the employee and spouse level, that is dental is 6.99 and vision is 4.35 for a total of \$11.34 per week. Do you authorize partners to make those deductions?

Speaker speaker\_1: Yes.

Speaker speaker\_0: Okay. And then let's get their information on here. What's their first and last name?

Speaker speaker\_1: Uh, their first and last name is Felicity, F-e-l-i-c-i-t-y.

Speaker speaker\_0: Mm-hmm.

Speaker speaker\_1: Um, and last name Aaron, A-a-r-o-n.

Speaker speaker\_0: Okay. Do you by chance have her Social?

Speaker speaker\_1: I'm trying to get it, um, through text.

Speaker speaker\_0: Okay. Um, if you need-

Speaker speaker\_1: Um-

Speaker speaker\_0: ... to you can give us a call back with that information.

Speaker speaker\_1: Okay.

Speaker speaker\_0: All right, and then, uh, date of birth?

Speaker speaker\_1: 09/21/1992.

Speaker speaker\_0: All right. Thank you. So it's going to take about one to two weeks for the enrollment process. Once processing is complete, you should start seeing those deductions coming out of your checks. The Monday following us receiving that deduction information is when policy becomes effective. ID cards will typically arrive about a week or two after that effective day, okay?

Speaker speaker\_1: Okay. Um, and then I just-

Speaker speaker\_0: All right.

Speaker speaker\_1: ... need to call back with her, um, date of birth and Social?

Speaker speaker\_0: Uh, just her Social. I was able to get the date of birth from you. Um, but yeah, just give us a call back with her Social, uh, whenever you can. Um, we're here Monday

through Friday, 8:00 AM to 8:00 PM Eastern.

Speaker speaker\_1: Oh, she just sent it to me. Sorry.

Speaker speaker\_0: Oh, okay. One moment. Let me get back to that screen, and what is it?

Speaker speaker\_1: It is, uh, 647-

Speaker speaker\_0: Mm-hmm.

Speaker speaker\_1: ... uh, 32-

Speaker speaker\_0: Mm-hmm.

Speaker speaker\_1: ... 7050.

Speaker speaker\_0: Thank you. All right. So then we're good to go. Uh, anything else?

Speaker speaker\_1: Uh, no, that'll be it.

Speaker speaker\_0: Okay. I do apologize real quick. One other thing I do need to make sure you're aware of.

Speaker speaker\_1: Yeah.

Speaker speaker\_0: Um, the dental and vision policies under Partners Personnel are known as Section 125 plans. This is an IRS regulation that allows partners to make the deductions for the plans pre-tax. Um, however, because they allow this, they do then require if you select these plans, you have to stay enrolled into them as long as you're account through Partners. You're only allowed to make any changes to these plans during open enrollment windows. So you're, as a new hire, you have until February 12th to make any final decisions. After February 12th, you're locked into these plans, um, until either open enrollment, which is typically in October, or you, um... No, it's in August, sorry. Typically in August or you have a, uh, you have a qualifying life event, something like, um, getting, uh, getting divorced, having a child, getting an insurance company pro- or insurance policy from another insurance company, something like that. Um, any questions regarding that?

Speaker speaker\_1: No.

Speaker speaker\_0: All right then. Well, with that said, now, now that I've gone over all of that as well, was there anything else I can help with?

Speaker speaker\_1: Um, th- that, that insurance, the, the dental and the vision, you guys just offer the one plan? There's no, like, basic or, uh, you know, any couple of options?

Speaker speaker\_0: Yes, correct. Unfortunately, there's only a single dental and a single vision plan available.

Speaker speaker\_1: Okay. I just always want to ask because, uh, some companies they have multiple. So I-

Speaker speaker\_0: Right.

Speaker speaker\_1: ... just want to know that.

Speaker speaker\_0: Yeah. No, uh, unfortunately, it's not the case here. There's only the single of each type. But, but I do know that, yeah, some- some places do have options. That's just not the case here.

Speaker speaker\_1: Yeah. A- anything's better than a- nothing, you know? I'm good with it.

Speaker speaker\_0: All right then. Well, that's everything, Ms. Matthews. Thanks again for calling. You have a wonderful day.

Speaker speaker\_1: You too. Thank you.

Speaker speaker\_0: You're welcome. Bye now.