

## 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 and a Card. This is Chris. How can I help you today? Uh, my name is Ashon Smith. Uh, I had recently received a call. I was no long- or at the time I was not around my phone, but I had recently received a call about, um, my benefits of me and adding a kid, and you guys didn't have the full information for it. Okay. Yeah, uh, sounds like we had received an enrollment form that you'd filled out, but we're- Yeah. ... but we're missing some information to, uh, move forward with it. Let me pull your file up and see what we need to get from you. What staffing company do you work with? Uh, I just know it's... I just started. I, or just started. I didn't, haven't even started working yet, but I believe it's for the Workforce in Illinois, uh, for Walmart or something like that. I'm gonna have to look at the email. Okay. Yeah, un- uh, unfortunately I need, I need to know the a- the name of the staffing company in order to pull up any sort of file to see what exactly we were missing. Um, you said Work... Is, is it Work Source or Focus Workforce or the- Oh, Focus, Focus Work. Focus Workforce. Okay. All right. What's the last four of your Social, sir? Say that again? What's the last four of your Social? 1352. And your first and last name? Ashon Smith. Ashon Smith. Got it. Mr. Smith, can you verify your address and your date of birth for me please? 3400 Bryan Avenue North, Minneapolis, Minnesota 55412. Um, birthday 07/01/1994. Thank you. Phone on file is 612-441-0350? Yes. All right. One moment. Okay. Yeah, so what it was was that we had seen you had set up enrollment, um, for employee and child or employee and children- Mm-hmm. ... but we were missing your children's information to get them added on to the policy properly. So we just needed to verify, uh, what... Verify their information to be able to get them added. Give me just- Okay. ... a moment and I should be able to... Sorry, go ahead. I was gonna say, what type of information do you need? Uh, we would need first and last name, date of birth and Social Security number. Um, okay. I, I would have to try to either find it or get the Social Security number and then we'll go from there, but... Okay. Um, what we can do is, uh, in the meantime, as long as we have the date of birth and the name, we can get them added on and you can give us a call back with the Social later on. Okay. All right. One moment. All right. Let's go ahead and move forward with this. Um, and then what, uh... How many children are you covering? Uh, for right now I'm gonna cover one, and I do have more that I do want to cover, but I would have to get all their information. Okay. That's fine. Um, the- but let's go ahead and get the, uh, the one that you, that you want to add now. What's their first and last name? Alayah Smith. A-L-A-Y-I-A-H Smith. All right. And then what's her date of birth? Uh, 05... 05/08/2014. All right. Okay. So that- And that's it. ... that's, uh, at minimum what we need to be able to add any, any dependents onto the plan. Um- Okay. But like I said, whenever you, whenever you do have Alayah's Social, just give us a call back. We can, uh, we can go ahead and add it later on. And then any, um, other dependents that you want to add, you've got 30

days from the date of your first paycheck to do so. Um- Okay. So anytime during that timeframe you can always give us a call to add any further dependents. Okay? Okay. All right. Anything else? Uh, nope, that's it. All right. Thanks again for calling and have a wonderful day. Thank you. You too. You're welcome. 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 and a Card. This is Chris. How can I help you today?

Speaker speaker\_2: Uh, my name is Ashon Smith. Uh, I had recently received a call. I was no long- or at the time I was not around my phone, but I had recently received a call about, um, my benefits of me and adding a kid, and you guys didn't have the full information for it.

Speaker speaker\_1: Okay. Yeah, uh, sounds like we had received an enrollment form that you'd filled out, but we're-

Speaker speaker\_2: Yeah.

Speaker speaker\_1: ... but we're missing some information to, uh, move forward with it. Let me pull your file up and see what we need to get from you. What staffing company do you work with?

Speaker speaker\_2: Uh, I just know it's... I just started. I, or just started. I didn't, haven't even started working yet, but I believe it's for the Workforce in Illinois, uh, for Walmart or something like that. I'm gonna have to look at the email.

Speaker speaker\_1: Okay. Yeah, un- uh, unfortunately I need, I need to know the a- the name of the staffing company in order to pull up any sort of file to see what exactly we were missing. Um, you said Work... Is, is it Work Source or Focus Workforce or the-

Speaker speaker\_2: Oh, Focus, Focus Work.

Speaker speaker\_1: Focus Workforce. Okay. All right. What's the last four of your Social, sir?

Speaker speaker\_2: Say that again?

Speaker speaker\_1: What's the last four of your Social?

Speaker speaker\_2: 1352.

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

Speaker speaker\_2: Ashon Smith.

Speaker speaker\_1: Ashon Smith. Got it. Mr. Smith, can you verify your address and your date of birth for me please?

Speaker speaker\_2: 3400 Bryan Avenue North, Minneapolis, Minnesota 55412. Um, birthday 07/01/1994.

Speaker speaker\_1: Thank you. Phone on file is 612-441-0350?

Speaker speaker\_2: Yes.

Speaker speaker\_1: All right. One moment. Okay. Yeah, so what it was was that we had seen you had set up enrollment, um, for employee and child or employee and children-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... but we were missing your children's information to get them added on to the policy properly. So we just needed to verify, uh, what... Verify their information to be able to get them added. Give me just-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... a moment and I should be able to... Sorry, go ahead.

Speaker speaker\_2: I was gonna say, what type of information do you need?

Speaker speaker\_1: Uh, we would need first and last name, date of birth and Social Security number.

Speaker speaker\_2: Um, okay. I, I would have to try to either find it or get the Social Security number and then we'll go from there, but...

Speaker speaker\_1: Okay. Um, what we can do is, uh, in the meantime, as long as we have the date of birth and the name, we can get them added on and you can give us a call back with the Social later on.

Speaker speaker\_2: Okay.

Speaker speaker\_1: All right. One moment. All right. Let's go ahead and move forward with this. Um, and then what, uh... How many children are you covering?

Speaker speaker\_2: Uh, for right now I'm gonna cover one, and I do have more that I do want to cover, but I would have to get all their information.

Speaker speaker\_1: Okay. That's fine. Um, the- but let's go ahead and get the, uh, the one that you, that you want to add now. What's their first and last name?

Speaker speaker\_2: Alayah Smith. A-L-A-Y-I-A-H Smith.

Speaker speaker\_1: All right. And then what's her date of birth?

Speaker speaker\_2: Uh, 05... 05/08/2014.

Speaker speaker\_1: All right. Okay. So that-

Speaker speaker\_2: And that's it.

Speaker speaker\_1: ... that's, uh, at minimum what we need to be able to add any, any dependents onto the plan. Um-

Speaker speaker\_2: Okay.

Speaker speaker\_1: But like I said, whenever you, whenever you do have Alayah's Social, just give us a call back. We can, uh, we can go ahead and add it later on. And then any, um, other dependents that you want to add, you've got 30 days from the date of your first paycheck to do so. Um-

Speaker speaker\_2: Okay.

Speaker speaker\_1: So anytime during that timeframe you can always give us a call to add any further dependents. Okay?

Speaker speaker\_2: Okay.

Speaker speaker\_1: All right. Anything else?

Speaker speaker\_2: Uh, nope, that's it.

Speaker speaker\_1: All right. Thanks again for calling and have a wonderful day.

Speaker speaker\_2: Thank you. You too.

Speaker speaker\_1: You're welcome. Bye now.