

Transcript: Chris Sofield

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Full Transcript

Your call may be monitored or recorded for quality assurance- Mm-hmm. ... purposes. Thank you for calling Benefits and a Card, this is Chris, how can I help you today? Hi, I wanted to enroll in a plan for, uh, Creative Circle. Okay. What is... What's the last four of your Social to locate your file? Uh, 6468. And your first and last name? Bethanie, B-E-T-H-A-N-I-E, last name's Jones, J-O-N-E-S. All right, Ms. Jones, could you verify your address and your date of birth for me please? Yeah. My address is 115 Thompson Drive, Williamsville, New York, 14221. And my date of birth is 9/9/1997. Thank you. We have a phone on file that looks like 716-343-3297? Yes. That's correct. All right. And did you have an idea of what you wanted to enroll into, ma'am? Um, I, I believe so, yes. All right, and what were we looking at then? Um, I was looking at the Stay Healthy Plan and then adding on, uh, the dental, vision, and term life bundle. Okay. Uh, anything else? Um, I don't think so. I think that's it. All right. So Stay Healthy and then the dental, life, and vision bundle. Um, now is this gonna be all for just yourself or are you covering anyone else? Yes, it's just for me. Got it. All right. This totals out to \$23.48 per week, do you authorize Creative Circle to make those deductions? Yeah. All right. Gonna take about one to two weeks for the enrollment to process, and once processing is complete, you should start seeing deductions coming out of your checks. Monday following first deduction is when policies become effective. ID cards should arrive about one to two weeks after that effective date. Please be aware, the Stay Healthy Plan, uh, is known as a Section 125 plan. This is an IRS regulation that allows Creative Circle to, uh, it allows us to make the deductions of the plan pre-tax. However, because they allow that to happen, they then require that you stay enrolled into the plan, if you select it, as long as you're temp through Creative Circle. Uh, you're only allowed to make dedu- uh, make changes to that plan or even cancel that plan during your open enrollment windows, either, uh, your new hire window, the first 30 days after your first check, or, uh, open enrollment, which Creative Circle, I believe, hol- is holding, uh... Yes, uh, so next month, uh, December 23rd is their open enrollment window. Outside of those windows, you're kind of locked in to the plan. Uh, you're only allowed to make any changes after that with a qualifying life event, something like getting married or divorced, having or adopting a child, or getting insurance from another insurance company. Uh, any questions regarding that? No. All right. And then we do need to note a beneficiary for the life insurance policy, who would you like that to be? Uh, can you put Anita Jones, A-N-I-T-A J-O-N-E-S. All right, and her relationship to you? Uh, mother. Got it. All right. Okay, that's everything I needed to set up your enrollment, um, and everything I needed to go over with you. Did you have any other questions for me? Yeah, I just wanted to know, um, how I'm supposed to look up what's in network and out of network for the plan? Yeah. So for medical, you'll go to multiplan.com. Okay. Uh, for dental, you'll go to ampublic.com. Okay. And for vision, you'll go to metlife.com/mybenefits. Okay. Thank you. You're welcome. Anything

else? Nope, that should do it. All right, 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-

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: ... purposes.

Speaker speaker_2: Thank you for calling Benefits and a Card, this is Chris, how can I help you today?

Speaker speaker_3: Hi, I wanted to enor- enroll in a plan for, uh, Creative Circle.

Speaker speaker_2: Okay. What is... What's the last four of your Social to locate your file?

Speaker speaker_3: Uh, 6468.

Speaker speaker_2: And your first and last name?

Speaker speaker_3: Bethanie, B-E-T-H-A-N-I-E, last name's Jones, J-O-N-E-S.

Speaker speaker_2: All right, Ms. Jones, could you verify your address and your date of birth for me please?

Speaker speaker_3: Yeah. My address is 115 Thompson Drive, Williamsville, New York, 14221. And my date of birth is 9/9/1997.

Speaker speaker_2: Thank you. We have a phone on file that looks like 716-343-3297?

Speaker speaker_3: Yes. That's correct.

Speaker speaker_2: All right. And did you have an idea of what you wanted to enroll into, ma'am?

Speaker speaker_3: Um, I, I believe so, yes.

Speaker speaker_2: All right, and what were we looking at then?

Speaker speaker_3: Um, I was looking at the Stay Healthy Plan and then adding on, uh, the dental, vision, and term life bundle.

Speaker speaker_2: Okay. Uh, anything else?

Speaker speaker_3: Um, I don't think so. I think that's it.

Speaker speaker_2: All right. So Stay Healthy and then the dental, life, and vision bundle. Um, now is this gonna be all for just yourself or are you covering anyone else?

Speaker speaker_3: Yes, it's just for me.

Speaker speaker_2: Got it. All right. This totals out to \$23.48 per week, do you authorize Creative Circle to make those deductions?

Speaker speaker_3: Yeah.

Speaker speaker_2: All right. Gonna take about one to two weeks for the enrollment to process, and once processing is complete, you should start seeing deductions coming out of your checks. Monday following first deduction is when policies become effective. ID cards should arrive about one to two weeks after that effective date. Please be aware, the Stay Healthy Plan, uh, is known as a Section 125 plan. This is an IRS regulation that allows Creative Circle to, uh, it allows us to make the deductions of the plan pre-tax. However, because they allow that to happen, they then require that you stay enrolled into the plan, if you select it, as long as you're temp through Creative Circle. Uh, you're only allowed to make dedu- uh, make changes to that plan or even cancel that plan during your open enrollment windows, either, uh, your new hire window, the first 30 days after your first check, or, uh, open enrollment, which Creative Circle, I believe, hol- is holding, uh... Yes, uh, so next month, uh, December 23rd is their open enrollment window. Outside of those windows, you're kind of locked in to the plan. Uh, you're only allowed to make any changes after that with a qualifying life event, something like getting married or divorced, having or adopting a child, or getting insurance from another insurance company. Uh, any questions regarding that?

Speaker speaker_3: No.

Speaker speaker_2: All right. And then we do need to note a beneficiary for the life insurance policy, who would you like that to be?

Speaker speaker_3: Uh, can you put Anita Jones, A-N-I-T-A J-O-N-E-S.

Speaker speaker_2: All right, and her relationship to you?

Speaker speaker_3: Uh, mother.

Speaker speaker_2: Got it. All right. Okay, that's everything I needed to set up your enrollment, um, and everything I needed to go over with you. Did you have any other questions for me?

Speaker speaker_3: Yeah, I just wanted to know, um, how I'm supposed to look up what's in network and out of network for the plan?

Speaker speaker_2: Yeah. So for medical, you'll go to multiplan.com.

Speaker speaker_3: Okay.

Speaker speaker_2: Uh, for dental, you'll go to ampublic.com.

Speaker speaker_3: Okay.

Speaker speaker_2: And for vision, you'll go to metlife.com/mybenefits.

Speaker speaker_3: Okay. Thank you.

Speaker speaker_2: You're welcome. Anything else?

Speaker speaker_3: Nope, that should do it.

Speaker speaker_2: All right, thanks again for calling and have a wonderful day.

Speaker speaker_3: You too, bye.

Speaker speaker_2: Bye now.