

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? Hey, Chris. Uh, yeah. I just want to enroll in benefits, discuss like- Okay. ... options and that kind of thing. Okay. What staffing company do you work with? Creative Circle. And the last four of your Social? 7580. All right. And then your first and last name? Daniel Sauro. All right, Mr. Sauro, could you verify your address and date of birth for me, please? Yes. My address is 141 East 13th Street, Apartment R3A. And my... What was the other thing? Uh, your date of birth, but I also still need the, uh- Oh. ... rest of the address, the city, state, and zip. Oh. Uh, city, state, zip is New York, New York, uh, 10003. Okay. Um... All right. And then your date of birth? 11-10-86. Okay. And then we have a phone on file of 415-1396? Yeah. Thank you. One moment. Mm-hmm. All right. And did you have an i- any idea of what kind of insurance you wanted to enroll into from Creative Circle? Um, yes. I, I wanted to, like, kind of ask, um, d- are you able to, like, go over options with me? Yeah. So, uh- Sure. ... as far as what they offer, Creative Circle offers, um, four different medical plans. Uh, one which is preventative care only, so good for things like physicals, vaccines, cancer screenings, and things like that. But it's, it wouldn't cover any sort of treatment visits or anything like that. Um, and then three, the Insure Plus plans, Basic, Enhanced, and Premier, which would cover those treatment visits, like doctor's visits, hospital visits, if you're sick or injured or anything like that. Um, with the higher level you select being more coverage for specifically hospitalizations and surgeries. Um, but these plans do not cover any preventative care, so those physicals and vaccines are not covered by Insure Plus. Uh, what you can do if you feel like you need both types of benefit is enroll into both plans at the same time. Um, and then additionally, they offer a bundle for dental, life, and vision, um, a plan for critical illness, a plan for group accident, a plan for behavioral health or therapy c-services. Gotcha. Um, okay. So what is, like, the mo- so, like, I just need, you know... I just, like, want to be covered in case something goes wrong, I guess. What would be the plan for that? I cannot provide any sort of recommendations, unfortunately. We're not allowed to do so. Um- Gotcha. So... Yeah, yeah. Um, not a recommendation, just, like, in terms of, like... Um, like, I just want to get what... Like, I'm... This is, like, a probably a temporary role. It's a freelance position, you know. Um... Right. So, it's not forever and I don't plan on, like, you know, using... It's just basically, like, if something goes catastrophically wrong, God forbid, you know, car accident, something, you know, some kind of... something comes up that's unexpected. I'm young and healthy, whatever. I know you can't give recommendations, but I'm just saying, like, this is the situation for, like, what is... You know, if something were to go wrong and I need to go to the emergency room, or I need to go to, like... you know, get some kind of treatment for, like, some illness or something, uh, what... which plan that you discussed would cover that and how much is it? Uh, so that would be any one of the Insure

Plus plans, Basic, Enhanced, or Premier. Basic is 17.21- Got it. ... a week, Enhanced is 24.38 a week, and Premier is 34.91 a week. Um, like I said, the only difference between these is just hospitalizations and surgeries, things like that. Um, all other benefits, like sickness visits, urgent care, or, like, anything like that, uh, is pretty much the exact same. Gotcha. Um, do you have, like, a, uh, like a document that kind of lays everything... I'm just kind of a visual person. Do you have, like, a document that kind of, like, lists each thing and what the benefits are and the cost of each? Yes, we do actually. Um- Okay. Can you confirm, we have your email on file as dsauro@Yahoo.com? Yeah. It, it... Can you change it to DanielSauro@gmail.com? That's, like, a better email for me. Yeah, we can do that. DanielSauro- Okay. ... @Gmail instead? Yeah. Got it. We'll do that. All right. So, um, what I'll do then is I'll email you a copy of Creative Circle's benefits guide. This is an information packet that goes over all the plans that they offer, gives you an idea of what all is available, what all, um, kind of, uh, like, examples of what could be covered, and kind of give you, like, all the pricing for every plan as well. Just kind of give you all of that information right there in that document to review. Um... Gotcha. I have a document from them, the United States Freelance Employee Benefits 2024. Is that the one you're gonna send? Um, no. This one, this one, the, uh, the front page or the, uh, the, like, cover page should be, uh, S- uh, Benefits in a Card, powered by Benefits Wizards, specially designed for Creative Circle. Make sure that's, uh- Cool. Okay, okay. All right. So yeah, um, that's, uh, that's gonna come from info@benefitsinacard.com. Just give that a read through, and then if you decide to enroll into anything, give us a call back. Uh, as far as your, uh, window to do so, your deadline's not gonna be until January 10th as a new hire, um, but open enrollment also starts in about two weeks. So you actually technically have between now and January 31st to make any, any final decisions. Okay. And then w- if I get coverage... If I decide in, like, a month to do it, is that... is it retroactive to now or... No. No, it wouldn't be- Huh. ... retroactive to now. It would... It, uh... Any enrollment is only moving forward. Gotcha. Cool. Okay. I just want to make sure I'm, like, you know, covering my bases. Oh, I understand. Um... All right. Was there anything else that I might be able to help you with at this time, Mr. Sar- Mr. Sauro? Um, no, I don't think so. Let me just... Once I get the... I think once I get that document from you, um, and give it a look, and then I can probably make a more informed decision. All right then. Well, if that's everything, uh, yeah, you should be receiving that, uh, that email with the document in just a couple of minutes, if you haven't already. Uh, just check your junk mail if you don't see it in your inbox. Um, but yeah, that's everything. Cool. Thank you again for calling and have a good day. Sure. Yeah. And then are you... What hours are you guys, uh, open? Uh, we're open Monday through Friday, 8:00 AM to 8:00 PM Eastern. We will be closed, um, for both Christmas Eve/Christmas Day and New Year's Eve/New Year's Day. Gotcha. Cool. So I'll probably call you back. Uh, I'll probably call you back, uh, later today or Monday. All right then. Anything else, sir? That's it. Thanks so much. No problem. Thanks for calling and have a wonderful day. All right. You too. Bye-bye. Bye-bye.

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: Hey, Chris. Uh, yeah. I just want to enroll in benefits, discuss like-

Speaker speaker_1: Okay.

Speaker speaker_2: ... options and that kind of thing.

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

Speaker speaker_2: Creative Circle.

Speaker speaker_1: And the last four of your Social?

Speaker speaker_2: 7580.

Speaker speaker_1: All right. And then your first and last name?

Speaker speaker_2: Daniel Sauro.

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

Speaker speaker_2: Yes. My address is 141 East 13th Street, Apartment R3A. And my... What was the other thing?

Speaker speaker_1: Uh, your date of birth, but I also still need the, uh-

Speaker speaker_2: Oh.

Speaker speaker_1: ... rest of the address, the city, state, and zip.

Speaker speaker_2: Oh. Uh, city, state, zip is New York, New York, uh, 10003.

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

Speaker speaker_2: 11-10-86.

Speaker speaker_1: Okay. And then we have a phone on file of 415-1396?

Speaker speaker_2: Yeah.

Speaker speaker_1: Thank you. One moment.

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: All right. And did you have an i- any idea of what kind of insurance you wanted to enroll into from Creative Circle?

Speaker speaker_2: Um, yes. I, I wanted to, like, kind of ask, um, d- are you able to, like, go over options with me?

Speaker speaker_1: Yeah. So, uh-

Speaker speaker_2: Sure.

Speaker speaker_1: ... as far as what they offer, Creative Circle offers, um, four different medical plans. Uh, one which is preventative care only, so good for things like physicals, vaccines, cancer screenings, and things like that. But it's, it wouldn't cover any sort of treatment visits or anything like that. Um, and then three, the Insure Plus plans, Basic, Enhanced, and Premier, which would cover those treatment visits, like doctor's visits, hospital visits, if you're sick or injured or anything like that. Um, with the higher level you select being more coverage for specifically hospitalizations and surgeries. Um, but these plans do not cover any preventative care, so those physicals and vaccines are not covered by Insure Plus. Uh, what you can do if you feel like you need both types of benefit is enroll into both plans at the same time. Um, and then additionally, they offer a bundle for dental, life, and vision, um, a plan for critical illness, a plan for group accident, a plan for behavioral health or therapy c-services.

Speaker speaker_2: Gotcha. Um, okay. So what is, like, the mo- so, like, I just need, you know... I just, like, want to be covered in case something goes wrong, I guess. What would be the plan for that?

Speaker speaker_1: I cannot provide any sort of recommendations, unfortunately. We're not allowed to do so. Um-

Speaker speaker_2: Gotcha.

Speaker speaker_1: So...

Speaker speaker_2: Yeah, yeah. Um, not a recommendation, just, like, in terms of, like... Um, like, I just want to get what... Like, I'm... This is, like, a probably a temporary role. It's a freelance position, you know. Um...

Speaker speaker_1: Right.

Speaker speaker_2: So, it's not forever and I don't plan on, like, you know, using... It's just basically, like, if something goes catastrophically wrong, God forbid, you know, car accident, something, you know, some kind of... something comes up that's unexpected. I'm young and healthy, whatever. I know you can't give recommendations, but I'm just saying, like, this is the situation for, like, what is... You know, if something were to go wrong and I need to go to the emergency room, or I need to go to, like... you know, get some kind of treatment for, like, some illness or something, uh, what... which plan that you discussed would cover that and how much is it?

Speaker speaker_1: Uh, so that would be any one of the Insure Plus plans, Basic, Enhanced, or Premier. Basic is 17.21-

Speaker speaker_2: Got it.

Speaker speaker_1: ... a week, Enhanced is 24.38 a week, and Premier is 34.91 a week. Um, like I said, the only difference between these is just hospitalizations and surgeries, things like that. Um, all other benefits, like sickness visits, urgent care, or, like, anything like that, uh, is pretty much the exact same.

Speaker speaker_2: Gotcha. Um, do you have, like, a, uh, like a document that kind of lays everything... I'm just kind of a visual person. Do you have, like, a document that kind of, like, lists each thing and what the benefits are and the cost of each?

Speaker speaker_1: Yes, we do actually. Um-

Speaker speaker_2: Okay.

Speaker speaker_1: Can you confirm, we have your email on file as dsauro@Yahoo.com?

Speaker speaker_2: Yeah. It, it... Can you change it to DanielSauro@gmail.com? That's, like, a better email for me.

Speaker speaker_1: Yeah, we can do that. DanielSauro-

Speaker speaker_2: Okay.

Speaker speaker_1: ... @Gmail instead?

Speaker speaker_2: Yeah.

Speaker speaker_1: Got it. We'll do that. All right. So, um, what I'll do then is I'll email you a copy of Creative Circle's benefits guide. This is an information packet that goes over all the plans that they offer, gives you an idea of what all is available, what all, um, kind of, uh, like, examples of what could be covered, and kind of give you, like, all the pricing for every plan as well. Just kind of give you all of that information right there in that document to review. Um...

Speaker speaker_2: Gotcha. I have a document from them, the United States Freelance Employee Benefits 2024. Is that the one you're gonna send?

Speaker speaker_1: Um, no. This one, this one, the, uh, the front page or the, uh, the, like, cover page should be, uh, S- uh, Benefits in a Card, powered by Benefits Wizards, specially designed for Creative Circle. Make sure that's, uh-

Speaker speaker_2: Cool. Okay, okay.

Speaker speaker_1: All right. So yeah, um, that's, uh, that's gonna come from info@benefitsinacard.com. Just give that a read through, and then if you decide to enroll into anything, give us a call back. Uh, as far as your, uh, window to do so, your deadline's not gonna be until January 10th as a new hire, um, but open enrollment also starts in about two weeks. So you actually technically have between now and January 31st to make any, any final decisions.

Speaker speaker_2: Okay. And then w- if I get coverage... If I decide in, like, a month to do it, is that... is it retroactive to now or...

Speaker speaker_1: No. No, it wouldn't be-

Speaker speaker_2: Huh.

Speaker speaker_1: ... retroactive to now. It would... It, uh... Any enrollment is only moving forward.

Speaker speaker_2: Gotcha. Cool. Okay. I just want to make sure I'm, like, you know, covering my bases.

Speaker speaker_1: Oh, I understand. Um... All right. Was there anything else that I might be able to help you with at this time, Mr. Sar- Mr. Sauro?

Speaker speaker_2: Um, no, I don't think so. Let me just... Once I get the... I think once I get that document from you, um, and give it a look, and then I can probably make a more informed decision.

Speaker speaker_1: All right then. Well, if that's everything, uh, yeah, you should be receiving that, uh, that email with the document in just a couple of minutes, if you haven't already. Uh, just check your junk mail if you don't see it in your inbox. Um, but yeah, that's everything.

Speaker speaker_2: Cool.

Speaker speaker_1: Thank you again for calling and have a good day.

Speaker speaker_2: Sure. Yeah. And then are you... What hours are you guys, uh, open?

Speaker speaker_1: Uh, we're open Monday through Friday, 8:00 AM to 8:00 PM Eastern. We will be closed, um, for both Christmas Eve/Christmas Day and New Year's Eve/New Year's Day.

Speaker speaker_2: Gotcha. Cool. So I'll probably call you back. Uh, I'll probably call you back, uh, later today or Monday.

Speaker speaker_1: All right then. Anything else, sir?

Speaker speaker_2: That's it. Thanks so much.

Speaker speaker_1: No problem. Thanks for calling and have a wonderful day.

Speaker speaker_2: All right. You too. Bye-bye.

Speaker speaker_1: Bye-bye.