

## 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? Hi, Chris. My name is Jeremy Lowe, and I am a new employee of Oxford and I have not had a chance or been able to get into the portal to get my benefits set up, and I saw this number as an option to do that. So are you able to help me with that? Yeah, I should be able to look into that for you. Uh, you said you're with Oxford. What's the last four of your Social? 5838. Thank you. All right, Mr. Lowe. Could you verify your address and your date of birth for me please? Yep. 133021 Claredon Troy Road, Burton, Ohio 44021. Date of birth, September 7th, 1971. Thank you. We have a phone number on file of 440-804-4033. Is that correct? That is correct. All right. Uh, y- yeah, it does look like you are eligible to enroll into benefits. Looks like your window just started, um, last Friday, so you've got until, uh, looks like February 14th to make any final decisions. Mm-hmm. Um, did you have an idea of what kind of, um, what kind of insurance you wanted to enroll into? Yeah, the optical is one. Okay. All right, so vision. Anything else? Um, is there vision options for just me or can you put a- another person on that as well? Yeah, so, so there's only a single vision plan but you have options of, uh, employee only coverage or adding your spouse, your children, or the whole family. Okay. I'd like to include my spouse on that as well, please. Okay. We can do that. And then, all right, anything else? Um, what are the life insurance options? Uh, there's a, there's only a single life insurance policy. Uh, there's a \$20,000 policy for you, uh, 2,500 for your spouse. Okay. What is the cost for... Those are really small b- death benefits, but for myself? Uh, just for yourself- Is that like- Sorry, go ahead. Are these like little term policies or- Yeah, it's a term policy, term life. Okay. Um, and then the, uh, for just yourself it's \$2.11 per week. Okay. So eight bucks for 20... Yeah, let's not do that. That doesn't seem right. So, um, I'm trying to think what else. I guess we'll just go with... What is, I guess, what is the, um, dental cost for just the member? For just you, \$3.64 per week. Okay. Let's, um, let's go ahead and add that as well please. Okay. So we're looking at vision for you and your spouse and then term life and dental for just you? Correct. Got it, okay. All right, let's see here. No, I, I think we said no term life. Oh, no term life? Okay. Yeah. So just vis- vision for you and your spouse and then dental for you, and just those two plans? Yes, please. All right. Uh, this totals out to, uh, so dental is 3.64 for just yourself and vision is 4.35 for you and your spouse. This is a total- Mm-hmm. ... of \$7.99 per week for these two plans. Great. Do you authorize Oxford to make these deductions? I do. All right. So it's going to take about one to two weeks for this enrollment to process. Once processing is complete, you should start seeing those deductions coming out of your checks. The Monday following that first deduction is when policies become effective. ID cards will typically arrive about one to two weeks after that effective date. And then let's go ahead and get the information we need to add your spouse onto your policy. What's their first and last name? First name is

Kristina with a K. Mm-hmm. Same last name. And then last name? Yep, L-O-W-E. Got it. Do you by chance have her Social? I do. It's 477-04-4005. Thank you. And then her date of birth. March 25th, 1970. Got it. All right. That's all I needed to move forward with your enrollment. Was there anything else I can help you with? What did you say, again, was the effective date? Uh, the Monday following the first deduction out of your paycheck. Unfortunately, I can't give you anything more concrete than that as it is subject to when those deductions happen. And you said that could be a couple of weeks, right? It, it'll, it'll take about a week or two for the enrollment, for the enrollment to fully process. Any time after that processing period is when you could start seeing those deductions. But because policy is, uh, because policies are dependent on deductions because it means, that, that's what pays for the insurance premiums- Mm-hmm. ... um, once the, once everything is processed on our end for enrollment, for the actual enrollment itself- Yeah. ... it's then, um, it's then up to Oxford's payroll team to handle the deductions. We're not part of that, so unfortunately I can't tell you when that would happen. Understood. Okay. Thank you very much. I think we're good. No problem. Anything else? Nope, that's all I got. All right. Thanks again for calling and have a wonderful day. You too. Bye-bye. All right, 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: Hi, Chris. My name is Jeremy Lowe, and I am a new employee of Oxford and I have not had a chance or been able to get into the portal to get my benefits set up, and I saw this number as an option to do that. So are you able to help me with that?

Speaker speaker\_1: Yeah, I should be able to look into that for you. Uh, you said you're with Oxford. What's the last four of your Social?

Speaker speaker\_2: 5838.

Speaker speaker\_1: Thank you. All right, Mr. Lowe. Could you verify your address and your date of birth for me please?

Speaker speaker\_2: Yep. 133021 Claredon Troy Road, Burton, Ohio 44021. Date of birth, September 7th, 1971.

Speaker speaker\_1: Thank you. We have a phone number on file of 440-804-4033. Is that correct?

Speaker speaker\_2: That is correct.

Speaker speaker\_1: All right. Uh, y- yeah, it does look like you are eligible to enroll into benefits. Looks like your window just started, um, last Friday, so you've got until, uh, looks like February 14th to make any final decisions.

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: Um, did you have an idea of what kind of, um, what kind of insurance you wanted to enroll into?

Speaker speaker\_2: Yeah, the optical is one.

Speaker speaker\_1: Okay. All right, so vision. Anything else?

Speaker speaker\_2: Um, is there vision options for just me or can you put a- another person on that as well?

Speaker speaker\_1: Yeah, so, so there's only a single vision plan but you have options of, uh, employee only coverage or adding your spouse, your children, or the whole family.

Speaker speaker\_2: Okay. I'd like to include my spouse on that as well, please.

Speaker speaker\_1: Okay. We can do that. And then, all right, anything else?

Speaker speaker\_2: Um, what are the life insurance options?

Speaker speaker\_1: Uh, there's a, there's only a single life insurance policy. Uh, there's a \$20,000 policy for you, uh, 2,500 for your spouse.

Speaker speaker\_2: Okay. What is the cost for... Those are really small b- death benefits, but for myself?

Speaker speaker\_1: Uh, just for yourself-

Speaker speaker\_2: Is that like-

Speaker speaker\_1: Sorry, go ahead.

Speaker speaker\_2: Are these like little term policies or-

Speaker speaker\_1: Yeah, it's a term policy, term life.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Um, and then the, uh, for just yourself it's \$2.11 per week.

Speaker speaker\_2: Okay. So eight bucks for 20... Yeah, let's not do that. That doesn't seem right. So, um, I'm trying to think what else. I guess we'll just go with... What is, I guess, what is the, um, dental cost for just the member?

Speaker speaker\_1: For just you, \$3.64 per week.

Speaker speaker\_2: Okay. Let's, um, let's go ahead and add that as well please.

Speaker speaker\_1: Okay. So we're looking at vision for you and your spouse and then term life and dental for just you?

Speaker speaker\_2: Correct.

Speaker speaker\_1: Got it, okay. All right, let's see here.

Speaker speaker\_2: No, I, I think we said no term life.

Speaker speaker\_1: Oh, no term life? Okay.

Speaker speaker\_2: Yeah.

Speaker speaker\_1: So just vis- vision for you and your spouse and then dental for you, and just those two plans?

Speaker speaker\_2: Yes, please.

Speaker speaker\_1: All right. Uh, this totals out to, uh, so dental is 3.64 for just yourself and vision is 4.35 for you and your spouse. This is a total-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... of \$7.99 per week for these two plans.

Speaker speaker\_2: Great.

Speaker speaker\_1: Do you authorize Oxford to make these deductions?

Speaker speaker\_2: I do.

Speaker speaker\_1: All right. So it's going to take about one to two weeks for this enrollment to process. Once processing is complete, you should start seeing those deductions coming out of your checks. The Monday following that first deduction is when policies become effective. ID cards will typically arrive about one to two weeks after that effective date. And then let's go ahead and get the information we need to add your spouse onto your policy. What's their first and last name?

Speaker speaker\_2: First name is Kristina with a K.

Speaker speaker\_1: Mm-hmm.

Speaker speaker\_2: Same last name.

Speaker speaker\_1: And then last name?

Speaker speaker\_2: Yep, L-O-W-E.

Speaker speaker\_1: Got it. Do you by chance have her Social?

Speaker speaker\_2: I do. It's 477-04-4005.

Speaker speaker\_1: Thank you. And then her date of birth.

Speaker speaker\_2: March 25th, 1970.

Speaker speaker\_1: Got it. All right. That's all I needed to move forward with your enrollment. Was there anything else I can help you with?

Speaker speaker\_2: What did you say, again, was the effective date?

Speaker speaker\_1: Uh, the Monday following the first deduction out of your paycheck. Unfortunately, I can't give you anything more concrete than that as it is subject to when those deductions happen.

Speaker speaker\_2: And you said that could be a couple of weeks, right?

Speaker speaker\_1: It, it'll, it'll take about a week or two for the enrollment, for the enrollment to fully process. Any time after that processing period is when you could start seeing those deductions. But because policy is, uh, because policies are dependent on deductions because it means, that, that's what pays for the insurance premiums-

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: ... um, once the, once everything is processed on our end for enrollment, for the actual enrollment itself-

Speaker speaker\_2: Yeah.

Speaker speaker\_1: ... it's then, um, it's then up to Oxford's payroll team to handle the deductions. We're not part of that, so unfortunately I can't tell you when that would happen.

Speaker speaker\_2: Understood. Okay. Thank you very much. I think we're good.

Speaker speaker\_1: No problem. Anything else?

Speaker speaker\_2: Nope, that's all I got.

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

Speaker speaker\_2: You too. Bye-bye.

Speaker speaker\_1: All right, bye now.