

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, I was, uh, kinda new here, so I was wondering how am I supposed to go about, uh, including these benefits? Okay. Well- Or applying for them. Uh, which staffing company do you work with? Uh, Partners in Personal. Partners in Personal, okay. In Personal. And the last four of your Social? Zero, two, zero, six. Thank you. Your first and last name? Uh, Adrian Pagan. Thank you. Mr. Pagan, could you verify your address and your date of birth? Uh, address, yes. Date of birth, uh, October 4th, 20... 2005. And- Okay. And your address, sir? 604 Miles Boulevard, Dundee, Florida. Okay. And then we have a phone number on file for you at 787-979-0454, is that correct? Yep. Okay. All right. Let's see here. Okay, so you are... It looks like you are still eligible to enroll into insurance benefits. Your window does not close until... let's see here, January 15th. So, you've got between now and then to make any final decisions. As far as actually, like, how to enroll, uh, you can, you can do that over the phone with one of our representatives here. Uh, now did you have an idea of what you wanted to enroll into? Yes. Okay. And what were we looking for, sir? Uh, I was only looking for dental, vision and, uh, life insurance. Dental, vision and life insurance. We can do that. Is it for just yourself or are you covering anyone else? Just myself. Got it. Dental is \$3.63 a week, vision is \$2.15 a week and life is \$2.11 a week, totaling out to \$7.89 per week. Do we authorize partners to make these deductions? Yes. All right. Okay. So, we'll go ahead and set that up. Now, it's gonna take, uh, it's gonna take maybe a week or two for everything to process. Um, you should start seeing your deductions coming out of your checks after that week or two processing time. The Monday following us receiving that deduction information from partners is when the policy becomes effective. ID cards will typically arrive one to two weeks after that effective date. And then, the only other thing I need to make sure that you're aware of, your dental and vision plans are known as Section 125 plans. This is an IRS regulation that allows partners to make the deductions pre-tax, however, because they allow this to happen, they then require that as long as you attempt through partners, you have to stay enrolled in these plans if you select them. As such, you're, um, you're only allowed to make any changes or even cancel these plans, dental and vision, um, during open enrollment windows, such as your new hire or op- open enrollment once a year, or with a qualifying life event like getting married, having a child or getting an insurance comp- uh, insurance policy from another insurance company. Any questions regarding that? No. All right. And then, one last thing I need from you. Who are we naming as the beneficiary for the life insurance policy? Uh... No, I didn't actually quite think of that one. Th- this, this can be, this can be anyone. It can be one of your parents, one of your grandparents, one of your children, your best friend, your sibling. Uh, anything like that. I think, uh, my mother. Your mother. All right, and what's her name? Sarali Rivera. Can you spell that for me, please? Just one

second. S-A-R-A-L-I, Sarali. Mm-hmm. Rivera. R-I-V-E-R-A. All right, thank you. All right, that is everything I needed to be able to get you enrolled. Was there anything else I could help you with? No. I believe that was all. All right. Well, if that's everything, thanks again for calling and have a wonderful day. Thank you very much. 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, I was, uh, kinda new here, so I was wondering how am I supposed to go about, uh, including these benefits?

Speaker speaker_1: Okay. Well-

Speaker speaker_2: Or applying for them.

Speaker speaker_1: Uh, which staffing company do you work with?

Speaker speaker_2: Uh, Partners in Personal.

Speaker speaker_1: Partners in Personal, okay.

Speaker speaker_2: In Personal.

Speaker speaker_1: And the last four of your Social?

Speaker speaker_2: Zero, two, zero, six.

Speaker speaker_1: Thank you. Your first and last name?

Speaker speaker_2: Uh, Adrian Pagan.

Speaker speaker_1: Thank you. Mr. Pagan, could you verify your address and your date of birth?

Speaker speaker_2: Uh, address, yes. Date of birth, uh, October 4th, 20... 2005. And-

Speaker speaker_1: Okay. And your address, sir?

Speaker speaker_2: 604 Miles Boulevard, Dundee, Florida.

Speaker speaker_1: Okay. And then we have a phone number on file for you at 787-979-0454, is that correct?

Speaker speaker_2: Yep.

Speaker speaker_1: Okay. All right. Let's see here. Okay, so you are... It looks like you are still eligible to enroll into insurance benefits. Your window does not close until... let's see here, January 15th. So, you've got between now and then to make any final decisions. As far as

actually, like, how to enroll, uh, you can, you can do that over the phone with one of our representatives here. Uh, now did you have an idea of what you wanted to enroll into?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. And what were we looking for, sir?

Speaker speaker_2: Uh, I was only looking for dental, vision and, uh, life insurance.

Speaker speaker_1: Dental, vision and life insurance. We can do that. Is it for just yourself or are you covering anyone else?

Speaker speaker_2: Just myself.

Speaker speaker_1: Got it. Dental is \$3.63 a week, vision is \$2.15 a week and life is \$2.11 a week, totaling out to \$7.89 per week. Do we authorize partners to make these deductions?

Speaker speaker_2: Yes.

Speaker speaker_1: All right. Okay. So, we'll go ahead and set that up. Now, it's gonna take, uh, it's gonna take maybe a week or two for everything to process. Um, you should start seeing your deductions coming out of your checks after that week or two processing time. The Monday following us receiving that deduction information from partners is when the policy becomes effective. ID cards will typically arrive one to two weeks after that effective date. And then, the only other thing I need to make sure that you're aware of, your dental and vision plans are known as Section 125 plans. This is an IRS regulation that allows partners to make the deductions pre-tax, however, because they allow this to happen, they then require that as long as you attempt through partners, you have to stay enrolled in these plans if you select them. As such, you're, um, you're only allowed to make any changes or even cancel these plans, dental and vision, um, during open enrollment windows, such as your new hire or open enrollment once a year, or with a qualifying life event like getting married, having a child or getting an insurance comp- uh, insurance policy from another insurance company. Any questions regarding that?

Speaker speaker_2: No.

Speaker speaker_1: All right. And then, one last thing I need from you. Who are we naming as the beneficiary for the life insurance policy?

Speaker speaker_2: Uh... No, I didn't actually quite think of that one.

Speaker speaker_1: Th- this, this can be, this can be anyone. It can be one of your parents, one of your grandparents, one of your children, your best friend, your sibling. Uh, anything like that.

Speaker speaker_2: I think, uh, my mother.

Speaker speaker_1: Your mother. All right, and what's her name?

Speaker speaker_2: Sarali Rivera.

Speaker speaker_1: Can you spell that for me, please?

Speaker speaker_2: Just one second. S-A-R-A-L-I, Sarali.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: Rivera. R-I-V-E-R-A.

Speaker speaker_1: All right, thank you. All right, that is everything I needed to be able to get you enrolled. Was there anything else I could help you with?

Speaker speaker_2: No. I believe that was all.

Speaker speaker_1: All right. Well, if that's everything, thanks again for calling and have a wonderful day.

Speaker speaker_2: Thank you very much.

Speaker speaker_1: You're welcome. Bye now.