

## **Transcript: Chris Sofield**

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### **Full Transcript**

Hello, this is Sherry- Your call may be monitored or recorded for quality assurance purposes. Hi, good afternoon. Can I speak with Sherry Horn? This is she. Hi, Ms. Horn. My name is Chris. I'm with Benefits In The Card calling on behalf of Creative Circle, returning a voice mail you left with us yesterday. How you doing? Good. How are you guys? That's good. I guess your office is open today then? Uh, yes, ma'am unfortunately we were closed yesterday due to inclement weather. Sorry about that. We just, uh... it was a little bit too unsafe for us to be here. Um- No, that's okay. I was just curious where you were. No. That's entirely, entirely reasonable. Um, but before we continue, uh, call is being recorded for quality assurance training purposes. I just wanted to reach out and see about helping you out. I understand that you were looking to, uh, add your... uh, add w- a child to your insurance plan. Is that correct? Yes. Uh-huh. Okay. Yeah, we can get that done for you. Let me- ... get to that screen here. All right. And I show it looks like you have the accident, critical illness, and then dental, life, and vision bundle, um, all currently at employee only, so we're just upgrading all those to employ a child? Yes. All right. Are we adding anything else? Any other plans or are we just keeping at these five? Um, what are the other plans? Uh, so, currently the only other options available that you don't already have would be, um, medical, uh, behavioral health, or the free Rx, uh, prescription program. No, I don't need those. Okay. All right then. So we're looking at just keeping the same ones that you already have, just upgrading those. Um, adding the child to that will bring the total weekly deductions to \$22.90 per week. Do you authorize Creative Circle to make those deductions? Yes. All right. And then let's get what we need to fully get him added on here, as soon as my, uh, system decides it wants to work. There we go. All right. And what's your son's name? Jonas Horn. J-O-N-A-S. Jonas Horn, okay. Um, all right. Do you by any chance have his social? Uh... Uh... Hold on. Figured out I had that handy but... I don't know. Let me see here. Okay. Uh, 537-51-5447. Thank you. And then what's his date of birth? 04/05/03. All right. And then, was Jonas the only, uh, child you were adding? Yes. Okay. All right then. So, that's all I needed to add him on here. It's gonna take about one to two weeks for this change to process. Once everything processes you should start seeing your deductions increase from the \$12.42 to the \$22.90. Monday following the first deduction of \$22.90 is when the changes will fully take effect and Jonas will be on your policies, and you'll receive new ID cards about a week or two after that showing that he's on there. Okay. Great. All right. Anything else? Uh, no. I think that's it for right now. All right. Thanks for taking the time to speak with me, Ms. Horn. You have a wonderful day. Thank you. Appreciate it. Sure. Thanks for calling me back. Of course. Bye. Bye now.

### **Conversation Format**

Speaker speaker\_0: Hello, this is Sherry-

Speaker speaker\_1: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_2: Hi, good afternoon. Can I speak with Sherry Horn?

Speaker speaker\_0: This is she.

Speaker speaker\_2: Hi, Ms. Horn. My name is Chris. I'm with Benefits In The Card calling on behalf of Creative Circle, returning a voice mail you left with us yesterday. How you doing?

Speaker speaker\_0: Good. How are you guys?

Speaker speaker\_2: That's good.

Speaker speaker\_0: I guess your office is open today then?

Speaker speaker\_2: Uh, yes, ma'am unfortunately we were closed yesterday due to inclement weather. Sorry about that. We just, uh... it was a little bit too unsafe for us to be here. Um-

Speaker speaker\_0: No, that's okay. I was just curious where you were.

Speaker speaker\_2: No. That's entirely, entirely reasonable. Um, but before we continue, uh, call is being recorded for quality assurance training purposes. I just wanted to reach out and see about helping you out. I understand that you were looking to, uh, add your... uh, add w- a child to your insurance plan. Is that correct?

Speaker speaker\_0: Yes. Uh-huh.

Speaker speaker\_2: Okay. Yeah, we can get that done for you. Let me- ... get to that screen here. All right. And I show it looks like you have the accident, critical illness, and then dental, life, and vision bundle, um, all currently at employee only, so we're just upgrading all those to employ a child?

Speaker speaker\_0: Yes.

Speaker speaker\_2: All right. Are we adding anything else? Any other plans or are we just keeping at these five?

Speaker speaker\_0: Um, what are the other plans?

Speaker speaker\_2: Uh, so, currently the only other options available that you don't already have would be, um, medical, uh, behavioral health, or the free Rx, uh, prescription program.

Speaker speaker\_0: No, I don't need those.

Speaker speaker\_2: Okay. All right then. So we're looking at just keeping the same ones that you already have, just upgrading those. Um, adding the child to that will bring the total weekly deductions to \$22.90 per week. Do you authorize Creative Circle to make those deductions?

Speaker speaker\_0: Yes.

Speaker speaker\_2: All right. And then let's get what we need to fully get him added on here, as soon as my, uh, system decides it wants to work. There we go. All right. And what's your

son's name?

Speaker speaker\_0: Jonas Horn. J-O-N-A-S.

Speaker speaker\_2: Jonas Horn, okay. Um, all right. Do you by any chance have his social?

Speaker speaker\_0: Uh... Uh... Hold on. Figured out I had that handy but... I don't know. Let me see here. Okay. Uh, 537-51-5447.

Speaker speaker\_2: Thank you. And then what's his date of birth?

Speaker speaker\_0: 04/05/03.

Speaker speaker\_2: All right. And then, was Jonas the only, uh, child you were adding?

Speaker speaker\_0: Yes.

Speaker speaker\_2: Okay. All right then. So, that's all I needed to add him on here. It's gonna take about one to two weeks for this change to process. Once everything processes you should start seeing your deductions increase from the \$12.42 to the \$22.90. Monday following the first deduction of \$22.90 is when the changes will fully take effect and Jonas will be on your policies, and you'll receive new ID cards about a week or two after that showing that he's on there.

Speaker speaker\_0: Okay. Great.

Speaker speaker\_2: All right. Anything else?

Speaker speaker\_0: Uh, no. I think that's it for right now.

Speaker speaker\_2: All right. Thanks for taking the time to speak with me, Ms. Horn. You have a wonderful day.

Speaker speaker\_0: Thank you. Appreciate it.

Speaker speaker\_2: Sure.

Speaker speaker\_0: Thanks for calling me back.

Speaker speaker\_2: Of course.

Speaker speaker\_0: Bye.

Speaker speaker\_2: Bye now.