

Transcript: Chris Sofield

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. ... Hi, I would like to make changes to my policy. Okay. Uh, what staffing company do you work with? Um, MAU. Okay. And the last four of your Social? 4707. Okay. And your first and last name? Kenya Fallon. All right, Ms. Fallon, could you verify your address and date of birth for me, please? 2120 Hubbard Street, Paris, Texas 75460. And you said, um, my date of birth? Yes, ma'am. 09/21/1982. Okay. And then phone on file we have as 904-228-0394? Correct. Okay. And let's see here. What changes were you looking to make, ma'am? Um, the only thing that I want to keep is, uh, dental. Everything else, um, I don't need it. Okay, so you want dental only and nothing else? Right. All right, is that for just yourself, or are you covering anyone else? It's just myself. Got it. That is \$3.51 per week. Do you authorize MAU to make those deductions? Yes, I do. All right, it's going to take about one to two weeks for the enrollment to process. Okay. Um, when the processing is complete, you should start seeing those deductions coming out of your checks. Monday following the first deduction is when the policy is effective. ID card will arrive about a week or two after the effective date. Mm-hmm. Please be aware, dental is a Section 125 policy. This is an IRS regulation that allows MAU to make the deduction for the plan pre-tax. However, because they allow this to happen, they then require as long as you're attempt through MAU, if you enroll in this plan you have to stay enrolled in this plan. As such, you're only allowed to make changes during your eligibility window, either your first 30 days as a new hire, after your first check- Mm-hmm. ... or the company open enrollment once a year. Outside of those windows, you are locked into this plan unless you have a qualifying life event, typically something like getting married, having a child or getting an insurance policy from another insurance company. Mm-hmm. Any questions regarding that? Not at all. All right, that's everything I needed to set up your enrollment. Was there anything else I could help you with? No, sir. All right, thanks again for calling and have a wonderful day. You too. Bye. All right, bye now.

Conversation Format

Speaker speaker_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker_1: ... Hi, I would like to make changes to my policy.

Speaker speaker_2: Okay. Uh, what staffing company do you work with?

Speaker speaker_1: Um, MAU.

Speaker speaker_2: Okay. And the last four of your Social?

Speaker speaker_1: 4707.

Speaker speaker_2: Okay. And your first and last name?

Speaker speaker_1: Kenya Fallon.

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

Speaker speaker_1: 2120 Hubbard Street, Paris, Texas 75460. And you said, um, my date of birth?

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: 09/21/1982.

Speaker speaker_2: Okay. And then phone on file we have as 904-228-0394?

Speaker speaker_1: Correct.

Speaker speaker_2: Okay. And let's see here. What changes were you looking to make, ma'am?

Speaker speaker_1: Um, the only thing that I want to keep is, uh, dental. Everything else, um, I don't need it.

Speaker speaker_2: Okay, so you want dental only and nothing else?

Speaker speaker_1: Right.

Speaker speaker_2: All right, is that for just yourself, or are you covering anyone else?

Speaker speaker_1: It's just myself.

Speaker speaker_2: Got it. That is \$3.51 per week. Do you authorize MAU to make those deductions?

Speaker speaker_1: Yes, I do.

Speaker speaker_2: All right, it's going to take about one to two weeks for the enrollment to process.

Speaker speaker_1: Okay.

Speaker speaker_2: Um, when the processing is complete, you should start seeing those deductions coming out of your checks. Monday following the first deduction is when the policy is effective. ID card will arrive about a week or two after the effective date.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: Please be aware, dental is a Section 125 policy. This is an IRS regulation that allows MAU to make the deduction for the plan pre-tax. However, because they allow this to happen, they then require as long as you're attempt through MAU, if you enroll in this plan you have to stay enrolled in this plan. As such, you're only allowed to make changes during

your eligibility window, either your first 30 days as a new hire, after your first check-

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: ... or the company open enrollment once a year. Outside of those windows, you are locked into this plan unless you have a qualifying life event, typically something like getting married, having a child or getting an insurance policy from another insurance company.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: Any questions regarding that?

Speaker speaker_1: Not at all.

Speaker speaker_2: All right, that's everything I needed to set up your enrollment. Was there anything else I could help you with?

Speaker speaker_1: No, sir.

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

Speaker speaker_1: You too. Bye.

Speaker speaker_2: All right, bye now.