

## **Transcript: Estefania**

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### **Full Transcript**

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Beneficent of Cary. My name is Stephanie. How can I assist you? Um, yes, can you send me a copy of my b- my insurance card? Yes. Um- I don't have them. Yeah. I can. What is the agency that you're with? Creative Circle. Okay. And then, what are the last two of your Social? What's the last two? I'm sorry, the last four. 595. Okay. And your first and last name, please. Uh, Phillip Gerwan. Okay. For security purposes, could you please verify your full address as well as your date of birth for me? Okay. 840 Larimer Street, West Hollywood, 90069-071498. Thank you. Is your phone number still 337-344-5799? Yes, that's the one. And then, I have your first name, last name at gmail.com. Is that still up to date? Yes. Okay. Thank you. Um, and I was also gonna tell you that it looks like we're missing a beneficiary from you. Did you want to go ahead and add one? No, that's fine. Okay. All right. You said, uh, you said no, right? Yeah. No. Okay. Um, can I put you in a brief hold while I send you that to your email file? Yes. Okay. Thank you. Okay. Thank you for your hold, sir. I went ahead and emailed you your cards to that email file. Do you mind verifying that you received that email? Uh, let me double check. I'm just trying to see if I'm... Okay, um... And then it should come from an email that says info@benefitsinacard.com. Yes. So, okay, cool. Which one is for the... Are these all for So, so I attached... I believe the first one is gonna be the dental one. The one after that is gonna be your Insure Plus Basic, and then the third one is your vision, and then the last one to the right is your preventative. What does that mean, the preventative? Preventative would be your, um, like, your MEC Tele-RS, that's the one that would cover, like, your one physical visit a year, some vaccinations, cancer, STD screening. Um, that's that preventative card. And then, the Insure Plus Basic is the one that actually covers, like, your doctor visits if you were to get sick, hospital visits if you get injured, urgent care, emergency room and surgeries. So the one that says APL is gonna be- Okay. ... um, your hospital indemnity and then the one that says 90 degrees is for your preventative services. Okay, amazing. And, uh, so, like, for, like, doctor visits and, uh, like, uh, prescriptions, that's for the second one you sent me, which is... Yes. ... two four nine. Um, so, so the one that says American Public Life, that one's the one that covers your actual doctor visits if you were to get sick or injured, if you go to the emergency room, surgeries. The... That one is through Pharmacoville and then with your preventative, which is your MEC Tele-RS, the one at the very far end that says 90 degrees, that one's for your MEC Tele-RS and you have prescription benefits with them as well, but through Elexir. Okay. Hold on. Sorry, I'm being, I'm being confused. Just give me a second. I won't... Uh, I got it. Okay. Can we just go through them by step-by-step, sorry, if you don't mind? Yeah, yeah, yeah. That's fine. Okay. So can you open up... Can we do the first one first? I'm gonna write it down. Yes. Let me... Let me go to the files real quick. Sorry. Okay. Okay. So, the one that says Elexir, it's gonna say Elexir Creative Circle 90 degrees. Okay.

Hold on. Let me see. That's- The one that says 90 degrees. Can I pull- Is that the file name? No. So, if you open the, the card or the file, uh, it's gonna give you, like, one, two, three... Five different, like, kinda cards. One says MetLife and it's gonna say 90 degrees. If you open it and it says 90 degrees as well as Elexir, which is E-L-E-X-I-R. Yeah, I see that one, but it's, like, under pharmacy. Like, it's under MEC PD PDF. Is that the one you're looking at? Yes. So that one is your preventative plan and your pharmacy- Okay. ... is Elexir, which is E-L-E-X-I-R. That's your preventative one. So that's the one that would cover, like, one physical visit a year, some vaccinations, some STD and cancer screenings. So that's for your MEC plan. And then the one that says PB- Yeah. ... that says Creative Circle, um, MetLife, vision- Yeah. I see that one. That's your vision card. That one's just your vision card. They have- Okay. So for the first two PDFs of the same file, that's the same thing? Uh, no. Okay. I just... Okay. So the one... So the one that says Carrollton, you see that it says American Public Life and then it says Carrollton? Yes. I see that one. Yes. That one is for your dental. Okay. Okay. So that one... So the second one I see now is American Public Life Pharmacoville. And then, yeah. And then the one that just says, uh, APL Pharmacoville, that's your, um, card that you would take if you were to go to the doctor sick. Okay, cool. All right. Sounds good. Okay. Did you have any more questions? No. That's it. Thank you so much. You're welcome. Have a nice day. You too. Thanks.

## Conversation Format

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Beneficent of Cary. My name is Stephanie. How can I assist you?

Speaker speaker\_2: Um, yes, can you send me a copy of my b- my insurance card?

Speaker speaker\_1: Yes. Um-

Speaker speaker\_2: I don't have them.

Speaker speaker\_1: Yeah. I can. What is the agency that you're with?

Speaker speaker\_2: Creative Circle.

Speaker speaker\_1: Okay. And then, what are the last two of your Social?

Speaker speaker\_2: What's the last two?

Speaker speaker\_1: I'm sorry, the last four.

Speaker speaker\_2: 595.

Speaker speaker\_1: Okay. And your first and last name, please.

Speaker speaker\_2: Uh, Phillip Gerwan.

Speaker speaker\_1: Okay. For security purposes, could you please verify your full address as well as your date of birth for me?

Speaker speaker\_2: Okay. 840 Larimer Street, West Hollywood, 90069-071498.

Speaker speaker\_1: Thank you. Is your phone number still 337-344-5799?

Speaker speaker\_2: Yes, that's the one.

Speaker speaker\_1: And then, I have your first name, last name at gmail.com. Is that still up to date?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. Thank you. Um, and I was also gonna tell you that it looks like we're missing a beneficiary from you. Did you want to go ahead and add one?

Speaker speaker\_2: No, that's fine.

Speaker speaker\_1: Okay. All right. You said, uh, you said no, right?

Speaker speaker\_2: Yeah. No.

Speaker speaker\_1: Okay. Um, can I put you in a brief hold while I send you that to your email file?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. Thank you. Okay. Thank you for your hold, sir. I went ahead and emailed you your cards to that email file. Do you mind verifying that you received that email?

Speaker speaker\_3: Uh, let me double check. I'm just trying to see if I'm... Okay, um...

Speaker speaker\_1: And then it should come from an email that says info@benefitsinacard.com.

Speaker speaker\_3: Yes. So, okay, cool. Which one is for the... Are these all for

Speaker speaker\_4: So, so I attached... I believe the first one is gonna be the dental one. The one after that is gonna be your Insure Plus Basic, and then the third one is your vision, and then the last one to the right is your preventative.

Speaker speaker\_3: What does that mean, the preventative?

Speaker speaker\_1: Preventative would be your, um, like, your MEC Tele-RS, that's the one that would cover, like, your one physical visit a year, some vaccinations, cancer, STD screening. Um, that's that preventative card. And then, the Insure Plus Basic is the one that actually covers, like, your doctor visits if you were to get sick, hospital visits if you get injured, urgent care, emergency room and surgeries. So the one that says APL is gonna be-

Speaker speaker\_3: Okay.

Speaker speaker\_1: ... um, your hospital indemnity and then the one that says 90 degrees is for your preventative services.

Speaker speaker\_3: Okay, amazing. And, uh, so, like, for, like, doctor visits and, uh, like, uh, prescriptions, that's for the second one you sent me, which is...

Speaker speaker\_1: Yes.

Speaker speaker\_3: ... two four nine.

Speaker speaker\_1: Um, so, so the one that says American Public Life, that one's the one that covers your actual doctor visits if you were to get sick or injured, if you go to the emergency room, surgeries. The... That one is through Pharmacoville and then with your preventative, which is your MEC Tele-RS, the one at the very far end that says 90 degrees, that one's for your MEC Tele-RS and you have prescription benefits with them as well, but through Elexir.

Speaker speaker\_3: Okay. Hold on. Sorry, I'm being, I'm being confused. Just give me a second. I won't... Uh, I got it.

Speaker speaker\_1: Okay.

Speaker speaker\_3: Can we just go through them by step-by-step, sorry, if you don't mind?

Speaker speaker\_1: Yeah, yeah, yeah. That's fine.

Speaker speaker\_3: Okay. So can you open up... Can we do the first one first? I'm gonna write it down.

Speaker speaker\_1: Yes. Let me... Let me go to the files real quick. Sorry. Okay. Okay. So, the one that says Elexir, it's gonna say Elexir Creative Circle 90 degrees.

Speaker speaker\_3: Okay. Hold on. Let me see. That's-

Speaker speaker\_1: The one that says 90 degrees. Can I pull-

Speaker speaker\_3: Is that the file name?

Speaker speaker\_1: No. So, if you open the, the card or the file, uh, it's gonna give you, like, one, two, three... Five different, like, kinda cards. One says MetLife and it's gonna say 90 degrees. If you open it and it says 90 degrees as well as Elexir, which is E-L-E-X-I-R.

Speaker speaker\_3: Yeah, I see that one, but it's, like, under pharmacy. Like, it's under MEC PD PDF. Is that the one you're looking at?

Speaker speaker\_1: Yes. So that one is your preventative plan and your pharmacy-

Speaker speaker\_3: Okay.

Speaker speaker\_1: ... is Elexir, which is E-L-E-X-I-R. That's your preventative one. So that's the one that would cover, like, one physical visit a year, some vaccinations, some STD and cancer screenings. So that's for your MEC plan. And then the one that says PB-

Speaker speaker\_3: Yeah.

Speaker speaker\_1: ... that says Creative Circle, um, MetLife, vision-

Speaker speaker\_3: Yeah. I see that one.

Speaker speaker\_1: That's your vision card. That one's just your vision card. They have-

Speaker speaker\_3: Okay. So for the first two PDFs of the same file, that's the same thing?

Speaker speaker\_1: Uh, no.

Speaker speaker\_3: Okay. I just... Okay.

Speaker speaker\_1: So the one... So the one that says Carrollton, you see that it says American Public Life and then it says Carrollton?

Speaker speaker\_3: Yes. I see that one. Yes.

Speaker speaker\_1: That one is for your dental.

Speaker speaker\_3: Okay. Okay. So that one... So the second one I see now is American Public Life Pharmacoville.

Speaker speaker\_1: And then, yeah. And then the one that just says, uh, APL Pharmacoville, that's your, um, card that you would take if you were to go to the doctor sick.

Speaker speaker\_3: Okay, cool. All right. Sounds good.

Speaker speaker\_1: Okay. Did you have any more questions?

Speaker speaker\_3: No. That's it. Thank you so much.

Speaker speaker\_1: You're welcome. Have a nice day.

Speaker speaker\_3: You too. Thanks.