

Transcript: Estefania

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Full Transcript

Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Hi, um, I'm Cooper Leetch. Um, I'm calling, um, I'm working with, uh, Partners for, I believe, I forgot the whole name, but it was Partners for something. Um, and they said to call this number to enroll in benefits. Yes, sir. Um, Partners Personnel? Yeah! That's the one. Okay. I, I always forget it. It's okay. Um, do you know, what are the last four of your Social? Uh... Ah, I need to look at that number pad to remember that 'cause I always, I just type it in usually. Uh, it is 757859. Okay, thank you. For security purposes, can you please verify your address and date of birth for me? Uh, yeah. So my address is 6317 Wilmington Way. Mm-hmm. Um, and then what was the other one you asked for? Um, your date of birth, but can you give me your full- Your- ... address, city and state, please? Yeah. So it's gonna be 6317 Wilmington Way, Flowery Branch, Georgia 30542. Um, and my date of birth is June 29th, 2005. Great. Thank you for that. And then, I have your phone number as 678-949-3708. Is that still up-to-date? Uh, yeah, 678-949-3708. Okay, thank you. And then, I have your email address as cooper, your last name, @yahoo.com. Is that up-to-date? Uh, yes, ma'am. It should be cooperleetch, spelled L-E-E-T-C-H, @yahoo.com. Okay, thank you. And then, did you know, by any chance, what you want to enroll into or did you want me to send you that benefit guide? And I can go over the plans as well. Um, if you don't mind, could you send me the benefit guide 'cause I didn't really know. Yeah. I, I just was told to call, so... Okay, yeah, you're fine. I went ahead and sent it to your email. Do you mind verifying that you received it? It should come from an email that says info@benefitsinacard.com. Yeah, just give me one second. I'm gonna look on my phone real quick. Okay. And then if you don't see it right away, I would also check your spam and your junk 'cause sometimes it sends it there. All righty. I did indeed get that email. Okay, you did? Yes, ma'am. Okay. All right. So, if you want, I can go ahead and start going over the plans. So, I was... Before I start going over them, I do have to let you know that although the medical plans as well as the dental and the vision are under a IRS regulation that's called Section 125. So technically what that section is, it allows you to pay these plans with pre-tax dollars. However, if you do want to cancel the plan once you enroll into it or add dependents or make any changes in general to that specific plan, um, such as, like, canceling it or adding a dependent, the only time that you would be eligible to do so is within the first 30 days of you receiving your first check or when, when the company is within company open enrollment, which for Partners Personal, it's in the month of, I, I believe October, but I can double-check real quick just to make sure and then I'll let you know when the last day that, to enroll that you have or to make any changes in those plans. Um, give me one second. Let me check to see when their company is within company open enrollment. So yeah, in the month of October, and then the last day that you would have to make any changes or in general to enroll or either cancel any of those plans or make changes within those plans is, I can give

you the date too. It would be- I'm gonna, I'm gonna put you on speaker real quick just so I can look at all this stuff as well. Okay, yeah. That's fine. Um, the last day that you would have to enroll if you decide to enroll would be February the 19th, okay? And also- I gotcha. ... this would be the last day that you would have if you do decide to enroll into the medi- ... one of the medical plans or the dental and vision, the last day that you would have to drop that plan or add dependents to that plan would be on the 19th as well. Okay? I just wanted to let you know just so that you keep it in mind while I go over the plans 'cause I just- Yeah, I gotcha. And just 'cause I know, um, I'll prob- I'll be honest. I'm, I'm still living with my parents, so like I, I already have a lot of, like, the, like, the stuff, like all the benefits and stuff from- Mm-hmm. ... my parents. Um, does anything, is anything, like, free or does it all cost a part of my paycheck? No. All of these have their deductions- No. ... included in them. Deductions? Mm-hmm. And I'll be honest. I, I, I thought, um, I thought it was gonna be something else, so like, uh, I don't really need to enroll into anything. I was just told to call, so I called and I j-... so... Ah, okay. Yeah, 'cause they only offer medical, um, benefits. So, it would be like dental, your term life, vision, uh, 24-hour group accident, short-term disability, critical illness with cancer benefit. Those are some of the plans. Then they've got daily protection. They also offer a preventative plan, which is the one that would cover, like, a physical and some check-ups. And then your three VIPs are the ones that actually cover doctor visits estat- hospital visits, urgent care, emergency room. They all do have their deductions in them. And it's only- I gotcha. Yeah. So in that case, I... Yeah, in that case, I... I'll be honest. I probably don't need to enroll at en- I don't need to enroll into, into anything 'cause I already- Okay. ... I got stuff through my, my mom, uh, but- Gotcha. ... and also, it's just, just mostly a temporary job, but I was just calling just 'cause it told me to. But I appreciate your time. Yeah. I... You're welcome. And I was gonna tell you, it's not mandatory, so if you don't want to enroll, you don't have to, and they don't auto-enroll their members into any of the plans. So, if you don't want to enroll, you don't have to really do anything 'cause you just wouldn't have to- Okay, cool. I was just calling 'cause I just wanted to double-check all that stuff, so- Okay. Yeah, that's fine. ... I appreciate your time so much. All right. Have a nice day. You as well. You have a wonderful night. Bye-bye. Thank you. Bye. Bye-bye.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you?

Speaker speaker_1: Hi, um, I'm Cooper Leetch. Um, I'm calling, um, I'm working with, uh, Partners for, I believe, I forgot the whole name, but it was Partners for something. Um, and they said to call this number to enroll in benefits.

Speaker speaker_0: Yes, sir. Um, Partners Personnel?

Speaker speaker_1: Yeah! That's the one.

Speaker speaker_0: Okay.

Speaker speaker_1: I, I always forget it.

Speaker speaker_0: It's okay. Um, do you know, what are the last four of your Social?

Speaker speaker_1: Uh... Ah, I need to look at that number pad to remember that 'cause I always, I just type it in usually. Uh, it is 757859.

Speaker speaker_0: Okay, thank you. For security purposes, can you please verify your address and date of birth for me?

Speaker speaker_1: Uh, yeah. So my address is 6317 Wilmington Way.

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: Um, and then what was the other one you asked for?

Speaker speaker_0: Um, your date of birth, but can you give me your full-

Speaker speaker_1: Your-

Speaker speaker_0: ... address, city and state, please?

Speaker speaker_1: Yeah. So it's gonna be 6317 Wilmington Way, Flowery Branch, Georgia 30542. Um, and my date of birth is June 29th, 2005.

Speaker speaker_0: Great. Thank you for that. And then, I have your phone number as 678-949-3708. Is that still up-to-date?

Speaker speaker_1: Uh, yeah, 678-949-3708.

Speaker speaker_0: Okay, thank you. And then, I have your email address as cooper, your last name, @yahoo.com. Is that up-to-date?

Speaker speaker_1: Uh, yes, ma'am. It should be cooperleetch, spelled L-E-E-T-C-H, @yahoo.com.

Speaker speaker_0: Okay, thank you. And then, did you know, by any chance, what you want to enroll into or did you want me to send you that benefit guide? And I can go over the plans as well.

Speaker speaker_1: Um, if you don't mind, could you send me the benefit guide 'cause I didn't really know.

Speaker speaker_0: Yeah.

Speaker speaker_1: I, I just was told to call, so...

Speaker speaker_0: Okay, yeah, you're fine. I went ahead and sent it to your email. Do you mind verifying that you received it? It should come from an email that says info@benefitsinacard.com.

Speaker speaker_1: Yeah, just give me one second. I'm gonna look on my phone real quick.

Speaker speaker_0: Okay. And then if you don't see it right away, I would also check your spam and your junk 'cause sometimes it sends it there.

Speaker speaker_1: All righty. I did indeed get that email.

Speaker speaker_0: Okay, you did?

Speaker speaker_1: Yes, ma'am.

Speaker speaker_0: Okay. All right. So, if you want, I can go ahead and start going over the plans. So, I was... Before I start going over them, I do have to let you know that although the medical plans as well as the dental and the vision are under a IRS regulation that's called Section 125. So technically what that section is, it allows you to pay these plans with pre-tax dollars. However, if you do want to cancel the plan once you enroll into it or add dependents or make any changes in general to that specific plan, um, such as, like, canceling it or adding a dependent, the only time that you would be eligible to do so is within the first 30 days of you receiving your first check or when, when the company is within company open enrollment, which for Partners Personal, it's in the month of, I, I believe October, but I can double-check real quick just to make sure and then I'll let you know when the last day that, to enroll that you have or to make any changes in those plans. Um, give me one second. Let me check to see when their company is within company open enrollment. So yeah, in the month of October, and then the last day that you would have to make any changes or in general to enroll or either cancel any of those plans or make changes within those plans is, I can give you the date too. It would be-

Speaker speaker_1: I'm gonna, I'm gonna put you on speaker real quick just so I can look at all this stuff as well.

Speaker speaker_0: Okay, yeah. That's fine. Um, the last day that you would have to enroll if you decide to enroll would be February the 19th, okay? And also-

Speaker speaker_1: I gotcha.

Speaker speaker_0: ... this would be the last day that you would have if you do decide to enroll into the medi- ... one of the medical plans or the dental and vision, the last day that you would have to drop that plan or add dependents to that plan would be on the 19th as well. Okay? I just wanted to let you know just so that you keep it in mind while I go over the plans 'cause I just-

Speaker speaker_1: Yeah, I gotcha. And just 'cause I know, um, I'll prob- I'll be honest. I'm, I'm still living with my parents, so like I, I already have a lot of, like, the, like, the stuff, like all the benefits and stuff from-

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: ... my parents. Um, does anything, is anything, like, free or does it all cost a part of my paycheck?

Speaker speaker_0: No. All of these have their deductions-

Speaker speaker_1: No.

Speaker speaker_0: ... included in them.

Speaker speaker_1: Deductions?

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: And I'll be honest. I, I, I thought, um, I thought it was gonna be something else, so like, uh, I don't really need to enroll into anything. I was just told to call, so I called and I j-... so...

Speaker speaker_0: Ah, okay. Yeah, 'cause they only offer medical, um, benefits. So, it would be like dental, your term life, vision, uh, 24-hour group accident, short-term disability, critical illness with cancer benefit. Those are some of the plans. Then they've got daily protection. They also offer a preventative plan, which is the one that would cover, like, a physical and some check-ups. And then your three VIPs are the ones that actually cover doctor visits estate-hospital visits, urgent care, emergency room. They all do have their deductions in them. And it's only-

Speaker speaker_1: I gotcha. Yeah. So in that case, I... Yeah, in that case, I... I'll be honest. I probably don't need to enroll at en- I don't need to enroll into, into anything 'cause I already-

Speaker speaker_0: Okay.

Speaker speaker_1: ... I got stuff through my, my mom, uh, but-

Speaker speaker_0: Gotcha.

Speaker speaker_1: ... and also, it's just, just mostly a temporary job, but I was just calling just 'cause it told me to. But I appreciate your time.

Speaker speaker_0: Yeah. I... You're welcome. And I was gonna tell you, it's not mandatory, so if you don't want to enroll, you don't have to, and they don't auto-enroll their members into any of the plans. So, if you don't want to enroll, you don't have to really do anything 'cause you just wouldn't have to-

Speaker speaker_1: Okay, cool. I was just calling 'cause I just wanted to double-check all that stuff, so-

Speaker speaker_0: Okay. Yeah, that's fine.

Speaker speaker_1: ... I appreciate your time so much.

Speaker speaker_0: All right. Have a nice day.

Speaker speaker_1: You as well. You have a wonderful night. Bye-bye.

Speaker speaker_0: Thank you. Bye.

Speaker speaker_1: Bye-bye.