

Transcript: Estefania

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefit CenterCard. My name is Stephanie. How can I assist you? Hi. Um, I just wanted to essentially cancel my plan for 2025, um- Okay. ... and I know, yeah, the renewal period is right around now, so... Gotcha. Yeah, what staff and agency are you with? Uh, Creative Circle. And then what are the last four of your Social? 0430. And for security purposes, could you please verify your address as well as your date of birth for me? Yeah, 34... It's... The address is 340 Esplanade Ave., Apartment 219404. Date of birth is 6/12/1997. So, did you recently move by any chance? Oh, I do have two addresses. Yeah, um, the other is 16251 Azalea Way, Los Gatos, California 95032. Okay, thank you. And then is your phone number 48438515? Yes. May I have your first name, period, last initial @icon.com? Is that up-to-date? Yes. All right, and then give me one second. All right, give me one second while I review your account. Mm-hmm. Oh. Oh, ... see, um, if I can cancel it, but your plans are under a IRS regulation called Section 125, so the only periods that you can cancel those plans would be within company open enrollment period for your dental, um, vision. I'm sorry. No, I'm wrong. My... Give me one second. So I can cancel, um, everything but your preventative plan. You're welcome to call us back Monday, that's when they start their company open enrollment period, to cancel that plan. Since it's under that IRS regulation. Oh, perfect. Sorry, I, I thought it was started already, so yeah, I'm happy to call back Monday. It's okay. Di- Did you want me to go ahead and cancel the ones that I can or do you just want to call back Monday? I'll just call back Monday. Okay. Um, and it looks like it's gonna be... Give me one second. Let me give you... So it starts Monday, and it ends the 31st of January. So if you forget to call Monday, that's no big deal 'cause you have all those days, um, but it does start Monday. So I would call Monday- Okay. ... if you do wanna cancel it just so that you don't forget and then pass the period. Okay. Awesome. Thank you so much. You're welcome. Have a nice day. Thanks. You too. Bye. Bye.

Conversation Format

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

Speaker speaker_1: Thank you for calling Benefit CenterCard. My name is Stephanie. How can I assist you?

Speaker speaker_2: Hi. Um, I just wanted to essentially cancel my plan for 2025, um-

Speaker speaker_1: Okay.

Speaker speaker_2: ... and I know, yeah, the renewal period is right around now, so...

Speaker speaker_1: Gotcha. Yeah, what staff and agency are you with?

Speaker speaker_2: Uh, Creative Circle.

Speaker speaker_1: And then what are the last four of your Social?

Speaker speaker_2: 0430.

Speaker speaker_1: And for security purposes, could you please verify your address as well as your date of birth for me?

Speaker speaker_2: Yeah, 34... It's... The address is 340 Esplanade Ave., Apartment 219404. Date of birth is 6/12/1997.

Speaker speaker_1: So, did you recently move by any chance?

Speaker speaker_2: Oh, I do have two addresses. Yeah, um, the other is 16251 Azalea Way, Los Gatos, California 95032.

Speaker speaker_1: Okay, thank you. And then is your phone number 48438515?

Speaker speaker_2: Yes.

Speaker speaker_1: May I have your first name, period, last initial @icon.com? Is that up-to-date?

Speaker speaker_2: Yes.

Speaker speaker_1: All right, and then give me one second. All right, give me one second while I review your account.

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: Oh. Oh, ... see, um, if I can cancel it, but your plans are under a IRS regulation called Section 125, so the only periods that you can cancel those plans would be within company open enrollment period for your dental, um, vision. I'm sorry. No, I'm wrong. My... Give me one second. So I can cancel, um, everything but your preventative plan. You're welcome to call us back Monday, that's when they start their company open enrollment period, to cancel that plan. Since it's under that IRS regulation.

Speaker speaker_2: Oh, perfect. Sorry, I, I thought it was started already, so yeah, I'm happy to call back Monday.

Speaker speaker_1: It's okay. Di- Did you want me to go ahead and cancel the ones that I can or do you just want to call back Monday?

Speaker speaker_2: I'll just call back Monday.

Speaker speaker_1: Okay. Um, and it looks like it's gonna be... Give me one second. Let me give you... So it starts Monday, and it ends the 31st of January. So if you forget to call Monday, that's no big deal 'cause you have all those days, um, but it does start Monday. So I

would call Monday-

Speaker speaker_2: Okay.

Speaker speaker_1: ... if you do wanna cancel it just so that you don't forget and then pass the period.

Speaker speaker_2: Okay. Awesome. Thank you so much.

Speaker speaker_1: You're welcome. Have a nice day.

Speaker speaker_2: Thanks. You too. Bye.

Speaker speaker_1: Bye.