

Transcript: Estefania

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Yes, ma'am. My name is Kaitlyn McLean. I was wanting to find out some information about the insurance. Okay. What staffing agency do you work for? Crown Staffing. Okay. And then, what are the last four of your social? 1536. And your first and last name? Kaitlyn, K-A-I-T-L-Y-N... excuse me, McLean, M-C-L-E-A-N. Okay, thank you. For security purposes, could you verify your full address and date of birth for me? 441 Talon Drive, Hopkinsville, Kentucky, 42240. And the date of birth is 05/09/2000. Is your phone number 270-881-2105? No, that has changed. Okay. Is it the one you're calling from? 270-348- 348-9545. Thank you. And then at half, your first name period last name 14@icon.com, is that up to date? Correct. Okay. Um, were you wanting to enroll? Yes, if possible. Okay. I was wanting to check out the plans to see what was gonna be best, and possibly enroll today. In the last 30 days, have you experienced a loss of benefit, gotten married, divorced, having or adopted- Uh, I'm going to be losing my insur- the current insurance I have, I'll be losing at the end of the month. Okay. So at the moment, you won't, wouldn't be eligible to enroll, um, because you're outside of your personal open enrollment period, which are the first 30 days of receiving your first check, and you're outside of your company open enrollment. Uh, I can verify to see in what month that falls in, though. Because once they're in company open enrollment, you'll be eligible to enroll. Oh, okay. You're with Crown, right? Mm-hmm. Um, the last... Their company open enrollment is between the month of December up until January. Uh, the 3rd, that was the last day to enroll. Okay, so I'm not gonna be able to enroll? No, ma'am. Unfortunately not. I wouldn't be able to enroll you at this time. What about the 30-day period? So, y- you would have to call once you lose that benefit. Okay. As long as you're not outside those 30 days, and they will ask for, um, documents stating that you did lose that benefit within that timeframe. So, once that happens, you're welcome to give us a call. But since you haven't experienced none of those, loss of benefit, got married, divorced, having a baby, or adopted within the last 30 days, at the moment, I wouldn't be able to enroll you into the benefits. But once you do experience that, you're welcome to give us a call, 'cause they're gonna ask you the same questions that I just did. And once you tell them, "Yeah, I have lost benefit..." So, so does that mean that... Um, you have to call. So somebody 30... Oh, sorry. So, as, honestly, as soon as you lose that benefit, I would call. Okay, so, but the 30 days, those 30 days after my first check? Yes. The only time you're actually eligible to enroll is 30 days after receiving your first check. The first one, though. Okay. After those 30 days, you would have to either enroll within company open enrollment, which for them was between December 2nd up until January 3rd. Since you're outside of those two, that's why I asked, um, did you lose benefit, got married, divorced, had a baby, or adopted within the last 30 days. Since you haven't experienced none of those, I can't

enroll you at this time. But once you lose that benefit, I would call those right away, um, but they will- Okay. ... request documents, 'cause obviously they're gonna have to investigate to see if you are eligible. Right, I know my insurance company's gonna request documents from Crown to prove that I have the job, what I'm making and everything like that. Was... With them getting that paper, would that serve justice for open enrollment data? So, who, um... The only times you're eligible is within your personal open enrollment, which are the first 30 days of receiving your very first check, or when the company's within company open enrollment. Right. And then, if you lose benefit, you would... And let's say, um, you call us and you're still outside your personal open enrollment, they're gonna request documents from you. They have to actually- Okay. ... prove that you did lose that benefit within the last 30 days. Um, and then our main office takes care of that. Okay. But you would have f some type of proof stating that you lost it within the last 30 days. Okay. Do you want me to go ahead and send you that, by any chance? 'Cause I can go ahead and send you that, um, that... Yes, please send us a email, if you could. Once you have that information, you would have to email it to the main office. And then- Okay. ... they will, um, inform you if you're eligible or not. Okay. Okay? Um- Could you still tell me about the plans for the insurance, though? Yes. Um, so i- so since you're not eligible at the moment, if, I can go ahead and send you the documents.... like, the benefit- Okay. ... number. And that benefit guy has all the plans that they offer, as well as the prices to those plans. Okay. Yeah, I would... Uh, yeah. But it's better for you to, like, know if you're actually eligible or not. Um, but I, I can send you all that information still, but you would still have to go through- Yeah, please. ... that process and call, and stuff. I honestly would- That sounds good. Um, I can send you that email, but I would call back- Okay. ... this number once you lose that benefit just to make sure. Okay. Okay? Is that a good email to send it to? Yes, ma'am. Okay. Give me one second. I'm gonna put you in a brief hold while I send you that information. Okay. Thank you for your hold. I went ahead and emailed you those two, um, emails, okay? So one of it- Okay. ... is gonna be Quality Life Event. Um, once you lose that benefit, I would do that as soon as possible, just to make sure that you're within- Okay. ... that timeframe. And then I would call and just- The other says... The other one's the benefit guy. Mm-hmm. Yes, ma'am. So those two right there. Okay. I received both of them. All right. So that's really what you just need. Um, just keep in mind there is that timeframe, so as long as you do it nothing past in 30 days, then you should be good. And then we'll... Once, um, they'll know if you're eligible or not, you should be receiving a call to let you know. And then- Okay. ... that 270-348-9545 is a good phone number, right? Yes, ma'am. Okay. And then would you like me to add a secondary or just leave that one there? Just leave that blank. Okay. If you have any more questions, and I'm pretty sure- No, ma'am, that was all for today. If you s-... If you still have questions by the time that you enroll, um- Okay. ... we'll be happy to go over the plans with you. Okay. But first I want, I wanna make sure that you're even eligible before I explain the plans. Right. Mm-hmm. But that should really be it. That's really the only thing they're gonna ask for. All right. Thank you. I appreciate your help today. You welcome. Have a nice day. You as well.

Conversation Format

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

Speaker speaker_1: Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you?

Speaker speaker_2: Yes, ma'am. My name is Kaitlyn McLean. I was wanting to find out some information about the insurance.

Speaker speaker_1: Okay. What staffing agency do you work for?

Speaker speaker_2: Crown Staffing.

Speaker speaker_1: Okay. And then, what are the last four of your social?

Speaker speaker_2: 1536.

Speaker speaker_1: And your first and last name?

Speaker speaker_2: Kaitlyn, K-A-I-T-L-Y-N... excuse me, McLean, M-C-L-E-A-N.

Speaker speaker_1: Okay, thank you. For security purposes, could you verify your full address and date of birth for me?

Speaker speaker_2: 441 Talon Drive, Hopkinsville, Kentucky, 42240. And the date of birth is 05/09/2000.

Speaker speaker_1: Is your phone number 270-881-2105?

Speaker speaker_2: No, that has changed.

Speaker speaker_1: Okay. Is it the one you're calling from? 270-348-

Speaker speaker_3: 348-9545.

Speaker speaker_1: Thank you. And then at half, your first name period last name 14@icon.com, is that up to date?

Speaker speaker_2: Correct.

Speaker speaker_1: Okay. Um, were you wanting to enroll?

Speaker speaker_2: Yes, if possible.

Speaker speaker_1: Okay.

Speaker speaker_2: I was wanting to check out the plans to see what was gonna be best, and possibly enroll today.

Speaker speaker_1: In the last 30 days, have you experienced a loss of benefit, gotten married, divorced, having or adopted-

Speaker speaker_2: Uh, I'm going to be losing my insur- the current insurance I have, I'll be losing at the end of the month.

Speaker speaker_1: Okay. So at the moment, you won't, wouldn't be eligible to enroll, um, because you're outside of your personal open enrollment period, which are the first 30 days of

receiving your first check, and you're outside of your company open enrollment. Uh, I can verify to see in what month that falls in, though. Because once they're in company open enrollment, you'll be eligible to enroll. Oh, okay. You're with Crown, right?

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: Um, the last... Their company open enrollment is between the month of December up until January. Uh, the 3rd, that was the last day to enroll.

Speaker speaker_2: Okay, so I'm not gonna be able to enroll?

Speaker speaker_1: No, ma'am. Unfortunately not. I wouldn't be able to enroll you at this time.

Speaker speaker_2: What about the 30-day period?

Speaker speaker_1: So, y- you would have to call once you lose that benefit.

Speaker speaker_2: Okay.

Speaker speaker_1: As long as you're not outside those 30 days, and they will ask for, um, documents stating that you did lose that benefit within that timeframe. So, once that happens, you're welcome to give us a call. But since you haven't experienced none of those, loss of benefit, got married, divorced, having a baby, or adopted within the last 30 days, at the moment, I wouldn't be able to enroll you into the benefits. But once you do experience that, you're welcome to give us a call, 'cause they're gonna ask you the same questions that I just did. And once you tell them, "Yeah, I have lost benefit..."

Speaker speaker_2: So, so does that mean that...

Speaker speaker_1: Um, you have to call.

Speaker speaker_2: So somebody 30... Oh, sorry.

Speaker speaker_1: So, as, honestly, as soon as you lose that benefit, I would call.

Speaker speaker_2: Okay, so, but the 30 days, those 30 days after my first check?

Speaker speaker_1: Yes. The only time you're actually eligible to enroll is 30 days after receiving your first check. The first one, though.

Speaker speaker_2: Okay.

Speaker speaker_1: After those 30 days, you would have to either enroll within company open enrollment, which for them was between December 2nd up until January 3rd. Since you're outside of those two, that's why I asked, um, did you lose benefit, got married, divorced, had a baby, or adopted within the last 30 days. Since you haven't experienced none of those, I can't enroll you at this time. But once you lose that benefit, I would call those right away, um, but they will-

Speaker speaker_2: Okay.

Speaker speaker_1: ... request documents, 'cause obviously they're gonna have to investigate to see if you are eligible.

Speaker speaker_2: Right, I know my insurance company's gonna request documents from Crown to prove that I have the job, what I'm making and everything like that. Was... With them getting that paper, would that serve justice for open enrollment data?

Speaker speaker_1: So, who, um... The only times you're eligible is within your personal open enrollment, which are the first 30 days of receiving your very first check, or when the company's within company open enrollment.

Speaker speaker_2: Right.

Speaker speaker_1: And then, if you lose benefit, you would... And let's say, um, you call us and you're still outside your personal open enrollment, they're gonna request documents from you. They have to actually-

Speaker speaker_2: Okay.

Speaker speaker_1: ... prove that you did lose that benefit within the last 30 days. Um, and then our main office takes care of that.

Speaker speaker_2: Okay.

Speaker speaker_1: But you would have *f* some type of proof stating that you lost it within the last 30 days.

Speaker speaker_2: Okay.

Speaker speaker_1: Do you want me to go ahead and send you that, by any chance? 'Cause I can go ahead and send you that, um, that...

Speaker speaker_2: Yes, please send us a email, if you could.

Speaker speaker_1: Once you have that information, you would have to email it to the main office. And then-

Speaker speaker_2: Okay.

Speaker speaker_1: ... they will, um, inform you if you're eligible or not.

Speaker speaker_2: Okay.

Speaker speaker_1: Okay? Um-

Speaker speaker_2: Could you still tell me about the plans for the insurance, though?

Speaker speaker_1: Yes. Um, so i- so since you're not eligible at the moment, if, I can go ahead and send you the documents.... like, the benefit-

Speaker speaker_4: Okay.

Speaker speaker_1: ... number. And that benefit guy has all the plans that they offer, as well as the prices to those plans.

Speaker speaker_4: Okay.

Speaker speaker_1: Yeah, I would... Uh, yeah. But it's better for you to, like, know if you're actually eligible or not. Um, but I, I can send you all that information still, but you would still have to go through-

Speaker speaker_4: Yeah, please.

Speaker speaker_1: ... that process and call, and stuff. I honestly would-

Speaker speaker_4: That sounds good.

Speaker speaker_1: Um, I can send you that email, but I would call back-

Speaker speaker_4: Okay.

Speaker speaker_1: ... this number once you lose that benefit just to make sure.

Speaker speaker_4: Okay.

Speaker speaker_1: Okay? Is that a good email to send it to?

Speaker speaker_4: Yes, ma'am.

Speaker speaker_1: Okay. Give me one second. I'm gonna put you in a brief hold while I send you that information.

Speaker speaker_4: Okay.

Speaker speaker_1: Thank you for your hold. I went ahead and emailed you those two, um, emails, okay? So one of it-

Speaker speaker_4: Okay.

Speaker speaker_1: ... is gonna be Quality Life Event. Um, once you lose that benefit, I would do that as soon as possible, just to make sure that you're within-

Speaker speaker_4: Okay.

Speaker speaker_1: ... that timeframe. And then I would call and just-

Speaker speaker_4: The other says... The other one's the benefit guy.

Speaker speaker_1: Mm-hmm. Yes, ma'am. So those two right there.

Speaker speaker_4: Okay. I received both of them.

Speaker speaker_1: All right. So that's really what you just need. Um, just keep in mind there is that timeframe, so as long as you do it nothing past in 30 days, then you should be good. And then we'll... Once, um, they'll know if you're eligible or not, you should be receiving a call to let you know. And then-

Speaker speaker_4: Okay.

Speaker speaker_1: ... that 270-348-9545 is a good phone number, right?

Speaker speaker_4: Yes, ma'am.

Speaker speaker_1: Okay. And then would you like me to add a secondary or just leave that one there?

Speaker speaker_4: Just leave that blank.

Speaker speaker_1: Okay. If you have any more questions, and I'm pretty sure-

Speaker speaker_4: No, ma'am, that was all for today.

Speaker speaker_1: If you s-... If you still have questions by the time that you enroll, um-

Speaker speaker_4: Okay.

Speaker speaker_1: ... we'll be happy to go over the plans with you.

Speaker speaker_4: Okay.

Speaker speaker_1: But first I want, I wanna make sure that you're even eligible before I explain the plans.

Speaker speaker_4: Right.

Speaker speaker_1: Mm-hmm. But that should really be it. That's really the only thing they're gonna ask for.

Speaker speaker_4: All right. Thank you. I appreciate your help today.

Speaker speaker_1: You welcome. Have a nice day.

Speaker speaker_4: You as well.