

Transcript: Estefania

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Full Transcript

Thank you for calling Benefits 10 10- Why rite name? My information is listed. Hi, um, my name is Katie Cannon. How can I help you? Um, I got a voicemail from Francesca yesterday, um, I'm making changes to my, um, insurance and she was calling, I guess, to make sure that I was really doing those changes. I guess, did I not pick up... Uh, it sounds like she said I picked a preventative medical plan. Mm-hmm. So, could you, could you pull me up, please so we can look? Yes. Um, what are the last four of your Social and then what staff and agency do you work for? The last four of my social's 2-6-8-8, and I work for Focus Group Management. Okay, thank you. And then your first and last name, please. Catherine Cannon. For security purposes, can you verify your address and date of birth? 9531 Nautical Mile Road in Reno, Nevada, 89506, and the date of birth is 10-23-77. Is your phone number still 775-750-0560? Yes. And then what's your email? Jcraider69@icloud.com. Okay, thank you, and all right give me one second while I review your account. Thank you. Okay, thank you for your hold. So it looks like the reason why they called you was to see if you wanted to make any changes to your elections or if you wanted to keep them the same. Um, it looks like you're currently enrolled into dental as well as a VIP plus. Oh, right, now, I, I guess I had a plan right when I first started that I didn't even know that I had which was great, and then I chose a new one, um, just last week, and- Mm-hmm. ... um, do you show... Is that which one you're talking about? 'Cause the message she left me shows that I changed from, I guess the VIP. Her message states that, "It shows you were trying to change into a medical preventative dental and life insurance," which is term life. Mm-hmm. So she's calling to make sure that's what I wanted to do. Is the plan I just signed up with, is it not medical and dental? I, I'm so confused. Okay, 'cause, um, it looks like the f- I guess your enrollment form. Let me pull it up real quick. Um- Yeah, sorry. Go ahead. Just all the plans that are available are so confusing, so I made my husband choose it, and then I chose it and now she's calling, like, almost like I've picked a plan that isn't, like, insurance except preventative? I just need to be able to go to the doctor. Okay, yeah. Um, so they- I know, some of the plans are virtual and I don't want that. Mm-hmm. And so the one plan you have to meet the \$6,500 deductible before it starts paying. Yeah. One plan is only preventative, and I don't want any of those. So yeah, I don't know. Okay. So it looks like the reason why they called you is because they were looking over your, um, file import. And that one was the one that said different plans. It had the preventative one-... dental and then the term life. Um, but the one that you spoke with her regarding was your medical plan, which is the dental and then the VIP Plus. But since they saw that file, they got a bit confused on exactly which plans you wanted. But if you just want dental and your medical plan, which is the VIP Plus, that's the one that would cover doctor visits if sick, hospital visits if injured, urgent care, emergency room, and surgeries. Yeah. Yeah, that's what I want. And, uh, did, did they offer that confusion because I signed up for, like, um, life

insurance as well? I put that as well. Yes. Maybe that's where they're feeling. Okay. So I guess t-to, um, fill that out, and then you spoke with her. They got a bit confused of which plans you actually wanted, so they were calling you just to verify since the last day of the company open enrollment is the 14th. Like, this week. Yeah. Okay. Yeah. So they just wanted to call you before, uh, and s- so that they can make those changes if you did want, like, the preventative dental and term life. Um, so you don't want those, right? You just wanted your dental- I do want those. ... and then your medical plan. Right? Did you want those? Well, I do want the life as well. Yeah. Okay. So I want medical, dental, and the life. Yeah. Okay. Let me add that 'cause right now, you only have dental and then your medical. Okay. Okay. Let me add. So, uh, whenever I add term life or employee... Did you wanna do the employee only? Um, let's do that. Yeah, I'm good with that. Okay. Yeah. So, right now, it looks like it's a weekly deduction of \$37.18, but once I add term life, which is \$2.11- Mm-hmm. ... that is a new weekly deduction of \$39.29. Do you allow me to make these changes? Yes, I do. Okay. Stop talking. Okay. Please allow one or two weeks for staff and agency to start making this new deduction. So there is a possibility that you still may see one or two deductions of \$37.18 for the dental plan and your medical plan. But once you see that new deduction of the \$39.29 come out of your paycheck, that's when that term life plan becomes effective, that following 90 days. Okay. Perfect. Thank you so much for your help. Okay? You're welcome. Okay, have a good day. Thank you. So, so far, you have dental, term life, and then your medical plan, okay? Awesome. Okay. Thank you. And then... You're welcome. The medical plan that you selected doesn't cover your preventative visits, okay? So it's just the medical part. Okay. Okay, yeah. Okay? All right. Thank you. You're welcome. Have a nice day. You too. Thanks. Mm-hmm. Bye.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits 10 10-

Speaker speaker_1: Why rite name? My information is listed.

Speaker speaker_2: Hi, um, my name is Katie Cannon.

Speaker speaker_1: How can I help you?

Speaker speaker_2: Um, I got a voicemail from Francesca yesterday, um, I'm making changes to my, um, insurance and she was calling, I guess, to make sure that I was really doing those changes. I guess, did I not pick up... Uh, it sounds like she said I picked a preventative medical plan.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: So, could you, could you pull me up, please so we can look?

Speaker speaker_1: Yes. Um, what are the last four of your Social and then what staff and agency do you work for?

Speaker speaker_2: The last four of my social's 2-6-8-8, and I work for Focus Group Management.

Speaker speaker_1: Okay, thank you. And then your first and last name, please.

Speaker speaker_2: Catherine Cannon.

Speaker speaker_1: For security purposes, can you verify your address and date of birth?

Speaker speaker_2: 9531 Nautical Mile Road in Reno, Nevada, 89506, and the date of birth is 10-23-77.

Speaker speaker_1: Is your phone number still 775-750-0560?

Speaker speaker_2: Yes.

Speaker speaker_1: And then what's your email?

Speaker speaker_2: Jcraider69@icloud.com.

Speaker speaker_1: Okay, thank you, and all right give me one second while I review your account.

Speaker speaker_2: Thank you.

Speaker speaker_1: Okay, thank you for your hold. So it looks like the reason why they called you was to see if you wanted to make any changes to your elections or if you wanted to keep them the same. Um, it looks like you're currently enrolled into dental as well as a VIP plus.

Speaker speaker_2: Oh, right, now, I, I guess I had a plan right when I first started that I didn't even know that I had which was great, and then I chose a new one, um, just last week, and-

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: ... um, do you show... Is that which one you're talking about? 'Cause the message she left me shows that I changed from, I guess the VIP. Her message states that, "It shows you were trying to change into a medical preventative dental and life insurance," which is term life.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: So she's calling to make sure that's what I wanted to do. Is the plan I just signed up with, is it not medical and dental? I, I'm so confused.

Speaker speaker_1: Okay, 'cause, um, it looks like the f- I guess your enrollment form. Let me pull it up real quick. Um-

Speaker speaker_2: Yeah, sorry.

Speaker speaker_1: Go ahead.

Speaker speaker_2: Just all the plans that are available are so confusing, so I made my husband choose it, and then I chose it and now she's calling, like, almost like I've picked a plan that isn't, like, insurance except preventative? I just need to be able to go to the doctor.

Speaker speaker_1: Okay, yeah. Um, so they-

Speaker speaker_2: I know, some of the plans are virtual and I don't want that.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: And so the one plan you have to meet the \$6,500 deductible before it starts paying.

Speaker speaker_1: Yeah.

Speaker speaker_2: One plan is only preventative, and I don't want any of those. So yeah, I don't know.

Speaker speaker_1: Okay. So it looks like the reason why they called you is because they were looking over your, um, file import. And that one was the one that said different plans. It had the preventative one-... dental and then the term life. Um, but the one that you spoke with her regarding was your medical plan, which is the dental and then the VIP Plus. But since they saw that file, they got a bit confused on exactly which plans you wanted. But if you just want dental and your medical plan, which is the VIP Plus, that's the one that would cover doctor visits if sick, hospital visits if injured, urgent care, emergency room, and surgeries.

Speaker speaker_3: Yeah. Yeah, that's what I want. And, uh, did, did they offer that confusion because I signed up for, like, um, life insurance as well? I put that as well.

Speaker speaker_1: Yes.

Speaker speaker_3: Maybe that's where they're feeling. Okay.

Speaker speaker_1: So I guess t-to, um, fill that out, and then you spoke with her. They got a bit confused of which plans you actually wanted, so they were calling you just to verify since the last day of the company open enrollment is the 14th.

Speaker speaker_3: Like, this week. Yeah. Okay.

Speaker speaker_1: Yeah. So they just wanted to call you before, uh, and s- so that they can make those changes if you did want, like, the preventative dental and term life. Um, so you don't want those, right? You just wanted your dental-

Speaker speaker_3: I do want those.

Speaker speaker_1: ... and then your medical plan. Right? Did you want those?

Speaker speaker_3: Well, I do want the life as well. Yeah.

Speaker speaker_1: Okay.

Speaker speaker_3: So I want medical, dental, and the life. Yeah.

Speaker speaker_1: Okay. Let me add that 'cause right now, you only have dental and then your medical.

Speaker speaker_3: Okay.

Speaker speaker_1: Okay. Let me add. So, uh, whenever I add term life or employee... Did you wanna do the employee only? Um, let's do that.

Speaker speaker_3: Yeah, I'm good with that.

Speaker speaker_1: Okay.

Speaker speaker_3: Yeah.

Speaker speaker_1: So, right now, it looks like it's a weekly deduction of \$37.18, but once I add term life, which is \$2.11-

Speaker speaker_3: Mm-hmm.

Speaker speaker_1: ... that is a new weekly deduction of \$39.29. Do you allow me to make these changes?

Speaker speaker_3: Yes, I do.

Speaker speaker_1: Okay.

Speaker speaker_3: Stop talking. Okay.

Speaker speaker_1: Please allow one or two weeks for staff and agency to start making this new deduction. So there is a possibility that you still may see one or two deductions of \$37.18 for the dental plan and your medical plan. But once you see that new deduction of the \$39.29 come out of your paycheck, that's when that term life plan becomes effective, that following 90 days.

Speaker speaker_3: Okay. Perfect. Thank you so much for your help.

Speaker speaker_1: Okay? You're welcome.

Speaker speaker_3: Okay, have a good day.

Speaker speaker_1: Thank you. So, so far, you have dental, term life, and then your medical plan, okay?

Speaker speaker_3: Awesome. Okay. Thank you.

Speaker speaker_1: And then... You're welcome. The medical plan that you selected doesn't cover your preventative visits, okay? So it's just the medical part.

Speaker speaker_3: Okay. Okay, yeah.

Speaker speaker_1: Okay?

Speaker speaker_3: All right. Thank you.

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

Speaker speaker_3: You too. Thanks.

Speaker speaker_1: Mm-hmm.

Speaker speaker_3: Bye.