

## **Transcript: Estefania**

**Acevedo-5383615773327360-4694211178184704**

### **Full Transcript**

Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Okay. Hello, Miss Stephanie. My name is Donnell Matlock, and I just got hired with the Partner, uh, Up, uh, about a good, about a good month ago. And I wasn't sure, I think I'm gonna get taken out my check, but I wasn't sure if I was covered with benefits, health benefits, and I was trying to get more information about that. Is this the right line to talk to? Yeah, this is the right number. You said you're with Partners, and what are the last four of your social? That is correct. Uh, my last four of my social will be 3968. Okay, and then your first and last name, please? My name will be Donnell Matlock, like the old TV show. Okay, thank you. And then can you please verify your address and date of birth? It's gonna be 150 Oak Ridge Place, Greenville, South Carolina, 29615. Uh, it's 2/8/1997. Okay, thank you. Let's see. And then I don't have a phone number. Is this a good number to put on file, the 414-307-0505? That is correct. Okay, thank you. And then what's a good email address? Gonna be Donnell, D-O-N-N-E-L, M as in Mary, the number seven, @gmail.com. Okay, thank you. And you actually don't have any coverage. Um, they don't auto-enroll their new hires into any of the plans. So if you don't call within the first 30 days of receiving your check, you won't be enrolled into any of the benefits. Um, the next period that you're eligible to enroll is within company open enrollment, which for Partners Personal, it's held in the month of October. Um, I was gonna ask you, have you experienced a life event within 30 days, like losing benefits- No. ... have, getting married, divorced, having a baby, or adopting? Yes, I had a baby. Okay, and it has been within 30 days of that life event, correct? Yes. Um, I wanna, 'cause I think I'm on my third check. I don't know if it's had, do it tell you if I'm not eligible to sign up yet? I'm sorry? I was h- I was wondering, do it tells you if I'm not eligible to sign up yet? 'Cause I think I only got like three checks so far. So right now at the moment, you're not, by what I'm looking at. Your last day to call in to enroll was April the 23rd. That was your last day. Oh, wow. Good, okay. Yeah, and then, um, since you didn't do so and they don't auto-enroll their new hires into any of the benefits, you don't have any coverage. Um, and then it's not within company open enrollment right now. It's not till October for their staffing agencies. But if you experience a quality, qualifying life event within the past 30 days of that life event, you could be eligible to enroll, but you would have to submit some documents, um, stating that proof that it has been 30 days of that life event. Um, because they do ask for some type of evidence. Um, if you haven't experienced anything like that, like losing benefit, getting married, having a divorce, having a baby, or adopting, you would have to wait for the next company open enrollment, which is held in October. Okay, and how can I upload those documents? I have to send them to your email. Then who reviews it is the main office. They're the ones who review it for eligibility to see if you are eligible, um, to enroll with those documents. If you are, they'll notify me and I can give you a call to set up your plans. But if you're not, then you would have to

wait for the next company open enrollment. So you're welcome to submit that. Okay. And then it really just depends on the main office if they consider that to be within that timeframe. Okay. But I went ahead and emailed that to your email file. Can you please verify that you received it? It's gonna come from info@benefitsinacard.com. And then it's actually gonna tell you in the email exactly everything that they require for that document that you're gonna send over to us. Okay, thank you so much. I did receive that email. Okay, and then I would just look through that, whatever, uh, proof that you have, I would just send it over. And like I said, the main office reviews and they'll be the ones to notify me. Thank you so much, ma'am. You welcome. I hope you have a great day. 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: Okay. Hello, Miss Stephanie. My name is Donnell Matlock, and I just got hired with the Partner, uh, Up, uh, about a good, about a good month ago. And I wasn't sure, I think I'm gonna get taken out my check, but I wasn't sure if I was covered with benefits, health benefits, and I was trying to get more information about that. Is this the right line to talk to?

Speaker speaker\_0: Yeah, this is the right number. You said you're with Partners, and what are the last four of your social?

Speaker speaker\_1: That is correct. Uh, my last four of my social will be 3968.

Speaker speaker\_0: Okay, and then your first and last name, please?

Speaker speaker\_1: My name will be Donnell Matlock, like the old TV show.

Speaker speaker\_0: Okay, thank you. And then can you please verify your address and date of birth?

Speaker speaker\_1: It's gonna be 150 Oak Ridge Place, Greenville, South Carolina, 29615. Uh, it's 2/8/1997.

Speaker speaker\_0: Okay, thank you. Let's see. And then I don't have a phone number. Is this a good number to put on file, the 414-307-0505?

Speaker speaker\_1: That is correct.

Speaker speaker\_0: Okay, thank you. And then what's a good email address?

Speaker speaker\_1: Gonna be Donnell, D-O-N-N-E-L, M as in Mary, the number seven, @gmail.com.

Speaker speaker\_0: Okay, thank you. And you actually don't have any coverage. Um, they don't auto-enroll their new hires into any of the plans. So if you don't call within the first 30 days of receiving your check, you won't be enrolled into any of the benefits. Um, the next period that you're eligible to enroll is within company open enrollment, which for Partners

Personal, it's held in the month of October. Um, I was gonna ask you, have you experienced a life event within 30 days, like losing benefits-

Speaker speaker\_1: No.

Speaker speaker\_0: ... have, getting married, divorced, having a baby, or adopting?

Speaker speaker\_1: Yes, I had a baby.

Speaker speaker\_0: Okay, and it has been within 30 days of that life event, correct?

Speaker speaker\_1: Yes. Um, I wanna, 'cause I think I'm on my third check. I don't know if it's had, do it tell you if I'm not eligible to sign up yet?

Speaker speaker\_0: I'm sorry?

Speaker speaker\_1: I was h- I was wondering, do it tells you if I'm not eligible to sign up yet? 'Cause I think I only got like three checks so far.

Speaker speaker\_0: So right now at the moment, you're not, by what I'm looking at. Your last day to call in to enroll was April the 23rd. That was your last day.

Speaker speaker\_1: Oh, wow. Good, okay.

Speaker speaker\_0: Yeah, and then, um, since you didn't do so and they don't auto-enroll their new hires into any of the benefits, you don't have any coverage. Um, and then it's not within company open enrollment right now. It's not till October for their staffing agencies. But if you experience a quality, qualifying life event within the past 30 days of that life event, you could be eligible to enroll, but you would have to submit some documents, um, stating that proof that it has been 30 days of that life event. Um, because they do ask for some type of evidence. Um, if you haven't experienced anything like that, like losing benefit, getting married, having a divorce, having a baby, or adopting, you would have to wait for the next company open enrollment, which is held in October.

Speaker speaker\_1: Okay, and how can I upload those documents?

Speaker speaker\_0: I have to send them to your email. Then who reviews it is the main office. They're the ones who review it for eligibility to see if you are eligible, um, to enroll with those documents. If you are, they'll notify me and I can give you a call to set up your plans. But if you're not, then you would have to wait for the next company open enrollment. So you're welcome to submit that.

Speaker speaker\_1: Okay.

Speaker speaker\_0: And then it really just depends on the main office if they consider that to be within that timeframe.

Speaker speaker\_1: Okay.

Speaker speaker\_0: But I went ahead and emailed that to your email file. Can you please verify that you received it? It's gonna come from [info@benefitsinacard.com](mailto:info@benefitsinacard.com). And then it's actually gonna tell you in the email exactly everything that they require for that document that

you're gonna send over to us.

Speaker speaker\_1: Okay, thank you so much. I did receive that email.

Speaker speaker\_0: Okay, and then I would just look through that, whatever, uh, proof that you have, I would just send it over. And like I said, the main office reviews and they'll be the ones to notify me.

Speaker speaker\_1: Thank you so much, ma'am.

Speaker speaker\_0: You welcome. I hope you have a great day.

Speaker speaker\_1: Bye-bye.