

Transcript: Estefania

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Full Transcript

Thank you for calling Benefits in a Car. My name is Stephanie. How can I assist you? Um, yes, this is Sherry Cresswell and I was just wanting to get some information about the insurance. Okay. What staff and agency are you working with? Partners. Okay. What is the last four of your Social? Um, 8414. And then what was that first name, last name? Sherry Cresswell. Okay, so Sherry- S-H-A-R-R-... Did you find me? Yes, ma'am. Okay. For security purposes- Mm-hmm. ... can you please verify your address and date of birth? Um, it's 726 34th Place, Fort Madison, Iowa, 52627. And then my birthday, is that what you said? Yes, ma'am. 11-28-65. Okay. Thank you. And then for security purpose... I'm sorry. Um, is your phone number still 319-470-6637? Yes. I have your first name, last name, 26 at gmail.com. Is that up-to-date? Yes. It is. Okay. Thank you. How long have you been w- working with them? Since October. Okay. Um, in the last 30 days, have you experienced a quality life event, like a loss of benefit, got- gotten married, divorced- No. ... had a baby or adopted? No. I just wanted to see about the insurance because I don't have any. Okay. So only- So- ... in two periods you're eligible to enroll. The first period is within the first 30 days of you receiving your first check. And it looks like your deadline date was November the 13. That would've been the end of your personal open enrollment. You can still enroll. However, you would have to do it within company open enrollment, which let me see when that is for Partners Personal. Uh, let me check real quick. I believe in, it's in October but let me just make sure. Oh, well, sure. Yeah. I can't wait til October. Yes, ma'am. So it's til... Last year was between the dates of October the 14 up until October the 25th. So most likely it'll be around that, those dates. But it's definitely in October, um, since you aren't- Okay. ... outside of your personal open enrollment, unfortunately, you would have to wait til the next company open enrollment which is held in October. Okay. All right. Well, thank you then. I'm sorry. I hope you have a great day. That's all right. Okay, thanks. Bye.

Conversation Format

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

Speaker speaker_1: Um, yes, this is Sherry Cresswell and I was just wanting to get some information about the insurance.

Speaker speaker_0: Okay. What staff and agency are you working with?

Speaker speaker_1: Partners.

Speaker speaker_0: Okay. What is the last four of your Social?

Speaker speaker_1: Um, 8414.

Speaker speaker_0: And then what was that first name, last name?

Speaker speaker_1: Sherry Cresswell.

Speaker speaker_0: Okay, so Sherry-

Speaker speaker_1: S-H-A-R-R-... Did you find me?

Speaker speaker_0: Yes, ma'am.

Speaker speaker_1: Okay.

Speaker speaker_0: For security purposes-

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: ... can you please verify your address and date of birth?

Speaker speaker_1: Um, it's 726 34th Place, Fort Madison, Iowa, 52627. And then my birthday, is that what you said?

Speaker speaker_0: Yes, ma'am.

Speaker speaker_1: 11-28-65.

Speaker speaker_0: Okay. Thank you. And then for security purpose... I'm sorry. Um, is your phone number still 319-470-6637?

Speaker speaker_1: Yes.

Speaker speaker_0: I have your first name, last name, 26 at gmail.com. Is that up-to-date?

Speaker speaker_1: Yes. It is.

Speaker speaker_0: Okay. Thank you. How long have you been w- working with them?

Speaker speaker_1: Since October.

Speaker speaker_0: Okay. Um, in the last 30 days, have you experienced a quality life event, like a loss of benefit, got- gotten married, divorced-

Speaker speaker_1: No.

Speaker speaker_0: ... had a baby or adopted?

Speaker speaker_1: No. I just wanted to see about the insurance because I don't have any.

Speaker speaker_0: Okay. So only-

Speaker speaker_1: So-

Speaker speaker_0: ... in two periods you're eligible to enroll. The first period is within the first 30 days of you receiving your first check. And it looks like your deadline date was November the 13. That would've been the end of your personal open enrollment. You can still enroll. However, you would have to do it within company open enrollment, which let me see when that is for Partners Personal. Uh, let me check real quick. I believe in, it's in October but let me just make sure.

Speaker speaker_1: Oh, well, sure.

Speaker speaker_0: Yeah.

Speaker speaker_1: I can't wait til October.

Speaker speaker_0: Yes, ma'am. So it's til... Last year was between the dates of October the 14 up until October the 25th. So most likely it'll be around that, those dates. But it's definitely in October, um, since you aren't-

Speaker speaker_1: Okay.

Speaker speaker_0: ... outside of your personal open enrollment, unfortunately, you would have to wait til the next company open enrollment which is held in October.

Speaker speaker_1: Okay. All right. Well, thank you then.

Speaker speaker_0: I'm sorry. I hope you have a great day.

Speaker speaker_1: That's all right. Okay, thanks. Bye.