

Transcript: Estefania

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Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Hey, good afternoon. I'm calling from Benefits on a Card- Hi. ... on behalf of Partners Personal. I'm looking to speak with Adrian Richwell. Hello? Hello? Yes, ma'am. I'm looking to speak with Adrian Richwell. This is she, this is she. Um, hey, good morning. So, you called yesterday regarding to enroll. Um, so I actually got a response back to the, from the main office to see if you were allowed to enroll back into the benefits. Um, they told me that you are allowed to do a restatement, so what that technically means is if you do enroll, you would have to get the same plans that you used to have, which is group accident and dental insurance- That's fine but I didn't know that. ... group accident and dental insurance- Could you remind me of what, um, I mean, I wasn't, I know I have vision and dental. Do I happen to have accident insurance as well? Yeah. You have group accident for employee only for two dollars, dental for employee only for \$3.63, vision for employee only for \$2.15. So, technically what I got informed is that you can allow to re-enroll as a reinstatement, so technically that means that you would have to get the same plans that you had before. Um, you aren't allowed since you're outside- That's fine, That's all I wanted, yeah. Okay. Since you're outside personal open enrollment and company open enrollment, you wouldn't be allowed to add any more plans until the next company open enrollment, which for Partners Personal it's in the month of October, okay? Right. So, if you want to add, like, additional plans in the month of October when they're within company open enrollment, you're welcome to give us a call and we can add those. But for now- I appreciate that. ... you would have to do the same plan that you had before if that's okay with you. That's fine. Okay? All right. So, we had group accident for employee only, that's still \$2.00. Then we had your dental plan for \$3.63 weekly. And then vision for \$2.15 weekly. That being a weekly deduction from your paycheck of \$7.78. Um, I do have to remind you that your dental plan and your vision plan are under section 125, which allows you to pay these two plans with pre-tax dollars. However, if you do want to cancel either dental or vision or make, add dependents later on, you would have to do it within company open enrollment, which is in the month of October. Okay? I appreciate your call. You're welcome. And then I do have to get your verbal permission to make these, um, changes. Do you allow Partners Personal to make the weekly deduction of \$7.78 from your paycheck? Yes, you have my permission. Okay. Please allow one to two weeks for Partners Personal to start making this very first deduction. Once you see the first deduction of the \$7.78 come out of your paycheck, the following Monday of that first deduction is when your plans become effective, and by that first week, either Thursday or Friday, you should be receiving your dental and vision card, and if you have a doctor's appoint, well, a vision or doctor's appointment, um, around that time, you can call us if you still don't have your cards and we can email them to you- Okay. ... for dental and vision, okay? All right. Did you have any questions? No. And then before I let you go, who do you want to put

down as your beneficiary since you have group accident? Um, how about Vicky Williams? Okay. You said Vicky Williams? Yes. And then the relationship? Just like that. Okay. All right, and then that's all I needed from you. Did you have any other questions? Hey, I appreciate it. You're welcome. I hope you have a great day. You do the same. Thank you. Thanks again. Thanks for calling. Bye. Thank you. Bye.

Conversation Format

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

Speaker speaker_1: Hey, good afternoon. I'm calling from Benefits on a Card-

Speaker speaker_2: Hi.

Speaker speaker_1: ... on behalf of Partners Personal. I'm looking to speak with Adrian Richwell. Hello?

Speaker speaker_2: Hello?

Speaker speaker_1: Yes, ma'am. I'm looking to speak with Adrian Richwell.

Speaker speaker_2: This is she, this is she.

Speaker speaker_1: Um, hey, good morning. So, you called yesterday regarding to enroll. Um, so I actually got a response back to the, from the main office to see if you were allowed to enroll back into the benefits. Um, they told me that you are allowed to do a restatement, so what that technically means is if you do enroll, you would have to get the same plans that you used to have, which is group accident and dental insurance-

Speaker speaker_2: That's fine but I didn't know that.

Speaker speaker_1: ... group accident and dental insurance-

Speaker speaker_2: Could you remind me of what, um, I mean, I wasn't, I know I have vision and dental. Do I happen to have accident insurance as well?

Speaker speaker_1: Yeah. You have group accident for employee only for two dollars, dental for employee only for \$3.63, vision for employee only for \$2.15. So, technically what I got informed is that you can allow to re-enroll as a reinstatement, so technically that means that you would have to get the same plans that you had before. Um, you aren't allowed since you're outside-

Speaker speaker_2: That's fine,

Speaker speaker_3: That's all I wanted, yeah.

Speaker speaker_1: Okay. Since you're outside personal open enrollment and company open enrollment, you wouldn't be allowed to add any more plans until the next company open enrollment, which for Partners Personal it's in the month of October, okay?

Speaker speaker_2: Right.

Speaker speaker_1: So, if you want to add, like, additional plans in the month of October when they're within company open enrollment, you're welcome to give us a call and we can add those. But for now-

Speaker speaker_2: I appreciate that.

Speaker speaker_1: ... you would have to do the same plan that you had before if that's okay with you.

Speaker speaker_2: That's fine.

Speaker speaker_1: Okay? All right. So, we had group accident for employee only, that's still \$2.00. Then we had your dental plan for \$3.63 weekly. And then vision for \$2.15 weekly. That being a weekly deduction from your paycheck of \$7.78. Um, I do have to remind you that your dental plan and your vision plan are under section 125, which allows you to pay these two plans with pre-tax dollars. However, if you do want to cancel either dental or vision or make, add dependents later on, you would have to do it within company open enrollment, which is in the month of October. Okay?

Speaker speaker_2: I appreciate your call.

Speaker speaker_1: You're welcome. And then I do have to get your verbal permission to make these, um, changes. Do you allow Partners Personal to make the weekly deduction of \$7.78 from your paycheck?

Speaker speaker_2: Yes, you have my permission.

Speaker speaker_1: Okay. Please allow one to two weeks for Partners Personal to start making this very first deduction. Once you see the first deduction of the \$7.78 come out of your paycheck, the following Monday of that first deduction is when your plans become effective, and by that first week, either Thursday or Friday, you should be receiving your dental and vision card, and if you have a doctor's appoint, well, a vision or doctor's appointment, um, around that time, you can call us if you still don't have your cards and we can email them to you-

Speaker speaker_2: Okay.

Speaker speaker_1: ... for dental and vision, okay? All right. Did you have any questions?

Speaker speaker_2: No.

Speaker speaker_1: And then before I let you go, who do you want to put down as your beneficiary since you have group accident?

Speaker speaker_2: Um, how about Vicky Williams?

Speaker speaker_1: Okay. You said Vicky Williams?

Speaker speaker_2: Yes.

Speaker speaker_1: And then the relationship?

Speaker speaker_2: Just like that.

Speaker speaker_1: Okay. All right, and then that's all I needed from you. Did you have any other questions?

Speaker speaker_2: Hey, I appreciate it.

Speaker speaker_1: You're welcome. I hope you have a great day.

Speaker speaker_2: You do the same. Thank you. Thanks again. Thanks for calling. Bye.

Speaker speaker_1: Thank you. Bye.