

Transcript: Estefania

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Full Transcript

Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Hey, Stephanie. How you doing? Hey. Good, thank you. How about you? Um, I'm good. Getting off work. So yeah, uh, my name is Josh Benner and I was referred from my resource manager. He gave y'all a call concerning about the benefits stuff. Okay, what staffing agency is it? What's happened? Mm-hmm. It was, uh, the Resource Center located in Winston-Salem, North Carolina. Is that the name, The Resource? Yes, ma'am. Okay. Okay, and then what are the last four of your social? 4522. And your first and last name? You said what, ma'am? Um, what's your first and last name? Josh Benner. Oh, that's pronounced Joshua Benner. For security purposes, can you verify your address and date of birth? 3608 Harvard Road. And date of birth, 7/29/97. And what was that city and state? Winston-Salem, North Carolina. Okay. 336-920-004 is your phone number? 0004, yes, ma'am. And then I have josh.benner1997@gmail.com. Is that up to date? Yes, ma'am. Okay. Okay, um, what was your question regarding your benefits? Um, I wanted to, uh, see was my benefit good 'cause I wanted to add one of my family members on. Okay. On the next- So, so y- um, in the last 30 days, have you experienced a quality life event, like a loss of benefit, gotten, gotten married, divorced, had a baby, or adopted? Um, no. So you would have to wait for the next company open enrollment to be eligible to enroll your, into a new level of coverage because if you add your family member, that means you're adding a dependent and you're only eligible to do that within the first 30 days of receiving your first check or within company open enrollment. Um, so you would have to call back within company open enrollment to be eligible to enroll them into that plan. Oh. Yeah. All right. Um, it looks like they held their company open enrollment in the month of December. Last year they did it between December 9th up until January the 31st. So most likely they'll do it in the same month but, um, it does unfortunately have to be within company open enrollment after your 30 days are up of receiving your first check, which it looks like it was, let me see when it was. Oh, it was back in, in Aug, in September. Yeah, so you would have to wait unfortunately. And I was gonna tell you that we're missing a beneficiary from you. Did you want to go ahead and add that? You said you're missing a what? A beneficiary. So if something was to happen to you, since you added term life and short-term disability, who would you like to leave that money to? Uh, nobody. So just leave it blank? Now, yeah. Okay. Then... Okay. Um, but yeah, to add a dependent, to add new plans or to add dependents, you would have to wait for the next company open enrollment, which is in December. Okay. Okay. All right. I appreciate your time. You're welcome. Have a nice day, sir. 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: Hey, Stephanie. How you doing?

Speaker speaker_0: Hey. Good, thank you. How about you?

Speaker speaker_1: Um, I'm good. Getting off work. So yeah, uh, my name is Josh Benner and I was referred from my resource manager. He gave y'all a call concerning about the benefits stuff.

Speaker speaker_0: Okay, what staffing agency is it?

Speaker speaker_1: What's happened?

Speaker speaker_0: Mm-hmm.

Speaker speaker_1: It was, uh, the Resource Center located in Winston-Salem, North Carolina.

Speaker speaker_0: Is that the name, The Resource?

Speaker speaker_1: Yes, ma'am.

Speaker speaker_0: Okay. Okay, and then what are the last four of your social?

Speaker speaker_1: 4522.

Speaker speaker_0: And your first and last name?

Speaker speaker_1: You said what, ma'am?

Speaker speaker_0: Um, what's your first and last name?

Speaker speaker_1: Josh Benner. Oh, that's pronounced Joshua Benner.

Speaker speaker_0: For security purposes, can you verify your address and date of birth?

Speaker speaker_1: 3608 Harvard Road. And date of birth, 7/29/97.

Speaker speaker_0: And what was that city and state?

Speaker speaker_1: Winston-Salem, North Carolina.

Speaker speaker_0: Okay. 336-920-004 is your phone number?

Speaker speaker_1: 0004, yes, ma'am.

Speaker speaker_0: And then I have josh.benner1997@gmail.com. Is that up to date?

Speaker speaker_1: Yes, ma'am.

Speaker speaker_0: Okay. Okay, um, what was your question regarding your benefits?

Speaker speaker_1: Um, I wanted to, uh, see was my benefit good 'cause I wanted to add one of my family members on.

Speaker speaker_0: Okay.

Speaker speaker_1: On the next-

Speaker speaker_0: So, so y- um, in the last 30 days, have you experienced a quality life event, like a loss of benefit, gotten, gotten married, divorced, had a baby, or adopted?

Speaker speaker_1: Um, no.

Speaker speaker_0: So you would have to wait for the next company open enrollment to be eligible to enroll your, into a new level of coverage because if you add your family member, that means you're adding a dependent and you're only eligible to do that within the first 30 days of receiving your first check or within company open enrollment. Um, so you would have to call back within company open enrollment to be eligible to enroll them into that plan.

Speaker speaker_1: Oh. Yeah. All right.

Speaker speaker_0: Um, it looks like they held their company open enrollment in the month of December. Last year they did it between December 9th up until January the 31st. So most likely they'll do it in the same month but, um, it does unfortunately have to be within company open enrollment after your 30 days are up of receiving your first check, which it looks like it was, let me see when it was. Oh, it was back in, in Aug, in September. Yeah, so you would have to wait unfortunately. And I was gonna tell you that we're missing a beneficiary from you. Did you want to go ahead and add that?

Speaker speaker_1: You said you're missing a what?

Speaker speaker_0: A beneficiary. So if something was to happen to you, since you added term life and short-term disability, who would you like to leave that money to?

Speaker speaker_1: Uh, nobody.

Speaker speaker_0: So just leave it blank?

Speaker speaker_1: Now, yeah.

Speaker speaker_0: Okay. Then... Okay. Um, but yeah, to add a dependent, to add new plans or to add dependents, you would have to wait for the next company open enrollment, which is in December.

Speaker speaker_1: Okay. Okay.

Speaker speaker_0: All right.

Speaker speaker_1: I appreciate your time.

Speaker speaker_0: You're welcome. Have a nice day, sir.

Speaker speaker_1: Bye.