

## **Transcript: Estefania**

**Acevedo-6368168200421376-5133080729010176**

### **Full Transcript**

Thank you for calling Benefits Note Card. My name is Stephanie. How can I assist you? Uh, my employer sent me this, uh, number and a text about, uh, insurance. Mm-hmm. Yes, sir. So. Who, um, is your employer? Partner's, uh- Okay. Yeah. ... staffing agency. So, um, you're probably within your personal open enrollment period, which means 30 days from the day that you receive your first check, which makes you eligible to enroll into the healthcare benefits that they offer. So they do offer benefits, but it's only for healthcare such as like dental, vision, a preventative plan, behavioral health. There's different medical plans to choose from, and they all have their separate deductions to them. So your deduction from your pay check really depends on how many plans you select and if you include dependents with these plans. Something totally optional, it's not mandatory, but you will get reminders letting you know regarding company open enrollment and personal open enrollment, which right now you're probably within your personal. Yeah. Okay. So ... Were you looking at enrolling? Uh, well, I was thinking about it, but I don't know right now. D- do you want me to give you the- I don't know. ... deadline date? 'Cause they only give you those 30 days. If, um, you're not- Right. ... sure yet, I can provide the date, just in case you change your mind. Okay. Give me the date if you don't mind. Um, I just need the last four of your Social so that I can open your file. Okay. 4490. For security purposes, could you please verify the address that we have, as well as your date of birth? 100 Wendellwood Circle, Smyrna, Tennessee 37167. And birth date is nine... September the 9th. Oh, September the 11th, 1961. Okay. Thank you. And then I have your phone number being 615-390-5912? Yes. Okay. And then I have rloon1340@gmail.com. Yep. Okay, so it looks like your last day to enroll, if you do decide to enroll into their healthcare benefits, would be March 12th. So that would be the last day that you would have. Um, if you pass that date, the next period would be in the month of October, when they have their company open enrollment. Okay, you said that was March the 11th, um, and the 9th? The March 12th. Oh, 12th. Okay, 12th. Mm-hmm. All right. Did you want me to send you- Okay ... I was also- ... the benefit guide to your email? Yeah. I can send it to you, and then I guess you could look over it, and if you don't wanna enroll, you don't really have to call us back since they don't do any type of auto enrollment. But if you do wanna enroll, you would have to contact us before that deadline. Right. Okay. Yeah. Let's do that. All right. I went ahead and emailed that to you. It should come from an email that says info@benefitsnotecard.com. Um, so that has been sent, and your deadline, like I said, is March the 12th. I would call before that if you do wanna enroll, just to be on the safe side. Okay. No, appreciate it. All right. Well, I hope you have a great day. All right, ma'am. You too. Thank you. Bye. Bye.

### **Conversation Format**

Speaker speaker\_0: Thank you for calling Benefits Note Card. My name is Stephanie. How can I assist you?

Speaker speaker\_1: Uh, my employer sent me this, uh, number and a text about, uh, insurance.

Speaker speaker\_0: Mm-hmm. Yes, sir.

Speaker speaker\_1: So.

Speaker speaker\_0: Who, um, is your employer?

Speaker speaker\_1: Partner's, uh-

Speaker speaker\_0: Okay. Yeah.

Speaker speaker\_1: ... staffing agency.

Speaker speaker\_0: So, um, you're probably within your personal open enrollment period, which means 30 days from the day that you receive your first check, which makes you eligible to enroll into the healthcare benefits that they offer. So they do offer benefits, but it's only for healthcare such as like dental, vision, a preventative plan, behavioral health. There's different medical plans to choose from, and they all have their separate deductions to them. So your deduction from your pay check really depends on how many plans you select and if you include dependents with these plans. Something totally optional, it's not mandatory, but you will get reminders letting you know regarding company open enrollment and personal open enrollment, which right now you're probably within your personal.

Speaker speaker\_1: Yeah. Okay. So ...

Speaker speaker\_0: Were you looking at enrolling?

Speaker speaker\_1: Uh, well, I was thinking about it, but I don't know right now.

Speaker speaker\_0: D- do you want me to give you the-

Speaker speaker\_1: I don't know.

Speaker speaker\_0: ... deadline date? 'Cause they only give you those 30 days. If, um, you're not-

Speaker speaker\_1: Right.

Speaker speaker\_0: ... sure yet, I can provide the date, just in case you change your mind.

Speaker speaker\_1: Okay. Give me the date if you don't mind.

Speaker speaker\_0: Um, I just need the last four of your Social so that I can open your file.

Speaker speaker\_1: Okay. 4490.

Speaker speaker\_0: For security purposes, could you please verify the address that we have, as well as your date of birth?

Speaker speaker\_1: 100 Wendellwood Circle, Smyrna, Tennessee 37167. And birth date is nine... September the 9th. Oh, September the 11th, 1961.

Speaker speaker\_0: Okay. Thank you. And then I have your phone number being 615-390-5912?

Speaker speaker\_1: Yes.

Speaker speaker\_0: Okay. And then I have rloon1340@gmail.com.

Speaker speaker\_1: Yep.

Speaker speaker\_0: Okay, so it looks like your last day to enroll, if you do decide to enroll into their healthcare benefits, would be March 12th. So that would be the last day that you would have. Um, if you pass that date, the next period would be in the month of October, when they have their company open enrollment.

Speaker speaker\_1: Okay, you said that was March the 11th, um, and the 9th?

Speaker speaker\_0: The March 12th.

Speaker speaker\_1: Oh, 12th. Okay, 12th.

Speaker speaker\_0: Mm-hmm.

Speaker speaker\_1: All right.

Speaker speaker\_0: Did you want me to send you-

Speaker speaker\_1: Okay ... I was also-

Speaker speaker\_0: ... the benefit guide to your email?

Speaker speaker\_1: Yeah.

Speaker speaker\_0: I can send it to you, and then I guess you could look over it, and if you don't wanna enroll, you don't really have to call us back since they don't do any type of auto enrollment. But if you do wanna enroll, you would have to contact us before that deadline.

Speaker speaker\_1: Right. Okay. Yeah. Let's do that.

Speaker speaker\_0: All right. I went ahead and emailed that to you. It should come from an email that says info@benefitsnotecard.com. Um, so that has been sent, and your deadline, like I said, is March the 12th. I would call before that if you do wanna enroll, just to be on the safe side.

Speaker speaker\_1: Okay. No, appreciate it.

Speaker speaker\_0: All right. Well, I hope you have a great day.

Speaker speaker\_1: All right, ma'am. You too. Thank you.

Speaker speaker\_0: Bye.

Speaker speaker\_1: Bye.