

## **Transcript: Estefania**

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### **Full Transcript**

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you? Uh, yes. I'm calling 'cause I'm, um, I work for Partners, um, Personnel at Lazard in New York City, and I have a question about a benefits card that has to do with, uh, travel expenses. Can I... Are, are you a person who I could talk to about this, or do I need to talk to someone else? I'm just going by a- So we- ... number I found on an email. Yeah. So we are the healthcare administrators for staffing agencies. Um, so to get in your file, we need to ask you like, um, for your social and then get you to verify some information. Okay. That's fine. Okay. Um, what is the last four of your social? It's 6095. Okay. And for security purposes, could you verify your address as well as your date of birth? Uh, my, my address is 900 West 190th Street, Apartment 2M, New York, New York 10040. Mm-hmm. And my bir- birthdate is September 15th, 1959. Okay. Is your phone number still the 917-539-3375? It is. Good. Thank you. Um, so you said that you were calling regarding travel expenses. So they offer- So Yeah, well, so what... Okay, go ahead. Um, so they do offer, um, healthcare benefits, but it would just be like for healthcare. Well, there's... But it's a program called WEX, W-E-X Benefits. Um, I guess it also handles health, health, like a health savings account kind of thing. But it's a benefit card that's used for travel. For example, I have, um, I, I have... Well, prior to COVID, we had money taken out of our paychecks- Mm-hmm. ... put into this account. It was tax-free. We could use it then to spend on travel, so, you know, subway fare going to and from work and- Yeah. ... that kind of thing. Yeah. They don't... Um, well, they don't offer that for these plans. It's only like preventative plan. And then they offer three hospital indemnity plans. Um, a preventative plan combined with a hospital indemnity one, and then just like short term critical illness, dental, vision, term life, and 24 hour group accident, but nothing regarding travel expenses. Okay. Well, i- if this was... I mean, this was a benefit when, um... I mean, Partners bought Chartwell Staffing Services, um- Yeah, they don't. They- ... and this was suspended. Well, yeah. It was up until probably last year. I mean, up until... Actually, only a few months ago, this travel, this wor- this card worked fine, and then suddenly it was suspended. Well, there's money in the, in the account that I have to retrieve. Yeah. Like I said, they... For th- these, this coverage, this type of coverage is only for healthcare benefits. I'm not really... With my knowledge, I'm- So you- I believe not to have that. ... you don't know anything about a WEX Benefits Card? No, ma'am. Okay. And I want to- Is there anyone else that can talk to? I could ask. I was gonna inform you. Um, either way, we wouldn't be able to, to enroll you into any benefits just 'cause you're only eligible within two periods. Your first one, they consider your personal open enrollment period, which is the first 30 days of receiving your first salary check, and then whenever the company's in company open enrollment, which for the Partners Personal was in the month of October. Right, yeah. But I could ask. Because it's not about enrolling in something, it's about

reinstating something that it currently exists. But it sounds like you have no idea what I'm talking about. I can ask. Right? Uh- Like I said, this is only for healthcare benefits, but I mean, I could ask. Right. Is, is there a... Is there a number, is there a contact for employees who work in New York, in New York State, for example? Nope. That's- So- ... someone different from you. Yeah, that's- So it sounds like you work for the entire company. No. We're the healthcare administrators for different staffing agencies, not just Partners Personal. Okay. But we're just the healthcare administrators. Okay. Okay, then do you have a number where I can contact Partners Personnel directly? No. We don't, we don't have those. Like I said, we're the healthcare administrators for different agencies. Okay. So you... But then you probably don't... I mean, this problems could exist and you just don't know about it. Okay. All right. I, I'll have to try to find out another way. Thank you anyway. I'm sorry. You're welcome. Have a nice day. Okay. All right. All right. Bye-bye.

## Conversation Format

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Benefits in a Card. My name is Stephanie. How can I assist you?

Speaker speaker\_2: Uh, yes. I'm calling 'cause I'm, um, I work for Partners, um, Personnel at Lazard in New York City, and I have a question about a benefits card that has to do with, uh, travel expenses. Can I... Are, are you a person who I could talk to about this, or do I need to talk to someone else? I'm just going by a-

Speaker speaker\_1: So we-

Speaker speaker\_2: ... number I found on an email.

Speaker speaker\_1: Yeah. So we are the healthcare administrators for staffing agencies. Um, so to get in your file, we need to ask you like, um, for your social and then get you to verify some information.

Speaker speaker\_2: Okay. That's fine.

Speaker speaker\_1: Okay. Um, what is the last four of your social?

Speaker speaker\_2: It's 6095.

Speaker speaker\_1: Okay. And for security purposes, could you verify your address as well as your date of birth?

Speaker speaker\_2: Uh, my, my address is 900 West 190th Street, Apartment 2M, New York, New York 10040.

Speaker speaker\_1: Mm-hmm.

Speaker speaker\_2: And my bir- birthdate is September 15th, 1959.

Speaker speaker\_1: Okay. Is your phone number still the 917-539-3375?

Speaker speaker\_2: It is.

Speaker speaker\_1: Good. Thank you. Um, so you said that you were calling regarding travel expenses. So they offer-

Speaker speaker\_2: So

Speaker speaker\_3: Yeah, well, so what... Okay, go ahead.

Speaker speaker\_1: Um, so they do offer, um, healthcare benefits, but it would just be like for healthcare.

Speaker speaker\_2: Well, there's... But it's a program called WEX, W-E-X Benefits. Um, I guess it also handles health, health, like a health savings account kind of thing. But it's a benefit card that's used for travel. For example, I have, um, I, I have... Well, prior to COVID, we had money taken out of our paychecks-

Speaker speaker\_1: Mm-hmm.

Speaker speaker\_2: ... put into this account. It was tax-free. We could use it then to spend on travel, so, you know, subway fare going to and from work and-

Speaker speaker\_1: Yeah.

Speaker speaker\_2: ... that kind of thing.

Speaker speaker\_1: Yeah. They don't... Um, well, they don't offer that for these plans. It's only like preventative plan. And then they offer three hospital indemnity plans. Um, a preventative plan combined with a hospital indemnity one, and then just like short term critical illness, dental, vision, term life, and 24 hour group accident, but nothing regarding travel expenses.

Speaker speaker\_2: Okay. Well, i- if this was... I mean, this was a benefit when, um... I mean, Partners bought Chartwell Staffing Services, um-

Speaker speaker\_1: Yeah, they don't. They-

Speaker speaker\_2: ... and this was suspended.

Speaker speaker\_1: Well, yeah.

Speaker speaker\_2: It was up until probably last year. I mean, up until... Actually, only a few months ago, this travel, this wor- this card worked fine, and then suddenly it was suspended. Well, there's money in the, in the account that I have to retrieve.

Speaker speaker\_1: Yeah. Like I said, they... For th- these, this coverage, this type of coverage is only for healthcare benefits. I'm not really... With my knowledge, I'm-

Speaker speaker\_2: So you-

Speaker speaker\_1: I believe not to have that.

Speaker speaker\_2: ... you don't know anything about a WEX Benefits Card?

Speaker speaker\_1: No, ma'am.

Speaker speaker\_2: Okay.

Speaker speaker\_1: And I want to-

Speaker speaker\_2: Is there anyone else that can talk to?

Speaker speaker\_1: I could ask. I was gonna inform you. Um, either way, we wouldn't be able to, to enroll you into any benefits just 'cause you're only eligible within two periods. Your first one, they consider your personal open enrollment period, which is the first 30 days of receiving your first salary check, and then whenever the company's in company open enrollment, which for the Partners Personal was in the month of October.

Speaker speaker\_2: Right, yeah.

Speaker speaker\_1: But I could ask.

Speaker speaker\_2: Because it's not about enrolling in something, it's about reinstating something that it currently exists. But it sounds like you have no idea what I'm talking about.

Speaker speaker\_1: I can ask.

Speaker speaker\_2: Right? Uh-

Speaker speaker\_1: Like I said, this is only for healthcare benefits, but I mean, I could ask.

Speaker speaker\_2: Right. Is, is there a... Is there a number, is there a contact for employees who work in New York, in New York State, for example?

Speaker speaker\_1: Nope.

Speaker speaker\_2: That's-

Speaker speaker\_1: So-

Speaker speaker\_2: ... someone different from you.

Speaker speaker\_1: Yeah, that's-

Speaker speaker\_2: So it sounds like you work for the entire company.

Speaker speaker\_1: No. We're the healthcare administrators for different staffing agencies, not just Partners Personal.

Speaker speaker\_2: Okay.

Speaker speaker\_1: But we're just the healthcare administrators.

Speaker speaker\_2: Okay. Okay, then do you have a number where I can contact Partners Personnel directly?

Speaker speaker\_1: No. We don't, we don't have those. Like I said, we're the healthcare administrators for different agencies.

Speaker speaker\_2: Okay. So you... But then you probably don't... I mean, this problems could exist and you just don't know about it. Okay. All right. I, I'll have to try to find out another way. Thank you anyway.

Speaker speaker\_1: I'm sorry. You're welcome. Have a nice day.

Speaker speaker\_2: Okay. All right. All right. Bye-bye.