

Transcript: Francesca

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Full Transcript

Thank you for holding Benefit 10-0-5. My name is Francesca. How can I assist you today? Hi, Francesca. My name is Lisa Jameson and yesterday an associate helped me, um, enroll in benefits because there was something wrong with my account. I believe she said I was in the system twice, so she offered to, uh, manually, um, enroll me. And I'm calling because I would like to just quickly confirm all my selections, because I think there might be one that's missing. Can you help me with that? Sure. What staffing company do you work with? Uh, Creative Circle. What are the last four of your Social? 5606. Can I just verify your mailing address and date of birth to make sure I'm in the right account? I'm sorry. Uh, what did you say you need to make sure you're in the right account? Yes, ma'am. Your address and date of birth, please. Oh, yes. Go ahead. My address is 102 Justin Avenue, Shreveport, Louisiana 71105, and my date of birth is October 3rd, 1961. I have that phone number to reach you down as 347-533-1018. Yes. Mm-hmm. And lastly, I have your email down as first name period last name at gmail.com, and then allabouteve38 at gmail.com as well. Yes, they are both right. So I see you were enrolled into a FreeRx membership, Insurplus Premier, Dental- Mm-hmm. ... Critical Illness, Term Life, and Vision. Um, Term Life and Vision, I, I would also like to, um... You said Critical Illness. I would also like, uh, the employee only for Group Accident, please. So Group Accident actually already comes in your InsurPlus Premier plan. Oh, it is? Okay. And then, I guess, i- could you please confirm then if, uh, MEC TeleRx is included? No, ma'am, that's the one plan you're not enrolled into currently. Okay. May I... Um, I would like to select that as well, please. All right. Bear with me one moment. Okay. Okay. So due to the fact that the Stay Healthy MEC TeleRx already has the FreeRx on it, there's not gonna be a standalone FreeRx membership- Oh. ... on your policy. Okay. So it's- Okay. ... just gonna be the InsurPlus Premier, the bundle of the dental, Term Life, and Vision, then that Critical Illness and the Stay Healthy MEC TeleRx. Okay. So instead of being like 52.13 from the previous one, it will be 61.77 per paycheck. Okay. All right. Thank you so much. Of course. And do you authorize Creative Circle to make those deductions for the selected benefits? Yes, I do. All right. So it should be taking one to two weeks for you to start seeing those deductions. When you see the first one, following Monday, coverage will be active. And the same week of activation, Friday, they'll send out the benefit cards. Okay. All right. Thank you so much for your help again. I appreciate it. Of course. And then who would you like to put down as your life insurance beneficiary? Oh, uh, that would be my younger daughter. Um, her first name is Amy, A-M-Y, and her second name is spelled... I'm sorry, her last name is spelled L-A, S as in Susan, S as in Susan, E, T as in Tom, T as in Tom, E-R. So it's, uh, Amy Lasiter. All right. So you are all, all set. Mm-hmm. I do have to say that Stay Healthy is under Section 125, which means that it's gonna be taken out of their pre-tax. Due to the fact that it is a free tax plan, the IRS has restrictions on it. You can't make changes or cancellations unless you have an open

enrollment period or a qualified life event. Uh, could you repeat what you said? I just heard the 125. I'm not sure what, what you said. Yes, ma'am. The MEC TeleRx that you requested to be enrolled into is under Section 125. The plan is gonna be deducted out of your t- paycheck pre-tax. Due to the fact that it is a free tax plan, the IRS has restrictions where you cannot make changes or cancellations unless you're in an open enrollment period or qualified life event. Okay. And I have a, a silly question, because I said I wanted to be enrolled. Can you tell me what MEC TeleRx actually is? It's a medical preventative care plan. It will cover preventative services only, like your physicals, your screenings for blood pressure or iron deficiency. The counseling for a healthy diet or avoiding UV exposures from the sun, the preventative immunizations like varicella, tetanus or influenza, and the preventative generic prescriptions. It does come with a FreeRx membership and then a virtual urgent care package. And it has a network requirement. Okay. Okay. And then, with everything, my, um, out of pocket or out of each paycheck was still gonna be that \$60 range you had mentioned? Yes, ma'am. Okay, great. Thank you. Of course. Was there anything else we can assist you with today? Oh, no, thanks. Hope you have a wonderful rest of your day. Thank you for your time today. Thank you, too. Bye-bye. Bye.

Conversation Format

Speaker speaker_0: Thank you for holding Benefit 10-0-5. My name is Francesca. How can I assist you today?

Speaker speaker_1: Hi, Francesca. My name is Lisa Jameson and yesterday an associate helped me, um, enroll in benefits because there was something wrong with my account. I believe she said I was in the system twice, so she offered to, uh, manually, um, enroll me. And I'm calling because I would like to just quickly confirm all my selections, because I think there might be one that's missing. Can you help me with that?

Speaker speaker_0: Sure. What staffing company do you work with?

Speaker speaker_1: Uh, Creative Circle.

Speaker speaker_0: What are the last four of your Social?

Speaker speaker_1: 5606.

Speaker speaker_0: Can I just verify your mailing address and date of birth to make sure I'm in the right account?

Speaker speaker_1: I'm sorry. Uh, what did you say you need to make sure you're in the right account?

Speaker speaker_0: Yes, ma'am. Your address and date of birth, please.

Speaker speaker_1: Oh, yes.

Speaker speaker_0: Go ahead.

Speaker speaker_1: My address is 102 Justin Avenue, Shreveport, Louisiana 71105, and my date of birth is October 3rd, 1961.

Speaker speaker_0: I have that phone number to reach you down as 347-533-1018.

Speaker speaker_1: Yes. Mm-hmm.

Speaker speaker_0: And lastly, I have your email down as first name period last name at gmail.com, and then allabouteve38 at gmail.com as well.

Speaker speaker_1: Yes, they are both right.

Speaker speaker_0: So I see you were enrolled into a FreeRx membership, Insurplus Premier, Dental-

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: ... Critical Illness, Term Life, and Vision.

Speaker speaker_1: Um, Term Life and Vision, I, I would also like to, um... You said Critical Illness. I would also like, uh, the employee only for Group Accident, please.

Speaker speaker_0: So Group Accident actually already comes in your InsurPlus Premier plan.

Speaker speaker_1: Oh, it is? Okay. And then, I guess, i- could you please confirm then if, uh, MEC TeleRx is included?

Speaker speaker_0: No, ma'am, that's the one plan you're not enrolled into currently.

Speaker speaker_1: Okay. May I... Um, I would like to select that as well, please.

Speaker speaker_0: All right. Bear with me one moment.

Speaker speaker_1: Okay.

Speaker speaker_0: Okay. So due to the fact that the Stay Healthy MEC TeleRx already has the FreeRx on it, there's not gonna be a standalone FreeRx membership-

Speaker speaker_1: Oh.

Speaker speaker_0: ... on your policy.

Speaker speaker_1: Okay.

Speaker speaker_0: So it's-

Speaker speaker_1: Okay.

Speaker speaker_0: ... just gonna be the InsurPlus Premier, the bundle of the dental, Term Life, and Vision, then that Critical Illness and the Stay Healthy MEC TeleRx.

Speaker speaker_1: Okay.

Speaker speaker_0: So instead of being like 52.13 from the previous one, it will be 61.77 per paycheck.

Speaker speaker_1: Okay. All right. Thank you so much.

Speaker speaker_0: Of course. And do you authorize Creative Circle to make those deductions for the selected benefits?

Speaker speaker_1: Yes, I do.

Speaker speaker_0: All right. So it should be taking one to two weeks for you to start seeing those deductions. When you see the first one, following Monday, coverage will be active. And the same week of activation, Friday, they'll send out the benefit cards.

Speaker speaker_1: Okay. All right. Thank you so much for your help again. I appreciate it.

Speaker speaker_0: Of course. And then who would you like to put down as your life insurance beneficiary?

Speaker speaker_1: Oh, uh, that would be my younger daughter. Um, her first name is Amy, A-M-Y, and her second name is spelled... I'm sorry, her last name is spelled L-A, S as in Susan, S as in Susan, E, T as in Tom, T as in Tom, E-R. So it's, uh, Amy Lasiter.

Speaker speaker_0: All right. So you are all, all set.

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: I do have to say that Stay Healthy is under Section 125, which means that it's gonna be taken out of their pre-tax. Due to the fact that it is a free tax plan, the IRS has restrictions on it. You can't make changes or cancellations unless you have an open enrollment period or a qualified life event.

Speaker speaker_1: Uh, could you repeat what you said? I just heard the 125. I'm not sure what, what you said.

Speaker speaker_0: Yes, ma'am. The MEC TeleRx that you requested to be enrolled into is under Section 125. The plan is gonna be deducted out of your t- paycheck pre-tax. Due to the fact that it is a free tax plan, the IRS has restrictions where you cannot make changes or cancellations unless you're in an open enrollment period or qualified life event.

Speaker speaker_1: Okay. And I have a, a silly question, because I said I wanted to be enrolled. Can you tell me what MEC TeleRx actually is?

Speaker speaker_0: It's a medical preventative care plan. It will cover preventative services only, like your physicals, your screenings for blood pressure or iron deficiency. The counseling for a healthy diet or avoiding UV exposures from the sun, the preventative immunizations like varicella, tetanus or influenza, and the preventative generic prescriptions. It does come with a FreeRx membership and then a virtual urgent care package. And it has a network requirement.

Speaker speaker_1: Okay. Okay. And then, with everything, my, um, out of pocket or out of each paycheck was still gonna be that \$60 range you had mentioned?

Speaker speaker_0: Yes, ma'am.

Speaker speaker_1: Okay, great. Thank you.

Speaker speaker_0: Of course. Was there anything else we can assist you with today?

Speaker speaker_1: Oh, no, thanks.

Speaker speaker_0: Hope you have a wonderful rest of your day. Thank you for your time today.

Speaker speaker_1: Thank you, too. Bye-bye.

Speaker speaker_0: Bye.