

Transcript: Francesca

Baez-5723287041392640-6172455996276736

Full Transcript

Thank you for calling Benefits in a Card. My name is Francesca, how can I assist you today? Hi, um, I... My name is Stephanie Soccer and I currently have benefits. I was wondering, um, what I need to do if I wanted to, uh, make changes. Okay. So in order to make changes to the benefits we need to take a look into your account to see what type of benefits you're currently eligible to change. What are the last four of your Social? Um, 3989 910. Oh, I've got one. I've got one. Here, you go. And what is the name of the staffing company you're with? Uh, Clinical Staffing Resources. Um, go ahead and wash your hands with soap and water. Okay. Sorry, um- Can you tell me the red... Huh? Go ahead, go ahead. Okay. I'm also going to make sure that I'm in the right account. Can you verify your mailing address for me and your date of birth? 31336 Interview Bend, Wesley Chapel, Florida, 323545 and then 469069. I have this contact down as 410-375-9242 as primary. Yes. Yes. And then I have secondary down as 301-312-2909. Yes. And then the last thing, your email is down as fac0469@gmail.com. Correct. All right, bear with me one moment. Um, so unfortunately at the moment, you're not eligible to make changes on the policy, due to the fact that you don't have an open enrollment period, as well as the fact that all of your plans are under Section 125, which means that all three of them are being taken out of your paycheck pre-tax, so the IRS has a regulation that you can't cancel or make changes unless you have that open enrollment period or qualified life event. Ugh. So 'cause my husband is... He's got a new job and he's gonna carry himself and my son. Is that not considered a, a, um, a life event? Yes, ma'am. So if both of your dependents are going to be having coverage with a different carrier... Yes. Once we have that letter that shows their name as well as the coverage they're gonna have with an effective date, you're able to submit it- Okay. ... to see if it will be approved as a qualified life event. Okay. Um, what... Where am I submitting it? I'm gonna go ahead and send you an email- Okay. ... which will be titled QLE Submission. And then you can go ahead and attach the form, whether it's a scan or an screenshot of that document. Just make sure it does have their names in there, the type of coverage they're getting, and the effective date. Okay. Um, okay. You're gonna send that to me right now? All right. Yes, ma'am. I just sent it to you from our office email, which is info@benefitsinacard.com. Okay. Sounds good. All right. Thank you. Was there anything else I can assist you with today or just that? No, that's it. That's it. All right. Thank you. So once you do submit that document, it's gonna take 24- Mm-hmm. ... to 48 hours for the front office to process it. And as soon as they get back to me on that, I'll be giving you a call. Okay. Okay. You're welcome. All right. If I could just- Was there anything else? No problem then. Okay. No, that's it. Thank you.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits in a Card. My name is Francesca, how can I assist you today?

Speaker speaker_1: Hi, um, I... My name is Stephanie Soccer and I currently have benefits. I was wondering, um, what I need to do if I wanted to, uh, make changes.

Speaker speaker_0: Okay. So in order to make changes to the benefits we need to take a look into your account to see what type of benefits you're currently eligible to change. What are the last four of your Social?

Speaker speaker_1: Um, 3989 910.

Speaker speaker_2: Oh, I've got one. I've got one. Here, you go.

Speaker speaker_0: And what is the name of the staffing company you're with?

Speaker speaker_1: Uh, Clinical Staffing Resources. Um, go ahead and wash your hands with soap and water.

Speaker speaker_2: Okay.

Speaker speaker_1: Sorry, um-

Speaker speaker_0: Can you tell me the red... Huh?

Speaker speaker_1: Go ahead, go ahead.

Speaker speaker_0: Okay. I'm also going to make sure that I'm in the right account. Can you verify your mailing address for me and your date of birth?

Speaker speaker_1: 31336 Interview Bend, Wesley Chapel, Florida, 323545 and then 469069.

Speaker speaker_0: I have this contact down as 410-375-9242 as primary.

Speaker speaker_1: Yes. Yes.

Speaker speaker_0: And then I have secondary down as 301-312-2909.

Speaker speaker_1: Yes.

Speaker speaker_0: And then the last thing, your email is down as fac0469@gmail.com.

Speaker speaker_1: Correct.

Speaker speaker_0: All right, bear with me one moment. Um, so unfortunately at the moment, you're not eligible to make changes on the policy, due to the fact that you don't have an open enrollment period, as well as the fact that all of your plans are under Section 125, which means that all three of them are being taken out of your paycheck pre-tax, so the IRS has a regulation that you can't cancel or make changes unless you have that open enrollment period or qualified life event.

Speaker speaker_1: Ugh. So 'cause my husband is... He's got a new job and he's gonna carry himself and my son. Is that not considered a, a, um, a life event?

Speaker speaker_0: Yes, ma'am. So if both of your dependents are going to be having coverage with a different carrier...

Speaker speaker_1: Yes.

Speaker speaker_0: Once we have that letter that shows their name as well as the coverage they're gonna have with an effective date, you're able to submit it-

Speaker speaker_1: Okay.

Speaker speaker_0: ... to see if it will be approved as a qualified life event.

Speaker speaker_1: Okay. Um, what... Where am I submitting it?

Speaker speaker_0: I'm gonna go ahead and send you an email-

Speaker speaker_1: Okay.

Speaker speaker_0: ... which will be titled QLE Submission. And then you can go ahead and attach the form, whether it's a scan or an screenshot of that document. Just make sure it does have their names in there, the type of coverage they're getting, and the effective date.

Speaker speaker_1: Okay. Um, okay. You're gonna send that to me right now?

Speaker speaker_0: All right. Yes, ma'am. I just sent it to you from our office email, which is info@benefitsinacard.com.

Speaker speaker_1: Okay. Sounds good.

Speaker speaker_0: All right.

Speaker speaker_1: Thank you.

Speaker speaker_0: Was there anything else I can assist you with today or just that?

Speaker speaker_1: No, that's it. That's it.

Speaker speaker_0: All right.

Speaker speaker_1: Thank you.

Speaker speaker_0: So once you do submit that document, it's gonna take 24-

Speaker speaker_3: Mm-hmm.

Speaker speaker_0: ... to 48 hours for the front office to process it. And as soon as they get back to me on that, I'll be giving you a call.

Speaker speaker_1: Okay. Okay. You're welcome.

Speaker speaker_0: All right.

Speaker speaker_1: If I could just-

Speaker speaker_0: Was there anything else? No problem then. Okay.

Speaker speaker_1: No, that's it. Thank you.