

## **Transcript: Francesca**

**Baez-6041043250233344-5290950297436160**

### **Full Transcript**

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits USA. My name is Francesca. How can I assist you today? Uh, yes, this is Ralph Templeton. Um, I was calling back 'cause I, um, I was updating my insurance. But, um, I was calling back 'cause I needed my, um, daughter's Social Security number, I think, added, and I have that now. Uh-huh. Can I just look for your account with stuff and companies you work with? I wor- work WorkSmart. And the last four of your Social? 7071. Okay, Mr. Ralph, is the last name Templeton? Yes. Okay. And then for security purposes, could you please verify your mailing address for me and your date of birth? 19 Bacardi Drive, Greenville, South Carolina 29605. Date of birth is June 26th, 1978. All right. Let's see. I see it here. For the VIP Basic for yourself and child, correct? Yes. All right. Now we have her last name as A as in apple, N as in Nancy, T-O-S, C as in Charlie, Y as in yellow, K as in kite? Yes. Very good. And then date of birth, I have it as August 9, '04? Yes. All right. You can go ahead with that Social whenever you're ready. Okay. 178-82-1488. There we go. And then were you only looking to make that change of adding that missing information or did you want to make any changes to that policy? No, I was just making it, um, adding that. Understood. So you are all set. Um, I believe they probably already went over this with you, but just so you know, that policy with her is gonna take one to two weeks to get activated. Okay. And then once you see that change from the w- There we go. The s- The one with the 16.32 to go to the 25.43, Monday following that deduction of the 25.43 will be when her coverage becomes active and when you're gonna switch over to that new plan. And then Friday of that activation week is when the carrier send out the benefit cards. Now specifically speaking, the carrier for your plan is American Public Life. They only do a digital copy sent to your email on file that Friday. Okay. Now if you want a hard copy, once you see that deduction, following Monday from that deduction, you can give us a call at any time during that week so that we can put in a mail request so they can send you a physical copy. Okay. Okay. All right. And then I believe the only last thing that I want to make sure I do tell you is your benefit card is gonna be the same one for her, so there won't be a separate... I'm sorry. There won't be a separate one with just her name on it. It is gonna have your information and, at some point, I believe it's in one of the corners, it's gonna say employee plus child. So you guys will be using the same benefit card. Okay. All right. So you should be all set. Was there anything else that we can assist you with today? No, that's it. Understood. In the event that you are looking to make any changes, you have till January 31st. That will be when your company open enrollment period will be ending. All right. Thank you. You're welcome. Have a wonderful rest of your day and thank you for giving us a call today. Oh, you too. Bye. 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 USA. My name is Francesca. How can I assist you today?

Speaker speaker\_2: Uh, yes, this is Ralph Templeton. Um, I was calling back 'cause I, um, I was updating my insurance. But, um, I was calling back 'cause I needed my, um, daughter's Social Security number, I think, added, and I have that now.

Speaker speaker\_1: Uh-huh. Can I just look for your account with stuff and companies you work with?

Speaker speaker\_2: I wor- work WorkSmart.

Speaker speaker\_1: And the last four of your Social?

Speaker speaker\_2: 7071.

Speaker speaker\_1: Okay, Mr. Ralph, is the last name Templeton?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Okay. And then for security purposes, could you please verify your mailing address for me and your date of birth?

Speaker speaker\_2: 19 Bacardi Drive, Greenville, South Carolina 29605. Date of birth is June 26th, 1978.

Speaker speaker\_1: All right. Let's see. I see it here. For the VIP Basic for yourself and child, correct?

Speaker speaker\_2: Yes.

Speaker speaker\_1: All right. Now we have her last name as A as in apple, N as in Nancy, T-O-S, C as in Charlie, Y as in yellow, K as in kite?

Speaker speaker\_2: Yes.

Speaker speaker\_1: Very good. And then date of birth, I have it as August 9, '04?

Speaker speaker\_2: Yes.

Speaker speaker\_1: All right. You can go ahead with that Social whenever you're ready.

Speaker speaker\_2: Okay. 178-82-1488.

Speaker speaker\_1: There we go. And then were you only looking to make that change of adding that missing information or did you want to make any changes to that policy?

Speaker speaker\_2: No, I was just making it, um, adding that.

Speaker speaker\_1: Understood. So you are all set. Um, I believe they probably already went over this with you, but just so you know, that policy with her is gonna take one to two weeks to get activated.

Speaker speaker\_2: Okay.

Speaker speaker\_1: And then once you see that change from the w- There we go. The s- The one with the 16.32 to go to the 25.43, Monday following that deduction of the 25.43 will be when her coverage becomes active and when you're gonna switch over to that new plan. And then Friday of that activation week is when the carrier send out the benefit cards. Now specifically speaking, the carrier for your plan is American Public Life. They only do a digital copy sent to your email on file that Friday.

Speaker speaker\_2: Okay.

Speaker speaker\_1: Now if you want a hard copy, once you see that deduction, following Monday from that deduction, you can give us a call at any time during that week so that we can put in a mail request so they can send you a physical copy.

Speaker speaker\_2: Okay. Okay.

Speaker speaker\_1: All right. And then I believe the only last thing that I want to make sure I do tell you is your benefit card is gonna be the same one for her, so there won't be a separate... I'm sorry. There won't be a separate one with just her name on it. It is gonna have your information and, at some point, I believe it's in one of the corners, it's gonna say employee plus child. So you guys will be using the same benefit card.

Speaker speaker\_2: Okay.

Speaker speaker\_1: All right. So you should be all set. Was there anything else that we can assist you with today?

Speaker speaker\_2: No, that's it.

Speaker speaker\_1: Understood. In the event that you are looking to make any changes, you have till January 31st. That will be when your company open enrollment period will be ending.

Speaker speaker\_2: All right. Thank you.

Speaker speaker\_1: You're welcome. Have a wonderful rest of your day and thank you for giving us a call today.

Speaker speaker\_2: Oh, you too. Bye.

Speaker speaker\_1: Bye-bye.