

Transcript: Pamela

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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. This is Pamela speaking. How may I help you? Hi. My name is Maximilian Esparza, and I'm trying to get some insurance set up for me, please. Who do you work for, ma'am, uh, sir? I'm sorry. Uh, Morales. Um, with Morales, but I'm working for SIA. No problem. May I have the last four digits of your Social? Of course. Um, it's, uh, 3095. 3095. 3095. Okay. 3095. Yeah, three- uh, 3095. Okay. Mr. Esparza? Yeah. For security reason, just to make sure we are in the correct file, we need to verify your complete address and date of birth. That's okay. So my address is, uh, 510 Gas Line Road, Mulberry, Indiana and the postal code is 46058. Um, and my date of birth is June, uh, 23rd of 1993. 6-23-1993. We have a... We have a phone number of 5317-389-1149. Yeah. He wants- And your email is... Um, and your email is maxparker23@aol.com. Yes, correct. Okay. Let's see. And do you know what plan would you like to enroll to? Yeah, it's called the VIP Classic for employee and children. Okay. What else? Um. Oh, vision and dental. With vision and dental. Okay. So we have the VIP Classic, um, dental and vision for employee plus child. Your premium will be \$45.96. Uh-huh. That would be it. Yeah. Perfect. All right. Now, uh, Morales is under Section 125. What it means is that you... Hello? Are you there? Yeah, I'm right here. Okay. I'm sorry. It's just that, um, for some reason it went away. So Section 125, what it means is that your, uh, premium will be taken before taxes, which lowers- Uh-huh. ... the taxable income. Now, if you need to cancel, you will have to wait for company open enrollment or a qualified life event. Okay. Um, let's see. Now, I'm gonna need children or child information. Okay. May I have the first name? Okay. Uh, it's Thomas Roberto Esparza. By any chance you have the Social? Yes. Uh, you ready? Yes. It's, uh, 397-75-6238. Okay. And date of birth? June 2018. Okay. You have to tell her. Did you hear that? I'm sorry. . No. What's the date of birth? Uh, it's, uh- December 23rd. ... December 23rd- 2018. ... 2018. Say what? Any other child that you want to add? Yes. Um, Amelia Lorraine Esparza. Lorraine Esparza? Mm-hmm. Her Social? It's, uh, A14-49-5278. And her date of birth? It's 7-2-2014. Okay. July 2nd- Any other child? No, that would be all. Okay. So the benefits will start the following Monday after we receive the first premium from your employer. Then the ID cards will arrive within seven to 10 days. You receive... I mean, sorry, your medical card, which is the VIP-Mm-hmm. That's it. That one, you're going to receive it on, um, in your email. But after benefits are active- Mm-hmm. ... you'll need a physical one. You could give us a call and we could request one for you. Okay. Uh, okay. Is there anything else I could do for you, sir? No. That was... Yes. Oh, one second. Um, ma'am? Um, I'm his wife, Macy. Um, I ha- currently have Max and, uh, Thomas and Amelia on my insurance. Um, they said I need some sort of COBRA documentation or a proof of his insurance starting so that I can get them dropped from my insurance. Okay. Um, let me see if we are able to provide you with that since the benefits are n- not yet active. Just bear

with me and I'll let you know. So, I think I have three days, um, to show that from when the, when the eligibility is beginning. Okay. So, you need this for, as a qualified live event? Um... Correct. But I need, I need, I mean, I'm not sure if we all- if we able to provide that to you because I'm just enrolling them in the benefits. So, I'm not- Okay. ... I have to... Because I'm not the one who sent it out, so I have to check with that department. Just bear with me. Okay. Sam? Uh, yes? Okay. So, unfortunately, we cannot provide the letter yet because we don't have an active coverage and, um, we don't have the exact day when the benefit was going to start because we have to wait for your company to make this direc- um, the payment in order for the benefits to start. So, we're not able to provide that letter yet. Okay, thank you. No problem. So, do we ... Yes. ... number again to get that information? Yeah, you could give us a call back as so- even the same day the benefits become effective which will... Okay. Um, as soon as he see his deduction on their payroll, the following Monday, the benefits will be active. So, you could give us a call on that day. Okay, thank you. All right. Thank you for giving us a call. Have a great rest of the day. Thank you. Thank you so much. 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 in a Card. This is Pamela speaking. How may I help you?

Speaker speaker_2: Hi. My name is Maximilian Esparza, and I'm trying to get some insurance set up for me, please.

Speaker speaker_1: Who do you work for, ma'am, uh, sir? I'm sorry.

Speaker speaker_2: Uh, Morales. Um, with Morales, but I'm working for SIA.

Speaker speaker_1: No problem. May I have the last four digits of your Social?

Speaker speaker_2: Of course. Um, it's, uh, 3095. 3095.

Speaker speaker_1: 3095. Okay. 3095.

Speaker speaker_2: Yeah, three- uh, 3095.

Speaker speaker_1: Okay. Mr. Esparza?

Speaker speaker_2: Yeah.

Speaker speaker_1: For security reason, just to make sure we are in the correct file, we need to verify your complete address and date of birth.

Speaker speaker_2: That's okay. So my address is, uh, 510 Gas Line Road, Mulberry, Indiana and the postal code is 46058. Um, and my date of birth is June, uh, 23rd of 1993. 6-23-1993.

Speaker speaker_1: We have a... We have a phone number of 5317-389-1149.

Speaker speaker_2: Yeah. He wants-

Speaker speaker_1: And your email is... Um, and your email is maxparker23@aol.com.

Speaker speaker_2: Yes, correct.

Speaker speaker_1: Okay. Let's see. And do you know what plan would you like to enroll to?

Speaker speaker_2: Yeah, it's called the VIP Classic for employee and children.

Speaker speaker_1: Okay. What else?

Speaker speaker_2: Um.

Speaker speaker_3: Oh, vision and dental.

Speaker speaker_2: With vision and dental.

Speaker speaker_1: Okay. So we have the VIP Classic, um, dental and vision for employee plus child. Your premium will be \$45.96.

Speaker speaker_2: Uh-huh. That would be it. Yeah.

Speaker speaker_1: Perfect. All right. Now, uh, Morales is under Section 125. What it means is that you... Hello? Are you there?

Speaker speaker_2: Yeah, I'm right here.

Speaker speaker_1: Okay. I'm sorry. It's just that, um, for some reason it went away. So Section 125, what it means is that your, uh, premium will be taken before taxes, which lowers-

Speaker speaker_2: Uh-huh.

Speaker speaker_1: ... the taxable income. Now, if you need to cancel, you will have to wait for company open enrollment or a qualified life event.

Speaker speaker_2: Okay.

Speaker speaker_1: Um, let's see. Now, I'm gonna need children or child information.

Speaker speaker_2: Okay.

Speaker speaker_1: May I have the first name?

Speaker speaker_2: Okay. Uh, it's Thomas Roberto Esparza.

Speaker speaker_1: By any chance you have the Social?

Speaker speaker_2: Yes. Uh, you ready?

Speaker speaker_1: Yes.

Speaker speaker_2: It's, uh, 397-75-6238.

Speaker speaker_1: Okay. And date of birth?

Speaker speaker_3: June 2018.

Speaker speaker_1: Okay.

Speaker speaker_3: You have to tell her.

Speaker speaker_2: Did you hear that? I'm sorry. .

Speaker speaker_1: No. What's the date of birth?

Speaker speaker_2: Uh, it's, uh-

Speaker speaker_3: December 23rd.

Speaker speaker_1: ... December 23rd-

Speaker speaker_3: 2018.

Speaker speaker_2: ... 2018. Say what?

Speaker speaker_1: Any other child that you want to add?

Speaker speaker_2: Yes. Um, Amelia Lorraine Esparza.

Speaker speaker_1: Lorraine Esparza?

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: Her Social?

Speaker speaker_2: It's, uh, A14-49-5278.

Speaker speaker_1: And her date of birth?

Speaker speaker_2: It's 7-2-2014.

Speaker speaker_1: Okay.

Speaker speaker_2: July 2nd-

Speaker speaker_1: Any other child?

Speaker speaker_2: No, that would be all.

Speaker speaker_1: Okay. So the benefits will start the following Monday after we receive the first premium from your employer. Then the ID cards will arrive within seven to 10 days. You receive... I mean, sorry, your medical card, which is the VIP-

Speaker speaker_4: Mm-hmm.

Speaker speaker_1: That's it. That one, you're going to receive it on, um, in your email. But after benefits are active-

Speaker speaker_4: Mm-hmm.

Speaker speaker_1: ... you'll need a physical one. You could give us a call and we could request one for you.

Speaker speaker_4: Okay.

Speaker speaker_1: Uh, okay. Is there anything else I could do for you, sir?

Speaker speaker_4: No. That was...

Speaker speaker_5: Yes.

Speaker speaker_4: Oh, one second.

Speaker speaker_5: Um, ma'am? Um, I'm his wife, Macy. Um, I ha- currently have Max and, uh, Thomas and Amelia on my insurance. Um, they said I need some sort of COBRA documentation or a proof of his insurance starting so that I can get them dropped from my insurance.

Speaker speaker_1: Okay. Um, let me see if we are able to provide you with that since the benefits are n- not yet active. Just bear with me and I'll let you know.

Speaker speaker_5: So, I think I have three days, um, to show that from when the, when the eligibility is beginning.

Speaker speaker_1: Okay. So, you need this for, as a qualified live event? Um...

Speaker speaker_5: Correct.

Speaker speaker_1: But I need, I need, I mean, I'm not sure if we all- if we able to provide that to you because I'm just enrolling them in the benefits. So, I'm not-

Speaker speaker_5: Okay.

Speaker speaker_1: ... I have to... Because I'm not the one who sent it out, so I have to check with that department. Just bear with me.

Speaker speaker_5: Okay.

Speaker speaker_1: Sam?

Speaker speaker_4: Uh, yes?

Speaker speaker_1: Okay. So, unfortunately, we cannot provide the letter yet because we don't have an active coverage and, um, we don't have the exact day when the benefit was going to start because we have to wait for your company to make this direc- um, the payment in order for the benefits to start. So, we're not able to provide that letter yet.

Speaker speaker_5: Okay, thank you.

Speaker speaker_1: No problem.

Speaker speaker_5: So, do we ...

Speaker speaker_1: Yes.

Speaker speaker_5: ... number again to get that information?

Speaker speaker_1: Yeah, you could give us a call back as so- even the same day the benefits become effective which will...

Speaker speaker_5: Okay.

Speaker speaker_1: Um, as soon as he see his deduction on their payroll, the following Monday, the benefits will be active. So, you could give us a call on that day.

Speaker speaker_5: Okay, thank you.

Speaker speaker_1: All right. Thank you for giving us a call. Have a great rest of the day.

Speaker speaker_5: Thank you.

Speaker speaker_4: Thank you so much. Bye.

Speaker speaker_1: Bye-bye.