

Transcript: Pearl

Rojas-4557598114234368-5421228393283584

Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Hi, good afternoon. Thank you for calling Benefits in a Card. My name is Pearl. Who do I, would I like to speak to with? Hi, Pearl. I just called. This is Onisha again. Um, why did I call? I have another question. Sure. Um, I'm trying to click, um, enrolling into everything, but I'm having trouble selecting a couple of the options. Like it, it won't turn green is what I'm saying. Hmm, I'm not sure why that is. If you'd like, I can enroll you over the phone, um- Yeah. ... but I'm not sure which way it will let you click it. I, yeah. Okay, what is the- Sorry, go ahead. No problem. What is the last four digits of your Social? Um, 0943. Okay, bear with me. And you said Create a Circle, correct? Mm-hmm, yes. All righty, and can you confirm your address and date of birth? Uh, yes. It is, address is 4050 1/2 Mississippi Street, San Diego, California 92104, and date of birth is 7-7-94. Okay, can I have your phone number as 760-554-9194? Correct, yes. Can I have your email address as onisha.lee11@gmail.com? Mm-hmm, correct. Okay. Okay, just here where you logged in, um, do-do, and then you are in Company Open Enrollment. So I'm not sure why it's not letting you enroll. Um, if you want to just read out your selections to me, and I'll go ahead and do it on this end. Great. Um, I'll do Insure Plus, the H3. Okay. The Free Rx, the Dental. Okay. I wanted to, uh, decline Term Life. So with the dental, it's a bundle of a Dental, Term Life and Vision. Oh, is that what's happening? Sorry. Are we... No problem. Were you trying to, were you trying to click on the MEC TelRx as well? Yes. Well, yeah, 'cause I couldn't hit Term Life or Vision. Like, I was selecting Dental, but then I can't select the other two. Yep, so that's why I'm bet- the other two weren't turning 'cause it's a bundle, and once you click one, the other three, the other two are selected. And then with, if you choose the MEC TelRx, or if you choose Free Rx first and then try to s- choose the MEC TelRx, it's not going to let you because the TelRx already has Free Rx included- Oh, you... So you have to unselect the Free Rx and then select the MEC TelRx. Wow. See? Helpful. Okay, and then the Behavioral Health. We have Behavioral Health. Anything else? Um, I think I also selected yes for Illness and I declined Accident, though maybe I should just say yes to that and save two bucks. What's the total if I say yes to the Accident and then everything else? If you do all your selections as you told me right now plus the Group Accident, it's 53.93 a week. 53.93 a week, yeah. Okay, great. I think, yeah, let's, let's just do that. Okay. And then like I said, it'll take one to two weeks for the staff at the agency to start making those deductions. Once you see that first deduction, the next Monday you're active, and then later that we- week, , excuse me, you'll see your Dental, Vision and MEC TelRx , excuse me, cards in the mail, and then your medical will go to your email. Mm-hmm. And then you'll also receive a email for your Behavioral Health, um, to register and use those services as well. Okay, amazing. All righty, and then for your, um, Term Life and Group Accident, who would you want the beneficiary to be? Um... Oh, yeah. Wow. Um, can I put my mother down? Yeah, of course. Okay. Uh, her

name is Elvira, E-L-V-I-R-A. Okay. And her last name is Lee, L-E-E. All righty, so I went ahead and got her down. And she will be receiving 100%, correct? Mm-hmm, yes, that's correct. All righty, and then your MEC plan is under an IRS regulation called Section 125, meaning if it is not Com- Company Open Enrollment or you have a Qualified Life Event occur, you cannot cancel or change that plan. Okay. Do you have any questions? Um... Wait, actually can you just repeat that? I think I blanked out, sorry. No problem. So that the MEC TelRx plan is under an IRS regulation called Section 125, meaning if it is not Company Open Enrollment or you have a Qualified Life Event occur, you cannot cancel or change that plan. Got it, got it. But I can enroll right now? Yes. Okay, yes, understood. Thank you. All righty, is there anything else I can assist you with today? No, no. This is it, this is it. All righty, thank you so much for calling. You have a great day. Thank you, you too. Bye.

Conversation Format

Speaker speaker_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker_1: Hi, good afternoon. Thank you for calling Benefits in a Card. My name is Pearl. Who do I, would I like to speak to with?

Speaker speaker_2: Hi, Pearl. I just called. This is Onisha again. Um, why did I call? I have another question.

Speaker speaker_1: Sure.

Speaker speaker_2: Um, I'm trying to click, um, enrolling into everything, but I'm having trouble selecting a couple of the options. Like it, it won't turn green is what I'm saying.

Speaker speaker_1: Hmm, I'm not sure why that is. If you'd like, I can enroll you over the phone, um-

Speaker speaker_2: Yeah.

Speaker speaker_1: ... but I'm not sure which way it will let you click it.

Speaker speaker_2: I, yeah.

Speaker speaker_1: Okay, what is the-

Speaker speaker_2: Sorry, go ahead.

Speaker speaker_1: No problem. What is the last four digits of your Social?

Speaker speaker_2: Um, 0943.

Speaker speaker_1: Okay, bear with me. And you said Create a Circle, correct?

Speaker speaker_2: Mm-hmm, yes.

Speaker speaker_1: All righty, and can you confirm your address and date of birth?

Speaker speaker_2: Uh, yes. It is, address is 4050 1/2 Mississippi Street, San Diego, California 92104, and date of birth is 7-7-94.

Speaker speaker_1: Okay, can I have your phone number as 760-554-9194?

Speaker speaker_2: Correct, yes.

Speaker speaker_1: Can I have your email address as onisha.lee11@gmail.com?

Speaker speaker_2: Mm-hmm, correct.

Speaker speaker_1: Okay. Okay, just here where you logged in, um, do-do, and then you are in Company Open Enrollment. So I'm not sure why it's not letting you enroll. Um, if you want to just read out your selections to me, and I'll go ahead and do it on this end.

Speaker speaker_2: Great. Um, I'll do Insure Plus, the H3.

Speaker speaker_1: Okay.

Speaker speaker_2: The Free Rx, the Dental.

Speaker speaker_1: Okay.

Speaker speaker_2: I wanted to, uh, decline Term Life.

Speaker speaker_1: So with the dental, it's a bundle of a Dental, Term Life and Vision.

Speaker speaker_2: Oh, is that what's happening? Sorry.

Speaker speaker_1: Are we... No problem. Were you trying to, were you trying to click on the MEC TelRx as well?

Speaker speaker_2: Yes. Well, yeah, 'cause I couldn't hit Term Life or Vision. Like, I was selecting Dental, but then I can't select the other two.

Speaker speaker_1: Yep, so that's why I'm bet- the other two weren't turning 'cause it's a bundle, and once you click one, the other three, the other two are selected. And then with, if you choose the MEC TelRx, or if you choose Free Rx first and then try to s- choose the MEC TelRx, it's not going to let you because the TelRx already has Free Rx included-

Speaker speaker_2: Oh, you...

Speaker speaker_1: So you have to unselect the Free Rx and then select the MEC TelRx.

Speaker speaker_2: Wow. See? Helpful. Okay, and then the Behavioral Health.

Speaker speaker_1: We have Behavioral Health. Anything else?

Speaker speaker_2: Um, I think I also selected yes for Illness and I declined Accident, though maybe I should just say yes to that and save two bucks. What's the total if I say yes to the Accident and then everything else?

Speaker speaker_1: If you do all your selections as you told me right now plus the Group Accident, it's 53.93 a week.

Speaker speaker_2: 53.93 a week, yeah. Okay, great. I think, yeah, let's, let's just do that.

Speaker speaker_1: Okay. And then like I said, it'll take one to two weeks for the staff at the agency to start making those deductions. Once you see that first deduction, the next Monday you're active, and then later that we- week, , excuse me, you'll see your Dental, Vision and MEC TelRx , excuse me, cards in the mail, and then your medical will go to your email.

Speaker speaker_2: Mm-hmm.

Speaker speaker_1: And then you'll also receive a email for your Behavioral Health, um, to register and use those services as well.

Speaker speaker_2: Okay, amazing.

Speaker speaker_1: All righty, and then for your, um, Term Life and Group Accident, who would you want the beneficiary to be?

Speaker speaker_2: Um... Oh, yeah. Wow. Um, can I put my mother down?

Speaker speaker_1: Yeah, of course.

Speaker speaker_2: Okay. Uh, her name is Elvira, E-L-V-I-R-A.

Speaker speaker_1: Okay.

Speaker speaker_2: And her last name is Lee, L-E-E.

Speaker speaker_1: All righty, so I went ahead and got her down. And she will be receiving 100%, correct?

Speaker speaker_2: Mm-hmm, yes, that's correct.

Speaker speaker_1: All righty, and then your MEC plan is under an IRS regulation called Section 125, meaning if it is not Com- Company Open Enrollment or you have a Qualified Life Event occur, you cannot cancel or change that plan.

Speaker speaker_2: Okay.

Speaker speaker_1: Do you have any questions?

Speaker speaker_2: Um... Wait, actually can you just repeat that? I think I blanked out, sorry.

Speaker speaker_1: No problem. So that the MEC TelRx plan is under an IRS regulation called Section 125, meaning if it is not Company Open Enrollment or you have a Qualified Life Event occur, you cannot cancel or change that plan.

Speaker speaker_2: Got it, got it. But I can enroll right now?

Speaker speaker_1: Yes.

Speaker speaker_2: Okay, yes, understood. Thank you.

Speaker speaker_1: All righty, is there anything else I can assist you with today?

Speaker speaker_2: No, no. This is it, this is it.

Speaker speaker_1: All righty, thank you so much for calling. You have a great day.

Speaker speaker_2: Thank you, you too. Bye.