

Transcript: VICTORIA

Taylor-4795840531480576-5847244163465216

Full Transcript

Your call may be monitored or recorded for quality assurance purposes. ... benefits on a card. This is Victoria. How can I help you? Hey, Victoria. This is Daniel. How you doing? Good, how are you? I am trying... Yeah, I'm doing good. I am trying to... Add benefits. ... add benefits. Okay, sure. What's the name of the agency you work for? Uh, Integrity. Integrity. Okay. And the last four of your Social? Uh, 5483. And your last name? Pollock. P-O-L-L-O-C-K. Okay. Do you mind verifying your address and date of birth? Uh, address is 506 East Utica Street, Sellersburg, Indiana, 47172. And date of birth is 12-8-77. Okay, phone number 812-725-2193? Yeah. And then email is daniel- What, say what to me again? All right, ... Phone number you have is... Sorry about that. Phone number I have 812-725-2193. Yeah, I mean, that's my wife. That's fine still, either one. We're good. She's al... She works from home and... Okay. And... Is your number the one you're calling from? Yes. Okay. I'll go ahead and list that and per, her phone number as secondary. Yeah, that's fine. And then, um, email is daniel31e@gmail.com? Yes. Okay. So, I do see that you're already pending for enrollment. It looks like, um, for the free R- accident, dental, critical illness, term life, vision and the VIP+ medical plan for you and your spouse. And then it looks like you also selected the short-term disability for yourself. Yes. Yes, but we can't add my two daughters on the life. Like the critical- Like the critical... Um, term life. Or... Yeah, term... Was it term life? Whatever it was, I can't log in to see what it was. Yeah, we can't log in to see it. They were getting in with you, but the vision's the only thing - So, as of right now, it looks like everything is for employee plus spouse, except for the short-term disability. So which ones are you wanting to do for your family? Everything but the medical, vision and dental. That's where the girls are. Yeah, 'cause we want to do the critical, the accident, the life insurance. Everything but medical, dental and vision. Yes. That's all I... I just want them. Uh, I don't want the ones that she just said to add. I don't... The girls don't need them. I want 'em. I want the others. Okay. So we're gonna do the group accident, the critical illness and the term life for employee plus spous-... Or, I'm sorry, employee plus family? Yeah. Yes. Okay. And then let's see. And then, just to make sure I'm getting this right, the free Rx dental vision and the medical for employee plus spouse? Yeah. Yes. And then, of course, we can only do short-term disability for employee only. Yeah. Yes. Uh-huh. Okay. Give me just a few seconds so I can change that real quick. All right. Okay. And so for the term life, critical illness and group accident, we're gonna be adding your spouse and your children, correct? Yes. Okay. Just wanted to make sure. VIP+... Dental, free Rx, vision. All right. So I got the VIP+, free Rx, dental and vision for employee plus spouse, the short-term disability for employee only, and then the term life, critical illness and group accident for employee plus family. Yes. All right. So, the weekly deduction would be \$103.83. Yes, that's it. Okay. Let me change it. And then... Okay, so I have your spouse listed already. Uh, how many children are we adding on? Two. Two. What's the first child's name? Brianna. Is

that B-R-I-A-N-A? Yeah. B-R-I-A-N-N-A. And what's the last name? Pollock. P-O-L-L-O-C-K. All right. Date of birth? 01/18/01. If that was my wife, she knew it faster than I will tell you. Gotcha. 01/18/2001? Yeah. Yes. Okay. And then social? Her social is 313-23-9001. Okay. And then who's next? Uh, Alyssa. That's A-L-Y-S-S-A. Same last name? Yes. Date of birth? 02/07/02. 02/07/2002? Yes. Okay. And then the social? 308-25-8071. And is that everybody? Yes. Okay. And then it looks like we're still missing the beneficiary. Who did you want to name as the beneficiary? I'm your benefi- beneficiary. My wife. Okay. And can, can we add like two... Usually I add me for 100 and then I do a second one for, like, the girls 50/50. So, what we do, um, is it all has to come out to a, a total of 100%. So if, if you were to do three people, um- Well usually... his old job would ask me, like, for a first beneficiary in case something happens to me or whatever, he would ask for, like, a second beneficiary and then I would add the girls. But if you only do one, then it'll just be me. Okay. I mean, we can do three. We would just have to split the percentages, um, to where That one. Yeah. ... 100%. So, like, one... I'm sorry. Go ahead. We'll just do me at 100%. Oh, okay. All right. All righty. So I went ahead and made those changes. Now, I'm not sure if anyone advised you of this. Um, it does typically take about one to two weeks for the actual enrollment to be processed through payroll. So you might not see that first deduction until two weeks from now. Um, once you do see the deduction being made out of your check, coverage will start the following Monday. And then, uh, once the coverage is actually active, the ID cards are made and sent to you within 7 to 10 business days. Um, you'll get- That work? Uh, you'll get the dental and the vision card by mail, but the medical ID card is typically emailed to you from the insurance carrier. So just keep an eye on your email as well. All right. And I think that's pretty much it. Did you have any other questions for me? No. That was, that was the only questions we had, and I appreciate it. Thank you. Yes, sir. You have a wonderful day. Yeah. You too. Thank you. Bye-bye. Bye.

Conversation Format

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

Speaker speaker_1: ... benefits on a card. This is Victoria. How can I help you?

Speaker speaker_2: Hey, Victoria. This is Daniel. How you doing?

Speaker speaker_1: Good, how are you?

Speaker speaker_2: I am trying... Yeah, I'm doing good. I am trying to...

Speaker speaker_0: Add benefits.

Speaker speaker_2: ... add benefits.

Speaker speaker_1: Okay, sure. What's the name of the agency you work for?

Speaker speaker_2: Uh, Integrity. Integrity.

Speaker speaker_1: Okay. And the last four of your Social?

Speaker speaker_2: Uh, 5483.

Speaker speaker_1: And your last name?

Speaker speaker_2: Pollock. P-O-L-L-O-C-K.

Speaker speaker_1: Okay. Do you mind verifying your address and date of birth?

Speaker speaker_2: Uh, address is 506 East Utica Street, Sellersburg, Indiana, 47172. And date of birth is 12-8-77.

Speaker speaker_1: Okay, phone number 812-725-2193?

Speaker speaker_2: Yeah.

Speaker speaker_1: And then email is daniel-

Speaker speaker_2: What, say what to me again? All right, ...

Speaker speaker_1: Phone number you have is... Sorry about that. Phone number I have 812-725-2193.

Speaker speaker_2: Yeah, I mean, that's my wife. That's fine still, either one. We're good. She's al... She works from home and...

Speaker speaker_1: Okay.

Speaker speaker_2: And...

Speaker speaker_1: Is your number the one you're calling from?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. I'll go ahead and list that and per, her phone number as secondary.

Speaker speaker_2: Yeah, that's fine.

Speaker speaker_1: And then, um, email is daniel31e@gmail.com?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. So, I do see that you're already pending for enrollment. It looks like, um, for the free R- accident, dental, critical illness, term life, vision and the VIP+ medical plan for you and your spouse. And then it looks like you also selected the short-term disability for yourself.

Speaker speaker_0: Yes.

Speaker speaker_2: Yes, but we can't add my two daughters on the life.

Speaker speaker_0: Like the critical-

Speaker speaker_2: Like the critical...

Speaker speaker_0: Um, term life.

Speaker speaker_2: Or... Yeah, term... Was it term life?

Speaker speaker_0: Whatever it was, I can't log in to see what it was.

Speaker speaker_2: Yeah, we can't log in to see it.

Speaker speaker_0: They were getting in with you, but the vision's the only thing -

Speaker speaker_1: So, as of right now, it looks like everything is for employee plus spouse, except for the short-term disability. So which ones are you wanting to do for your family?

Speaker speaker_0: Everything but the medical, vision and dental.

Speaker speaker_2: That's where the girls are.

Speaker speaker_0: Yeah, 'cause we want to do the critical, the accident, the life insurance. Everything but medical, dental and vision.

Speaker speaker_2: Yes. That's all I... I just want them. Uh, I don't want the ones that she just said to add. I don't... The girls don't need them. I want 'em. I want the others.

Speaker speaker_1: Okay. So we're gonna do the group accident, the critical illness and the term life for employee plus spouse... Or, I'm sorry, employee plus family?

Speaker speaker_0: Yeah.

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. And then let's see. And then, just to make sure I'm getting this right, the free Rx dental vision and the medical for employee plus spouse?

Speaker speaker_0: Yeah.

Speaker speaker_2: Yes.

Speaker speaker_1: And then, of course, we can only do short-term disability for employee only.

Speaker speaker_0: Yeah.

Speaker speaker_2: Yes.

Speaker speaker_0: Uh-huh.

Speaker speaker_1: Okay. Give me just a few seconds so I can change that real quick.

Speaker speaker_2: All right.

Speaker speaker_1: Okay. And so for the term life, critical illness and group accident, we're gonna be adding your spouse and your children, correct?

Speaker speaker_2: Yes.

Speaker speaker_1: Okay. Just wanted to make sure. VIP+... Dental, free Rx, vision. All right. So I got the VIP+, free Rx, dental and vision for employee plus spouse, the short-term

disability for employee only, and then the term life, critical illness and group accident for employee plus family.

Speaker speaker_2: Yes.

Speaker speaker_1: All right. So, the weekly deduction would be \$103.83.

Speaker speaker_2: Yes, that's it.

Speaker speaker_1: Okay. Let me change it. And then... Okay, so I have your spouse listed already. Uh, how many children are we adding on?

Speaker speaker_2: Two.

Speaker speaker_1: Two. What's the first child's name?

Speaker speaker_2: Brianna.

Speaker speaker_1: Is that B-R-I-A-N-A?

Speaker speaker_3: Yeah. B-R-I-A-N-N-A.

Speaker speaker_1: And what's the last name?

Speaker speaker_3: Pollock. P-O-L-L-O-C-K.

Speaker speaker_1: All right. Date of birth?

Speaker speaker_4: 01/18/01.

Speaker speaker_3: If that was my wife, she knew it faster than I will tell you.

Speaker speaker_1: Gotcha. 01/18/2001?

Speaker speaker_4: Yeah.

Speaker speaker_3: Yes.

Speaker speaker_1: Okay. And then social?

Speaker speaker_4: Her social is 313-23-9001.

Speaker speaker_1: Okay. And then who's next?

Speaker speaker_3: Uh, Alyssa. That's A-L-Y-S-S-A.

Speaker speaker_1: Same last name?

Speaker speaker_3: Yes.

Speaker speaker_1: Date of birth?

Speaker speaker_5: 02/07/02.

Speaker speaker_1: 02/07/2002?

Speaker speaker_5: Yes.

Speaker speaker_1: Okay. And then the social?

Speaker speaker_5: 308-25-8071.

Speaker speaker_1: And is that everybody?

Speaker speaker_3: Yes.

Speaker speaker_1: Okay. And then it looks like we're still missing the beneficiary. Who did you want to name as the beneficiary?

Speaker speaker_4: I'm your benefi- beneficiary.

Speaker speaker_3: My wife.

Speaker speaker_1: Okay.

Speaker speaker_4: And can, can we add like two... Usually I add me for 100 and then I do a second one for, like, the girls 50/50.

Speaker speaker_1: So, what we do, um, is it all has to come out to a, a total of 100%. So if, if you were to do three people, um-

Speaker speaker_4: Well usually... his old job would ask me, like, for a first beneficiary in case something happens to me or whatever, he would ask for, like, a second beneficiary and then I would add the girls. But if you only do one, then it'll just be me.

Speaker speaker_1: Okay. I mean, we can do three. We would just have to split the percentages, um, to where

Speaker speaker_6: That one. Yeah.

Speaker speaker_1: ... 100%. So, like, one... I'm sorry. Go ahead.

Speaker speaker_4: We'll just do me at 100%.

Speaker speaker_1: Oh, okay. All right. All righty. So I went ahead and made those changes. Now, I'm not sure if anyone advised you of this. Um, it does typically take about one to two weeks for the actual enrollment to be processed through payroll. So you might not see that first deduction until two weeks from now. Um, once you do see the deduction being made out of your check, coverage will start the following Monday. And then, uh, once the coverage is actually active, the ID cards are made and sent to you within 7 to 10 business days. Um, you'll get-

Speaker speaker_3: That work?

Speaker speaker_1: Uh, you'll get the dental and the vision card by mail, but the medical ID card is typically emailed to you from the insurance carrier. So just keep an eye on your email as well.

Speaker speaker_3: All right.

Speaker speaker_1: And I think that's pretty much it. Did you have any other questions for me?

Speaker speaker_3: No. That was, that was the only questions we had, and I appreciate it. Thank you.

Speaker speaker_1: Yes, sir. You have a wonderful day.

Speaker speaker_3: Yeah. You too.

Speaker speaker_1: Thank you. Bye-bye.

Speaker speaker_3: Bye.