

Transcript: VICTORIA

Taylor-5145750257451008-5000685784580096

Full Transcript

Thank you for calling Benefits on a Card. This is Victoria. How can I help you? Hi, Victoria. My name is Sarah, and I am calling from American Public Life Insurance. How are you doing today? Good. How are you? Good. Um, we have a mutual client, um, who's insured with us, and they have a disability claim that is awaiting some paperwork to be filled out that was sent over to you guys. Um, I'm wondering... I have the insured on the other line. I'm wondering if this is something that you could help them with, as far as what's holding up the paperwork. I'm not even know- even aware of any type of, like, paperwork that we do for that. Um, let me- Are you familiar with a Karen? Karen Peretta? I have that name as a contact. Yeah, that's one of our account managers. Yeah, so I've been trying to reach her because our information states that if an employee is having difficulty getting the employer portion of a claim filled out, they were to contact her, but I can't even get through to her. Okay. Have you been trying to contact her by email? Um, I have a phone number of 864-770-6166. Do you have a different way I can maybe try and reach her directly? Um, let me... Let me s- pull up the patient file real quick, as well. Um, I can check on that. Okay. Okay. Don't worry. What's the last four of their Social? Uh, let's see. It's 8209. And their first and last name? Um, so first name is Dun- Dunra, and last name is Moffitt. How do you spell the last name? Um, M-O-F-F-I-T-T. And their date of birth? Uh, 6/22 of '73. Okay. Give me one second. I'm just reaching out to her to see if there's a different way that she can be contacted. Yeah. No worries. I get it. Like, you know? Can't just be giving out information. Like, I totally get it. And, honestly, the only, uh... Like, I didn't wanna just transfer this woman 'cause she's, like, irritated. She's, like, been trying to get this disability payment for over a month and, like, is just waiting for her employer to fill out this information, and I'm like, "I can't just transfer 'cause..." Yeah. See, and w- here in the customer service department, I, I wasn't aware of that even being a, a thing, so... A thing. Yeah. I hear you. And then, it's like, yeah, for you to get a call, like, somebody coming in hot, and you're like, "What? Huh?" Uh, let's see. Haven't gotten a response yet. Um... Okay, I think she might be in a call. Do you mind if I put you on a brief hold? I'm just gonna reach out to my manager and see what else we could, might do. Yeah. No worries. Go for it. Okay. Are you still there? Yes, ma'am. I'm so sorry. Um, so I- No. That's okay. I just wanted to check in with her and let her know I was still there talking to you. Gotcha. Um, so I just got word back, it looks like Karen's actually in a call right now. Okay. But I can give you her email. I don't know- Okay. ... if that'll be helpful. Okay. Um... Um... Yeah. What's her email? So it's just gonna be her first name, Karen, and then dot, her last name, which is P-U-E-R-T-A- Mm-hmm. ... @benefitsinacard.com. ... @card.benefits. Okay. And benefitsinacard's all written out, just like it sounds? Yeah. Benefitsinacard.com. Okay. All right. I will send her an email. Are you guys on Central Time where you're at? Uh, Eastern Time. You're on Eastern? Okay. Are you guys just in office until, like, 5:00, or do you know-

Yeah. Um, I- ... what time it is there? Now, the customer service, we're open till 8:00 PM. Now, her, I- I'm not sure when she'll be off today. Okay. I see that she's still on right now. She's actually in a call, um- Okay. All right. And then what I'll do- Um- ... also is I'll send an email to her on my end about what's going on. Okay. Yeah. I'll send her all the policy details and then I'll just let the caller know that, um, I reached out to her and I'll try them back maybe... Maybe I'll hear back from her by tomorrow, so then I can just call the insured back. So no worries. But thank you so much for that. I appreciate you. Yes, ma'am. You have a wonderful day. You too. Bye-bye.

Conversation Format

Speaker speaker_0: Thank you for calling Benefits on a Card. This is Victoria. How can I help you?

Speaker speaker_1: Hi, Victoria. My name is Sarah, and I am calling from American Public Life Insurance. How are you doing today?

Speaker speaker_0: Good. How are you?

Speaker speaker_1: Good. Um, we have a mutual client, um, who's insured with us, and they have a disability claim that is awaiting some paperwork to be filled out that was sent over to you guys. Um, I'm wondering... I have the insured on the other line. I'm wondering if this is something that you could help them with, as far as what's holding up the paperwork.

Speaker speaker_0: I'm not even kno- e- even aware of any type of, like, paperwork that we do for that. Um, let me-

Speaker speaker_1: Are you familiar with a Karen? Karen Peretta? I have that name as a contact.

Speaker speaker_0: Yeah, that's one of our account managers.

Speaker speaker_1: Yeah, so I've been trying to reach her because our information states that if an employee is having difficulty getting the employer portion of a claim filled out, they were to contact her, but I can't even get through to her.

Speaker speaker_0: Okay. Have you been trying to contact her by email?

Speaker speaker_1: Um, I have a phone number of 864-770-6166. Do you have a different way I can maybe try and reach her directly?

Speaker speaker_0: Um, let me... Let me s- pull up the patient file real quick, as well. Um, I can check on that.

Speaker speaker_1: Okay. Okay. Don't worry.

Speaker speaker_0: What's the last four of their Social?

Speaker speaker_1: Uh, let's see. It's 8209.

Speaker speaker_0: And their first and last name?

Speaker speaker_1: Um, so first name is Dun- Dunra, and last name is Moffitt.

Speaker speaker_0: How do you spell the last name?

Speaker speaker_1: Um, M-O-F-F-I-T-T.

Speaker speaker_0: And their date of birth?

Speaker speaker_1: Uh, 6/22 of '73.

Speaker speaker_0: Okay. Give me one second. I'm just reaching out to her to see if there's a different way that she can be contacted.

Speaker speaker_1: Yeah. No worries. I get it. Like, you know? Can't just be giving out information . Like, I totally get it. And, honestly, the only, uh... Like, I didn't wanna just transfer this woman 'cause she's, like, irritated. She's, like, been trying to get this disability payment for over a month and, like, is just waiting for her employer to fill out this information, and I'm like, "I can't just transfer 'cause..."

Speaker speaker_0: Yeah. See, and w- here in the customer service department, I, I wasn't aware of that even being a, a thing, so...

Speaker speaker_1: A thing. Yeah. I hear you. And then, it's like, yeah, for you to get a call, like, somebody coming in hot, and you're like, "What? Huh?"

Speaker speaker_0: Uh, let's see. Haven't gotten a response yet. Um... Okay, I think she might be in a call. Do you mind if I put you on a brief hold? I'm just gonna reach out to my manager and see what else we could, might do.

Speaker speaker_1: Yeah. No worries. Go for it.

Speaker speaker_0: Okay.

Speaker speaker_1: Are you still there?

Speaker speaker_0: Yes, ma'am. I'm so sorry. Um, so I-

Speaker speaker_1: No. That's okay. I just wanted to check in with her and let her know I was still there talking to you.

Speaker speaker_0: Gotcha. Um, so I just got word back, it looks like Karen's actually in a call right now.

Speaker speaker_1: Okay.

Speaker speaker_0: But I can give you her email. I don't know-

Speaker speaker_1: Okay.

Speaker speaker_0: ... if that'll be helpful.

Speaker speaker_1: Okay.

Speaker speaker_0: Um...

Speaker speaker_1: Um... Yeah. What's her email?

Speaker speaker_0: So it's just gonna be her first name, Karen, and then dot, her last name, which is P-U-E-R-T-A-

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: ... @benefitsinacard.com.

Speaker speaker_1: ... @card.benefits. Okay. And benefitsinacard's all written out, just like it sounds?

Speaker speaker_0: Yeah. Benefitsinacard.com.

Speaker speaker_1: Okay. All right. I will send her an email. Are you guys on Central Time where you're at?

Speaker speaker_0: Uh, Eastern Time.

Speaker speaker_1: You're on Eastern? Okay. Are you guys just in office until, like, 5:00, or do you know-

Speaker speaker_0: Yeah. Um, I-

Speaker speaker_1: ... what time it is there?

Speaker speaker_0: Now, the customer service, we're open till 8:00 PM. Now, her, I- I'm not sure when she'll be off today.

Speaker speaker_1: Okay.

Speaker speaker_0: I see that she's still on right now. She's actually in a call, um-

Speaker speaker_1: Okay. All right.

Speaker speaker_0: And then what I'll do-

Speaker speaker_1: Um-

Speaker speaker_0: ... also is I'll send an email to her on my end about what's going on.

Speaker speaker_1: Okay. Yeah. I'll send her all the policy details and then I'll just let the caller know that, um, I reached out to her and I'll try them back maybe... Maybe I'll hear back from her by tomorrow, so then I can just call the insured back. So no worries. But thank you so much for that. I appreciate you.

Speaker speaker_0: Yes, ma'am. You have a wonderful day.

Speaker speaker_1: You too. Bye-bye.