

## Transcript: VICTORIA

**Taylor-5459302054281216-4828746899701760**

### Full Transcript

Thank you for calling Benefits and a Card. This is Victoria. How can I help you? Uh, yes, ma'am. Um, I, I'm supposed to call and change my, uh, benefits. Um, I've just started. Uh, this will be my third week with the company and they tell me I'm supposed to, I'm supposed to call and change, uh, my benefits. Okay. What's the name of the agency you work for? Uh, Carlton, Carlton Staffing. And the last four of your Social? 6543. Okay. And, um, your first and last name? Herbert James. Gotcha. Do you mind verifying your address and date of birth? My address is 9393 Tidwell Road, Apartment 2622, Houston, Texas 77078 and birthday is 5/10/1988. And then phone number 346-218-3062? Yes, ma'am. Okay. And then email is first and last name The Number Five at gmail.com. Yes, ma'am. Okay. Um, let's see. And what are you wanting to change it to? 'Cause I see you're currently enrolled into the MEC TelRx. Uh, I'll do, uh, VIP Standard, uh, Family. Okay. Let's see. Is that all you're wanting to change? Uh, the dental. I need, I need to change everything to fami- uh, family. Well, basically everything needs changed to family. So the only thing that you're enrolled into currently though is the MEC TelRx for employee only. Okay, so- So you want to change the medical to the VIP Standard for employee plus family and then add on dental for employee plus family as well? Yeah. Dental and vision. Vision for employee plus family? Yes, ma'am. Okay. And is that everything? Um, I'm looking at the book of... The, uh, term... Is it the term, the, uh, term life? Can I, uh, enroll in that? Sure. Are you wanting that for employee plus family as well? Yes, ma'am. Okay. Was there anything else? Uh... The short-term disability. Okay. Uh, and that's it. All right. So I have the VIP Standard, dental, term life and vision for employee plus family, and then the short-term disability for employee only. Um, it looks like it would come out to a total of \$75.63 a week. Okay. Now, I do want to let you know that all of these plans are under Section 125, which is basically a IRS code that allows you to pay your share of the premium with pre-tax dollars. Because of this, the IRS does put stipulations on when you're able to change or cancel the plans. Um, so, of course, you do have the remainder of your personal open enrollment period, which will end on, it looks like the 9th of May. So you have until the 9th of May to make any changes or cancellations. Outside of that, you would have to wait for the company's open enrollment period to make any further changes or cancellations to your enrollment. Okay. Now, it will take about one to two weeks for these changes to be processed through your payroll. Once you see the first deduction of \$75.63, the coverage will start the following Monday. And then, uh, once the coverage is active, your ID cards are made and then sent to you within seven to ten business days. Okay. Do I, uh, have to go online and put them on, on there or how do I do it? No, I could do that for you. Um, I was just about to get to that. Let's start off with your spouse. What is your spouse's name? Uh, Dikeasa. Uh, D-I-K... Hold on one second. It's, uh, D-I-K, uh, E-Y. Oh, no, I'm sorry. D-I-K-E-A S-H-E-Y-A. Okay, just to make sure I got that right. So it's B as in boy, I-K-E-A S-H-E-Y-A? No, it's, uh, D, D as

in dog. Okay, so D-I-K-E-A S-H-E-Y-A. Yes, ma'am. And last name? Um, uh, James. And date of birth? 4/30/95. No, I'm sorry, 4/30/94. Okay. And then full Social.... here. 30 years. I called you yesterday. Should be getting this. Uh. Um, I don't, I don't see the... I don't have her social security number. Okay, that's fine. I can put all zeroes for now and then you can call us back once you have access to those. Hold on one second. Did you just wanna call back with the socials? Can you give her your social? Who is the lady? The insur-... For the insurance. Ma'am can you please tell him what she's giving her insur- her social for? Yes, ma'am. This is for, uh, the benefits being offered through his employer, Carlton Staffing. Oh, okay. Okay. Oh, it's 629-42-5411. Okay, so that's 629-425-4111? Yes, ma'am. Okay. All right, sir. And who did you, um... Are we just adding one chil- one child, or how many children are we adding? Two. Two. Okay, what's the first child's name? Are you... Hold on one second. Do you... Oh, oh, you wanna put Bucky and Gypsy on there too? No, they're on my insurance. Okay. No, just two. Uh, first child is, uh, Harley. H-A-R-L-E-Y James. Okay. And date of birth? 6/19/2020. All right. And then social? Uh, it is... Just one second. 715-24-8932. Okay. And is that a female or a male? Female. Okay. And then, who's next? Uh, Herbert. His name's the same as mine, Herbert James. He's the third one. Okay. So, Herbert James the third. And then, date of birth? Uh, today. 4-21-10. Okay, so 4-21-2010? Yes, ma'am. Okay. And then full social. Hold on, let's see. Where is that? Uh, 637-25-4621. Okay. And is that everybody? Yes, ma'am. Okay. And then who did you want to name as the beneficiary for your term life? Uh, do they have to be... They have to be 18, right? Not that I'm aware of. Uh, I can give it to my kids. Just do both of your kids? Yes, ma'am. Okay. In that case, I'm gonna do 50/50 so it's even between them. Give me one second. Thank you. All righty. So I got everybody listed, and you should be good to go from here. Uh, did you need help with anything else? Uh, no, ma'am. Thank you. You're welcome. You have a wonderful day. Hey, you too. Thank you.

## Conversation Format

Speaker speaker\_0: Thank you for calling Benefits and a Card. This is Victoria. How can I help you?

Speaker speaker\_1: Uh, yes, ma'am. Um, I, I'm supposed to call and change my, uh, benefits. Um, I've just started. Uh, this will be my third week with the company and they tell me I'm supposed to, I'm supposed to call and change, uh, my benefits.

Speaker speaker\_0: Okay. What's the name of the agency you work for?

Speaker speaker\_1: Uh, Carlton, Carlton Staffing.

Speaker speaker\_0: And the last four of your Social?

Speaker speaker\_1: 6543.

Speaker speaker\_0: Okay. And, um, your first and last name?

Speaker speaker\_1: Herbert James.

Speaker speaker\_0: Gotcha. Do you mind verifying your address and date of birth?

Speaker speaker\_1: My address is 9393 Tidwell Road, Apartment 2622, Houston, Texas 77078 and birthday is 5/10/1988.

Speaker speaker\_0: And then phone number 346-218-3062?

Speaker speaker\_1: Yes, ma'am.

Speaker speaker\_0: Okay. And then email is first and last name The Number Five at gmail.com.

Speaker speaker\_1: Yes, ma'am.

Speaker speaker\_0: Okay. Um, let's see. And what are you wanting to change it to? 'Cause I see you're currently enrolled into the MEC TelRx.

Speaker speaker\_1: Uh, I'll do, uh, VIP Standard, uh, Family.

Speaker speaker\_0: Okay. Let's see. Is that all you're wanting to change?

Speaker speaker\_1: Uh, the dental. I need, I need to change everything to fami- uh, family. Well, basically everything needs changed to family.

Speaker speaker\_0: So the only thing that you're enrolled into currently though is the MEC TelRx for employee only.

Speaker speaker\_1: Okay, so-

Speaker speaker\_0: So you want to change the medical to the VIP Standard for employee plus family and then add on dental for employee plus family as well?

Speaker speaker\_1: Yeah. Dental and vision.

Speaker speaker\_0: Vision for employee plus family?

Speaker speaker\_1: Yes, ma'am.

Speaker speaker\_0: Okay. And is that everything?

Speaker speaker\_1: Um, I'm looking at the book of... The, uh, term... Is it the term, the, uh, term life? Can I, uh, enroll in that?

Speaker speaker\_0: Sure. Are you wanting that for employee plus family as well?

Speaker speaker\_1: Yes, ma'am.

Speaker speaker\_0: Okay. Was there anything else?

Speaker speaker\_1: Uh... The short-term disability.

Speaker speaker\_0: Okay.

Speaker speaker\_1: Uh, and that's it.

Speaker speaker\_0: All right. So I have the VIP Standard, dental, term life and vision for employee plus family, and then the short-term disability for employee only. Um, it looks like it

would come out to a total of \$75.63 a week.

Speaker speaker\_1: Okay.

Speaker speaker\_0: Now, I do want to let you know that all of these plans are under Section 125, which is basically a IRS code that allows you to pay your share of the premium with pre-tax dollars. Because of this, the IRS does put stipulations on when you're able to change or cancel the plans. Um, so, of course, you do have the remainder of your personal open enrollment period, which will end on, it looks like the 9th of May. So you have until the 9th of May to make any changes or cancellations. Outside of that, you would have to wait for the company's open enrollment period to make any further changes or cancellations to your enrollment.

Speaker speaker\_1: Okay.

Speaker speaker\_0: Now, it will take about one to two weeks for these changes to be processed through your payroll. Once you see the first deduction of \$75.63, the coverage will start the following Monday. And then, uh, once the coverage is active, your ID cards are made and then sent to you within seven to ten business days.

Speaker speaker\_1: Okay. Do I, uh, have to go online and put them on, on there or how do I do it?

Speaker speaker\_0: No, I could do that for you. Um, I was just about to get to that. Let's start off with your spouse. What is your spouse's name?

Speaker speaker\_1: Uh, Dikeasa. Uh, D-I-K... Hold on one second. It's, uh, D-I-K, uh, E-Y. Oh, no, I'm sorry. D-I-K-E-A S-H-E-Y-A.

Speaker speaker\_0: Okay, just to make sure I got that right. So it's B as in boy, I-K-E-A S-H-E-Y-A?

Speaker speaker\_1: No, it's, uh, D, D as in dog.

Speaker speaker\_0: Okay, so D-I-K-E-A S-H-E-Y-A.

Speaker speaker\_1: Yes, ma'am.

Speaker speaker\_0: And last name?

Speaker speaker\_1: Um, uh, James.

Speaker speaker\_0: And date of birth?

Speaker speaker\_1: 4/30/95. No, I'm sorry, 4/30/94.

Speaker speaker\_0: Okay. And then full Social.

Speaker speaker\_2: ... here. 30 years. I called you yesterday. Should be getting this. Uh. Um, I don't, I don't see the... I don't have her social security number.

Speaker speaker\_0: Okay, that's fine. I can put all zeroes for now and then you can call us back once you have access to those.

Speaker speaker\_2: Hold on one second.

Speaker speaker\_0: Did you just wanna call back with the socials?

Speaker speaker\_2: Can you give her your social?

Speaker speaker\_3: Who is the lady?

Speaker speaker\_2: The insur-... For the insurance. Ma'am can you please tell him what she's giving her insur- her social for?

Speaker speaker\_0: Yes, ma'am. This is for, uh, the benefits being offered through his employer, Carlton Staffing.

Speaker speaker\_3: Oh, okay. Okay. Oh, it's 629-42-5411.

Speaker speaker\_0: Okay, so that's 629-425-4111?

Speaker speaker\_3: Yes, ma'am.

Speaker speaker\_0: Okay. All right, sir. And who did you, um... Are we just adding one child, or how many children are we adding?

Speaker speaker\_2: Two.

Speaker speaker\_0: Two. Okay, what's the first child's name?

Speaker speaker\_2: Are you... Hold on one second. Do you... Oh, oh, you wanna put Bucky and Gypsy on there too?

Speaker speaker\_3: No, they're on my insurance.

Speaker speaker\_2: Okay. No, just two. Uh, first child is, uh, Harley. H-A-R-L-E-Y James.

Speaker speaker\_0: Okay. And date of birth?

Speaker speaker\_2: 6/19/2020.

Speaker speaker\_0: All right. And then social?

Speaker speaker\_2: Uh, it is... Just one second. 715-24-8932.

Speaker speaker\_0: Okay. And is that a female or a male?

Speaker speaker\_2: Female.

Speaker speaker\_0: Okay. And then, who's next?

Speaker speaker\_2: Uh, Herbert. His name's the same as mine, Herbert James. He's the third one.

Speaker speaker\_0: Okay. So, Herbert James the third. And then, date of birth?

Speaker speaker\_2: Uh, today. 4-21-10.

Speaker speaker\_0: Okay, so 4-21-2010?

Speaker speaker\_2: Yes, ma'am.

Speaker speaker\_0: Okay. And then full social.

Speaker speaker\_2: Hold on, let's see. Where is that? Uh, 637-25-4621.

Speaker speaker\_0: Okay. And is that everybody?

Speaker speaker\_2: Yes, ma'am.

Speaker speaker\_0: Okay. And then who did you want to name as the beneficiary for your term life?

Speaker speaker\_2: Uh, do they have to be... They have to be 18, right?

Speaker speaker\_0: Not that I'm aware of.

Speaker speaker\_2: Uh, I can give it to my kids.

Speaker speaker\_0: Just do both of your kids?

Speaker speaker\_2: Yes, ma'am.

Speaker speaker\_0: Okay. In that case, I'm gonna do 50/50 so it's even between them. Give me one second.

Speaker speaker\_2: Thank you.

Speaker speaker\_0: All righty. So I got everybody listed, and you should be good to go from here. Uh, did you need help with anything else?

Speaker speaker\_2: Uh, no, ma'am. Thank you.

Speaker speaker\_0: You're welcome. You have a wonderful day.

Speaker speaker\_2: Hey, you too.

Speaker speaker\_0: Thank you.