

Transcript: VICTORIA

Taylor-5681096205713408-4944386639446016

Full Transcript

Thank you for calling Benefits on a Card. This is Victoria. How can I help you? Hey, Victoria, this is, um, I was calling because I have a, an insurance, uh, from my employer and, uh, I was trying to cancel and I was wondering if I can do it through phone today or where can I do it? When can I do it? Okay. What's the name of the agency that you work through? Uh, Superior Skill Trades. And the last four of your Social? 711315. And your first and last name? Miguel Diaz. All right, do you mind verifying your address and date of birth? It's, uh, 1113 Avenue, Austin, Texas 78573 and my date of birth, it's, uh, 9/4/1995. And then phone number 956-600-4708? That is correct. That's my cell phone. And then email is Mik- uh, miguel.miki.95@gmail? That is correct. Okay. And are you wanting to cancel everything that you enrolled in too? No, I wanted to see if I can cancel just, um, my family's insurance and just leave mine behind. Okay. So are you still wanting vision, dental, the VIP Classic Medical and term life but just switch it to employee only? Yes. How much is- Okay. If, if you, if you can tell me how, how much this is gonna be? I know right now I'm paying, like, close to \$90 a week. Yeah, so the VIP Classic Dental, term life and vision for employee only would be \$32.66. Okay. Did you wanna go ahead and switch that? Yes. Okay. So, it will take about one to two weeks for these changes to be processed through your payroll. So you may see one to two more payroll deductions for the original coverage that you had until it switches over to employee only. Okay, that's fine, as long as we do it right now. Yeah, so I went ahead and s- uh, put in the request to have it switched over to employee only. Now I do see that we're still missing a beneficiary for your term life. Who did you want to name for the beneficiary? Uh, the one that I had, uh, I, I have one only or how many do I need? It's, it's, it's up to you. I mean, if you wanna put two people as your beneficiary, you can do that. I can do 50/50. But as of right now, as of right now, how much, how many do I have? You don't have a benefi- beneficiary. I don't? Oh, okay, I thought I had... I thought, I thought I had one. It's, uh, to... Cassandra Saenz with a K, double S. I'm just gonna make sure I'm spelling that- K-A... K-A-S-S-A-N-D, um, yeah, D-R-A. Cassandra. K-A-S-S-A-N-D-R-A. Saenz. S-A-E-N-Z as in zebra. Okay, so last name is S-A-E, uh, N-Z? Yes. And then what is your relation to this person? Spouse. I'm sorry, did you say spouse? Yes. My wife. Okay. All righty. Well, I went ahead and listed her as the beneficiary and, yeah, you're all good to go from here. Did you need help with anything else? Can I add the secondary one? Uh, if you wanna add a secondary, I, I... Well, so the beneficiary that I'm listing would be primary, so if you're wanting to list two people, they would have 50% each. Mm-hmm. Yeah, no, that's fine. That's fine. So do you wanna leave it with Cassandra at 100%- Yes. ...or do you want to add a second pr- Okay. All righty. Did you need help with anything else? Uh, no, we should be good. Thank you, ma'am. You said... I'm in- I'm sorry, you said \$32 is the new weekly amount? Yes, it'll be \$32.66. Um, and again- Okay. ...just allow one to two weeks for those changes to be made. And that's for the VIP, that's

gonna be dental, vision and health, right? Yes, that's for vision, dental- Is it... I know they did, they did once already but I lost it. I lost the email. I don't know if you can send me just the, the doctors that are have available that they accept this insurance around my, my house or around my area. Can you do that? Okay, so I don't have access to this specific list of doctors but I can send you instructions on how to find that information to your email. Okay, that's fine. Yeah, because last time they send, they sent it out but I, I don't know, since I receive too many emails daily, I kind of lost it and I forgot under what name they sent it. Okay, I'll send some instructions to your email on how, on how to find providers. Okay, sounds good. All righty. Do you need help with anything else? No, ma'am that should be good today. If any, any, any n- uh, modification that I have to do, I can do them before the 30 or the 30th, 31st of this month, right? Um, so technically your, your employer, the last day for open enrollment is gonna be on the 1st of June but we are closed on weekends so I would say the 30th of May. Okay. All righty. Well, sounds good. All right, appreciate it. Thank you, ma'am. You're welcome. Have a wonderful day. You too. Bye-bye. 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: Hey, Victoria, this is, um, I was calling because I have a, an insurance, uh, from my employer and, uh, I was trying to cancel and I was wondering if I can do it through phone today or where can I do it? When can I do it?

Speaker speaker_0: Okay. What's the name of the agency that you work through?

Speaker speaker_1: Uh, Superior Skill Trades.

Speaker speaker_0: And the last four of your Social?

Speaker speaker_1: 711315.

Speaker speaker_0: And your first and last name?

Speaker speaker_1: Miguel Diaz.

Speaker speaker_0: All right, do you mind verifying your address and date of birth?

Speaker speaker_1: It's, uh, 1113 Avenue, Austin, Texas 78573 and my date of birth, it's, uh, 9/4/1995.

Speaker speaker_0: And then phone number 956-600-4708?

Speaker speaker_1: That is correct. That's my cell phone.

Speaker speaker_0: And then email is Mik- uh, miguel.miki.95@gmail?

Speaker speaker_1: That is correct.

Speaker speaker_0: Okay. And are you wanting to cancel everything that you enrolled in too?

Speaker speaker_1: No, I wanted to see if I can cancel just, um, my family's insurance and just leave mine behind.

Speaker speaker_0: Okay. So are you still wanting vision, dental, the VIP Classic Medical and term life but just switch it to employee only?

Speaker speaker_1: Yes. How much is-

Speaker speaker_0: Okay.

Speaker speaker_1: If, if you, if you can tell me how, how much this is gonna be? I know right now I'm paying, like, close to \$90 a week.

Speaker speaker_0: Yeah, so the VIP Classic Dental, term life and vision for employee only would be \$32.66.

Speaker speaker_1: Okay.

Speaker speaker_0: Did you wanna go ahead and switch that?

Speaker speaker_1: Yes.

Speaker speaker_0: Okay. So, it will take about one to two weeks for these changes to be processed through your payroll. So you may see one to two more payroll deductions for the original coverage that you had until it switches over to employee only.

Speaker speaker_1: Okay, that's fine, as long as we do it right now.

Speaker speaker_0: Yeah, so I went ahead and s- uh, put in the request to have it switched over to employee only. Now I do see that we're still missing a beneficiary for your term life. Who did you want to name for the beneficiary?

Speaker speaker_1: Uh, the one that I had, uh, I, I have one only or how many do I need?

Speaker speaker_0: It's, it's, it's up to you. I mean, if you wanna put two people as your beneficiary, you can do that. I can do 50/50.

Speaker speaker_1: But as of right now, as of right now, how much, how many do I have?

Speaker speaker_0: You don't have a benefi- beneficiary.

Speaker speaker_1: I don't? Oh, okay, I thought I had... I thought, I thought I had one. It's, uh, to... Cassandra Saenz with a K, double S.

Speaker speaker_0: I'm just gonna make sure I'm spelling that-

Speaker speaker_1: K-A... K-A-S-S-A-N-D, um, yeah, D-R-A. Cassandra. K-A-S-S-A-N-D-R-A. Saenz. S-A-E-N-Z as in zebra.

Speaker speaker_0: Okay, so last name is S-A-E, uh, N-Z?

Speaker speaker_1: Yes.

Speaker speaker_0: And then what is your relation to this person?

Speaker speaker_1: Spouse.

Speaker speaker_0: I'm sorry, did you say spouse?

Speaker speaker_1: Yes. My wife.

Speaker speaker_0: Okay. All righty. Well, I went ahead and listed her as the beneficiary and, yeah, you're all good to go from here. Did you need help with anything else?

Speaker speaker_1: Can I add the secondary one?

Speaker speaker_0: Uh, if you wanna add a secondary, I, I... Well, so the beneficiary that I'm listing would be primary, so if you're wanting to list two people, they would have 50% each.

Speaker speaker_1: Mm-hmm. Yeah, no, that's fine. That's fine.

Speaker speaker_0: So do you wanna leave it with Cassandra at 100%-

Speaker speaker_1: Yes.

Speaker speaker_0: ...or do you want to add a second pr- Okay. All righty. Did you need help with anything else?

Speaker speaker_1: Uh, no, we should be good. Thank you, ma'am. You said... I'm in- I'm sorry, you said \$32 is the new weekly amount?

Speaker speaker_0: Yes, it'll be \$32.66. Um, and again-

Speaker speaker_1: Okay.

Speaker speaker_0: ...just allow one to two weeks for those changes to be made.

Speaker speaker_1: And that's for the VIP, that's gonna be dental, vision and health, right?

Speaker speaker_0: Yes, that's for vision, dental-

Speaker speaker_1: Is it... I know they did, they did once already but I lost it. I lost the email. I don't know if you can send me just the, the doctors that are have available that they accept this insurance around my, my house or around my area. Can you do that?

Speaker speaker_0: Okay, so I don't have access to this specific list of doctors but I can send you instructions on how to find that information to your email.

Speaker speaker_1: Okay, that's fine. Yeah, because last time they send, they sent it out but I, I don't know, since I receive too many emails daily, I kind of lost it and I forgot under what name they sent it.

Speaker speaker_0: Okay, I'll send some instructions to your email on how, on how to find providers.

Speaker speaker_1: Okay, sounds good.

Speaker speaker_0: All righty. Do you need help with anything else?

Speaker speaker_1: No, ma'am that should be good today. If any, any, any n- uh, modification that I have to do, I can do them before the 30 or the 30th, 31st of this month, right?

Speaker speaker_0: Um, so technically your, your employer, the last day for open enrollment is gonna be on the 1st of June but we are closed on weekends so I would say the 30th of May.

Speaker speaker_1: Okay. All righty. Well, sounds good. All right, appreciate it. Thank you, ma'am.

Speaker speaker_0: You're welcome. Have a wonderful day.

Speaker speaker_1: You too. Bye-bye.

Speaker speaker_0: Bye-bye.