

Transcript: VICTORIA

Taylor-6258508688834560-5338106324107264

Full Transcript

Thank you for calling Benefits on a Card. This is Victoria. How can I help you? Hi. Um, I need- got a call, I guess, and an email that you needed some more information from me for, uh, open enrollment. Okay. Uh, what's the name of the agency you're working through? Creative Circle. All right. And the last four of your social? 2325. And your first and last name? Kathleen Kennedy. Okay. Do you mind, uh, verifying your address and date of birth? 3005 Cedar Crest Drive, McKinney, Texas 75070. Uh, date of birth is 10/18/74. And then, uh, phone number 575-5595? Yep. Okay. And then email is kennedypublicrelations@gmail.com? Yes. Okay. Give me one second. Okay. I see what's going on. Um, it looks like we were just missing your spouse's information, uh, for the Insure Plus Basics Group Accident and Critical Illness that you requested. Okay. Uh- Should I just go online or do you- they- everyone said to call, so that's what I did. Yeah. I mean, I can go ahead and add it for you now. Okay. It looks like, um, they switched it over to employee only, so let me cancel that, then I can add it on for you. Okay. So it looks like we may have just his name. Is it Brian Edward Kennedy? Yes. Okay. And that is who you want for the, uh, beneficiary, right? Mm-hmm. Okay. And then date of birth? His is 5/6/71. And then full social? And social is 5- 59212 0548. Okay. All righty. So I went ahead and canceled, uh, where we put it to employee only, got back to employee plus spouse, and then went ahead and got him listed. And you should be good to go from here. Cool. Um, I never got, like, a confirmation email or anything like that. Does that come later, like when it's active or...? Um, we don't- we don't automatically send one out. Um- Oh, okay. ... I can- yeah, I can put one together for you, um, but the coverage itself- No, no, no. That's okay. I- I just was making sure I wasn't, you know- that I didn't do something wrong that it wasn't going through or something. Gotcha. Yeah. Um, so the actual enrollment itself, I know it can take about one to two weeks to be processed through your payroll. And then, uh, once you see that first payroll deduction being made out of your check, the coverage will start the following Monday. And then once the coverage is active, that's when your ID cards and policy information is made and sent to you. Which for you, uh, the Insure Plus Basics ID card is typically emailed to you, so- so just keep an eye on your email for the ID card. Okay. Sounds good to me. Yeah. All righty. Uh, did you have any other questions for me? Nope. All righty. Perfect. You're all set. You have a wonderful day. Thank you so much. You too. Thank you. 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. Um, I need- got a call, I guess, and an email that you needed some more information from me for, uh, open enrollment.

Speaker speaker_0: Okay. Uh, what's the name of the agency you're working through?

Speaker speaker_1: Creative Circle.

Speaker speaker_0: All right. And the last four of your social?

Speaker speaker_1: 2325.

Speaker speaker_0: And your first and last name?

Speaker speaker_1: Kathleen Kennedy.

Speaker speaker_0: Okay. Do you mind, uh, verifying your address and date of birth?

Speaker speaker_1: 3005 Cedar Crest Drive, McKinney, Texas 75070. Uh, date of birth is 10/18/74.

Speaker speaker_0: And then, uh, phone number 575-5595?

Speaker speaker_1: Yep.

Speaker speaker_0: Okay. And then email is kennedypublicrelations@gmail.com?

Speaker speaker_1: Yes.

Speaker speaker_0: Okay. Give me one second. Okay. I see what's going on. Um, it looks like we were just missing your spouse's information, uh, for the Insure Plus Basics Group Accident and Critical Illness that you requested.

Speaker speaker_1: Okay.

Speaker speaker_0: Uh-

Speaker speaker_1: Should I just go online or do you- they- everyone said to call, so that's what I did.

Speaker speaker_0: Yeah. I mean, I can go ahead and add it for you now.

Speaker speaker_1: Okay.

Speaker speaker_0: It looks like, um, they switched it over to employee only, so let me cancel that, then I can add it on for you. Okay. So it looks like we may have just his name. Is it Brian Edward Kennedy?

Speaker speaker_1: Yes.

Speaker speaker_0: Okay. And that is who you want for the, uh, beneficiary, right?

Speaker speaker_1: Mm-hmm.

Speaker speaker_0: Okay. And then date of birth?

Speaker speaker_1: His is 5/6/71.

Speaker speaker_0: And then full social?

Speaker speaker_1: And social is 5- 59212 0548.

Speaker speaker_0: Okay. All righty. So I went ahead and canceled, uh, where we put it to employee only, got back to employee plus spouse, and then went ahead and got him listed. And you should be good to go from here.

Speaker speaker_1: Cool. Um, I never got, like, a confirmation email or anything like that. Does that come later, like when it's active or...?

Speaker speaker_0: Um, we don't- we don't automatically send one out. Um-

Speaker speaker_1: Oh, okay.

Speaker speaker_0: ... I can- yeah, I can put one together for you, um, but the coverage itself-

Speaker speaker_1: No, no, no. That's okay. I- I just was making sure I wasn't, you know- that I didn't do something wrong that it wasn't going through or something.

Speaker speaker_0: Gotcha. Yeah. Um, so the actual enrollment itself, I know it can take about one to two weeks to be processed through your payroll. And then, uh, once you see that first payroll deduction being made out of your check, the coverage will start the following Monday. And then once the coverage is active, that's when your ID cards and policy information is made and sent to you. Which for you, uh, the Insure Plus Basics ID card is typically emailed to you, so- so just keep an eye on your email for the ID card.

Speaker speaker_1: Okay. Sounds good to me.

Speaker speaker_0: Yeah. All righty. Uh, did you have any other questions for me?

Speaker speaker_1: Nope.

Speaker speaker_0: All righty. Perfect. You're all set. You have a wonderful day.

Speaker speaker_1: Thank you so much. You too.

Speaker speaker_0: Thank you. Bye-bye.