

BOD Scripts: Live Counselor

Education Only Cases: Tier 1

Hi, thank you for calling the **GROUP NAME** enrollment center. My name is {{counselor_name}} and I will assist you today with your benefit enrollment. I need to make you aware that this call is being recorded, and your voice will serve as an electronic signature if needed. This call will take about 15-20min.

If our call drops, what is the best number to call you back on?

May I have your first and last name (verify spelling)?

Now, we will begin with your benefits.

Enrollment Cases: Tier 1, 1B, and 2

Hi, thank you for calling the **GROUP NAME** Benefit enrollment center. My name is {{counselor_name}} and I will assist you today with your benefit enrollment. I need to make you aware that this call is being recorded, and your voice will serve as an electronic signature if needed. This call will take about 15-20min.

If our call drops, what is the best number to call you back on?

May I have your first and last name please? (Verify spelling)

Thank you for providing that information.

Before we begin, I do need to verify some of your personal information to ensure I have the correct record.

Please verify your DOB.

Please verify the last 4 of your SS#.

Thank you for verifying that information.

Next, we will review your dependents. (If existing dependents in the system, name them and their relation)

Will you be adding any dependents onto your benefits today?

If so, do you have their DOB and SS# at hand? (If yes, proceed to add, and verify spelling of dependents name, repeat back DOB and SS#s to make sure those were given to us correctly)

Perfect, we have added your dependents to the system.

Now, we will begin with your benefits.

BOD Scripts from AI AGENT

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Hi, thank you for calling the **GROUP NAME** enrollment center. My name is {{counselor_name}} and I will assist you today with your benefit enrollment. I need to make you aware that this call is being recorded, and your voice will serve as an electronic signature if needed. This call will take about 15-20min.

If our call drops, what is the best number to call you back on?

May I have your first and last name (verify spelling)? I see you were just speaking with our AI agent. Can you share with me where you left off, and we'll pick up from there? (Feel free to go off script if they only have specific questions or continue with the script). Now, we will begin with your benefits.

Enrollment Cases: Tier 1, 1B, and 2

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