

**OMB Supporting Statement**  
**Direct Express Survey**  
**Quantitative Survey**

**Background**

The Financial Management Service (FMS), a bureau of the Department of the Treasury (Treasury), has requested the JP Morgan Chase (JPMC), acting as Treasury's Financial Agent, plan and execute a survey for the Direct Express program. To perform this task, JPMC has contracted Convergys Customer Intelligence Services.

Social Security beneficiaries now have the option of receiving their payments electronically through the Direct Express card program managed by JPMC. This program provides those receiving Social Security payments a "check free" method of receiving their benefits. Beneficiaries enroll in Direct Express by calling JPMC Customer Service toll-free at 1 (866) 675-5648. After enrolling, program participants may:

- Receive their payments without the hassle associated with going to the bank to cash your checks
- Take greater comfort in the increased security that comes with eliminating checks that could be lost or stolen
- Access their Social Security funds 24 hours a day, 7 days a week via automated teller machines (ATMs)
- Make purchases anywhere MasterCard debit cards are accepted while receiving cash back when appropriate
- Check the most current account information by calling toll-free customer service and online at [www.myaccount.chase.com](http://www.myaccount.chase.com)

The objective of this voluntary telephone survey is to garner feedback from Direct Express program participants. The feedback gathered will be used to identify potential improvement opportunities for the Direct Express program. FMS' primary information needs that will be met by conducting this survey program include:

- Direct Express program awareness
- Overall satisfaction with Direct Express
- Previous method for receiving Social Security benefits
- Satisfaction with enrollment process
- Card usage
- Likelihood to recommend Direct Express

## **Methodology**

This is a one-time collection of information. To provide feedback on the Direct Express program, Convergys Customer Intelligence Services will conduct a telephone based survey with the Convergys team of professional market research interviewers located in Cincinnati, OH. JPMC will provide electronically a list of Direct Express program participants to Convergys Customer Intelligence Services. This list will identify the Direct Express program participants that are eligible to take part in this research program. The electronic list will include:

- Name
- Phone #
- Time and date of enrollment
- Benefit type
- Date of birth
- Any other pertinent information that may aid in the analysis of results

Convergys Customer Intelligence Services will randomly select from the list of Direct Express program participants and place outbound telephone calls to participants to ask for their participation in the Direct Express survey. Convergys Customer Intelligence will place the necessary number of survey attempts until 300 survey completes are garnered. Survey completion time is 10 minutes. Convergys Customer Intelligence Services will process the survey data and provide an executive summary Power Point presentation that includes a “key driver” analysis that identifies the items most associated with Direct Express card holder satisfaction.

## **Estimated Burden Hours**

There are approximately 2500 Direct Express program participants that will be eligible to participate in this survey program. To complete 300 phone surveys at 10 minutes per survey a total of 3000 minutes are needed which equates to 50 burden hours.

## **Contact**

For questions regarding the Direct Express survey, contact:

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