

## FY 2010 Work Incentives Planning and Assistance (WIPA) Survey

### GENERAL INTRODUCTION

Hello, my name is *(interviewer first and last name)*. I work for *(insert contractor name)* and I'm calling today on behalf of Social Security. Social Security recently sent you a letter explaining that someone would be calling to ask your opinion about the information and services you received from *(insert site name)* under a special program to help people with disabilities who want to work. This program is called Work Incentives Planning and Assistance.

Under this special program, counselors called Community Work Incentives Coordinators are helping Social Security by getting important information to people about what happens to their benefits when they work. The counselors also explain the special rules called "work incentives" that are available to help people go to work.

All of your answers will be kept private and won't be used for any other purpose. We won't ask for any personal information as part of the survey, just for your opinions of the service you received. The survey will take less than 20 minutes to complete. May we begin now?

- 1. Do you remember talking to a counselor from *(insert site name)* about how work and earnings affect your benefits and what work incentives might be available to help you?**

*(Do not read responses. Enter one response.)*

- Yes *(Skip to Q3.)*
- No

*(If question 1 is answered "no," probe to encourage recall with question 2.)*

- 2. Social Security records show that you received help from a counselor working for *(insert site name)*. The counselor doesn't work for Social Security but knows all their rules so they can help people who get Social Security benefits who might want to work. The counselor's job is to explain to you what happens to your cash benefits, medical insurance and other types of assistance if you work and earn money. The counselor also explains the special rules called "work incentives" that can help you go to work. Do you remember talking with someone about this?**

*(Do not read responses. Enter one response.)*

- Yes
- No *(Skip to end.)*

**3. How did you learn about the services provided by (insert site name) under the Work Incentives Planning and Assistance program?**

*(Do not read responses. Select all that apply.)*

- a. Was told about it by a social worker, lawyer or other professional
- b. Someone from the site named above or another organization (Department of Labor, Vocational Rehabilitation, etc.) gave a talk
- c. Saw it in the Ticket to Work information Social Security sent me
- d. Was referred by the Employment Network (EN) or Maximus
- e. Was told about it by a Social Security employee
- f. Saw it on Social Security's Internet website or in a Social Security office
- g. Saw/heard an ad or sign somewhere else; e.g., on the radio, in a local clinic
- h. Was told about it by a friend or relative
- i. Other (*Record response* \_\_\_\_\_)
- j. Don't remember

**4. When you first contacted (insert site name), how satisfied were you with how soon a counselor was available to talk to you? Were you:**

*(Read rating scale. Enter one response.)*

- a. Very satisfied (*Skip to Q6.*)
- b. Somewhat satisfied (*Skip to Q6.*)
- c. Somewhat dissatisfied, or
- d. Very dissatisfied
- e. No opinion (*Do not read.*) (*Skip to Q6.*)

**5. Why were you dissatisfied with how soon a counselor was available?**

*(Record response \_\_\_\_\_)*

**6. Did you talk to the counselor face-to-face, on the telephone or both?**

*(Do not read responses. Enter one response.)*

- a. Face-to-face only
- b. Telephone only (*Skip to Q14.*)
- c. Both
- d. Don't remember (*Skip to Q21.*)

- 7. Where did you usually meet with the counselor? Did you usually meet:**  
(Read responses; stop as soon as a response is chosen. Enter one response.)
- At their office
  - At some other location outside your home, or
  - In your home (Skip to Q14.)
  - Don't remember (Skip to Q14.)
- 8. Considering things like transportation, parking and the distance from your home, how would you rate the convenience of the location where you usually met with the counselor? Was it:**  
(Read rating scale. Enter one response.)
- Excellent (Skip to Q10.)
  - Very good (Skip to Q10.)
  - Good (Skip to Q10.)
  - Fair
  - Poor, or
  - Very poor
  - No opinion (Do not read.) (Skip to Q10.)
- 9. Why did you say the convenience of the location was (insert response from Q8)?**  
(Record response \_\_\_\_\_)
- 10. Thinking about things like the availability of automatic doors, elevators and wheelchair ramps, how accessible was the building where you usually met? Was it:**  
(Read rating scale. Enter one response.)
- Excellent (Skip to Q12.)
  - Very good (Skip to Q12.)
  - Good (Skip to Q12.)
  - Fair
  - Poor, or
  - Very poor
  - No opinion (Do not read.) (Skip to Q12.)
- 11. Why did you say the accessibility of the building was (insert response from Q10)?**

(Record response \_\_\_\_\_)

**12. How would you rate the privacy at your meeting place? Was it:**

(Read rating scale. Enter one response.)

- a. Excellent (If Q6 = face-to-face only, skip to Q21. If Q6 = both, skip to Q14.)
- b. Very good (If Q6 = face-to-face only, skip to Q21. If Q6 = both, skip to Q14.)
- c. Good (If Q6 = face-to-face only, skip to Q21. If Q6 = both, skip to Q14.)
- d. Fair
- e. Poor, or
- f. Very poor
- g. No opinion (Do not read.) (If Q6 = face-to-face only, skip to Q21. If Q6 = both, skip to Q14.)

**13. Why did you say privacy was (insert response from Q12)?**

(Record response \_\_\_\_\_)

(If Q6 = face-to-face only, skip to Q21. If Q6 = both, continue with Q14.)

**14. Did you ever try to call the counselor?**

(Do not read responses. Enter one response.)

- a. Yes
- b. No (Skip to Q21.)
- c. Don't remember (Skip to Q21.)

**15. How satisfied were you with the time it usually took you to get through to the counselor on the telephone? Were you:**

(Read rating scale. Enter one response.)

- a. Very satisfied (Skip to Q17.)
- b. Somewhat satisfied (Skip to Q17.)
- c. Somewhat dissatisfied, or
- d. Very dissatisfied
- e. No opinion (Do not read.) (Skip to Q17.)

**16. Why were you dissatisfied?** (*Record response \_\_\_\_\_*)

**17. Did you ever leave a message asking the counselor to call you back?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No (*Skip to Q21.*)
- c. Don't remember (*Skip to Q21.*)

**18. How soon did the counselor usually call you back? Was it usually the:**

*(Read responses. Enter one response.)*

- a. The same day
- b. The next work day
- c. Later, but still within about a week
- d. Over a week later, or
- e. Were you never called back
- f. Don't remember (*Do not read.*) (*Skip to Q21.*)

**19. How satisfied were you with the time it took the counselor to return your calls? Were you:**

*(Read rating scale. Enter one response.)*

- a. Very satisfied (*Skip to Q21.*)
- b. Somewhat satisfied (*Skip to Q21.*)
- c. Somewhat dissatisfied, or
- d. Very dissatisfied
- e. No opinion (*Do not read.*) (*Skip to Q21.*)

**20. Why were you dissatisfied?** (*Record response \_\_\_\_\_*)

**21. Now I'd like to ask you a few questions about the counselors that you spoke with. Were you helped by only one or more than one counselor?**

*(Do not read responses. Enter one response.)*

- a. Only one
- b. More than one
- c. Don't remember

**22. Thinking about all the counselors who may have helped you, how would you rate their courtesy? Was it:**

*(Read rating scale. Enter one response.)*

- a. Excellent
- b. Very good
- c. Good
- d. Fair
- e. Poor, or
- f. Very poor
- g. No opinion *(Do not read.)*

**23. How would you rate the helpfulness of the counselor? Was it:**

*(Read rating scale. Enter one response.)*

- a. Excellent
- b. Very good
- c. Good
- d. Fair
- e. Poor, or
- f. Very poor
- g. No opinion *(Do not read.)*

**26. Would you rate the amount of time the counselor spent with you as:**

*(Read rating scale. Enter one response.)*

- a. Excellent
- b. Very good
- c. Good

- d. Fair
- e. Poor, or
- f. Very poor
- g. No opinion (*Do not read.*)

*(If Q23, Q24 and/or Q25 = fair, poor or very poor, continue with Q27. Otherwise, skip to Q28.)*

**27. Why did you rate any of these things about the counselor as fair, poor or very poor?**  
*(Record response \_\_\_\_\_)*

**28. Now I'm going to read you a list of some things a person might want to talk to a counselor about. As I read each one, please answer yes or no to tell me if that was something you wanted to talk about. Did you want to talk to the counselor about:**  
*(Read responses. Select all that apply.)*

- a. How your Social Security benefits are affected by working
- b. How your health insurance is affected by working
- c. How to participate in the "Ticket" program
- d. Where to get help finding, keeping or changing a job, including increasing or decreasing the hours you work or your rate of pay
- e. Where to get help finding special accommodations to be able to work
- f. Where to get help paying for work-related expenses or training
- g. How to report your earnings to Social Security or other agencies
- h. How to deal with an overpayment caused by working
- i. Forms or letters you received from Social Security or other agencies
- j. Other (*Do not read.*) *(Record response \_\_\_\_\_)*
- k. Don't know/refused (*Do not read.*)

*(If only one response is given to Q28, skip to Q30.)*

**29. Out of the things you just identified, what was the main thing you wanted to talk about?**  
**Was it:**

*(Read responses. Enter one response.)*

*(Read responses from Q28 to aid recall, if necessary.)*

**30. Thinking about all the information and help you received from the counselor, I'd like you to tell me whether you strongly agree, somewhat agree, somewhat disagree or**

**strongly disagree with each of the following statements. I felt confident that the information the counselor gave me was correct. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q32.)*
- b. Somewhat agree *(Skip to Q32.)*
- c. Somewhat disagree, or
- d. Strongly disagree with this statement
- e. No opinion *(Do not read.) (Skip to Q32.)*

**31. Why do you disagree?** *(Record response \_\_\_\_\_)*

**32. The counselor clearly explained how working and earning money would affect my cash benefits, medical insurance and other types of assistance. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q34.)*
- b. Somewhat agree *(Skip to Q34.)*
- c. Somewhat disagree, or
- d. Strongly disagree with this statement
- e. No opinion *(Do not read.) (Skip to Q34.)*

**33. Why do you disagree?** *(Record response \_\_\_\_\_)*

**34. After talking with the counselor I knew what I was supposed to do or what was supposed to happen next. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q36.)*
- b. Somewhat agree *(Skip to Q36.)*
- c. Somewhat disagree, or
- d. Strongly disagree with this statement
- e. No opinion *(Do not read.) (Skip to Q36.)*

**35. Why do you disagree?** *(Record response \_\_\_\_\_)*



**36. Did the counselor ever write something for you that explained how working would affect your personal situation and benefits, or a plan for using work incentives to help you go to work?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q43.)*
- c. Don't remember *(Skip to Q43.)*

**37. Did the counselor review the written explanation with you?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q39.)*
- c. Don't remember *(Skip to Q39.)*

**38. Did the counselor review it with you in person or over the phone?**

*(Do not read responses. Enter one response.)*

- a. In person
- b. Over the phone
- c. Don't remember

**39. Tell me whether you agree or disagree with these statements. The personal written explanation the counselor gave me was clear. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree
- b. Somewhat agree
- c. Somewhat disagree, or
- d. Strongly disagree
- e. No opinion *(Do not read.)*

**40. The personal written explanation the counselor gave me was helpful. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree
- b. Somewhat agree
- c. Somewhat disagree, or
- d. Strongly disagree
- e. No opinion *(Do not read.)*

*(If Q39 and/or Q40 = somewhat or strongly disagree, continue with Q41. Otherwise, skip to Q42.)*

**41. Why do you feel the written explanation was not (if only Q39 = somewhat or strongly disagree, insert: “clear”); (if only Q40 = somewhat or strongly disagree, insert: “helpful”); (if both Q39 and Q40 = somewhat or strongly disagree, insert: “clear or helpful”)?** *(Record response \_\_\_\_\_)*

**42. How did you use the written explanation from the counselor? Did you use it:**

*(Read responses. Select all that apply.)*

- a. To remind you what the counselor told you about your benefits and working
- b. To remind you what your next steps should be about your benefits and working
- c. To help you explain the counselor’s information and recommendations to other organizations, such as Vocational Rehabilitation, or to your friends and family, or
- d. Did you use it for some other purpose? *(Record response \_\_\_\_\_)*
- e. Didn’t use it *(Do not read.)*
- f. Don’t remember *(Do not read.)*

**43. Did the counselor ever contact someone else on your behalf, such as Social Security, Vocational Rehabilitation (VR), or the Employment Network (EN)?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(If Q36 equals “yes,” skip to Q46; if Q36 equals “no,” skip to Q48.)*
- c. Don’t remember *(If Q36 equals “yes,” skip to Q46; if Q36 equals “no,” skip to Q48.)*

**44. Tell me whether you agree or disagree with the following statements. It was helpful when the counselor contacted someone else for me. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q46.)*
- b. Somewhat agree *(Skip to Q46.)*
- c. Somewhat disagree, or
- d. Strongly disagree
- e. No opinion *(Do not read.) (Skip to Q46.)*

**45. Why do you disagree?** *(Record response \_\_\_\_\_)*

**46. When the counselor had to take some action on my case, for example, send me something in the mail or make a phone call for me, they did it promptly. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q48.)*
- b. Somewhat agree *(Skip to Q48.)*
- c. Somewhat disagree, or
- d. Strongly disagree
- e. No opinion *(Do not read.) (Skip to Q48.)*

**47. Why do you disagree?** *(Record response \_\_\_\_\_)*

**48. Did the counselor give you any other written material, such as pamphlets, booklets or fact sheets, with information about working and disability benefits?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q51.)*
- c. Don't remember *(Skip to Q51.)*

**49. Tell me whether you agree or disagree with this statement. The pamphlets and booklets I received from the counselor helped me understand how work and earnings affect my benefits. Do you:**

*(Read rating scale. Enter one response.)*

- a. Strongly agree *(Skip to Q51.)*
- b. Somewhat agree *(Skip to Q51.)*
- c. Somewhat disagree, or
- d. Strongly disagree
- e. No opinion *(Do not read.) (Skip to Q51.)*

**50. Why do you disagree?** *(Record response \_\_\_\_\_)*

**51. Considering all the information and help given you by the counselor from *(insert site name)*, how would you rate the service provided overall? Was the service:**

*(Read rating scale. Enter one response.)*

- a. Excellent *(Skip to Q53.)*
- b. Very good *(Skip to Q53.)*
- c. Good *(Skip to Q53.)*
- d. Fair
- e. Poor, or
- f. Very poor
- g. No opinion *(Do not read.) (Skip to Q53.)*

**52. Why did you say the service provided overall was *(insert response from Q51)*?**

*(Record response \_\_\_\_\_)*

**Now Social Security would like to know a little more about you.**

**53. First, were you working at the time you first talked with the counselor?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q57.)*
- c. Don't know/refused *(Skip to Q60.)*

**54. Were you working full time (that is, 30 or more hours per week) or part time (less than 30 hours per week)?**

*(Do not read responses. Enter one response.)*

- a. Full time
- b. Part time
- c. Don't remember/refused

**55. How did the information the counselor gave you affect your decision to continue working? After speaking with the counselor did you:**

*(Read responses; stop reading as soon as a response is chosen. Enter one response.)*

- a. Keep working at the same rate
- b. Increase the number of hours you worked
- c. Decrease the number of hours you worked, or
- d. Did you stop working *(Skip to Q58.)*
- e. Don't know/refused *(Do not read.) (Skip to Q58.)*

**56. After speaking to the counselor, did you continue working at the same place or did you change employers?**

*(Do not read responses. Enter one response.)*

- a. Continued at same place
- b. Changed employers
- c. Don't know/refused *(Do not read.)*

*(All responders to Q56 skip to Q58.)*

**57. How did the information the counselor gave you affect your decision to start working or not to work? After speaking with the counselor did you:**

*(Read responses; stop reading as soon as a response is chosen. Enter one response.)*

- a. Remain unemployed
- b. Start working part time (less than 30 hours per week), or
- c. Start working full time (30 hours or more per week)
- d. Don't know/refused *(Do not read.)*

**58. Besides the information the counselor gave you, do you feel that there were other things in your life that affected your decision about working?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q60.)*
- c. Don't know/refused *(Skip to Q60.)*

**59. What were the other things that affected your decision about working?**

*(Do not read responses. Select all that apply.)*

- a. Medical condition
- b. Fear of losing monthly benefits
- c. Fear of losing medical insurance (Medicaid or Medicare)
- d. Child care issue
- e. Family situation other than child care
- f. General education/literacy issue
- g. Specific job training issue (e.g., using computers or other technology)
- h. Availability of jobs in area
- i. Inability to find the help needed to get a job
- j. Transportation issue
- k. Language barrier
- l. Other *(Record response \_\_\_\_\_)*
- m. Don't know/refused

**60. Are you working right now?**

*(Do not read responses. Enter one response.)*

- a. Yes
- b. No *(Skip to Q63.)*
- c. Don't know/refused *(Skip to Q63.)*

**61. How many hours do you usually work in a week? \_\_\_\_\_**

*(If respondents indicate that hours vary, try to get an estimate/average.)*

**62. How much do you earn per hour? \$ \_\_\_\_\_**

*(If respondents are not able to give hourly rate, record the earnings they can provide and indicate the frequency (week/month/year).)*

**63. What is the highest grade you completed in school?**

*(Do not read responses. Enter one response. If respondent is reluctant to give information, offer to read responses.)*

- a. Not a high school graduate
- b. High school graduate or equivalent (GED)
- c. Trade/technical/vocational training graduate
- d. Some college
- e. College graduate
- f. Graduate degree or postgraduate training
- g. Don't know/refused *(Do not read.)*

**64. Do you have any other comments about the information or services you received from the counselor?**

*(Do not read responses. Enter one response.)*

- a. Yes *(Record response \_\_\_\_\_)*
- b. No
- c. Don't know/refused

**CLOSING:** That's all the questions I have for you today and I want to thank you for taking time to be in this survey.

Work Incentives Planning and Assistance (WIPA) Survey

Prenotice Letter

Dear (*insert participant's name*):

Our records show that you received information or other services from (*insert site name*) under a special program to help people with disabilities who want to work. Through the Work Incentives Planning and Assistance program, counselors provide important information to people about what happens to their monthly disability benefits, health insurance, etc., if they work. The counselors also explain special rules called work incentives that are available to help people who want to work. We are conducting a survey to find out how satisfied you were with the information and services you received from the counselors at (*insert site name*) under this program.

A few days from now, an interviewer from (*insert contractor name*) will be calling to ask you to take part in our survey. Please be assured that (*insert contractor name*) will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses.

The telephone number we have for you is [(###) ###-####]. If this number is incorrect, or if there is another number that is more convenient for us to reach you on, please contact (*insert contractor name*) toll-free on (*insert contractor's toll-free phone number*) to give them that number.

If you have a question about your benefits, please call Social Security's toll-free information line at 1-800-772-1213. (Neither my staff nor the interviewers at (*insert contractor name*) are able to answer questions about your benefits.)

The survey will only take about 20 minutes to complete and it can be scheduled at your convenience. While your participation is voluntary, we hope you will take the time to be in the survey because your opinion matters. Your answers and comments will help Social Security serve you better.

Sincerely,

Kelly Croft  
Deputy Commissioner for Quality Performance  
Social Security Administration



## **PRIVACY ACT STATEMENT**

The Social Security Administration is authorized to collect the information for this survey under Executive Order 12862, "Setting Customer Service Standards". Your response to these questions is strictly voluntary. The information you provide will be used to help us improve the service that we give you. Your response will not be disclosed to any other government or private agency.

## **PAPERWORK REDUCTION ACT STATEMENT**

This information collection meets the requirements of 44 U.S.C. § 3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we provide a valid Office of Management and Budget (OMB) control number. The OMB control number for this survey is 0960-0526. We estimate that it will take about 20 minutes to complete this survey. This includes the time it will take to listen to the questions and give your responses. You may send comments on our time estimate above to: Social Security Administration, 6401 Security Boulevard, Baltimore, MD 21235-0001. *Send only comments relating to our time estimate to this address.*