

## **FIELD OFFICE CALLER SURVEY – FY 2010**

### Intro 1

Hello, my name is *[first and last name]* and I'm calling from Synovate on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called their local Social Security office. Our records show that the *(insert city from sample file)* Social Security office received a call on *(insert date from sample file)* from someone at this telephone number.

May I please speak with the person who made that call?

1. Yes, This is he/she **(continue with Intro 3)**
2. Yes, one moment please **(continue with Intro 2)**
3. No **(Attempt Conversion. If unsuccessful, record reason for non-response and TERMINATE)**

### Intro 2

***(Begin reading when respondent is on the line)***

Hello, my name is *[first and last name]*, and I'm calling from Synovate on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called their local Social Security office . Our records show that the *(insert city from sample file)* Social Security office received a call on *(insert date from sample file)* from someone at this telephone number. I understand that you are the person who made that call?

1. Yes **(continue with Intro 3)**
2. No **(Record reason for non-response and terminate)**

### Intro 3

Did you call the *(insert city from sample file)* office about Social Security business?

1. Yes, it was about Social Security Business **(continue with Intro 4)**
2. No (It was a personal call, wrong number, etc.) **(Record reason for non-response and terminate)**

### Intro 4

Could you please tell me if this number belongs to a business or is a personal phone?

1. Business **(record as business number and terminate)**
2. Personal phone **(continue to Intro 5)**

### Intro 5

The reason I am calling is to find out how Social Security can improve its telephone service. I'd like to assure you that the only information Social Security gives us is a telephone number and we will not ask you for any identifying information during the survey. You are not required to participate in this survey, but your opinions are very important to Social Security. All the answers you give will be kept private and will not be used for any other purpose. The survey should only take about 10 minutes.

### Intro 6

#### **INTERVIEWER: RECORD LANGUAGE OF INTERVIEW**

1. English
2. Spanish

### Intro 7

May I begin now?

1. Yes [**Continue to Intro 8**]
2. Cannot do interview now [**Go to appointment screen and schedule callback.**]
3. No—Refusal [**Attempt conversion. If unsuccessful, record reason for non-response and TERMINATE.**]

### Intro 8

Before my first question, I need to tell you that the Paperwork Reduction Act says that agencies may not collect information from the public without approval from the Office of Management and Budget (OMB). The OMB approval number for this survey is 0960-0526.

**[Continue to Q1]**

#### **Message for Answering Machines**

Hello, my name is (*first and last name*), and I'm calling from Synovate on behalf of the Social Security Administration. To help Social Security improve its telephone service, we are calling a sample of people who recently called their local Social Security office. Social Security's records show that someone at this number called the (*insert city from sample file*) Social Security office on (*insert date from sample file*). Please ask that person to call me and leave a message letting me know a good time to contact them. I can be reached at (*insert toll-free number*). In your message, please reference the Synovate ID number [INSERT MIQ]. I'd like to assure you that the only information Social Security gives us is a telephone number and we will not ask you for any identifying information during the survey. Thank you.

1. First, I'd like you to think about how easy it was to reach the *(insert city from sample file)* Social Security office when you called on *(insert date from sample file)*. Would you rate how quickly you got through as:

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

- a. Excellent
- b. Very good
- c. Good
- d. Fair
- e. Poor, or
- f. Very poor
- g. Don't know/no opinion ***(Do not read.)***

2. Did you have to make more than one call that day before you were able to reach the office?

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

- a. Yes
- b. No
- c. Don't know/don't remember

3. When you reached the office, you heard an automated message with information about their telephone service. I'd like to know how easy or hard you thought it was to understand this message. Would you say understanding the automated message was:

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

- a. Very easy ***(Skip to question 5.)***
- b. Somewhat easy ***(Skip to question 5.)***
- c. Somewhat hard, or
- d. Very hard
- e. No opinion/don't remember ***(Do not read.) (Skip to question 5.)***

4. Why did you feel it was hard to understand the automated message?  
**(Do not read responses. Enter all that apply.)**
- a. Too many options; menu was too long
  - b. Explanations of options were confusing, unclear
  - c. Options did not seem to fit the situation
  - d. Recording quality poor (too fast, not loud enough, words garbled)
  - e. Non-English speaking
  - f. Other **(Record response \_\_\_\_\_.)**
  - g. No opinion/don't remember
5. How was your call handled that day? Did you:  
**(Read responses. Stop as soon as responder makes a selection. Enter one response.)**
- a. Leave a voicemail message **(Pause for response.)** **(Skip to question 6.)**
  - b. Speak to an agent, **(Pause for response.)** **(Skip to question 9.)**
  - c. Or were you not able to get served that day **(Skip to question 12.)**
  - d. Don't know/don't remember **(Do not read.)** **(Skip to question 19.)**

**Questions 6 - 8 only apply to callers who left a voice mail message.**

6. When you left your message on voice mail, did you:  
**(Read responses. Enter one response.)**
- a. Ask someone to call you back, or did you
  - b. Leave information about your business **(Skip to question 19.)**
  - c. Do something else **(Do not read.)** **(Record response \_\_\_\_\_.)** **(Skip to question 19.)**
  - d. Don't know/don't remember **(Do not read.)** **(Skip to question 19.)**
7. Did Social Security call you back?  
**(Do not read responses. Enter one response.)**
- a. Yes
  - b. No **(Skip to question 19.)**
  - c. Don't know/don't remember **(Skip to question 19.)**

8. Did they call you back:
- (Read responses. Enter one response.)***
- a. The same day
  - b. The next work day
  - c. Later, but still within about a week, or
  - d. Over a week later
  - e. Don't know/don't remember ***(Do not read.)***

***(All responders to question 8 skip to question 13.)***

**Questions 9 – 11 only apply to callers who spoke to an agent.**

9. Did you enter the name or extension of a particular person or did you just want to speak to the next available agent?

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

- a. Entered name or extension of particular agent
- b. Went to next available agent
- c. Don't know/don't remember ***(Do not read.)***

10. Were you connected immediately to the agent or did you have to wait on hold?

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

- a. Connected immediately ***(Skip to question 13.)***
- b. Waited on hold
- c. Don't know/don't remember ***(Do not read.) (Skip to question 13.)***

11. How would you rate the amount of time you waited on hold until someone answered your call? Would you rate the amount of time as:

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

- a. Excellent
- b. Very good
- c. Good
- d. Fair
- e. Poor, or
- f. Very poor
- g. Don't know/no opinion ***(Do not read.)***

***(All responders to question 11 skip to question 13.)***

**Question 12 only applies to callers who weren't served the day of their call.**

12. What happened?

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

- a. Hung up; didn't want to leave voice mail message
- b. Hung up; waited on hold too long
- c. Hung up for personal reasons that had nothing to do with Social Security's service.
- d. Heard someone answer but the phone got disconnected
- e. Voice mailbox full; unable to leave message
- f. Something else ***(Record response \_\_\_\_\_.)***
- g. Don't know/don't remember

***(All responders to question 12 skip to question 18.)***

**Questions 13 - 17 only apply to callers who spoke to an agent.**

Now I'd like to ask you several questions about your satisfaction with the service the agent gave you during your call.

***(Read rating scale as needed for each question. Enter one response.)***

13. First, how would you rate the courtesy of the agent? Was it:
- a. Excellent
  - b. Very good
  - c. Good
  - d. Fair
  - e. Poor, or
  - f. Very poor
  - g. Don't know/no opinion ***(Do not read.)***
14. How well would you say the agent knew his/her job? Would you rate the agent's job knowledge as:
- a. Excellent
  - b. Very good
  - c. Good
  - d. Fair
  - e. Poor, or
  - f. Very poor
  - g. Don't know/no opinion ***(Do not read.)***
15. How would you rate the helpfulness of the agent during your call? Was it:
- a. Excellent
  - b. Very good
  - c. Good
  - d. Fair
  - e. Poor, or
  - f. Very poor
  - g. Don't know/no opinion ***(Do not read.)***

16. How clear were the explanations the agent gave you? Would you say the explanations were:

- a. Excellent
- b. Very good
- c. Good
- d. Fair
- e. Poor, or
- f. Very poor
- g. Don't know/no opinion **(Do not read.)**

17. Was the agent able to take care of your business completely during your call?

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

- a. Yes **(Skip to question 19.)**
- b. No
- c. Don't know/don't remember **(Skip to question 19.)**

18. Then what did you do, or what do you plan to do, to complete your business with Social Security? Did you or will you:

**(Read responses. Enter one response.)**

- a. Call Social Security's 800 number
- b. Call the local Social Security office again
- c. Visit the local Social Security office
- d. Use the Internet or email
- e. Send a letter or FAX
- f. Wait for Social Security to contact you or mail you something, or
- g. Will you do something else **(Record response \_\_\_\_\_.)**
- h. Do nothing about it **(Do not read.)**
- i. Don't know/no opinion **(Do not read.)**



19. **Overall**, how would you rate the service you received the day you called the Social Security office? Was it:

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

- a. Excellent ***(Skip to question 21.)***
- b. Very good ***(Skip to question 21.)***
- c. Good ***(Skip to question 21.)***
- d. Fair
- e. Poor, or
- f. Very poor
- g. Don't know/no opinion ***(Do not read.) (Skip to question 21.)***

20. Why did you rate the telephone service in this office as *(insert response from question 19)*?

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

- a. Too hard to get through
- b. Wait on hold to get to an agent was too long.
- c. Agent didn't answer question/didn't explain things well.
- d. Agent was not courteous.
- e. Social Security failed to take the requested action/problem not resolved.
- f. Don't like having to listen to automated messages or pressing numbers.
- g. Don't like leaving a message in voicemail.
- h. Transferred too many times/got the runaround.
- i. Recording was hard to understand.
- j. Employee never called back/slow to respond.
- k. Something else ***(Record response \_\_\_\_\_.)***
- l. Don't know/no opinion

21. If you contact Social Security for future business, what are you most likely to do? Will you:

**(Read responses. Enter one response.)**

- a. Call the 800 number
- b. Call your local office
- c. Visit your local office
- d. Use the Internet or email
- e. Write a letter
- f. Send a FAX, or
- g. Will you do something else **(Record response \_\_\_\_\_.)**
- h. Don't know/no opinion **(Do not read.)**

22. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the office on *(insert date from sample file)*. Can you tell me the main type of business you called about that day?

***[Do not read responses; select only one.]***

***[If responders do not describe the type of business they called about, for example, if they say:***

- ***They called for the local Social Security office address/phone number/hours;***
- ***They called to make/change/check the status of an appointment;***
- ***They called because they received a letter; or***
- ***They were returning a call from Social Security;***

***probe to find out the underlying type of business involved. If responder is still unable to identify the reason for the call, read responses.]***

- a. Applying for benefits or checking on an application that was already filed
- b. A change or question about someone's benefits, such as a change of address or direct deposit, a return to work, or the death of someone receiving benefits
- c. A Social Security Statement, or information about earnings paid into Social Security and an estimate of future benefits ***(Skip to question 24.)***
- d. A new or replacement Social Security card, or changing the name on a Social Security card ***(Skip to question 24.)***
- e. Appealing a decision Social Security had made, for example on a disability claim that was turned down ***(Skip to question 24.)***
- f. Medicare information or a replacement Medicare card or help with Medicare prescription drug costs ***(Skip to question 24.)***

- g. A review of your case
- h. An overpayment of benefits
- i. A representative payee situation
- j. Proof of your current payments (benefit verification letter)
- k. Something else? (**Record response \_\_\_\_\_.**) (**Skip to question 24.**)
- l. Don't know/don't remember (**Do not read.**) (**Skip to question 24.**)

23. Social Security would also like to know what kind of benefits you were calling about. Please answer "yes" or "no" as I read each type of benefit. Were you calling about:

**(Read responses. Enter all that apply. If responder answers "no" to all response choices, refer to the type of business identified in question 25 and probe further for the type of benefit involved.)**

- a. Social Security Retirement or Survivor benefits
- b. Social Security Disability benefits
- c. SSI (i.e., Supplemental Security Income)
- d. Medicare, or
- e. Medicaid
- f. Don't know/don't remember (**Do not read.**)

24. Do you have any comments or suggestions to help improve telephone service in the (insert city from sample file) Social Security office?

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

- a. Yes (**Record response \_\_\_\_\_.**)
- b. No

Contractor should say: "We estimated this survey would take 10 minutes to complete. Would you like to comment on this time estimate?"

If no, complete the survey.

If yes, read the Paperwork Reduction Act, below:

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 display a valid Office of Management and Budget control number. We estimated that it would take about 10 minutes to complete the survey. Send only comments relating to our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.

**Closing:** That's all the questions I have for you today. I want to thank you taking the time to participate in the survey.