

DOCUMENTATION FOR THE GENERIC CLEARANCE OF CUSTOMER SATISFACTION SURVEYS

TITLE OF INFORMATION COLLECTION: Fiscal Year (FY) 2013 Online
Authentication Survey

SSA SUB-NUMBER: D-03

DESCRIPTION OF ACTIVITY:

BACKGROUND

In May 2012, the Social Security Administration (SSA) introduced a new online authentication process that allows customers to create an online account (username and password) for conducting secure business on SSA's website. Currently, customers can use their online account to view their Social Security Statement online. Starting in December 2012, SSA will expand the use of the online account to current beneficiaries who want to report a change of address or direct deposit or obtain a proof of income letter on SSA's website.

SSA presents an American Customer Satisfaction Index (ACSI) online survey to a random sample of customers who successfully create an online account on our website. The purpose of this survey is to reach those customers who are unsuccessful in creating their online account on the website and must visit an SSA field office (FO) to resolve their issue. We have designed the to measure satisfaction with the entire online account registration process (including service received in person and over the telephone), and to gauge customers' inclination to use their online account for future business with SSA.

SURVEY

Description of Survey

We will conduct the Online Authentication Survey by mail using a scannable questionnaire. The survey covers aspects of online services that we know, based on SSA's other surveys of these populations, can have an influence on satisfaction. We also used SSA's annual surveys of office visitors, 800 number and FO callers to identify aspects of in-person and telephone service that affect customers' perceptions of service.

The survey questions address the following areas:

- What type of online account action brought the person to the FO, how the person heard about the online account, what type of business the person wanted to conduct using the online account, and (where applicable) why the person hasn't yet finished creating the online account;

- Satisfaction with in-person service, including office location, hours, signs and instructions, office comfort, appearance, privacy, and waiting time;
- Satisfaction with FO employees, including their helpfulness, courtesy, job knowledge and clarity of explanations;
- Whether the person was able to complete the business in one visit and whether SSA staff explained that they had to correct the person's SSA records;
- Satisfaction with the overall service received during the visit;
- Satisfaction with the service received on the telephone, including how long it took to reach someone and the SSA telephone staff's helpfulness, courtesy, job knowledge and clear explanations;
- Satisfaction with the overall service received from telephone staff;
- Satisfaction with SSA's notices concerning the online account;
- Satisfaction with SSA's website, including the ease of finding the online account service, appearance of the online pages, ease of answering questions, helpfulness of explanations and the length of time it took;
- Overall opinion of SSA's website for the online account service and level of confidence that the information on SSA's website is secure;
- Satisfaction with the entire experience creating an online account, likelihood to recommend the service to others, and likelihood to conduct other types of business on SSA's website;
- Demographic questions (Internet experience, age, education) to put the survey responses in perspective.

Statistical Information

Sample Selection

Because SSA just introduced the online account service to the public in May 2012, we have limited data to estimate the number of customers who will visit an FO to resolve their online account business. Based on our experience to date and SSA's proposed expansion of the online account service to more customers in December 2012, our best estimate is that about 1,500 visitors per month will visit an FO during the sample period. Our best projection is an annual universe of only 18,000.

SSA has systems that identify customers who visit an FO to resolve their online account business. We will use those systems to identify a random sample of survey participants during

the months of January – March 2013. We will select a biweekly sample of 500 cases until we achieve a total sample size of 3,000.

Methodology

An SSA-approved contractor conducts the survey by mail. We mail a pre-notification postcard to all sampled individuals advising them to expect the survey questionnaire. A week later, we mail a questionnaire with a cover letter that explains the purpose of the survey. We include both the Paperwork Reduction Act and the Privacy Act statements in the initial cover letter. We make two additional contacts to solicit participation; we send a follow-up postcard and a duplicate survey package (questionnaire and follow-up cover letter).

Response Rate

SSA takes the following steps to maximize the response rate for this survey:

- To minimize the time between customers' service experience and the survey, thereby ensuring salience, we select the samples biweekly.
- We mail out a pre-notification postcard to inform sampled individuals of 1) their selection to participate in the survey, and 2) they should be on the lookout for the envelope containing the questionnaire. Using a postcard format allows the sampled individuals to see that SSA sanctions the survey. Additionally, the postcard identifies the contractor who is conducting the survey for SSA, which should increase the likelihood that sampled individuals will open the envelope when they receive the questionnaire.
- Within one week after we send the initial postcard, we mail the questionnaire and an accompanying cover letter encouraging sampled individuals to respond by emphasizing the importance of the survey.
- One week later, we mail a reminder postcard to all sampled individuals.
- Two weeks after we send the reminder postcard, we mail a follow-up letter and another copy of the questionnaire to sampled individuals who have not responded as of that point.
- The scannable questionnaire is designed for ease of use, e.g., font sizes are large, difficult fill-in bubbles are not used

This is the first time SSA will be conducting a survey with this group of customers. However, SSA conducts an annual Internet Report Card survey with customers who have used other online transactional services on our website. Using a three-part mailing in the Internet Report Card survey, in FY 2012 we achieved response rates as high as 51 percent. Considering that we are making one additional contact to solicit participation in the Online Authentication Survey, we anticipate that we can achieve a 50 percent response rate from customers who visited an FO to resolve their online account business.

Sampling Variability

The key variable in the Online Authentication Survey is the person's overall satisfaction with the entire experience creating an online account. We define satisfaction as the combined rating of excellent, very good, or good (E/VG/G). Using the results of our annual surveys of SSA customers as a barometer, we estimate the overall rating will be around 80 percent E/VG/G. Assuming a 50 percent response rate, our proposed sample size is large enough to provide a sampling variability at the 95-percent confidence level equal to +/- 2.1, which is adequate for the intended purpose of the survey.

SSA's Office of Quality Performance will perform all sampling and data analysis. Statistical Dan Zabronsky, Director of SSA's Division of Modeling in OQP will provide statistical support... He can be reached at (410) 965-5953.

IF FOCUS GROUP MEMBERS WILL RECEIVE A PAYMENT, INDICATE AMOUNT
(No more than \$25 can be authorized under OMB rules):

We will not compensate participants for this survey.

USE OF SURVEY RESULTS:

SSA will use the results of this survey to evaluate and improve various aspects of its new online account service, particularly for customers who are unable to complete the process on our website.

BURDEN HOUR COMPUTATION *(Number of responses (X) estimated response time (/60) = annual burden hours):*

Number of Responses: 3,000
Estimated Response Time: 10 minutes
Annual Burden Hours: 500 hours

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