

**FISCAL YEAR 2014
NATIONAL 800 NUMBER CALLER SURVEY**

Intro 1

Hello, my name is *(first and last name)* and I'm calling from *(insert contractor name)* on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called Social Security's National 800 number. Our records show that Social Security 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, this is a business phone, cannot identify who called or do not have time to talk.
 (Record reason for non-response "business phone" and end call.)
4. No ***(Attempt Conversion. If unsuccessful, record reason for non-response and end call.)***

Intro 2

(Begin reading when respondent is on the line.)

Hello, my name is *(first and last name)*, and I'm calling from *(insert contractor name)* on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called Social Security's National 800 number. Our records show that Social Security 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 ***(Attempt to identify the person who made the call. If unsuccessful, record reason for non-response and end call.)***

Intro 3

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 15 minutes. May I begin the survey now?

1. Yes ***(Continue to Intro 4.)***
2. Cannot do interview now ***(Attempt to schedule callback.)***
3. No ***(Attempt conversion. If unsuccessful, record reason for non-response and end call.)***

Intro 4

INTERVIEWER: RECORD LANGUAGE OF INTERVIEW

1. English
2. Spanish

Intro 5

Before my first question, I need to tell you this survey has been approved by the Office of Management and Budget (OMB) as required by the Paperwork Reduction Act. The OMB approval number for this survey is 0960-0526. ***(Continue to Question 1.)***

MESSAGE FOR ANSWERING MACHINES

Hello, my name is (first and last name), and I'm calling from (insert contractor name) to conduct a survey for Social Security. I'd like to ask the person who called Social Security's National 800 number about the service they received. We'll try again soon or that person can call (insert contractor phone number) to leave a message with a good time to contact them. We will not ask for any identifying information during the survey. Thank you.

1. First, I'd like to ask you about your experience calling Social Security's National 800 number. How would you rate how long it took you to get served when you called on *(insert date from sample file)*? Would you say the length of time was:

(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/don't remember ***(Do not read.)***

2. When you called Social Security's National 800 number, you reached an automated speech recognition system. How comfortable did you feel talking to the automated system? Did you feel:

(Read rating scale. Enter one response.)

- A. Very comfortable
- B. Somewhat comfortable
- C. Somewhat uncomfortable, or
- D. Very uncomfortable
- E. Don't know/don't remember ***(Do not read.)***

3. How easy or hard was it was to get the automated system to understand the type of service you needed? When you give me your rating, please think only about how easy it was to reach the type of service you wanted. Would you say it 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 to reach the type of service you wanted
- e. Don't know/don't remember ***(Do not read). (Skip to question 5.)***

4. Why did you feel it was hard?

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

- A. I had to keep repeating myself; for example, it said I talked too fast or too slow; it couldn't understand the words I was saying.
- B. I didn't understand what the system was saying; I didn't know how to answer.
- C. It misinterpreted what I said and sent me to the wrong service.
- D. It took too long.
- E. I wanted to talk to an agent; don't like using automated systems.
- F. The available options didn't cover my situation.
- g. Something else **(Record response.)**
- H. Don't know/don't remember

5. Social Security's National 800 Number has automated services that people can use to handle some types of business without talking to an agent. Did you try to use any of the automated services to take care of your business that day?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 9.)**
- C. Don't know/don't remember **(Skip to question 9.)**

6. I'm going to read you a list of the automated services available on Social Security's 800 number. Please say "yes" or "no" as I read each one. Did you use the automated service for:

(Read responses. Enter all that apply.)

- A. Medicare information, a replacement Medicare card or help with Medicare prescription drug costs
- B. Requesting a proof of income letter (This letter can be used as proof that you are receiving Social Security or Supplemental Security Income benefits.)
- C. Requesting a form SSA-1099/1042S for tax information (This is a tax summary of the total Social Security benefits you were paid for the prior year.)
- D. Checking on the status of a claim you already filed
- E. The address and hours of your nearest Social Security office
- F. An application to obtain or replace a Social Security card, or
- G. A list of pamphlets and general information messages
- H. Don't know/don't remember ***(Do not read.)***

7. Were you able to complete your business using only the automated service?

(Do not read responses. Enter one response.)

- A. Yes ***(Skip to question 22.)***
- B. No
- C. Don't know/don't remember ***(Skip to question 22.)***

8. I'm going to read you a list of reasons why someone might not be able to use only an automated service when they call Social Security's 800 number. Please say "yes" or "no" as I read each one. Were you unable to complete your business using the automated service because:

(Read responses. Enter all that apply.)

- A. The automated service said in your situation you needed to speak to an agent.
- B. You didn't have the necessary information on hand to use the service.
- C. The automated service you tried didn't cover what you needed.
- D. You had some other business that couldn't be handled through an automated service.
- E. You wanted to talk to an agent to make sure everything was okay.
- F. You thought the automated service was just too hard to use, or
- g. Was it because of something else ***(Record response.)***
- H. Don't know/don't remember ***(Do not read.)***

9. *(If question 7 = b ("no"), insert: Since you couldn't complete your business using the automated service,)* Did you stay on the line to transfer to an agent or did you hang up?

(Do not read responses. Enter one response.)

- A. Stayed on the line
- b. Hung up ***(Skip to question 22.)***
- c. Don't know/don't remember ***(Skip to question 22.)***

10. When the system tried to transfer you to an agent, were you told they were all busy and to call back later?

(Do not read responses. Enter one response.)

- A. Yes ***(Skip to question 22.)***
- B. No
- c. Don't know/don't remember ***(Skip to question 22.)***

11. What happened next? Were you connected with an agent right away?

(Do not read responses. Enter one response.)

- A. Yes **(Skip to question 17.)**
- B. No
- c. Don't know/don't remember **(Skip to question 22.)**

12. Since you weren't connected with an agent right away, did you:

(Read responses. Stop as soon as responder makes a selection. Enter one response.)

- A. Wait on hold **(Pause for response.) (Skip to question 16.)**
- b. Have Social Security call you back **(Pause for response.) (Go to question 13.)**
- C. Hang up, or **(Pause for response.) (Skip to question 22.)**
- D. Did something else happen **(Record response.) (Skip to question 22.)**
- E. Don't know/don't remember **(Do not read.) (Skip to question 22.)**

13. And did you get that call?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 22.)**
- c. Don't know/don't remember **(Skip to question 22.)**

14. How did that work for you? Were you:

(Read rating scale. Enter one response.)

- A. Very satisfied **(Skip to question 17.)**
- B. Somewhat satisfied **(Skip to question 17.)**
- c. Somewhat dissatisfied, or
- D. Very dissatisfied with the callback
- E. Don't know/don't remember **(Do not read.) (Skip to question 17.)**

15. Why were you dissatisfied?

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

- A. Took a long time to receive a callback
- B. Wasn't convenient time when they called me back
- C. Still had to wait for an agent when they called me back
- D. I just don't like using automated systems
- E. Something else **(Record response.)**
- F. Don't know/don't remember

(All responders to question 15 skip to question 17.)

16. 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/don't remember **(Do not read.)**

17. Now I'd like to ask you several questions about your satisfaction with the service the agent gave you. First, how would rate the courtesy of the agent? Was it:

(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/don't remember **(Do not read.)**

18. How well would you say the agent knew his or her job? Would you rate the agent's job knowledge 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/don't remember ***(Do not read.)***

19. How would you rate the helpfulness of the agent during your call? Was it:

(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/don't remember ***(Do not read.)***

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

(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/don't remember ***(Do not read.)***

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

(Do not read responses. Enter one response.)

- A. Yes
- B. No
- C. Don't know/don't remember

22. Overall, how would you rate the service you received the day you called Social Security's National 800 number? Was it:

(Read rating scale. Enter one response.)

- a. Excellent **(Skip to question 24.)**
- B. Very good **(Skip to question 24.)**
- C. Good **(Skip to question 24.)**
- D. Fair
- E. Poor. or
- F. Very poor
- G. Don't know/don't remember **(Do not read.) (Skip to question 24.)**

23. Why did you rate the 800 number service as *(insert response from question 22)*?

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

- A. Took too long to get through the automated system to get to the service I needed.
- B. Was too hard to get automated system to understand me; had to keep repeating the same information
- C. Wait on hold to get to an agent was too long.
- D. Agent didn't answer question/didn't explain things well.
- E. Social Security failed to take requested action/problem not resolved.
- F. Agent was not courteous.
- G. Would rather talk to an agent/don't like automated systems.
- H. Something else **(Record response.)**
- I. Don't know/don't remember

24. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the National 800 number on *(insert date from sample file)*. What was the main type of business you called about that day? Was it about:

(Read responses. Stop as soon as responder makes a selection. Enter one response.)

[If responders do not describe the type of business they called about, for example, if they choose "some other business" and 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 says anything close to these examples, the interviewer should say, "Was the appointment/letter/call about..." and re-read responses a-e.]

- A. Benefits you or someone else already receive. ***(Pause for response.)***
- B. Filing an application for benefits or checking the status of an application you already filed. ***(Pause for response.)***
- C. Appealing a decision made by Social Security ***(Pause for response.)***
- d. A new or replacement Social Security card ***(Pause for response.)***
(Skip to question 26.)
- E. Medicare, or ***(Pause for response.) (Skip to question 26.)***
- F. Some other business ***(Record response.) (Skip to question 26.)***
- G. Don't know/don't remember ***(Do not read.) (Skip to question 26.)***

25. 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 response a, b, or c in question 24 and probe further for the type of benefit involved.)

- a. Social Security Retirement or benefits you receive as a spouse, widow(er) or child
- b. Social Security Disability benefits, or
- c. SSI (i.e., Supplemental Security Income)
- d. Don't know /don't remember ***(Do not read.)***

26. Before you called Social Security's National 800 number, did you try to take care of this business with Social Security another way?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 28.)**
- c. Don't know/don't remember **(Skip to question 28.)**

27. What did you do? Did you:

(Read responses. Enter all that apply.)

- A. Call a local Social Security office
- B. Visit a local office, or
- C. Try to use Social Security's website
- D. Something else **(Do not read.) (Record response.) (Skip to question 29.)**
- E. Don't know/don't remember **(Do not read.) (Skip to question 29.)**

28. Social Security would like to know why you weren't able to take care of your business that way. Can you tell me what happened?

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

- A. Couldn't get through to the local office on the phone
- B. Couldn't get served in person (e.g., wait was too long; office was closed)
- C. Was told my business couldn't be handled that way
- D. Made an appointment to speak to someone at a later date
- E. Social Security employee couldn't answer my question
- F. No online service for the business I needed; couldn't find the answer to my question online
- G. Tried an online service but it didn't work for me
- H. Some other reason **(Record response.)**
- I. Don't know/don't remember

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

(Read responses. Enter one response.)

- A. Call Social Security's National 800 number
- B. Call a local office
- C. Visit a local office
- D. Use Social Security's website, or
- E. Will you do something else ***(Record response.)***
- F. Don't know/don't remember ***(Do not read.)***

[INTERVIEWER NOTE: If earlier in the survey the respondent said they would use the Internet or email to contact Social Security, acknowledge this and explain that you need to ask a few more specific questions about Internet use.]

30. Social Security's Internet site provides Social Security information and services online. I'd like to ask you a few questions about doing business on the Internet. First, do you currently use the Internet?

(Do not read responses. Enter one response.)

- A. Yes
- B. No ***(Skip to question 41.)***
- C. Don't know/don't remember ***(Skip to question 41.)***

31. How do you access the Internet? Do you use a:

(Read responses. Enter all that apply.)

- A. Personal or laptop computer
- B. Wireless handheld device like a smartphone, iPad, etc.
- C. Some other way ***(Record response.)***
- D. Don't know/don't remember

Now I'm going to read you a short list of activities that some people do on the Internet. I'd like to know how often you do each of these online. Do you:

(Read responses. Enter one response.)

| | a. Often | b. Sometimes | c. Never | d. Don't know/ don't remember (Do not read.) |
|---|----------|--------------|----------|---|
| 32. Send e-mail | | | | |
| 33. Look for information online | | | | |
| 34. Make purchases online | | | | |
| 35. Bank or pay bills online | | | | |
| 36. Text message or chat | | | | |
| 37. Use Facebook, Twitter, or some other social networking site | | | | |

38. Have you ever visited Social Security's Internet site?

(Do not read responses. Enter one response.)

- A. Yes
- B. No
- C. Don't know/don't remember

39. Now I'd like you to think again about your call to Social Security's National 800 number that we've been talking about. If you could have used the Internet instead of calling, would you have been:

(Read rating scale. Enter one response.)

- A. Very likely **(Skip to question 41.)**
- B. Somewhat likely **(Skip to question 41.)**
- C. Not very likely, or
- D. Not at all likely to use the Internet instead
- E. Don't know/don't remember **(Do not read) (Skip to question 41.)**

40. Why do you feel that way?

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

- a. Don't like to do business online; prefer to deal with a person
- b. Information on Internet too general; need answers to my specific questions
- c. Concerned about security/privacy
- d. Not confident my business will be taken care of
- e. Lack the necessary computer skills
- f. Not sure I would be able to follow online instructions; might have questions
- g. Computer is too old/Internet service is too slow
- h. Some other reason **(Record response.)**
- i. Don't know/don't remember

41. Sometimes because of a medical condition, people need special accommodations to conduct their business with Social Security. When you contact Social Security in person, on the telephone, or online, do you need Social Security to provide any special accommodations because of a medical condition?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to Question 45.)**
- C. Don't know/don't remember **(Skip to Question 45.)**

42. Do you need special accommodations because of a:

(Read responses. Enter all that apply.)

- A. Physical limitation (for example, wheelchair access)
- B. Visual limitation (for example, large print documents)
- C. Deafness or difficulty hearing (for example, sign language interpreter)
- D. Other limitation (for example, a learning disability)
- E. Don't know/don't remember **(Do not read.) (Skip to Question 45.)**

43. How satisfied are you with how well Social Security meets your need for special accommodations? Are you:

(Read rating scale. Enter one response.)

- A. Very satisfied **(Skip to Question 45.)**
- B. Somewhat satisfied **(Skip to Question 45.)**
- C. Somewhat dissatisfied
- D. Very dissatisfied
- E. Don't know/don't remember **(Do not read.) (Skip to Question 45.)**

44. Why are you dissatisfied?

(Record response.)

45. Do you have any (if question 43 = "c" or "d," insert: "other") comments or suggestions to help improve service on Social Security's National 800 number?

(Do not read responses. Enter one response.)

- A. Yes **(Record response.)**
- B. No
- C. Don't know/don't remember

Read: Social Security estimated that this survey would take 15 minutes to complete. If you would like to send comments on this time estimate to Social Security, I can provide you with the mailing address. Would you like this address?

If yes, read the Paperwork Reduction Act statement below, then go to closing:

This information collection meets the requirements of 44 U.S.C. §3507, as amended by section 2 of the Paperwork Reduction Act of 1995. The Office of Management and Budget approval number is 0960-0526. You may send comments on this 15-minute time estimate to: *Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.*

If no, go to closing.

CLOSING: That's all the questions I have for you today. Thank you for taking the time to be in this survey. Have a good day (afternoon/evening).