

## 800 Number Caller Survey Questionnaire – FY 20XX

### GENERAL INTRODUCTION

Hello, my name is *[first and last name]*. I work for Synovate and I'm calling 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 800 number. Our records show that Social Security received a call on *[insert date from sample file]* from someone at this telephone number.

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

*--If a business or public/pay phone: [Advise the individual that we are not asking people who called from a business or public/pay phone to participate in this survey. Thank the individual for his/her time. Record reason for non-response.]*

*--If a personal phone: May I please speak with the person who called Social Security's 800 number on [insert date from sample file]?*

*[If caller indicates they are on their cell phone, ask if they would like to continue the interview using this phone or if they would like to schedule an interview using a different phone number.]*

*[If speaking to the person who called the 800 number, continue.]*

*[If the individual who answered the phone is not the person who called, then:*

*--If caller is unknown, record reason for non-response.*

*--If caller is not at home, arrange callback.*

*--If caller is at a different number, ask for the name and number and call there.*

*--If caller comes to the phone, read General introduction and: I understand that you are the person who made that call? [If the individual states he or she did not call, proceed as per above. If the individual acknowledges making the call, continue.]*

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.

May I begin now?

- A. *Yes [Continue.]*
- B. *Cannot do interview now [Go to appointment screen and schedule callback.]*
- C. *No—Refusal [Attempt conversion. If unsuccessful, record reason for nonresponse.]*

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.

#### MESSAGE FOR ANSWERING MACHINES

Hello, my name is [first and last name], and I'm calling 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 800 number. Social Security's records show that someone at this number called their 800 number on *[insert date from sample file]*. I would like to ask that person a few questions about the service they received that day. 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 1-800-\_\_\_\_\_. 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. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the 800 Number 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.]*

1. A new or replacement Social Security card, or changing the name on a Social Security card *[Skip to Q3.]*
2. Medicare information, a replacement Medicare card or help with Medicare prescription drug costs *[Skip to Q3.]*
3. A Social Security Statement, or information about earnings paid into Social Security and an estimate of future benefits *[Skip to Q3.]*
4. Applying for benefits or checking on an application that was already filed
5. A change of address for someone receiving benefits
6. Starting, changing or stopping direct deposit of someone's benefits
7. Any other change or question about someone's benefits or check. For example, the report of a death, work and earnings, an overpayment, a representative payee situation or nonreceipt of check.
8. Proof of current payments (benefit verification letter)
9. A review of your case
10. Appealing a decision Social Security made, for example, on a disability claim that was turned down *[Skip to Q3.]*
11. Something else *[Record response; skip to Q3.]*
12. Don't know/don't remember *[Skip to Q3.]*
13. Refused *[Skip to Q3.]*

2. 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; select all that apply. If caller answers “No” to all response choices, refer to the type of business identified in Q1 and probe further to identify the type of benefits.]*

1. Social Security retirement benefits, or benefits you receive as a spouse, widow(er) or child
  2. Social Security disability benefits
  3. SSI (Supplemental Security Income) benefits
  4. Medicare, or
  5. Medicaid
  6. Don’t know/don’t remember *[Do not read.]*
  7. Refused *[Do not read.]*
3. Now I’d like to ask you about your experience calling Social Security. First, how would you rate how long it took you to get served on the 800 number the day you called? Would you say the length of time was:

*[Read rating scale; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don’t know/don’t remember *[Do not read.]*
8. Refused *[Do not read.]*

4. When you called Social Security's 800 number, you reached an automated speech recognition system. Could you tell me how comfortable you felt talking to the automated system? Did you feel:

*[Read rating scale; select only one.]*

1. Very comfortable
  2. Somewhat comfortable
  3. Somewhat uncomfortable, or
  4. Very uncomfortable
  5. Don't know/don't remember *[Do not read.]*
  6. Refused *[Do not read.]*
5. After greeting you, the automated system asked you to say what you were calling about. I'd like to know how easy or hard you thought 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; select only one.]*

1. Very easy *[Skip to Q7.]*
2. Somewhat easy *[Skip to Q7.]*
3. Somewhat hard, or
4. Very hard to reach the type of service you wanted
5. Don't know/don't remember *[Do not read; skip to Q7.]*
6. Refused *[Do not read; skip to Q7.]*

6. Why did you feel it was hard?

*[Do not read responses; select all that apply.]*

1. 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.
2. I didn't understand what the system was saying; I didn't know how to answer.
3. It misinterpreted what I said and sent me to the wrong service.
4. It took too long.
5. I wanted to talk to an agent; don't like using automated systems.
6. The available options didn't cover my situation.
7. Something else *[Record response.]*
8. Don't know/don't remember
9. Refused

7. Social Security's 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; select only one.]*

1. Yes
2. No *[Skip to Q11.]*
3. Don't know/don't remember *[Skip to Q11.]*
4. Refused *[Skip to Q11.]*

8. 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; select all that apply.]*

1. Medicare information, a replacement Medicare card or help with Medicare prescription drug costs
2. The address and hours of your nearest Social Security office
3. An application to obtain or replace a Social Security card
4. A list of pamphlets and general information messages
5. A Social Security Statement (statement of earnings and estimate of future benefits)
6. Change of address
7. Direct deposit
8. Proof of current payments, or
9. A password or password request code or access to information in your personal account
10. Don't know/don't remember *[Do not read.]*
11. Refused *[Do not read.]*

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

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

1. Yes *[Skip to Q29.]*
2. No
3. Don't know/don't remember *[Skip to Q29.]*
4. Refused *[Skip to Q29.]*

10. I'm going to read you a list of reasons why a person 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; select all that apply.]*

1. The automated service said in your situation you needed to speak to an agent.
2. You didn't have the necessary information on hand to use the service.
3. The automated service you tried didn't cover what you needed.
4. You had some other business that couldn't be handled through an automated service.
5. You wanted to talk to an agent to make sure everything was okay.
6. You thought the automated service was just too hard to use., or
7. Was it because of something else *[Record response.]*
8. Don't know/don't remember *[Do not read.]*
9. Refused *[Do not read.]*

11. *[If Q9 = 2 ("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; select only one.]*

1. Stayed on the line
2. Hung up *[Skip to Q28.]*
3. Don't know/don't remember *[Skip to Q28.]*
4. Refused *[Skip to Q28.]*

12. 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; select only one.]*

1. Yes *[Skip to Q28.]*
2. No
3. Don't know/don't remember *[Skip to Q28.]*
4. Refused *[Skip to Q28.]*



13. Before an agent answered your call, Social Security's automated system asked for identifying information such as a Social Security Number, date of birth or place of birth. Do you remember giving this information?

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

1. Yes
2. No *[Skip to Q16.]*
3. Don't know *[Skip to Q16.]*
4. Refused *[Skip to Q16.]*

14. How easy was it to get the automated system to understand you? Would you say it was:

*[Read rating scale; select only one.]*

1. Very easy *[Skip to Q16.]*
2. Somewhat easy *[Skip to Q16.]*
3. Somewhat hard, or
4. Very hard
5. Don't know/don't remember *[Do not read; skip to Q16.]*
6. Refused *[Do not read; skip to Q16.]*

15. Why did you feel it was hard to get it to understand the information you gave?

*[Do not read responses; select all that apply.]*

1. 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.
2. I didn't understand what the system was saying; I didn't know how to answer.
3. It misinterpreted what I said.
4. It took too long.
5. I just don't like using automated systems.
6. Something else *[Record response.]*
7. Don't know/Don't remember
8. Refused

16. [If Q13 = 1 (“yes”), insert: After giving the identifying information,] What happened next? Were you connected with an agent right away?

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

1. Yes *[Skip to Q23.]*
2. No
3. Don’t know/don’t remember *[Skip to Q28.]*
4. Refused *[Skip to Q28.]*

17. Since you weren’t connected with an agent right away, did you wait on hold, did you have Social Security call you back, or did you hang up?

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

1. Waited on hold *[Skip to Q22.]*
2. Had Social Security call me back
3. Hung up *[Skip to Q28.]*
4. Don’t know/don’t remember *[Skip to Q28.]*
5. Refused *[Skip to Q28.]*

18. And did you get that call?

*[Do not read responses. Enter one response.]*

1. Yes *[Skip to Q20.]*
2. No
3. Don’t know/don’t remember *[Skip to Q28.]*
4. Refused *[Skip to Q28.]*

19. What happened?

*[Do not read responses; select all that apply.]*

1. Social Security never called me back.
2. There were problems with the system when they called me back.
3. I couldn't take the call when they called me back; had to cancel the callback.
4. Something else *[Record response.]*
5. Don't know/don't remember
6. Refused

*[All responders to Q19 skip to Q28.]*

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

*[Read rating scale; select only one.]*

1. Very satisfied *[Skip to Q22.]*
2. Somewhat satisfied *[Skip to Q22.]*
3. Somewhat dissatisfied, or
4. Very dissatisfied with the callback
5. Don't know/don't remember *[Skip to Q22.]*
6. Refused *[Skip to Q22.]*

21. Why were you dissatisfied?

*[Do not read responses; select all that apply.]*

1. Took a long time to receive a callback.
2. Wasn't convenient time when they called me back.
3. Still had to wait for an agent when they called me back.
4. I just don't like using automated systems.
5. Something else *[Record response.]*
6. Don't know/don't remember
7. Refused

22. [If Q17 = 1 (“waited on hold”), read Q22A: 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:]

[If Q18= 1 (“yes”), read Q22B: When you received the callback, how would you rate how long it took for the agent to come on the line? Would you rate the amount of time as:]

*[Read rating scale; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don’t know/don’t remember *[Do not read.]*
8. Refused *[Do not read.]*

23. 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; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don’t know/don’t remember *[Do not read.]*
8. Refused *[Do not read.]*

24. How well would you say the agent knew his or her job? Would you rate the agent's job knowledge as :

*[Read rating scale; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don't know/don't remember *[Do not read.]*
8. Refused *[Do not read.]*

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

*[Read rating scale; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don't know/don't remember *[Do not read.]*
8. Refused *[Do not read.]*

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

*[Read rating scale; select only one.]*

1. Excellent
2. Very good
3. Good
4. Fair
5. Poor, or
6. Very poor
7. Don't know/don't remember *[Do not read.]*
8. Refused *[Do not read.]*

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

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

1. Yes *[Skip to Q29.]*
2. No
3. Don't know/don't remember *[Skip to Q29.]*
4. Refused *[Skip to Q29.]*

28. 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; select all that apply.]*

1. Call the 800 number again
2. Call the local Social Security office
3. Visit the local Social Security office
4. Use the Internet or email
5. Send a letter or fax
6. Wait for Social Security to contact you or mail you something, or
7. Will you do something else *[Record response.]*
8. Do nothing about it *[Do not read.]*
9. Don't know/don't remember *[Do not read.]*
10. Refused *[Do not read.]*

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

*[Read rating scale; select only one.]*

1. Excellent *[Skip to Q31.]*
2. Very good *[Skip to Q31.]*
3. Good *[Skip to Q31.]*
4. Fair
5. Poor. or
6. Very poor
7. Don't know/don't remember *[Do not read; skip to Q31.]*
8. Refused *[Do not read; skip to Q31.]*

30. Why did you rate the 800 number service as *[insert response from Q29]*?

*[Do not read responses; select all that apply.]*

1. Took too long to get through the automated system to get to the service I needed.
2. Wait on hold to get to an agent was too long.
3. Was too hard to get automated system to understand me; had to keep repeating the same information
4. Agent didn't answer question/didn't explain things well.
5. Agent was not courteous.
6. Social Security failed to take requested action/problem not resolved.
7. Would rather talk to an agent/don't like automated systems.
8. Callback process didn't work well.
9. Something else *[Record response.]*
10. Don't know/don't remember
11. Refused

31. If you contact Social Security again, what are you most likely to do? Will you:

*[Read responses; select only one.]*

1. Call the 800 number
2. Call your local office
3. Visit your local office
4. Use the Internet or email
5. Write a letter
6. Send a FAX, or
7. Will you do something else *[Record response.]*
8. Don't know/don't remember *[Do not read.]*
9. Refused *[Do not read.]*

*[INTERVIEWER NOTE: If in any of the previous questions 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.]*

32. Social Security has its own Internet site, [www.socialsecurity.gov](http://www.socialsecurity.gov), that 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; select only one.]*

1. Yes
2. No *[Skip to Q41.]*
3. Don't know/don't remember *[Skip to Q41.]*
4. Refused *[Skip to Q41.]*



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; select only one.]*

	1. Often	2. Sometimes	3. Never	4. Don't know/ don't remember <i>[Do not read.]</i>	5. Refused <i>[Do not read.]</i>
33. Send e-mail					
34. Use Instant message or chat					
35. Look for information					
36. Make purchases					
37. Bank or pay bills					

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

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

1. Yes
2. No
3. Don't know/don't remember
4. Refused

39. Now I'd like you to think again about your call to Social Security's 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; select only one.]*

1. Very likely *[Skip to Q41.]*
2. Somewhat likely *[Skip to Q41.]*
3. Not very likely, or
4. Not at all likely to use the Internet instead
5. Don't know/don't remember *[Do not read; skip to Q41.]*
6. Refused *[Do not read; skip to Q41.]*

40. Why do you feel that way?

*[Do not read responses; select all that apply.]*

1. Don't like to do business online; prefer to deal with a person
2. Not sure I would be able to follow online instructions; might have questions
3. Not confident my business will be taken care of
4. Concerned about security/privacy
5. Computer is too old/Internet service is too slow
6. Lack the necessary computer skills
7. Some other reason *[Record response.]*
8. Don't know/don't remember
9. Refused

41. Do you have any other comments or suggestions to help improve Social Security's 800 number service?

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

1. Yes *[Record response.]*
2. No
3. Don't know/don't remember
4. Refused

**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. The OMB number for this collection is 0960-0526. We estimated that it will take about 10 minutes to complete this survey. If you would like to comment on this estimate, send **only** comments on our time estimate to: SSA, 6401 Security Blvd., Baltimore, MD 21235-6401.

**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.