

## **DOCUMENTATION FOR THE GENERIC CLEARANCE OF CUSTOMER SATISFACTION SURVEYS**

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**TITLE OF INFORMATION COLLECTION:** Fiscal Year (FY) 2016 Field Office (FO) Caller Survey

**SSA SUB-NUMBER:** D-01

**DESCRIPTION OF ACTIVITY** (*give purpose of activity, provide specific information; i.e., date(s) of survey, number of focus groups, locations, etc.*):

### **BACKGROUND**

The Social Security Administration (SSA) annually surveys individuals who do business with us to assess their satisfaction with the specific mode of contact they used. As part of this effort, we conduct the FO Caller Survey, in which we interview members of the public who contacted an SSA FO by telephone to transact their business. We designed the survey, which takes place shortly after the participant's FO call, to (1) measure public perception of FO telephone service; and (2) to collect information that will assist us in understanding the customer experience behind satisfaction ratings. SSA has been conducting a satisfaction survey with this population since 1997.

### **SURVEY**

#### **Description of Survey**

SSA plans to conduct the FO Caller Survey over a 4-week period in April/May 2016. We conduct the survey in the same general timeframe each year to maintain comparability of results. An SSA contractor conducts the survey interviews by telephone. The survey covers a variety of topics related to SSA's FO caller service, including the following:

- Callers' satisfaction with how quickly they got through to the FO;
- Whether callers had to make more than one call that day to reach the office;
- Callers' ease of understanding the FO's automated phone message;
- Whether callers left a voice mail message and if they received a return call;
- Whether the caller was connected immediately or had to wait on hold for an agent;
- Satisfaction with the time spent on hold waiting to speak to an agent;

- Satisfaction with agent service -- their courtesy, job knowledge, helpfulness, and clarity of explanations;
- What happened to callers who were unable to get served that day;
- Whether callers were able to complete their business during their call;
- Callers' rating of the FO telephone service overall;
- The nature of the callers' business and the type of benefits involved;
- Whether callers tried to take care of their business some other way before calling the FO, what action they took, and why they weren't successful;
- How callers plan to conduct future business with the agency;
- Whether callers use the Internet, what type of device they use, and what types of activities they do online;
- Whether callers are aware of, or already have, a *my Social Security* online account and, for those who do not have an account, how likely they are to create one; and
- Whether callers needed special accommodations to do business with SSA because of a medical condition, what those special accommodations are, and their satisfaction with how well SSA met their needs.

### **Statistical Information**

#### **Sample Selection**

We first select a random sample of 110 FOs to participate in the survey. The mix of sampled offices accurately represents all ten SSA regions and all types of FOs. During the 4-week sample selection period, we will process files of incoming call data to identify completed calls representing individuals who "got through" to these 110 FOs.

The 110 FOs selected for the survey receive approximately 4 million calls each year. Based on these estimates, we anticipate that over the 4-week period of the survey they will receive 300,000 calls. From the universe of calls received, we randomly select 4,000 unique telephone numbers. We use these originating numbers to attempt to contact and interview the individuals who placed the sample calls. During the interview process, we screen out calls that originate from a public or business telephone, since we cannot usually identify the individual who called the FO from such locations.

#### **Methodology**

An SSA-approved contractor will conduct this survey by telephone and translate the survey questionnaire into computer-assisted interviewing (CATI) software so that interviewing and data input of the individual's responses occur simultaneously. The CATI software also ensures that we ask only questions pertinent to the individual's circumstances, allowing for complicated question paths while still minimizing response burden.

## **Response Rate**

To maximize the response rate for this survey, SSA will:

- Select samples twice a week (to minimize the time between the customers' service experience and the survey);
- Transmit sample listings to the contractor within a week of the FO call;
- Have the contractor make at least 15 attempts to reach the caller over a 3-week period in an effort to obtain the highest possible response rate;
- Have the contractor arrange call attempts for daytime, evening, and weekend hours;
- Have the contractor arrange call backs and leave messages for the sampled individual as necessary, and provide a toll-free number for return calls to encourage participation;
- Provide Spanish-speaking interviewers as necessary.

In past years, using this methodology with similar populations, we typically achieved response rates around 50 percent. In the most recent FO Caller Survey for FY 2015, the response rate was 49 percent. We anticipate achieving a similar response rate in the FY 2016 FO Caller Survey. Considering the telephone number is the only contact information available to the contractor, this response rate is remarkably good. We routinely review the information recorded by the contractor each year to monitor any significant trends in the reasons for non-response and to ensure the contractor makes adequate efforts to achieve a good response rate.

## **Sampling Variability**

The key variable in the FO Caller Survey is overall satisfaction with telephone service. In the FY 2015 FO Caller Survey, the overall satisfaction rating was 77 percent excellent, very good or good. Our proposed sample size of 4,000 is large enough to allow for the screening of business calls and, assuming a 50 percent response rate from the remaining sample, will provide a sampling variability at the 95-percent confidence level of around +/-2 percent for this key indicator of satisfaction.

SSA's Office of Quality Review and Office of Quality Improvement (OQI) are responsible for sampling and data analysis. Douglas Turnbull, Director, Office of Modeling, OQI, SSA, provides statistical support. OMB can reach Mr. Turnbull at (410) 966-2595.

**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 in this survey.

**USE OF SURVEY RESULTS:**

SSA uses the results of this study to evaluate and improve various aspects of its FO telephone service. In addition, we combine the results from the FO Caller survey and annual surveys of 800 number callers and office visitors to calculate an overall satisfaction rate for SSA's agency priority goal, "Increase customer satisfaction with our services."

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

Number of Responses: 4,000  
Estimated Response Time: 10 minutes  
Annual Burden Hours: 667 hours

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