Retirement Survey Correspondence - English

Prenotice Postcard

Dear Social Security Customer:

Social Security believes that conducting surveys is one of the best ways to find out how well we are serving you. That's why we will soon be asking you to give us your opinion about the business you recently completed with us.

In a few days, you will receive a questionnaire in the mail from *[Contractor]*, who is conducting the survey for Social Security. When you receive their envelope, we hope that you will take the time to answer our questions. We look forward to hearing your opinions.

Michelle King Deputy Commissioner for Budget, Finance, Quality, and Management Social Security Administration

Initial Cover Letter

Dear Social Security Customer:

As I noted in my recent postcard, Social Security is conducting a survey to find out how well we served you when you filed an application for retirement benefits. You are one of only a small number of people across the country who were chosen to receive the enclosed questionnaire. While you are not required to respond, your opinions are very valuable. Your answers will help us make important decisions about how Social Security can best serve you.

Please be assured that *[Contractor]*, who is conducting this survey for us, will only give your responses to my staff here at Social Security, and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses. The barcode on this survey is only used to let us know whether you have returned your survey, so we don't send you reminder letters.

Please return your completed survey as soon as possible in the postage-paid envelope provided. If you have a question about Social Security benefits, please visit our web site at <u>www.socialsecurity.gov</u> or call our toll-free information line at 1-800-772-1213.

We appreciate your taking time out of your busy schedule to answer our survey.

Sincerely,

lichelle A. H.

Michelle King Deputy Commissioner for Budget, Finance, Quality, and Management Social Security Administration

Enclosures

Follow-up Postcard

SURVEY REMINDER

About two weeks ago, *[Contractor]* sent you a questionnaire to find out how well we served you during your recent business with us.

- If you have already mailed back your completed questionnaire, we thank you for your quick response.
- However, **if you have not yet returned the questionnaire**, we would appreciate it if you could take some time to complete it and send it back as soon as possible.
- **If you no longer have the questionnaire,** you don't need to do anything. *[Contractor]* will be mailing another one to you shortly.

Thank you for sharing your opinions with us.

Michelle King Deputy Commissioner for Budget, Finance, Quality, and Management Social Security Administration

Follow-up Cover Letter

Dear Social Security Customer:

Several weeks ago [Contractor] sent you a survey questionnaire to find out how well we served you when you filed an application for retirement benefits. We haven't yet heard from you and it's very important that we gather opinions from as many people as possible. If you recently mailed in your completed questionnaire, please discard this letter. We sincerely appreciate your help and look forward to receiving your response.

However, if you have not yet returned your questionnaire, we ask that you take some time now to complete it and send it back. For your convenience, we have enclosed another questionnaire along with a postage-paid return envelope.

Please be assured that *[Contractor]*, who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses.

If you have a question about Social Security benefits, please visit our web site at <u>www.socialsecurity.gov</u> or call our toll-free information line at 1-800-772-1213.

We would appreciate receiving your completed survey as soon as possible.

Sincerely,

fichellet A. King

Michelle King Deputy Commissioner for Budget, Finance, Quality, and Management Social Security Administration Social Security Administration

Enclosures

Closeout Letter

Dear Social Security Customer:

Recently we mailed you a survey questionnaire to find out how well we served you when you filed an application for retirement benefits. If you have already completed and returned the questionnaire, please accept our sincere thanks.

If you have not yet had time, we hope you will turn to it right away. We are wrapping up the survey and would like to include your opinions, but we need your quick response. We think it's extremely important to hear from everyone who was selected to participate in this survey.

Please be assured that *[Contractor]*, who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses.

If you have a question about Social Security benefits, please visit our web site at <u>www.socialsecurity.gov</u> or call our toll-free information line at 1-800-772-1213.

Thank you for your help.

Sincerely,

Michelle King Deputy Commissioner for Budget, Finance, Quality, and Management Social Security Administration Social Security Administration

ABOUT OUR SURVEY

Social Security would like to know how well we served you when you filed your recent application for retirement benefits. This survey also asks about your expectations for good service and how you want to do business with Social Security in the future. The survey asks you to rate the service you received in person, on the telephone, or on our website. The survey should take about 15 minutes to finish.

• Answer all questions as directed. You may be told to skip over some questions. When that happens, you will see an arrow with a note telling you what question to answer next:

Example:	Yes								
	⊠ No → <u>SKIF</u>	to Question 1							
INSTRUCTIONS FOR MARKING YOUR ANSWERS									
• Use a pen with blue or black ink or a nun	nber 2 pencil.	Make no stray marks.							
• Do not use a pen with ink that soaks thro	ough the paper.	Keep all entries within the appropriate boxes.							
PREPARIN	G TO FILE FOR R	ETIREMENT BENEFITS							

1. Before you filed your application for retirement benefits, did you get any information from **Social Security** to help you prepare?

Mark 🗵 ONLY one answer.

- Yes
- $\square \text{ No } \rightarrow \underline{SKIP} \text{ to Question 3.}$
- 2. How did you get that information from Social Security?

Mark 🗵 <u>all</u> answers that apply.

- □ Visited Social Security's website
- Called Social Security's national toll-free number
- Called a local Social Security office
- □ Visited a local Social Security office
- Reviewed last Social Security Statement I received in the mail
- Some other way: Please explain:
- 3. Did you get any information about Social Security retirement benefits from anywhere other than Social Security?

- ☐ Yes → Continue with Question 4.
- □ No \rightarrow SKIP to Question 5 if you answered "yes" in Question 1.
 - → <u>SKIP</u> to Question 7 if you answered "no" in Question 1.

4. Where did you get that information?

Mark 🗵 <u>all</u> answers that apply.

- Senior citizens organization, such as AARP
- Accountant or financial advisor
- Employer or union
- Friends or relatives
- Local seminars or meetings
- Traditional media (newspaper, magazine, TV, or radio)
- Website other than Social Security's
- Social networking site such as Facebook or Twitter
- Government agency other than Social Security
- Some other way: Please explain:
- 5. No matter where you obtained information to prepare for retirement, did it change your plans about when to start collecting your Social Security retirement benefits?

Mark 🗵 ONLY one answer.

- Yes
- No → <u>SKIP</u> to Question 7.
- 6. How did the information change your plans about when to start collecting your Social Security retirement benefits? Did you:

Mark 🗵 ONLY one answer.

- Claim Social Security benefits earlier than planned
- Claim Social Security benefits <u>later</u> than planned

HOW YOU FILED YOUR APPLICATION FOR RETIREMENT BENEFITS

7. Did you file your application for retirement benefits:

Mark 🗵 ONLY one answer.

- In person with a Social Security employee
- Over the telephone with a Social Security employee
- Through the mail
- □ On Social Security's website → <u>SKIP</u> to Question 12.
- 8. Social Security offers an online application on its website that people can use to file for retirement benefits. At the time you filed, were you aware of Social Security's online application?

- Yes
- No → SKIP to Question 10.

9. What was the main reason you didn't use the online retirement application?

Mark 🗵 ONLY one answer.

- Don't use the Internet
- Easier to understand things when explained by a person
- Can get my specific questions answered right away with a person
- Concerned about security and/or privacy of my information
- Concerned online application might be too hard, complicated
- Problem with computer or Internet access
- Tried to but was not successful
- Some other reason: Please explain:
- 10. Did you make an appointment with Social Security to file your retirement application?

Mark 🗵 ONLY one answer.

- Yes
- $\square \text{ No } \rightarrow \underline{SKIP} \text{ to Question 15.}$
- 11. Please rate the following aspects of your appointment with Social Security.

Mark 🗵 one answer for each item.	Excellent	Very Good	Good	Fair	Poor	Very Poor	No Opinion
How soon you could get an appointment							
Convenience of the scheduled appointment							

SATISFACTION WITH THE ONLINE APPLICATION

The next question is for people who filed their application for retirement benefits on Social Security's website. If you did <u>NOT</u> file your retirement application online, please <u>SKIP TO</u> Question 15.

12. After you completed your retirement application online, did Social Security contact you for additional information related to your retirement application?

- Yes
- 🔲 No
- → <u>SKIP</u> to Question 14.

13. What was the additional information that Social Security needed? Was the information related to your:

Mark 🗵 <u>all</u> answers that apply.

- Current Marriage Information or Divorce History
- Children or Dependents
- U.S. Military Service Details
- Employment or Self-Employment Details (Employer Name, Employment Start and End dates)
- Direct Deposit Details (Account Type, Routing Number, Bank Name)
- Identification (Name, SSN, Date and Place of Birth, Address, Phone Number)
- Date when you stopped working
- Earnings
- Railroad Employment or Federal Government Employment
- Age-Related Reduced Benefits
- Retirement Benefit Start Date
- Disability Application
- Medicare Coverage
- Medicaid (state health insurance) Coverage
- Some other reason: Please explain:
- 14. Please rate the following aspects of your experience using Social Security's online application.

Mark 🗵 one answer for each item.	Excellent	Very Good	Good	Fair	Poor	Very Poor	No Opinion
Ease of finding the online application on Social Security's website							
Ease of answering the questions on the online application							
Helpfulness of the explanations in the "More Info" links on the online application							
Availability of other help from Social Security to complete the online application							
Length of time it took to complete the online application							
How well the online application explained what would happen after you submitted it							

SATISFACTION WITH SOCIAL SECURITY'S TELEPHONE SERVICE

15. Did you ever call Social Security about your application for retirement benefits?

Mark 🗵 ONLY one answer.

Yes

 $\square No \rightarrow \underline{SKIP} \text{ to Question 18.}$

16. Did you call Social Security's national toll-free number, a local office, or both?

Mark 🗵 ONLY one answer.

- □ National toll-free number
- Local Social Security office
- D Both
- Not sure

17. Please rate the following aspects of Social Security's telephone service.

Mark 🗵 one answer for each item.	Excellent	Very Good	Good	Fair	Poor	Very Poor	No Opinion
The automated system that answered your call							
How long it took you to get through to an employee							
Helpfulness of the agent							
How clearly the agent explained things							

SATISFACTION WITH SOCIAL SECURITY'S IN-PERSON SERVICE

18. Did you ever visit a Social Security office about your application for retirement benefits?

- Yes
- $\square \text{ No } \rightarrow \underline{SKIP} \text{ to Question 20.}$
- 19. Please rate the following aspects of your visit to the Social Security office.

Mark 🗴 one answer for each item.	Excellent	Very Good	Good	Fair	Poor	Very Poor	No Opinion
Office hours							
Signs/instructions explaining how to check in when you got to the office							
Office comfort (seating, temperature, etc.)							
Office privacy							
Waiting time to be served in the office							
Helpfulness of the staff							
How clearly the staff explained things							

OVERALL SATISFACTION WITH THE APPLICATION EXPERIENCE

20. Please rate the following aspects of your experience filing for retirement benefits.

Mark 🗴 one answer for each item.	Excellent	Very Good	Good	Fair	Poor	Very Poor	No Opinion
How quickly you received Social Security's decision on your application							
Clarity of Social Security's letter explaining the amount of your benefits and when they would be paid							
Social Security's service overall							

YOUR SERVICE PREFERENCES

21. Please tell us how you would prefer to conduct Social Security business you might have in the future, such as changing your address or getting a statement of the total benefits you received in the last year. Mark 🗵 one method as your choice for each type of business.

To change information on my Social Security records, I would prefer									
An Automated Phone Service	An Agent on a National toll- free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email				

To get information from my Social Security records, I would prefer									
An Automated Phone Service	An Agent on a National toll- free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email				

22. Now we would like to know how you would define timely service when you do business with Social Security. First, when doing business on the **telephone**, please **mark** is the box that best describes the amount of time you think is reasonable to wait.

A reasonable time for me to wait:	Less than	1 to 3	4 to 5	6 to 10	11 to 20	More than
	1 minute	minutes	minutes	minutes	minutes	20 minutes
To speak to an employee on the phone is						

A reasonable time for me to wait:	Less than 1 hour	More than 1 hour but same day	Next day	2 to 3 days	More than 3 days	A week or more
For an employee to call me back when I leave a phone message is						

23. When doing business in person, please mark 🗵 the box that best describes the amount of time you think is reasonable to wait.

A reasonable time for me to wait:	Less than 5 minutes	5 to 10 minutes	11 to 20 minutes	21 to 30 minutes	31 to 45 minutes	More than 45 minutes
To be seen in an office <u>without</u> an appointment is …						
To be seen in an office <u>with</u> an appointment is …						

24. When doing business on <u>a website or by email</u>, please mark 🗷 the box that best describes the amount of time you think is reasonable to wait.

A reasonable time for me to wait:	Less than 1 hour	More than 1 hour but same day	Next day	2 to 3 Days	More than 3 days	A week or more
To get a response when I ask a question on a website or by email is						

PRIVACY OF YOUR PERSONAL INFORMATION

25. No matter how you choose to do business with us, in person, by telephone, through the mail, or online, Social Security takes great care to protect your personal information. Based on your recent experience applying for retirement benefits, how confident are you that the information in your Social Security records is secure?

Mark 🗵 one answer.	Very	Somewhat	Not Very	Not at All	No
	Confident	Confident	Confident	Confident	Opinion
I would rate my level of confidence in the security of my Social Security records as					

DOING BUSINESS ONLINE

26. Do you currently use the Internet?

Mark	SONLY one answer.
	Yes

 $\square \text{ No } \rightarrow \underline{SKIP} \text{ to Question 35.}$

27. How do you access the Internet? Do you use :

Mark 🗵 ONLY one answer.

- **Only** a personal or laptop computer
- **Only** a wireless handheld device like a smartphone or tablet
- **Both** a personal or laptop computer **and** a wireless handheld device

28. How would you rate your level of experience using the Internet?

Mark 🗵 one answer.	Very Experienced	Somewhat Experienced	Not Very Experienced	Not at All Experienced	No Opinion
I would rate my level of experience using the Internet as					

29. Social Security offers a service called *my* Social Security (<u>www.socialsecurity.gov/myaccount</u>) where people can create a secure online account with a user name and password to conduct various types of business. For example, if they receive benefits, people with an online account can change their address or direct deposit information, or get a statement of the monthly benefits they receive. Have you already created an online account with Social Security?

Mark 🗵 ONLY one answer.

 $\Box \quad \text{Yes} \quad \Rightarrow \quad \underline{SKIP} \text{ to Question 35.}$

🔲 No

30. To create a secure online account, Social Security must verify your identity. In addition to providing your name and Social Security number, how comfortable would you be providing each item below in order to do business online with Social Security?

Mark 🗴 one answer for each item.	Very Comfortable	Somewhat Comfortable	Not Very Comfortable	Not at all Comfortable	No Opinion
Your current address					
Your date of birth					
Your phone number					
Part of your credit card number					
Other personal information from your records, such as prior earnings or your Social Security payment amount.					

31. To verify your identity, Social Security would need to match the personal information you give against other records. Listed below are different kinds of records that Social Security could match with. How comfortable would you be with each?

Mark 🗴 one answer for each item.	Very Comfortable	Somewhat Comfortable	Not Very Comfortable	Not at all Comfortable	No Opinion
Checking against Social Security's own records					
Checking against records from a private company, like a credit bureau					

32. How likely would you be to create an online account for handling future Social Security business?

Mark 🗵 one answer.	Very Likely	Somewhat Likely	Not Very Likely	Not at All Likely	No Opinion
For me, creating an online account with a user name and password for Social Security business is					

33. What is the main reason why you might be likely to create an online account with Social Security?

- Can take care of my business any time of day
- Don't have to wait to speak to someone, either on the phone or in person
- Don't have to travel to the office
- Can have all my records at hand or can look something up if I need to
- Some other reason you might use it **Please explain:**
- Can't think of any reason why I would use it

- 34. What is the main reason why you might not be likely to create an online account with Social Security?
 - Mark 🗵 ONLY one answer.
 - Prefer to speak to a person
 - Concerned about security and/or privacy of my information
 - Problem with computer or Internet access
 - Concerned completing online business might be too hard, complicated
 - Some other reason you might not use it **Please explain:**
 - Can't think of any reason why I wouldn't use it

A LITTLE MORE ABOUT YOU

35. Do you own a cell phone?

Mark 🗵 ONLY one answer.

Yes

 $\square \text{ No } \rightarrow \underline{SKIP} \text{ to Question 37.}$

36. Do you use a cell phone to send and receive text messages?

Mark 🗷 ONLY one answer.

- Yes
- No
- 37. And for the final question, what is the highest level of education you have completed?

Mark 🗵 ONLY one answer.

- Not a high school graduate
- High school graduate or GED
- Trade/technical/vocational school graduate
- Some college
- Undergraduate degree
- Graduate degree or postgraduate training

Thank you for your time and attention with this survey. Please return the completed questionnaire in the enclosed postage-paid envelope as soon as possible to:

Social Security Survey

[Contractor Return Address]

PRIVACY ACT STATEMENT	PAPERWORK REDUCTION ACT STATEMENT
The Social Security Administration is authorized to	This information collection meets the requirements of
collect the information for this survey under Executive	44 U.S.C. § 3507, as amended by Section 2 of the
Order 12862, "Setting Customer Service Standards."	Paperwork Reduction Act of 1995. You do not need to
Your response to these questions is strictly voluntary.	answer these questions unless we display a valid Office
The information you provide will be used to help us	of Management and Budget control number. We
improve the service that we give you. Your response	estimate that it will take about 15 minutes to read the
will not be disclosed to any other government or private	instructions, gather the facts and answer the questions.
agency.	You may send comments on our time estimate above to:

OMB CONTROL NO: 0960-0526 EXPIRATION DATE: TBD	Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401. (<i>Send <u>only</u> comments</i> <i>relating to our time estimate to this address, not the</i>
	completed form.)