

**FISCAL YEAR 2019
FIELD OFFICE 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 their local Social Security office. Our records show that the *(insert city from sample file)* Social Security office 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 their local Social Security office. Our records show that the *(insert city from sample file)* Social Security office 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

Did you call the *(insert city and State from sample file)* office about Social Security business?

1. Yes, it was about Social Security Business. ***(Continue with Intro 4.)***
2. No, it was a personal call, wrong number, etc. ***(Record reason for non-response and end call.)***

Intro 4

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 take less than 10 minutes. May I begin the survey now?

1. Yes (***Continue to Intro 5.***)
2. Cannot do interview now (***Attempt to schedule callback.***)
3. No (***Attempt conversion. If unsuccessful, record reason for non-response and end call.***)

Intro 5

INTERVIEWER: RECORD LANGUAGE OF INTERVIEW

1. English
2. Spanish

Intro 6

Before my first question, I need to tell you that 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 the local Social Security office 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 you to think about how easy it was to reach the (*insert city and state from sample file*) Social Security office when you called on (*insert date from sample file*). Would you rate how quickly you got through 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/no opinion **(Do not read.)**

2. Did you have to make more than one call that day before you were able to reach the office?

(Do not read responses. Enter one response.)

- a. Yes
- b. No
- c. Don't know/don't remember

3. When you called the (*insert city name only from sample file*) office on (*insert date from sample file*), you heard an automated message with information about their telephone service. How easy or hard was it to understand this message? 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
- e. No opinion/don't remember **(Do not read.) (Skip to question 5.)**

4. Why did you feel it was hard to understand the automated message?

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

- a. Too many options; menu was too long
- b. Explanations of options were confusing, unclear
- c. Options did not seem to fit the situation
- d. Recording quality poor (too fast, not loud enough, words garbled)
- e. Non-English speaking
- f. Other **(Record response.)**
- g. No opinion/don't remember

5. How was your call handled that day? Did you:

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

- a. Leave a voicemail message **(Pause for response.)** **(Skip to question 6.)**
- b. Speak to an agent **(Pause for response.)** **(Skip to question 9.)**
- c. Or were you not able to get served that day **(Skip to question 12.)**
- d. Don't know/don't remember **(Do not read.)** **(Skip to question 18.)**

Questions 6 - 8 only apply to callers who left a voice mail message.

6. When you left your message on voice mail, did you ask someone to call you back?

(Do not read responses. Enter one response.)

- a. Yes
- b. No **(Skip to question 18.)**
- c. Don't know/don't remember **(Skip to question 18.)**

7. Did Social Security call you back?

(Do not read responses. Enter one response.)

- a. Yes
- b. No **(Skip to question 18.)**
- c. Don't know/don't remember **(Skip to question 18.)**

8. Did they call you back:

(Read responses. Enter one response.)

- a. The same day
- b. The next work day
- c. Later, but still within about a week, or
- d. Over a week later
- e. Don't know/don't remember ***(Do not read.)***

(All responders to question 8 skip to question 13.)

Questions 9 – 11 only apply to callers who spoke to an agent.

9. Did you enter the name or extension of a particular person or did you just want to speak to the next available agent?

(Do not read responses. Enter one response.)

- a. Entered name or extension of particular agent
- b. Went to next available agent
- c. Don't know/don't remember

10. Were you connected immediately to the agent or did you have to wait on hold?

(Do not read responses. Enter one response.)

- a. Connected immediately ***(Skip to question 13.)***
- b. Waited on hold
- c. Don't know/don't remember ***(Skip to question 13.)***

11. How would you rate the amount of time you waited on hold until someone answered your call? Would you rate it 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/no opinion ***(Do not read.)***

(All responders to question 11 skip to question 13.)

Question 12 only applies to callers who weren't served the day of their call.

12. What happened?

(Do not read responses. Enter one response.)

- a. I hung up; decided to end call myself
- b. The phone got disconnected; system hung up on me
- c. Voice mailbox full; unable to leave message; didn't want to leave message
- d. Something else ***(Record response.)***
- e. Don't know/don't remember

(All responders to question 12 skip to question 18.)

Questions 13- 17 only apply to callers who spoke to an agent.

13. Now I'd like to ask you several questions about your satisfaction with the service the agent gave you during your call. First, how would you 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/no opinion ***(Do not read.)***

14. How well would you say the agent knew his/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/no opinion ***(Do not read.)***

15. 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/no opinion ***(Do not read.)***

16. How clear were the explanations the agent gave you? Would you say they 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/no opinion ***(Do not read.)***

17. 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

18. Overall, how would you rate the service you received the day you called the Social Security office? Was it:

(Read rating scale. Enter one response.)

- a. Excellent ***(Skip to question 20.)***
- b. Very good ***(Skip to question 20.)***
- c. Good ***(Skip to question 20.)***
- d. Fair
- e. Poor, or
- f. Very poor
- g. Don't know/no opinion ***(Do not read.) (Skip to question 20.)***

19. Why did you rate the telephone service in this office as *(insert response from question 18)*?

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

- a. Employee never called back/slow to respond
- b. Too hard to get through; wait on hold to get to an agent was too long
- c. Agent didn't answer questions/didn't explain things well
- d. Social Security failed to take the requested action/problem not resolved
- e. Agent was not courteous
- f. Some other reason ***(Record response.)***
- g. Don't know/no opinion

20. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the office on *(insert date from sample file)*. What was the main type of business you called about that day? Please say "yes" or "no" as I read each one. 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 22.)
- e. Medicare, or ***(Pause for response.) (Skip to question 22.)***
- f. Some other business ***(Record response.) (Skip to question 22.)***
- g. Don't know/don't remember ***(Do not read.) (Skip to question 22.)***

21. 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 20 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.)***

22. Before you called the office, 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 25.)***
- c. Don’t know/don’t remember ***(Skip to question 25.)***

23. What did you do? Did you:

(Read responses. Enter all that apply.)

- a. Call Social Security’s National 800 number
- 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 25.)***
- e. Don’t know/don’t remember ***(Do not read.) (Skip to question 25.)***

24. Social Security would like to know why you weren't able to take care of your business that way? What happened?

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

- a. Couldn't get through to the National 800 number
- 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. Tried to file an application online, but I do not have a *my Social Security account*
- i. Social Security needed additional information or documents
- j. Social Security failed to take requested action; problem not resolved
- k. Some other reason **(Record response.)**
- l. Don't know/don't remember

25. 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/no opinion **(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.]

26. I'd like to ask you a few questions about doing Social Security 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 38.)**

27. Social Security offers a service called **my Social Security** where people can create a secure online account with a user name and password to conduct various types of business. For example, people who receive benefits can use it to change their address. Have you already created your **my Social Security** online account?

(Do not read responses. Enter one response.)

a. Yes

(Skip to question 30.)

b. No

28. Do you plan to create a **my Social Security** online account?

(Do not read responses. Enter one response.)

a. Yes

(Skip to question 34.)

b. No

c. Don't know

(Skip to question 37.)

29. What is the **main** reason you do not plan to create a **my Social Security** account?

(Do not read responses. Enter one response.)

a. Prefer to speak to a person

b. Concerned about security or privacy of my information

c. Problem with computer or Internet access

d. Concerned that completing my business online might be too hard, complicated

e. Some other reason **(Record response.)**

(All responders to question 29 skip to question 37.)

30. Have you used your **my Social Security** online account?

(Do not read responses. Enter one response.)

a. Yes

b. No **(Skip to question 34.)**

31. What have you used your *my Social Security* online account for?

(Read responses. Enter all that apply.)

- a. Requested a replacement Social Security card
- b. Checked the status of an application or appeal
- c. Filed an application for benefits
- d. Got my Social Security Statement
- e. Got my benefit verification letter
- f. Reported my wages
- g. Changed my address or phone number
- h. Started or changed direct deposit of my benefit payment
- i. Requested a replacement Medicare card
- j. Got a replacement SSA-1099 or SSA-104S for tax season
- k. Don't know/don't remember ***(Do not read.) (Skip to question 34.)***

32. Were you able to complete your business using your *my Social Security* online account?

(Do not read responses. Enter one response.)

- a. Yes ***(Skip to question 34.)***
- b. No

33. Why were you not able to complete your business using your *my Social Security* online account? ***(Record response.)***

34. Do you plan to use your *my Social Security* online account for future business?

(Do not read responses. Enter one response.)

- a. Yes
- b. No ***(Skip to question 36.)***

35. What do you plan to use your *my Social Security* online account for?

(Read responses. Enter all that apply.)

- a. Request a replacement Social Security
- b. Check the status of an application or appeal
- c. Get my Social Security Statement
- d. Get my benefit verification letter
- e. Report my wages
- f. Change my address or phone number
- g. Start or change direct deposit of my benefit payment
- h. Request a replacement Medicare card
- i. Get a replacement SSA-1099 or SSA-104S for tax season

(All responders to question 35 skip to question 38.)

36. Why won't you use your *my Social Security* online account for future business?

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

- a. It's easier to understand things explained by a person
- b. I can get questions answered right away by a person
- c. I am concerned about security or privacy of my information
- d. My computer is too old/Internet service is too slow
- e. I don't have the necessary computer skills or experience
- f. I am concerned it might be too hard or complicated
- g. Some other reason ***(Record response.)***

37. What do you plan to do instead of using your *my Social Security* online account for future business?

- a. Call the National 800 Number
- b. Call a local office
- c. Visit a local office

38. We would like to know a little more about you. First, do you own a cell phone?

(Do not read responses. Enter one response.)

- a. Yes
- b. No

(Skip to question 40.)

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

(Do not read responses. Enter one response.)

- a. Yes
- b. No

40. What is your age group? Are you:

(Read responses. Enter one response.)

- a. Under age 30
- b. Age 30 to 49
- c. Age 50 to 64
- d. Age 65 to 74
- e. Age 75 or older
- f. Declined to answer ***(Do not read.)***

CONCLUSION: That concludes the questions I had for you today.

Read: Social Security estimated that this survey would take less than 10 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. You may send comments on this 10-minute time estimate to: *Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.*

If no, go to closing.

CLOSING: Thank you for taking the time to be in this survey. Have a good day (afternoon/evening).