Appendix A: Initial Contact Scripts for Occupational Selection Test Respondents
Securing Appointment Script: Previous ORS Respondent (sample group 703 or 702)

Hello, my name is *[name]*, and I'm calling from the Bureau of Labor Statistics.

You may recall you were contacted previously by *[previous FE]* on *[approximate date of contact – e.g., last March, earlier this year, etc.]* to discuss vocational, physical, environmental, and cognitive demands of a few of your organization's jobs at XXXX location. We collect this data to help the Social Security Administration make better decisions about workers who are applying for disability. We all may know someone who suffers from a disability and we ourselves may one day need it. Therefore, we want to ensure we have the most up-to-date data on occupations within our national economy.

First, I want to thank *[you/your company]* for helping us with this important research. Do you mind if a note taker joins us for the call? [Note taker name] will joining as part of [his/her] skill development and will assist me in capturing the information you provide.

I'm contacting you today because we're testing what we hope is a better way of selecting jobs for the survey. I won't be asking a lot of questions. I have a list of types of jobs, and I'd like to ask you if any of these exist at your company. If any do, I'd like to briefly talk about the primary responsibilities of the jobs. We're aiming to identify [4/6/8] distinct jobs at your organization. I would really appreciate your feedback throughout the process, so we can learn how well this approach works and if it's easy for you to understand.

This call will take no longer than [45/60] minutes, but it might be easier if you have a list of all the jobs at [Sampled Location] to look through while we speak. The list would ideally include job titles as well as any distinctions that your company makes for your workers such as full-versus part-time status. If you're willing to share the list with me, I might be able to move more quickly through the selection process by looking at it before our discussion and identifying some jobs we may want to talk about. We can stop whenever you need to. Do you have time to help us out now? When would be a better time for me to call you back?

This study is being conducted for internal research only. The BLS will use the information you provide for statistical purposes only and takes rigorous security measures to protect confidential information to the fullest extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form

without your informed consent. The OMB clearance number for this voluntary collection is 1220-0141. BLS could not conduct this survey without a currently valid OMB control number.

Key Points that <u>must be shared</u> with the participant:
- Prior participation
- Study background, purpose and use *(internal research and statistical purposes only)*
- Establishment-specific details- Location
- Appointment duration
- Confidentiality Pledge
- Voluntary Nature of Survey
- Note-taker, if present
- OMB Approval for the Study

Securing Appointment Script: New Respondent (who did not participate in ORS702/703 interview)

Hello, my name is *[name]*, and I'm calling from the Bureau of Labor Statistics. I'm calling because your organization was chosen to participate in a study of occupational requirements that we're conducting on behalf of the Social Security Administration. We're working to collect data for SSA to use in its disability determination process. Your colleague, [Name of ORS702/703 respondent] assisted us last year with information about several jobs at XXXX location.

I'm contacting you today to ask for your continued assistance and to thank you for your company's previous commitment to this important study. Do you mind if a note taker joins us for the call? [Note taker name] will joining as part of [his/her] skill development and will assist me in capturing the information you provide.

In our previous contact with [company name], we talked with [ORS702/703 respondent] to select a few jobs at XXXX location and talked about the primary responsibilities of those jobs. We are now testing a new way of selecting jobs for the survey and we need feedback from our respondents, like yourself, to learn whether this new approach is working and is easy to use. In our new approach, I have a list of types of jobs, and I'd like to ask you if any of these exist at your company. If any do, I'd like to briefly talk about the primary responsibilities of the jobs. We're aiming to identify [4/6/8] distinct jobs at your organization. I would also appreciate your

feedback throughout the process and will have a couple of quick questions for you at the end about how we can improve the process for you.

The call will take no longer than [45/60] minutes, but it might be easier if you have a list of all the jobs at [Sampled Location] to look through while we speak. The list would ideally include job titles as well as any distinctions that your company makes for your workers such as full-versus part-time status. If you're willing to share the list with me, I might be able to move more quickly through the selection process by looking at it before our discussion and identifying some jobs we may want to talk about. We can stop whenever you need to. Do you have time to help us out now? When would be a better time for me to call you back?

The study is being conducted for internal research only. The BLS will use the information you provide for statistical purposes only and takes rigorous security measures to protect confidential information to the fullest extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act of 2002 (Title 5 of Public Law 107-347) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. The OMB clearance number for this voluntary collection is 1220-0141. BLS could not conduct this survey without a currently valid OMB control number.

Key Points that <u>must be shared</u> with the participant:
- Overview of ORS
- Prior participation
- Study background, purpose and use *(internal research and statistical purposes only)*
- Establishment-specific details -Location
- Appointment duration
- Confidentiality Pledge
- Voluntary Nature of Survey
- Note-taker, if present
- OMB Approval for the Study

Appendix B: Interview Scripts for Occupational Selection

Throughout the interview, the interviewer will ask probing questions when the information received is vague, incomplete or if the respondent's comments warrant additional probing.

For establishments with OES-reported job titles:

1) (Optional). Can you provide a list of all jobs at your company? The list would ideally include job titles as well as any distinctions that your company makes for your workers such as full- versus part-time status. If so, that may help speed up our selection process. If not, we can proceed without it.
   - If job list was already received prior to interview, interviewer would remind participant that the interviewer will be looking at the list and referring to it.
   - If asked for in initial contact, the interviewer would ask the participant if they were able to get a list and to remind them it may be useful to have in front of them.

   Repeat the following series of questions for each supplied target SOC. Once the goal number of targets is reached (4/6/8 based on establishment size), move to debrief questions:

2) Your company previously reported to the Bureau of Labor Statistics that you have [OES-reported job title] at this company. Do you currently have any employees in that position?
   - No – move to question 3
   - Yes – skip to question 6
3) Do you have anyone in the company who [SOC manual definition of target]?
   (For example: 13-2011 Accountants and Auditors manual definition in SOC 2010 "Examine, analyze, and interpret accounting records to prepare financial statements, give advice, or audit and evaluate statements prepared by others.")
   - No –repeat question 2 using the next target. If the answer is no for question 2 and question 3 for all targets, go to the job list provided in question 1 to randomly select the goal number (4/6/8 based on establishment size).
   - Yes - move to question 4
   - Maybe – Ask probing questions to determine whether company's job fits within the target.
     o If no, repeat question 2 using the next target.
     o If yes, move to question 4.
4) Do you have more than one job that fits that description?
   - Yes - move to question 5
   - No – skip to question 6

5) Can you list all the job titles that you feel fit into this category?
6) Does this job title(s) have full time and part time employees?
   - Yes
   - No
7) Are there any other differences in work schedules?
   - Yes
   - No
8) Are there any other distinctions that separate the employees into different categories?

   Ask probing questions to obtain enough information to be able to select one job title/worker characteristic combination that is narrowly defined and appropriate for ORS collection The ORS coded characteristics are full-/part-time, union/nonunion, time/incentive, and specific vocational preparation/leveling (which will vary if junior/senior, team lead/non-lead distinctions exist).

   Do you separate employees into:
   - union and nonunion workers   Yes   No
   - time based versus incentive based   Yes   No
   - junior and senior distinctions   Yes   No
   - team lead versus non-lead workers   Yes   No

9) How many employees do you have in this position, [selected job title/worker characteristic combination]?
10) What are the most important tasks this position, [selected job title/worker characteristic combination], does for your organization?
    o Obtain critical task list, then go back to question 2 using the next target.

For all other establishments:
1) (Optional). Can you provide a list of all jobs at your company? If so, that may help speed up our selection process. If not, we can proceed without it.
   If job list was already received prior to interview, interview would remind participant that they are looking at the list.
   If asked for in initial contact, the interviewer would ask the participant if they were able to get a list and to remind them it may be useful to have in front of them.

Repeat the following series of questions for each supplied target SOC. Once the goal number of targets is reached (4/6/8 based on establishment size), move to debrief questions:
2) Do you have anyone in the company who [SOC manual definition of target]?
   (For example: 13-2011 Accountants and Auditors manual definition in SOC 2010 "Examine, analyze, and interpret accounting records to prepare financial statements, give advice, or audit and evaluate statements prepared by others.")

- No –repeat question 2 using the next target. If the answer is no for all targets, go to the job list provided in question 1 to randomly select the goal number (4/6/8 based on establishment size).
- Yes - move to question 3
- Maybe – Ask probing questions to determine whether company's job fits within the target.
  - o If no, repeat question 2 using the next target.
  - o If yes, move to question 3.

3) Do you have more than one job that fits that description?
- No – skip to question 5
- Yes - move to question 4

4) Can you list all the job titles that you feel fit into this category?

5) Do these job titles have full time and part time employees?
- Yes
- No

6) Are there any other differences in work schedules?
- Yes
- No

7) Are there any other distinctions that separate the employees into different categories?

Ask probing questions to obtain enough information to be able to select one job title/worker characteristic combination that is narrowly defined and appropriate for ORS collection. The ORS coded characteristics are full-/part-time, union/nonunion, time/incentive, and specific vocational preparation/leveling (which will vary if junior/senior, team lead/non-lead distinctions exist).

Do you separate employees into:
- union and nonunion workers   Yes   No
- time based versus incentive based   Yes   No
- junior and senior distinctions   Yes   No
- team lead versus non-lead workers   Yes   No

8) How many employees do you have in this position, [selected job title/worker characteristic combination]?

9) What are the most important tasks this position, [selected job title/worker characteristic combination], does for your organization?
  - o Obtain critical task list, then go back to question 2 using the next target.

Debriefing Questions for all respondents:

- Would you say the process of identifying jobs for the survey was easy or difficult?
  - Easy
  - Difficult - If difficult then ask: Tell me more about what you found difficult
- Now that you've been through the selection process with me, is there anything I could have done or said beforehand that would make the process easier or quicker for you?
  - If used a job list: Do you think providing me the job list was useful in this process?
    - Yes – If yes: How so?
    - No
  - If didn't ask the participant for a job list: If I had asked you to get a job list for our call, do you think it would have been helpful?
    - Yes – If yes: How so?
    - No
- How comfortable do you feel that the jobs we selected together fall within our stated target of the kinds of jobs we were looking for?
- Do you remember the job selection process we used last year,?
  - Yes – If yes: How does this job selection process compare?
  - No
- Do you have any other comments or thoughts?