



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
Washington, DC 20415

Retirement Services

A Message from the Associate Director of Retirement Services

Dear Friend:

The U.S. Office of Personnel Management serves over 2.7 million federal annuitants and survivor annuitants. We work to provide our customers with high quality retirement benefit services. These benefits were earned through service to your country. OPM strives to provide services that match the commitment you made to public service.

This survey collects feedback on satisfaction with our retirement program products and services. We are asking federal annuitants and survivor annuitants to participate in this survey who on or after October 1, 2016; 1) contacted OPM Retirement Services for customer service regarding their retirement account, or 2) applied for and began receiving retirement annuity benefits from OPM Retirement Services. Your participation is voluntary; any information you provide will be kept confidential. This information will help us determine service areas that need improvement.

We will report the survey results to the President, Congress, and our own staff so they can assess how we are meeting our goals and carrying out our mission: Recruiting, Retaining, and Honoring a World-Class Workforce to Serve the American People. One way we do this is by maintaining a world-class benefits program. Your participation in this survey will help us build the workforce and achieve our mission. This means you continue to serve your country, and for that, we thank you.

Sincerely,

Kenneth Zawodny
Associate Director
Retirement Services

To take the survey, click on: %URL%

Recruit, Retain and Honor a World-Class Workforce to Serve the American People

U.S. Office of Personnel Management Retirement Services FY 2017 Customer Satisfaction Survey

Purpose of this Survey

Every year the Office of Personnel Management (OPM) sets new goals for improving the retirement services we provide to Federal annuitants. To reflect how well we meet these goals, our survey focuses on retirees who had a transaction with us during the last year (*from October 1, 2016*). This includes **Long-Time Retirees** (*retired before October 1, 2016*) who contacted us for service regarding their retirement accounts, and **New Retirees** (*retired on or after October 1, 2016*) who initially applied for retirement benefits or contacted us for service regarding their new accounts.

Instructions

Please read the instructions **carefully**. Some questions may not pertain to you; please mark these with the “*No Basis to Judge*” response. For most of the questions, you will mark only one response, but a few questions noted as “*Mark ALL that apply*” allow for multiple responses. The last section of this survey is for New Retirees; Long-Time Retirees should not answer questions in the last section. **If you need to stop doing the survey but plan to complete it later, click on *Save*. You can continue the survey by clicking on your original link. It will take you to the beginning of the survey, and you can page your way back to the point at which you left off. When you have completed the survey, click on the *Submit* button on the last page.**

Please **complete the questionnaire within 14 days of receiving email notice.**

Questions

If you have questions about this survey, we will be happy to help you. **Please email** us at: mib_survey@opm.gov.

Questions about your retirement claim or benefits should be directed to our Retirement Information Office at our toll-free number: 1-888-767-6738. You can also visit us at our Web site: www.opm.gov/retirement-services.

Frequently asked questions about the Customer Satisfaction Survey

What is the cost of doing the survey?

Costs are about \$4,000. This is mostly a one-person task, with a GS-13 program analyst devoting about five percent of annual staff hours to producing the survey and analyzing the results.

How is the validity of the survey results assured?

The survey results are subject to random audits by OPM's Office of the Inspector General.

Public Burden Statement

We estimate providing this information takes an average 25 minutes per survey, including the time for reviewing instructions, getting the needed data, and reviewing the requested information. Send comments regarding our estimate or any other aspect of this survey, including suggestions for reducing completion time, to the U.S. Office of Personnel Management, Retirement Services Publications Team (3206-0236), Washington, DC 20415-0001. The OMB Number, 3206-0236, is currently valid. OPM may not collect information, and you are not required to respond, unless this number is displayed.

Privacy Act Statement

In accordance with Public Law 93-579 (Privacy Act of 1974), the providing of personal information is completely voluntary. Collection of this information is authorized by Sections 1002, 3301, and 3304 of Title 5, U.S. Code.

Your responses to this survey are voluntary and there is no penalty for not responding. However, maximum participation is encouraged so that the data will be complete and representative.

The principal purpose in collecting this information is to study and report attitudes and perceptions of Federal annuitants regarding the retirement services provided to them by the U.S. Office of Personnel Management (OPM). Your responses will be used to improve these services.

Only OPM staff involved in collecting or preparing this information for analysis will have access to completed surveys. The information you provide will be analyzed and reported for the whole Federal annuitant population.

In any public release of survey results, no data will be disclosed that could be used to identify specific individuals and your individual responses will be treated confidentially.

Customer Satisfaction Survey

When answering the following questions, refer only to your monthly Federal annuitant or survivor annuitant payments and your experiences since October 1, 2016.

Long-Time and New Retirees

Whether you retired many years ago or just recently, and if you contacted us for service or information on your Federal retirement account on or after October 1, 2016, please answer the following questions regarding how well OPM Retirement Services served you.

Contacting Retirement Services

1. Did you have a transaction with Retirement Services since October 1, 2016 (completed the retirement claims process or contacted us for service on your existing retirement account)?

Yes

No

2. How long have you been a customer of OPM Retirement Services (number of years)?

A. Less than 5 years

B. 5 to 10 years

C. Over 10 years

3. Since October 1, 2016, how many times did you contact OPM Retirement Services (telephone, letter, Internet, etc.)?

A. Once

B. Twice

C. Three times

D. Four or more times

E. Not at all

4. It is easy to do business with OPM Retirement Services.

A. Strongly Agree

B. Agree

C. Neither Agree/Disagree

D. Disagree

E. Strongly Disagree

5. Assistance from OPM Retirement Services is provided at a time that is convenient to me (Monday - Friday, 7:40 a.m. to 5:00 p.m. Eastern Standard Time).

A. Strongly Agree

B. Agree

C. Neither Agree/Disagree

D. Disagree

E. Strongly Disagree

F. No Basis to Judge

text deleted

6. What difficulties, if any, have you experienced in trying to find someone in OPM Retirement Services to assist you? (Mark ALL that apply)

- A. No difficulties
- B. Telephone rang without answer or stayed busy
- C. Phone messages not returned
- D. Phone calls transferred multiple times
- E. Left on hold for a long time on the phone
- F. Automated phone service difficult to use
- G. E-mail was not answered
- H. Letters not answered in a timely manner
- I. Letters not answered
- J. I have not tried to find someone
- K. Other (specify):

7. How do you usually request OPM Retirement Services information, services, or products? (Mark only ONE response)

- A. Telephone
- B. E-mail
- C. Internet
- D. Postal Mail
- E. Services Online

8. How do you prefer to receive OPM Retirement Services information, services, or products? text deleted

- A. Telephone
- B. E-mail
- C. Internet
- D. Postal mail

9. OPM's automated phone system (1-888-767-6738) is easy to use.

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

10. Do you use the Internet?

- A. Yes
- B. No

11. To learn about retirement related services, have you accessed OPM's Web site www.opm.gov/retirement-services since October 1, 2016?

- A. Yes
- B. No

12. Have you accessed OPM's web site www.servicsonline.opm.gov to make an on-line customer service transaction since October 1, 2016?

- A. Yes
- B. No

two questions deleted

13. If you read the OPM Retirement Services blog (Retirement Info Center) (www.opm.gov/Blogs/Retire/index.aspx) since October 1, 2016, was the information useful?

- A. Yes
- B. Not sure
- C. No
- D. Did not read

14. If you viewed OPM Retirement Services Informational videos at www.opm.gov/retirement-services since October 1, 2016, was the information useful?

- A. Yes
- B. Not sure
- C. No
- D. Did not view

15. The communications materials I received from OPM Retirement Services were clear and understandable (e.g., letters, written information).

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

16. I am satisfied with the appearance of manuals, brochures, reports, and other communications materials (e.g., OPM Retirement Services Website, account statements) prepared by OPM Retirement Services.

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

Overall Satisfaction

17. OPM Retirement Services personnel are courteous.

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

18. OPM Retirement Services personnel are knowledgeable.

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

19. **OPM Retirement Services personnel are able to clearly explain their products and services.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

20. **OPM Retirement Services provided timely responses to the inquiries I sent on or after October 1, 2016.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

21. **OPM Retirement Services personnel give me accurate information.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

22. **After you retired, OPM Retirement Services personnel kept accurate records of your retirement account.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

23. **OPM Retirement Services personnel provide services when promised.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

24. **Problems and complaints are resolved quickly by OPM Retirement Services personnel.**

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree
- F. No Basis to Judge

25. Since October 1, 2016, I experienced a customer service problem with my annuity account in the following areas: (Mark ALL that apply).

- A. Initial application for retirement benefits
- B. Initial application claim for survivor benefits
- C. Allotment
- D. Cost of living increase
- E. Federal tax withholding
- F. State tax withholding
- G. Change in health benefits plans or options
- H. Change in life insurance options
- I. Change in mailing address
- J. Direct deposit of annuity payment
- K. Adjust annuity after change in marital status
- L. I have not experienced a problem
- M. Other (specify):

26. If you applied for survivor annuitant benefits on or after October 1, 2016, as the result of the death of a Federal retiree, how satisfied were you with the assistance you received from OPM Retirement Services in filing the paperwork needed to obtain benefits?

- A. Very Satisfied
- B. Satisfied
- C. Neither Dissatisfied/Satisfied
- D. Dissatisfied
- E. Very Dissatisfied
- F. No Basis to Judge

27. Overall, how satisfied are you with the services you received from OPM Retirement Services since October 1, 2016?

- A. Very Satisfied
- B. Satisfied
- C. Neither Dissatisfied/Satisfied
- D. Dissatisfied
- E. Very Dissatisfied

Long-Time Retirees have no further questions to answer. Thank you for answering these questions. We appreciate your participation. *New Retirees* (retired on or after October 1, 2016) should continue to answer the following questions.

New Retirees Only - Please Continue with the Survey

If you retired from Federal service on or after October 1, 2016, please answer the following questions regarding how well OPM and your agency served you during your initial retirement process.

Long-Time retirees (retired before October 1, 2016) should not answer these final questions.

Please select whether you are a long-time or new retiree.

New Retiree

Long-Time Retiree

Satisfaction with Retirement Services

28. In most cases, Interim Payments are paid until an applicant's annuity claim is processed and regular payments begin. Was this the case for your initial annuity claim?

A. Yes

B. Not Sure

C. No

29. After your Interim Payments ended, was your first regular retirement check computed correctly?

A. Yes, it was correct

B. Not sure

C. No, it was not correct

30. When you applied for retirement benefits, how satisfied were you with how well OPM Retirement Services handled all aspects of your retirement claim?

A. Very Satisfied

B. Satisfied

C. Neither Dissatisfied/Satisfied

D. Dissatisfied

E. Very Dissatisfied

31. OPM Retirement Services provided me with useful information regarding my retirement.

A. Strongly Agree

B. Agree

C. Neither Agree/Disagree

D. Disagree

E. Strongly Disagree

F. No Basis to Judge

Satisfaction with Your Agency Actions

32. Were you offered retirement counseling?

A. Yes

B. Not sure

C. No

33. Did you take retirement counseling?

A. Yes

B. Not sure

C. No

34. **At what point in your Federal career did your agency offer counseling or training about retirement planning? (Mark ALL that apply)**
- A. New employee orientation
 - B. Mid-career
 - C. Annual training open to all employees
 - D. More than 3 years before retirement
 - E. 1 to 3 years before retirement
 - F. Less than 1 year before retirement
 - G. Agency did not provide retirement counseling/training
 - H. Not sure
35. **What did the counseling cover? (Mark ALL that apply)**
- A. I did not receive retirement counseling
 - B. Overview of retirement benefits
 - C. Amount of annuity
 - D. Survivor benefits
 - E. Health insurance benefits
 - F. Life insurance benefits
 - G. Social Security benefits
 - H. Thrift Savings Plan
 - I. Taxes
 - J. Long Term Care
 - K. Need for retirement savings
 - L. How to calculate savings needed for retirement
 - M. Retirement life style
 - N. Setting retirement goals

36. **How satisfied were you that the information from your agency was accurate?**
- A. Very Satisfied
 - B. Satisfied
 - C. Neither Satisfied/Dissatisfied
 - D. Dissatisfied
 - E. Very Dissatisfied
 - F. No Basis to Judge
37. **How satisfied were you with how your agency helped you take appropriate actions (e.g., submitting retirement forms, decisions on health/life insurance, etc.)?**
- A. Very Satisfied
 - B. Satisfied
 - C. Neither Satisfied/Dissatisfied
 - D. Dissatisfied
 - E. Very Dissatisfied
 - F. No Basis to Judge
38. **How satisfied were you with how your agency helped you learn what to expect after you retired (e.g., how long until annuity payments begin, tax withholding, etc.)?**
- A. Very Satisfied
 - B. Satisfied
 - C. Neither Satisfied/Dissatisfied
 - D. Dissatisfied
 - E. Very Dissatisfied
 - F. No Basis to Judge

39. **How did your agency's estimate of your annuity compare to the annuity computed by OPM?**

- A. Estimate was close to or same as OPM's
- B. Estimate was significantly different from OPM's
- C. Did not receive estimate from my agency
- D. Not sure

40. **Which of the following describes how you planned your retirement? (Mark ALL that apply)**

- A. Attended agency training
- B. Used agency provided resources
- C. Received individual counseling
- D. Used outside sources
- E. Did not plan for my retirement
- F. Not sure