

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

# 2018 Customer Satisfaction Survey

*Survey is conducted electronically*





UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

Retirement Services

**SUBJECT:** *FY 2018 OPM Retirement Services Customer Satisfaction Survey*

**A Message from the Associate Director of OPM Retirement Services**

Dear Friend:

The U.S. Office of Personnel Management (OPM) is responsible for administering the Civil Service Retirement System and the Federal Employees Retirement System, serving over 2.6 million federal annuitants and survivor annuitants who receive monthly annuity payments. In addition to adjudicating retirement cases, OPM serves you by making address changes or tax status changes to accounts, sending out 1099-Rs, surveying certain customers to ensure their continued eligibility to receive benefits, and doing many other customer service activities on your behalf.

This survey collects feedback about how well we provide these services. We are asking federal annuitants and survivor annuitants to participate in this survey who on or after October 1, 2017:

- 1) Contacted OPM Retirement Services for customer service regarding their retirement account, or
- 2) Applied for and began receiving retirement annuity benefits (or survivor benefits) from OPM Retirement Services.

You may have participated in this survey last year; if you contacted us on or after October 1, 2017 you can also participate in this survey. Your participation is voluntary; any information you provide will be kept confidential.

Our Strategic Goal for 2018-22 calls for us to improve retirement services by reducing the average time to answer calls to 5 minutes or less and achieve an average case processing time of 60 days or less. The information you provide will help us determine how we can best meet these goals as well as determine other retirement benefit service areas that need improvement.

OPM will report the survey results to the President, Congress, and our staff to assess how well we meet our goals and serve our customers. We look forward to continuing to serve you. Thank you for contributing your valuable time to participate in this survey.

Sincerely,

A handwritten signature in black ink that reads "Kenneth Zawodny, Jr." with a stylized flourish at the end.

Kenneth Zawodny  
Associate Director  
Retirement Services

***To take the survey, click on: %URL%***

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

# **U.S. Office of Personnel Management Retirement Services FY 2018 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, 2017*). This includes **Long-Time Retirees** (*retired before October 1, 2017*) who contacted us for service regarding their retirement accounts, and **New Retirees** (*retired on or after October 1, 2017*) 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, if so, select “*No Basis to Judge*” response. For most of the questions, you will select only one response, but some questions noted as “*Select 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 the 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](mailto: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](http://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, unless this number is displayed.

## Privacy Act Statement

Pursuant to Public Law 93-579, this Privacy Act Statement serves to inform you of why OPM is requesting the information on this survey. **Authority:** OPM is authorized to collect the information requested on RI 10-72 pursuant to Title 5, U.S CFR, Sections 1002, 3301 and 3304, which discuss the principal purpose in collecting this information. **Purpose:** 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 OPM. Your responses will be used to improve these services. **Routine Uses:** 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. **Consequences of Failure to Provide Information:** Your response to this survey is voluntary and there is no penalty for not responding. However, maximum participation is encouraged so that the data will be complete and representative.

# 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, 2017.

## 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, 2017, 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, 2017 (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, 2017, 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

6. What difficulties, if any, have you experienced in trying to find someone in OPM Retirement Services to assist you? (*Select 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*):

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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?

- 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](http://www.opm.gov/retirement-services) since October 1, 2017?

- A. Yes
- B. No

12. Have you accessed OPM's web site [www.serviceline.opm.gov](http://www.serviceline.opm.gov) to make an on-line customer service transaction since October 1, 2017?

- A. Yes
- B. No



13. If you read the OPM Retirement Services blog (Retirement Info Center) ([www.opm.gov/Blogs/Retire/index.aspx](http://www.opm.gov/Blogs/Retire/index.aspx)) since October 1, 2017, 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](http://www.opm.gov/retirement-services) since October 1, 2017, 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, 2017.**

- 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, 2017, I experienced a customer service problem with my annuity account in the following areas: (Select 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):

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26. If you applied for survivor annuitant benefits on or after October 1, 2017, 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, 2017?

- 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, 2017) 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, 2017, 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, 2017) 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 by your agency?

- A. Yes
- B. Not sure
- C. No

33. Did you take retirement counseling offered by your agency?

- 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? (Select 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? (Select 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? (Select 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



**U.S. Office of Personnel Management**

Retirement Services

1900 E Street, NW, Washington, DC 20415

**MIB\_SURVEY@OPM.GOV**

Form Approved  
OMB Number: 3206-0236

RI 10-72  
Revised August 2018  
Previous editions are not usable

RS-02579-08/2018