

## Questionnaire Management Guidelines

### Goals:

- One consolidated document to track all model and CQ changes throughout the life of the project
- Questionnaire always matches the live survey
- Easy and error-free way to submit CQ changes
- All changes tracked and reflected in one document (DOT will help)

### Questionnaire Resources:

- 1 [Questionnaire Design and Approval Process](#)
- 2 [Question Grouping Rules](#)
- 3 [OPS vs. Skip Logic Decision for "Other, Please Specify"](#)
- 4 [Foreign Language Survey Instructions](#)



Model Instance Name:

OPM Retirement Services

MID: oV1c4VN9RAEkgIB9xAFY5w4C

Date: 4/30/2013

INVITATION TEXT IS HOSTED ON OPM APPLICATION AT LOGOUT PAGE. Should read:

Thank you for visiting Services Online. You are invited to take part in a brief survey to let us know what we are doing well and where we can improve. The following survey is estimated to take about 3-5 minutes to complete. Please click on the link below and take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.



[STATIC LINK EMBEDDED HERE]

The information you provide is confidential and will be used only to evaluate the Services Online website. Send comments regarding our time estimate (3-5 minutes) or any other aspect of this information collection, including suggestions for reducing completion time, to the Office of Personnel Management, Retirement Services Programs (OMB# 1090-0008), 1900 E. Street N.W., Washington DC 20415-3500.

### Welcome and Thank You Text

**Directions:**

This welcome text is shown at the top of the questionnaire window and the thank you text at the bottom. This is a good place to mention the site/company/agency name so the visitor knows whom they are taking the survey for. Feel free to modify the standard Welcome and Thank you text shown in the boxes below.

**Welcome Text**

Thank you for visiting our site. We would like your feedback so that we improve our services to meet your needs.

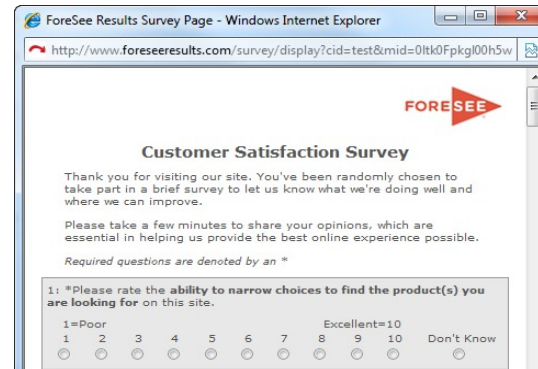
**DEFAULT Thank You Text**

Thank you for taking our survey and for helping us serve you better. We appreciate your input!

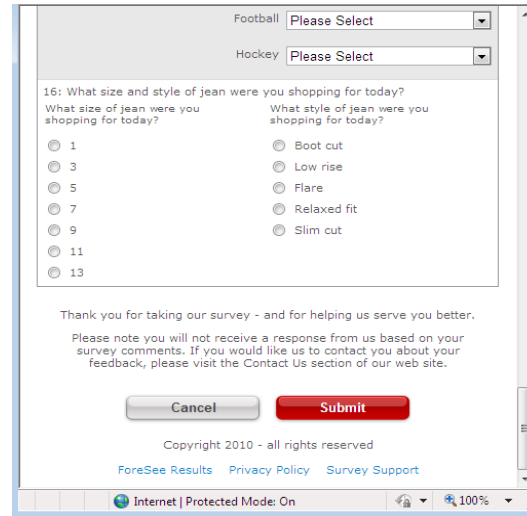
**ALTERNATE WEB Thank You Text**

### Examples

#### Welcome Text Example



#### Thank You Text Example



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Partitioned (Y/N)? Yes

Date: 4/30/2013



OPM Retirement Services

ELEMENTS (drivers of satisfaction)		CUSTOMER SATISFACTION	FUTURE BEHAVIORS	
MO Label			MO Label	
1	Content - Accuracy Please rate your perception of the <b>accuracy of information</b> on this site.	19 What is your <b>overall satisfaction</b> with this site? (1=Very Dissatisfied, 10=Very Satisfied)	22	Return How likely are you to <b>return to this site</b> ?
2	Content - Quality Please rate the <b>quality of information</b> on this site.	20 How well does this site <b>meet your expectations</b> ? (1= Falls Short, 10=Exceeds)		Recommend (1=Very Unlikely, 10=Very Likely)
3	Content - Freshness Please rate the <b>freshness of content</b> on this site.	21 How does this site <b>compare to your idea of an ideal website</b> ? (1=Not Very Close, 10=Very Close)	23	Recommend How likely are you to <b>recommend this site</b> to someone else?
4	Functionality - Usefulness Please rate the <b>usefulness of the website tools provided</b> on this site.		24	Increase Usage (1=Very Unlikely, 10=Very Likely) How likely are you to <b>increase your online interaction</b> with OPM Retirement Services in the next year?
5	Functionality - Convenient Please rate the <b>convenient placement of the website tools</b> on this site.			
6	Functionality - Variety Please rate the <b>variety of website tools</b> on this site.			
7	Navigation - Organized Please rate <b>how well the site is organized</b> .			
8	Navigation - Options Please rate the <b>options available for navigating</b> this site.			
9	Navigation - Layout Please rate <b>how well the site layout helps you find what you are looking for</b> .			
10	Look and Feel - Appeal Please rate the <b>visual appeal</b> of this site.			
11	Look and Feel - Balance Please rate the <b>balance of graphics and text</b> on this site.			
12	Look and Feel - Readability Please rate the <b>readability of the pages</b> on this site.			
13	Tasks/Transactions - Simplicity Please rate the <b>simplicity of the process for completing task(s)</b> on this site.			
14	Tasks/Transactions - Instructions Please rate the <b>clarity of instructions for completing task(s)</b> on this site.			
15	Tasks/Transactions - Verification Please rate the <b>verification of task completion</b> on this site.			
16	Site Performance - Loading Please rate how <b>quickly pages load</b> on this site.			
17	Site Performance - Consistency Please rate the <b>consistency of speed from page to page</b> on this site.			
18	Site Performance - Errors Please rate the <b>ability to load pages without getting error messages</b> on this site.			

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underlined & italicized: RE-ORDER  
 pink: ADDITION  
 blue + -->: REWORDING

OPM Retirement Services CUSTOM QUESTION LIST

QID	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label
		What is your primary reason for visiting the site today?	View annuity statement View case status while in interim pay View life insurance information Start/stop allotments (personal or organizational) Change Federal/State Income Tax withholding options View/Print/Request duplicate Form 1099-R Sign up or make changes to Direct Deposit Change mailing address Change email address Change password Sign in to keep password active <del>To set up access to the site for the first time</del> Other, please specify:		Radio button, one-up vertical	single	Y	Skip Logic Group*	Primary Reason
	B	Please specify your other primary reason for visiting the site today:			Text area, no char limit		N	Skip Logic Group*	OE_Primary Reason
		Did you accomplish what you wanted to do today on this site?	Yes No		Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
	A	Please tell us why you were unable to accomplish your task today.			Text area, no char limit	single	N	Skip Logic Group*	OE_Not Accomplish
		What is your primary role in visiting the site today?	Retiree Survivor annuitant Ex-spouse of a retiree		Radio button, one-up vertical	single	Y		Role
		Which device do you primarily use to access the OPM Retirement Services website?	Desktop/Laptop Computer Tablet (Amazon Fire, iPad, etc.) Mobile Phone (iPhone, Samsung Galaxy, etc.) Other Not Sure		Radio button, one-up vertical	single	Y		Device
		Have you ever accessed the OPM Retirement Services website via mobile phone or tablet?	Yes No Not Sure		Radio button, one-up vertical	single			Mobile Device
		How often do you visit this site?	<del>This is my first visit</del> Once every 6 months or less often Once every few months Monthly Weekly Daily or more often		Radio button, one-up vertical	single	Y		Visit Frequency

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BJL0710	B	Please specify your other primary reason for visiting the site today:			Text area, no char limit		N	Skip Logic Group*	OE_Primary Reason
BJL0711		Did you accomplish what you wanted to do today on this site?	Yes No	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us why you were unable to accomplish your task today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
COU0318827		Did you have to reset your password before logging in today?	Yes No	A	Radio button, one-up vertical	single	Y	Skip Logic Group*	Password Reset
COU0318828	A	How did you reset your password?	Through the call center Through the website		Radio button, one-up vertical	single	N	Skip Logic Group*	Password Reset Method
BJL0708		Which <b>role best describes</b> your visit to the site today?	Retiree Survivor annuitant Ex-spouse of a retiree		Radio button, one-up vertical	single	Y		Role
JIB0153074		Which device do you primarily use to access the OPM Retirement Services website?	Desktop/Laptop Computer Tablet (Amazon Fire, iPad, etc.) Mobile Phone (iPhone, Samsung Galaxy, etc.) Other Not Sure		Radio button, one-up vertical	single	Y		Device
JIB0153075		Have you ever accessed the OPM Retirement Services website via mobile phone or tablet?	Yes No Not Sure		Radio button, one-up vertical	single	Y		Mobile Device
BJL0707		How often do you visit this site?	This is my first visit Once every 6 months or less often Once every few months Monthly Weekly Daily or more often		Radio button, one-up vertical	single	Y		Visit Frequency
BJL0717		Please provide any <b>additional comments</b> about the OPM Retirement Services website here:			Text area, no char limit		N		OE_Additional Info

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BJL0711		Did you accomplish what you wanted to do today on this site?	Yes No <del>I wasn't looking for anything in particular / I'm just browsing.</del>	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
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BJL0707		How often do you visit this site?	This is my first visit <u>Once every 6 months or less often</u> <u>Once every few months</u> <u>Monthly</u> <u>Weekly</u> <u>Daily or more often</u> <del>Every few months or less often</del> Annually		Radio button, one-up vertical	single	Y		Visit Frequency
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BJL0708		Which <b>role best describes</b> your visit to the site today?	Retiree Survivor annuitant Ex-spouse of a retiree		Radio button, one-up vertical	single	Y		Role
BJL0709		What is your <b>primary reason</b> for visiting the site today?	View annuity statement View case status while in interim pay Start/stop allotments (personal or organizational) Change Federal/State Income Tax withholding options View/Print/Request duplicate Form 1099-R Sign up or make changes to Direct Deposit Change mailing address Change email address Change password Other, please specify:	B	Radio button, one-up vertical	single	Y	Skip Logic Group*	Primary Reason
BJL0710	B	Please specify your other primary reason for visiting the site today:			Text area, no char limit		N	Skip Logic Group*	OE_Primary Reason
BJL0711		Were you <b>able to accomplish</b> the primary reason for your visit today?	Yes No I wasn't looking for anything in particular / I'm just browsing	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
BJL0715		<del>Have you ever accessed OPM Retirement Services using a mobile phone or tablet?</del>	Yes No	H	<del>Radio button, one-up vertical</del>	<del>single</del>	<del>Y</del>	<del>Skip Logic Group*</del>	<del>Mobile Access</del>
BJL0716	H	<del>Would you be interested in accessing OPM Retirement Services with a mobile phone or tablet?</del>	Yes No Don't know		<del>Radio button, one-up vertical</del>	<del>single</del>	<del>Y</del>	<del>Skip Logic Group*</del>	<del>Mobile Interest</del>
BJL0717		Please tell us <b>additional comments</b> you would like to provide.			Text area, no char limit		N		OE_Additional Info

Model Instance Name:  
 OPM Retirement Services  
 MID: oV1c4VN9RAEkgIB9xAFY5w4C  
 Date: 12.5.13

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underlined & italicized: RE-ORDER  
 pink: ADDITION  
 blue + -->: REWORDING

OPM Retirement Services CUSTOM QUESTION LIST

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BJL0711		Were you <b>able to accomplish</b> the primary reason for your visit today?	Yes No I wasn't looking for anything in particular / I'm just browsing		Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
BJL0715		Have you ever <b>accessed</b> OPM Retirement Services <b>using a mobile phone or tablet</b> ?	Yes No		Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Access
BJL0716	H	Would you be <b>interested in accessing</b> OPM Retirement Services <b>with a mobile phone or tablet</b> ?	Yes No Don't know		Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Interest
BJL0717		Please tell us <b>additional comments</b> you would like to provide.			Text area, no char limit		N		OE_Additional Info

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BJL0711		Were you <b>able to accomplish</b> the primary reason for your visit today?	Yes No I wasn't looking for anything in particular / I'm just browsing	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
BJL0713		<del>What type of internet connection do you have?</del>	<del>Broadband / high speed (cable, satellite, DSL) Analogue (dial-up, modem) Mobile broadband Don't know Other, please specify:</del>		<del>Radio button, one-up vertical</del>	<del>single</del>	<del>Y</del>	<del>OPS Group*</del>	<del>Internet Type</del>
BJL0714	G	<del>Please Specify:</del>			<del>Text field, &lt;100 char</del>		<del>N</del>	<del>OPS Group*</del>	<del>OE_Internet Type</del>
BJL0715		Have you ever <b>accessed</b> OPM Retirement Services using a <b>mobile phone or tablet</b> ?	Yes No	H	Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Access
BJL0716	H	Would you be <b>interested in accessing</b> OPM Retirement Services <b>with a mobile phone or tablet</b> ?	Yes No Don't know		Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Interest
BJL0717		Please tell us <b>additional comments</b> you would like to provide.			Text area, no char limit		N		OE_Additional Info



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BJL0710	B	Please specify your other primary reason for visiting the site today:			Text area, no char limit		N	Skip Logic Group*	OE_Primary Reason
BJL0711		Were you <b>able to accomplish</b> the primary reason for your visit today?	Yes No I wasn't looking for anything in particular / I'm just browsing	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
BJL0713		What <b>type of internet connection</b> do you have?	Broadband / high speed (cable, satellite, DSL) Analogue (dial-up, modem) Mobile broadband Don't know Other, please specify:		Radio button, one-up vertical	single	Y	OPS Group*	Internet Type
BJL0714	G	Please Specify:			Text field, <100 char		N	OPS Group*	OE_Internet Type
BJL0715		Have you ever <b>accessed</b> OPM Retirement Services using a <b>mobile phone or tablet</b> ?	Yes No	H	Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Access
BJL0716	H	Would you be <b>interested in accessing</b> OPM Retirement Services <b>with a mobile phone or tablet</b> ?	Yes No Don't know		Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Interest
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Bonnie Richards:  
 Added one answer  
 choice to question,  
 and a minor format  
 edit

OPM Retirement Services CUSTOM QUESTION LIST

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BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
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Model Instance Name:  
 OPM Retirement Services  
 MID: oV1c4VN9RAEkgIB9xAFY5w4C  
 Date: 5.14.13

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OPM Retirement Services CUSTOM QUESTION LIST

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BJL0708		Which <b>role best describes</b> your visit to the site today?	Retiree Survivor Annuitant		Radio button, one-up vertical	single	Y		Role
BJL0709		What is your <b>primary reason</b> for visiting the site today?	View annuity statement View case status while in interim pay Start/stop allotments (personal or organizational) Change Federal/State Income Tax withholding options View/Print/Request duplicate Form 1099-R Sign up or make changes to Direct Deposit Change mailing address Change email address Change password Other, please specify:		Radio button, one-up vertical	single	Y	Skip Logic Group*	Primary Reason
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BJL0711		Were you <b>able to accomplish</b> the primary reason for your visit today?	Yes No I wasn't looking for anything in particular / I'm just browsing	F	Radio button, one-up vertical	single	Y	Skip Logic Group*	Accomplish
BJL0712	F	Please tell us more about what you had trouble doing or finding today.			Text area, no char limit		N	Skip Logic Group*	OE_Not Accomplish
BJL0713		What <b>type of internet connection</b> do you have?	Broadband / high speed (cable, satellite, DSL) Analogue (dial-up, modem) Mobile broadband Don't know Other, please specify:	G	Radio button, one-up vertical	single	Y	OPS Group*	Internet Type
BJL0714	G	Please Specify:			Text field, <100 char		N	OPS Group*	OE_Internet Type
BJL0715		Have you ever <b>accessed</b> OPM Retirement Services <b>using a mobile phone or tablet</b> ?	Yes No	H	Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Access
BJL0716	H	Would you be <b>interested in accessing</b> OPM Retirement Services <b>with a mobile phone or tablet</b> ?	Yes No Don't know		Radio button, one-up vertical	single	Y	Skip Logic Group*	Mobile Interest
BJL0717		Please tell us <b>additional comments</b> you would like to provide.			Text area, no char limit		N		OE_Additional Info