

**DOCUMENTATION FOR THE GENERIC CLEARANCE
OF CUSTOMER SATISFACTION SURVEYS OMB No. 0960-0526**

TITLE OF INFORMATION COLLECTION: Fiscal Year (FY) 2020
my Social Security Office Visitor
Survey

SSA SUB-NUMBER: D-03

DESCRIPTION OF ACTIVITY:

BACKGROUND:

The SSA is trying to determine why some customers who already have a *my Social Security* account chose to visit an office to conduct their business rather than using the electronic services available on our website. The purpose of this survey is to measure satisfaction with the office visit and gather customer satisfaction with and perceptions of the services available through *my Social Security* accounts. SSA will use the results of the survey to help improve the customer experience in the office and online.

SURVEY:

Description of Survey

We will conduct the survey by mail using a scannable questionnaire. The survey includes the following questions that address satisfaction with the online and in-office experience:

- Questions 1-18 ask participants questions about their recent business, what led them to visit a local office, whether they tried to take care of their business online and if so why that didn't work for them, and provides a context for understanding their ratings;
- Questions 19 - 29 solicit ratings of key aspects of the office experience, i.e., staff courtesy, office location, hours, signs and instructions, usefulness of the information provided in the waiting area, office comfort, appearance, privacy, waiting time, whether visitors were able to complete their business in one visit, and satisfaction with the overall service received during the visit.
- Questions 30 - 33 asks participants about their plans to use their *my Social Security* account in the future, what they plan to use it for, and if they don't plan to use it why not and what service delivery channel they would choose instead of using their *my Social Security* account.
- Question 34 asks participants about their willingness to provide personal preferences for service to help Social Security in the future

Statistical Information

Sample Selection

Each month about 300,000 customers who have a **my Social Security** account visit a field office to conduct business. SSA maintains a system that contains the name and address of the **my Social Security** account holders. SSA will match the account holders to another system SSA uses to record office visitors. SSA plans to select two separate samples of 10,000 records for each of the targeted business reasons to achieve a total sample size of 20,000.

Methodology

An SSA-approved contractor will conduct the survey by mail using a scannable questionnaire. We will mail a pre-notification postcard to all sampled individuals advising them to expect the survey questionnaire. Five days later, we will mail the questionnaire to all sampled individuals accompanied by a cover letter explaining the purpose of the survey. We include the Paperwork Reduction Act and the Privacy Act statements in the cover letter. Three weeks later, we will send a follow-up cover letter and another copy of the questionnaire to sampled individuals who have not responded as of that point.

Response Rate

SSA takes the following steps to maximize response rates:

- We mail out a pre-notification postcard to inform sampled individuals that they will soon be invited to participate in the survey, and to be on the lookout for the envelope containing the questionnaire. Using a postcard format allows sampled individuals to quickly see that SSA sanctions the survey. Additionally, the postcard identifies the contractor who is conducting the survey for SSA, which should increase the likelihood that sampled individuals will open the envelope when they receive the questionnaire.
- Within 5 days after sending the pre-notification postcard, we mail the survey questionnaire along with a cover letter encouraging sampled individuals to respond by emphasizing the importance of the survey.
- Three weeks after we send the first questionnaire, we mail a follow-up letter and a duplicate questionnaire to sampled individuals who have not yet responded. We will not send more than one follow-up, because we must obtain perceptions shortly after the customer visits the office to ensure their validity and utility.
- The questionnaire is easy to read and complete. We will design the scannable version for ease of use, e.g., font sizes will be large, and we will not use difficult fill-in bubbles.

- We provide SSA’s toll-free national 800 number so sampled individuals can call if they have any questions.

In other surveys of SSA customers where we used a similar methodology, we achieved response rates ranging from 30 to 50 percent, depending on the nature of the business. This response rate is the highest possible considering that time permits only a limited number of contacts.

Sampling Variability

The key variable for **my Social Security** account Office Visitor Survey is overall satisfaction received during visit. We define satisfaction as the combined rating of excellent, very good, or good (E/VG/G). In other surveys conducted with customers who visited an office, the overall satisfaction rating ranged from 80 to 95 percent E/VG/G. We anticipate a similar overall rating (about 87 percent E/VG/G) in the **my Social Security** account Office Visitor Survey. Assuming a 50 percent response rate, our proposed sample size is large enough to provide a sampling variability at the 95-percent confidence level equal to +/- 1.2, which is adequate for the intended purpose of the survey.

SSA’s Office of Quality Review will perform all sampling and sample analysis.

IF FOCUS GROUP MEMBERS WILL RECEIVE A PAYMENT, INDICATE AMOUNT
(No more than \$25 can be authorized under OMB rules):

We will not compensate participants for this survey.

USE OF SURVEY RESULTS:

SSA will use the results of the survey to identify areas for service delivery improvement.

BURDEN HOUR COMPUTATION *(Number of responses (X) estimated response time (/60) = annual burden hours):*

Number of Responses: 20,000
Estimated Response Time: 10 minutes
Annual Burden Hours: 3,333 hours