

**FISCAL YEAR 2019
NATIONAL 800 NUMBER CALLER SURVEY**

Intro 1

Hello, my name is *(first and last name)* and I'm calling from *(insert contractor name)* on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called Social Security's National 800 number. Our records show that Social Security received a call on *(insert date from sample file)* from someone at this telephone number.

May I please speak with the person who made that call?

1. Yes, this is he/she. ***(Continue with Intro 3.)***
2. Yes, one moment please. ***(Continue with Intro 2.)***
3. No, this is a business phone, cannot identify who called or do not have time to talk.
 (Record reason for non-response "business phone" and end call.)
4. No ***(Attempt Conversion. If unsuccessful, record reason for non-response and end call.)***

Intro 2

(Begin reading when respondent is on the line.)

Hello, my name is *(first and last name)*, and I'm calling from *(insert contractor name)* on behalf of the Social Security Administration. We are calling a sample of people from all over the country who recently called Social Security's National 800 number. Our records show that Social Security received a call on *(insert date from sample file)* from someone at this telephone number. I understand that you are the person who made that call?

1. Yes ***(Continue with Intro 3.)***
2. No ***(Attempt to identify the person who made the call. If unsuccessful, record reason for non-response and end call.)***

Intro 3

The reason I am calling is to find out how Social Security can improve its telephone service. I'd like to assure you that the only information Social Security gives us is a telephone number and we will not ask you for any identifying information during the survey. You are not required to participate in this survey, but your opinions are very important to Social Security. All the answers you give will be kept private and will not be used for any other purpose. The survey should take less than 10 minutes. May I begin the survey now?

1. Yes (***Continue to Intro 4.***)
2. Cannot do interview now (***Attempt to schedule callback.***)
3. No (***Attempt conversion. If unsuccessful, record reason for non-response and end call.***)

Intro 4

INTERVIEWER: RECORD LANGUAGE OF INTERVIEW

1. English
2. Spanish

Intro 5

Before my first question, I need to tell you this survey has been approved by the Office of Management and Budget (OMB) as required by the Paperwork Reduction Act. The OMB approval number for this survey is 0960-0526. (***Continue to Question 1.***)

MESSAGE FOR ANSWERING MACHINES

Hello, my name is (first and last name), and I'm calling from (insert contractor name) to conduct a survey for Social Security. I'd like to ask the person who called Social Security's National 800 number about the service they received. We'll try again soon or that person can call (insert contractor phone number) to leave a message with a good time to contact them. We will not ask for any identifying information during the survey. Thank you.

1. First, I'd like you to think about your experience reaching Social Security's National 800 number when you called on *(insert date from sample file)*. Would you rate how quickly you got served as:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember ***(Do not read.)***

2. When you called the National 800 number, you reached an automated speech recognition system. How comfortable did you feel talking to the automated system? Did you feel:

(Read rating scale. Enter one response.)

- A. Very comfortable
- B. Somewhat comfortable
- C. Somewhat uncomfortable, or
- D. Very uncomfortable
- E. Don't know/don't remember ***(Do not read.)***

3. How easy or hard was it was to get the automated system to understand the type of service you needed? Please think only about how easy it was to reach the type of service you wanted. Would you say it was:

(Read rating scale. Enter one response.)

- a. Very easy ***(Skip to question 5.)***
- b. Somewhat easy ***(Skip to question 5.)***
- c. Somewhat hard, or
- d. Very hard to reach the type of service you wanted
- e. Don't know/don't remember ***(Do not read). (Skip to question 5.)***

4. Why did you feel it was hard?

(Do not read responses. Enter all that apply.)

- A. I had to keep repeating myself; for example, it said I talked too fast or too slow; it couldn't understand the words I was saying.
- B. I didn't understand what the system was saying; I didn't know how to answer.
- C. It misinterpreted what I said and sent me to the wrong service.
- D. It took too long.
- E. I wanted to talk to an agent; don't like using automated systems.
- F. The available options didn't cover my situation.
- g. Something else **(Record response.)**
- H. Don't know/don't remember

5. The National 800 Number has automated services that people can use to handle some types of business without talking to an agent. Did you try to use any of the automated services that day?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 9.)**
- C. Don't know/don't remember **(Skip to question 9.)**

6. I'm going to read you a list of the automated services available on Social Security's 800 number. Please say "yes" or "no" as I read each one. Did you use the automated service for:

(Read responses. Enter all that apply.)

- A. Medicare information, a replacement Medicare card, or help with Medicare prescription drug costs
- B. Requesting a proof of income letter (This letter can be used as proof that you are receiving Social Security or Supplemental Security Income benefits.)
- C. Requesting a form SSA-1099/1042S for tax information (This is a tax summary of the total Social Security benefits you were paid for the prior year.)
- D. Checking on the status of a claim you already filed
- E. The address and hours of your nearest Social Security office
- F. An application to obtain or replace a Social Security card, or
- G. A list of pamphlets and general information messages
- H. Don't know/don't remember ***(Do not read.)***

7. Were you able to complete your business using only the automated service?

(Do not read responses. Enter one response.)

- A. Yes ***(Skip to question 22.)***
- B. No
- C. Don't know/don't remember ***(Skip to question 22.)***

8. I'm going to read you a list of reasons why someone might not be able to use only an automated service when they call Social Security's 800 number. Please say "yes" or "no" as I read each one. Were you unable to complete your business using the automated service because:

(Read responses. Enter all that apply.)

- A. The automated service said in your situation you needed to speak to an agent.
- B. You didn't have the necessary information on hand to use the service.
- C. The automated service you tried didn't cover what you needed.
- D. You had some other business that couldn't be handled through an automated service.
- E. You wanted to talk to an agent to make sure everything was okay.
- F. You thought the automated service was just too hard to use, or
- g. Was it because of something else ***(Record response.)***
- H. Don't know/don't remember ***(Do not read.)***

9. *(If question 7 = b ("no"), insert: Since you couldn't complete your business using the automated service,)* did you stay on the line to transfer to an agent or did you hang up?

(Do not read responses. Enter one response.)

- A. Stayed on the line
- b. Hung up ***(Skip to question 22.)***
- c. Don't know/don't remember ***(Skip to question 22.)***

10. When the system tried to transfer you to an agent, were you told they were all busy and to call back later?

(Do not read responses. Enter one response.)

- A. Yes ***(Skip to question 22.)***
- B. No
- c. Don't know/don't remember ***(Skip to question 22.)***

11. What happened next? Were you connected with an agent right away?

(Do not read responses. Enter one response.)

- A. Yes **(Skip to question 17.)**
- B. No
- c. Don't know/don't remember **(Skip to question 22.)**

12. Since you weren't connected with an agent right away, did you:

(Read responses. Stop as soon as responder makes a selection. Enter one response.)

- A. Wait on hold **(Pause for response.) (Skip to question 16.)**
- b. Have Social Security call you back **(Pause for response.) (Go to question 13.)**
- C. Hang up, or **(Pause for response.) (Skip to question 22.)**
- D. Did something else happen **(Record response.) (Skip to question 22.)**
- E. Don't know/don't remember **(Do not read.) (Skip to question 22.)**

13. And did you get that call?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 22.)**
- c. Don't know/don't remember **(Skip to question 22.)**

14. How did that work for you? Were you:

(Read rating scale. Enter one response.)

- A. Very satisfied **(Skip to question 17.)**
- B. Somewhat satisfied **(Skip to question 17.)**
- c. Somewhat dissatisfied, or
- D. Very dissatisfied with the callback
- E. Don't know/don't remember **(Do not read.) (Skip to question 17.)**

15. Why were you dissatisfied?

(Do not read responses. Enter all that apply.)

- A. Took a long time to receive a callback
- B. Wasn't convenient time when they called me back
- C. Still had to wait for an agent when they called me back
- D. I just don't like using automated systems
- E. Something else **(Record response.)**
- F. Don't know/don't remember

(All responders to question 15 skip to question 17.)

16. How would you rate the amount of time you waited on hold until someone answered your call? Would you rate it as:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember **(Do not read.)**

17. Now I'd like to ask you several questions about your satisfaction with the service the agent gave you. First, how would rate the courtesy of the agent? Was it:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember **(Do not read.)**

18. How well would you say the agent knew his or her job? Would you rate the agent's job knowledge as:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- g. Don't know/don't remember ***(Do not read.)***

19. How would you rate the helpfulness of the agent during your call? Was it:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember ***(Do not read.)***

20. How clear were the explanations the agent gave you? Would you say they were:

(Read rating scale. Enter one response.)

- A. Excellent
- B. Very good
- C. Good
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember ***(Do not read.)***

21. Was the agent able to take care of your business completely during your call?

(Do not read responses. Enter one response.)

- A. Yes
- B. No
- C. Don't know/don't remember

22. Overall, how would you rate the service you received the day you called Social Security's National 800 number? Was it:

(Read rating scale. Enter one response.)

- a. Excellent **(Skip to question 24.)**
- B. Very good **(Skip to question 24.)**
- C. Good **(Skip to question 24.)**
- D. Fair
- E. Poor, or
- F. Very poor
- G. Don't know/don't remember **(Do not read.) (Skip to question 24.)**

23. Why did you rate the 800 number service as *(insert response from question 22)*?

(Do not read responses. Enter all that apply.)

- A. Took too long to get through the automated system to get to the service I needed.
- B. Was too hard to get automated system to understand me; had to keep repeating the same information.
- C. Wait on hold to get to an agent was too long.
- D. Agent didn't answer question/didn't explain things well.
- E. Social Security failed to take requested action/problem not resolved.
- F. Agent was not courteous.
- G. Would rather talk to an agent/don't like automated systems.
- H. Some other reason **(Record response.)**
- I. Don't know/no opinion

24. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the National 800 number on *(insert date from sample file)*. What was the main type of business you called about that day? Was it about:

(Read responses. Stop as soon as responder makes a selection. Enter one response.)

[If responders do not describe the type of business they called about, for example, if they choose "some other business" and say:

- ***They called for the local Social Security office address/phone number/hours;***
- ***They called to make/change/check the status of an appointment;***
- ***They called because they received a letter; or***
- ***They were returning a call from Social Security;***

probe to find out the underlying type of business involved. If responder says anything close to these examples, the interviewer should say, "Was the appointment/letter/call about..." and re-read responses a-e.]

- A. Benefits you or someone else already receive. ***(Pause for response.)***
- B. Filing an application for benefits or checking the status of an application you already filed. ***(Pause for response.)***
- C. Appealing a decision made by Social Security ***(Pause for response.)***
- d. A new or replacement Social Security card ***(Pause for response.)***
(Skip to question 26.)
- E. Medicare, or ***(Pause for response.) (Skip to question 26.)***
- F. Some other business ***(Record response.) (Skip to question 26.)***
- G. Don't know/don't remember ***(Do not read.) (Skip to question 26.)***

25. Social Security would also like to know what kind of benefits you were calling about. Please answer "yes" or "no" as I read each type of benefit. Were you calling about:

(Read responses. Enter all that apply. If responder answers "no" to all response choices, refer to response a, b, or c in question 24 and probe further for the type of benefit involved.)

- a. Social Security Retirement or benefits you receive as a spouse, widow(er) or child
- b. Social Security Disability benefits, or
- c. SSI (i.e., Supplemental Security Income)
- d. Don't know /don't remember ***(Do not read.)***

26. Before you called the National 800 number, did you try to take care of this business with Social Security another way?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 29.)**
- c. Don't know/don't remember **(Skip to question 29.)**

27. What did you do? Did you:

(Read responses. Enter all that apply.)

- A. Call a local Social Security office
- B. Visit a local office, or
- C. Try to use Social Security's website
- D. Something else **(Do not read.) (Record response.) (Skip to question 29.)**
- E. Don't know/don't remember **(Do not read.) (Skip to question 29.)**

28. Social Security would like to know why you weren't able to take care of your business that way? What happened?

(Do not read responses. Enter all that apply.)

- A. Couldn't get through to the local office on the phone
- B. Couldn't get served in person (e.g., wait was too long; office was closed)
- C. Was told my business couldn't be handled that way
- D. Made an appointment to speak to someone at a later date
- E. Social Security employee couldn't answer my question
- F. No online service for the business I needed; couldn't find the answer to my question online
- G. Tried an online service but it didn't work for me
- H. Tried to file an application online, but I do not have a **my Social Security account**
- I. Social Security needed additional information or documents
- J. Social Security failed to take requested action; problem not resolved
- K. Some other reason **(Record response.)**
- L. Don't know/don't remember

29. If you contact Social Security for future business, what are you most likely to do? Will you:

(Read responses. Enter one response.)

- A. Call Social Security's National 800 number
- B. Call a local office
- C. Visit a local office
- D. Use Social Security's website, or
- E. Will you do something else ***(Record response.)***
- F. Don't know ***(Do not read.)***

[INTERVIEWER NOTE: If earlier in the survey the respondent said they would use the Internet or email to contact Social Security, acknowledge this and explain that you need to ask a few more specific questions about Internet use.]

30. I'd like to ask you a few questions about doing business on the Internet. First, do you currently use the Internet?

(Do not read responses. Enter one response.)

- A. Yes
- B. No ***(Skip to question 42.)***

31. Social Security offers a service called **my Social Security** where people can create a secure online account with a user name and password to conduct various types of business. For example, people who receive benefits can use it to change their address. Have you already created your **my Social Security** online account?

(Do not read responses. Enter one response.)

- A. Yes ***(Skip to question 34.)***
- B. No

32. Do you plan to create a *my Social Security* online account?

(Do not read responses. Enter one response.)

A. Yes

(Skip to question 38.)

B. No

C. Don't know

(Skip to question 41.)

33. What is the **main** reason you do not plan to create a *my Social Security* account?

(Do not read responses. Enter one response.)

A. Prefer to speak to a person

B. Concerned about security or privacy of my information

C. Problem with computer or Internet access

D. Concerned that completing my business online might be too hard, complicated

E. Some other reason ***(Record response.)***

(All responders to question 33 skip to question 41.)

34. Have you used your *my Social Security* online account?

(Do not read responses. Enter one response.)

A. Yes

B. No

(Skip to question 38.)

35. What have you used your *my Social Security* online account for?

(Read responses. Enter all that apply.)

A. Requested a replacement Social Security

B. Checked the status of an application or appeal

C. Filed an application for benefits

D. Got my Social Security Statement

E. Got my benefit verification letter

- F. Reported my wages
- G. Changed my address or phone number
- H. Started or changed direct deposit of my benefit payment
- I. Requested a replacement Medicare card
- J. Got a replacement SSA-1099 or SSA-104S for tax season
- K. Don't know/don't remember **(Do not read.) (Skip to question 38.)**

36. Were you able to complete your business using your **my Social Security** online account?

(Do not read responses. Enter one response.)

- A. Yes **(Skip to question 38.)**
- B. No

37. Why were you not able to complete your business using your **my Social Security** online account? **(Record response.)**

38. Do you plan to use your **my Social Security** online account for future business?

(Do not read responses. Enter one response.)

- A. Yes
- B. No **(Skip to question 40.)**

39. What do you plan to use your **my Social Security** online account for?

(Read responses. Enter all that apply.)

- A. Request a replacement Social Security
- B. Check the status of an application or appeal
- C. File an application for benefits
- D. Get my Social Security Statement
- E. Get my benefit verification letter
- F. Report my wages
- G. Change my address or phone number
- H. Start or change direct deposit of my benefit payment
- I. Request a replacement Medicare card
- J. Get a replacement SSA-1099 or SSA-104S for tax season

(All responders to question 39 skip to question 42.)

40. Why won't you use your *my Social Security* online account for future business?

(Do not read responses. Enter all that apply.)

- A. It's easier to understand things explained by a person
- B. I can get questions answered right away by a person
- C. I am concerned about security or privacy of my information
- D. My computer is too old/Internet service is too slow
- E. I don't have the necessary computer skills or experience
- F. I am concerned it might be too hard or complicated
- G. Some other reason ***(Record response.)***

41. What do you plan to do instead of using your *my Social Security* online account for future business?

- A. Call the National 800 Number
- B. Call a local office
- C. Visit a local office

42. We would like to know a little more about you. First, do you own a cell phone?

(Do not read responses. Enter one response.)

- A. Yes
- B. No

(Skip to question 44.)

43. Do you use a cell phone to send and receive text messages?

(Do not read responses. Enter one response.)

- A. Yes
- B. No

44. What is your age group? Are you:

(Read responses. Enter one response.)

- a. Under age 30
- b. Age 30 to 49
- c. Age 50 to 64
- d. Age 65 to 74
- e. Age 75 or older

f. Declined to answer **(Do not read.)**

CONCLUSION: That concludes the questions I had for you today.

Read: Social Security estimated that this survey would take less than 10 minutes to complete. If you would like to send comments on this time estimate to Social Security, I can provide you with the mailing address. Would you like this address?

If yes, read the Paperwork Reduction Act statement below, then go to closing:

This information collection meets the requirements of 44 U.S.C. §3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You may send comments on this 10-minute time estimate to: *Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.*

If no, go to closing.

CLOSING: Thank you for taking the time to be in this survey. Have a good day (afternoon/evening).