

ABOUT OUR *my* Social Security OFFICE VISITOR SURVEY

We would like to know why some *my* Social Security account holders choose to visit a Social Security office instead of using our website to conduct their business. The survey should take less than 10 minutes to complete.

- Answer all questions as directed. The instructions may tell you to skip over some questions. When that happens, you will see an arrow with a note telling you what question to answer next:

Example: Yes → GO TO question 2

No → SKIP to question 3.

INSTRUCTIONS FOR MARKING YOUR ANSWERS

- Use a pen with blue or black ink.
- Do not use a pen with ink that soaks through the paper.
- Mark X to indicate your answer. If you want to change your answer, completely fill in the answer box for the wrong answer and mark X in the box next to the correct answer.
- Make no stray marks.
- Keep all entries within the appropriate boxes.

Please **do not** write any of your personal information anywhere on this survey form.

YOUR REQUEST FOR A BENEFIT VERIFICATION LETTER

1. Social Security records show that you recently visited an office to request a benefit verification (income verification or award) letter. Did you visit a local office to get a benefit verification letter?

Mark [X] **ONE** answer.

Yes, I did recently visit a local office to get a benefit verification letter. →GO TO question 2.

Yes, I did recently visit a local office, but I did **not** request a benefit verification letter. →SKIP to question 19.

No, I did not, nor do I remember recently visiting a local office. →STOP! Do not complete this survey. Please leave the rest of the survey blank and return it in the enclosed envelope with only this box marked. Thank you for your time.

2. Why did you need to get a benefit verification letter?

Mark [X] **ONE** answer.

I needed it to get some assistance or benefits from another agency or program.

I wanted one for my own personal records.

I needed proof that I am **not** currently receiving any benefit payments.

I needed proof of my date of birth.

Some other reason (Please explain): _____

→ GO TO question 3. 3.

3. Prior to your visit to a local office, did you know that you had a *my* Social Security account?

Mark [X] **ONE** answer.

Yes → GO TO question 4.

No → SKIP to question 19.

4. Did you know that you could use your **my Social Security** account to request a benefit verification letter online?

Mark [X] ONE answer.

- Yes → **GO TO question 5.**
- No → **SKIP to question 19.**

5. Did you try to use your **my Social Security** account to request a benefit verification letter online?

Mark [X] ONE answer.

- Yes, I tried to get one online, but I was not able to get into my account. → **GO TO question 6.**
- Yes, I was able to get into my account, but I couldn't get the benefit verification letter. → **SKIP to question 7.**
- Yes, but the letter I printed was not accepted as a valid benefit verification letter. → **SKIP to question 8.**
- No, I did not try to get one online with **my Social Security** account. → **SKIP to question 17.**

6. Why weren't you able to get into your account?

Mark [X] ALL that apply.

- I couldn't remember my username or password.
- I couldn't answer the security questions.
- I got locked out.
- I couldn't access the Internet.
- I did not have access to my email or cell phone to receive a security code.
- I couldn't wait 5-10 days to reset where my security codes are sent.
- It was too hard or complicated.
- Some other reason (**Please explain**): _____

→ **SKIP to question 19.**

7. Why weren't you able to get your benefit verification letter online using your **my Social Security** account?

Mark [X] ALL that apply.

- I was unable to print the letter online with my computer.
- I was unable to print the letter online with my phone.
- I was unable to have one sent to me in the mail.
- I was unable to save one to my device.
- I opted out of electronic communications.
- It was too hard or complicated.
- Some other reason (**Please explain**): _____

→ **SKIP to question 9.**

8. Why was the letter you printed online not accepted as valid?

Mark [X] ALL that apply.

- It did not look like a valid benefit verification letter.
- It did not have a stamp or seal to certify it was valid.
- It did not have an official signature.
- It did not have all the information I needed.
- It included incorrect dates.
- Some other reason (**Please explain**): _____

→ **GO TO question 9.**

9. Did you use the “Get Help” tool that is available in your *my Social Security* account?

Mark [X] ONE answer.

- Yes → GO TO question 10.
- No → SKIP to question 19.

10. Did you view one of the popular questions available to customers or did you type your question into the search box?

Mark [X] ONE answer.

- I viewed one of the popular questions.
 - I typed my question into the search box.
 - I did both.
 - No, I did not do either. → SKIP to question 13.
- GO TO question 11.

11. Did the information answer your question(s)?

Mark [X] ONE answer.

- Yes → SKIP to question 13.
- No → GO TO question 12.

12. Why didn't the information answer your question? → GO TO question 13.

13. Did you ask to talk to an expert?

Mark [X] ONE answer.

- Yes → GO TO question 14.
- No → SKIP to question 19.

14. Did you request a callback or did you call Social Security?

Mark [X] ONE answer.

- I requested a callback.
 - I called Social Security.
 - I did both.
 - No, I did not do either.
- GO TO question 15.

15. Was Social Security able to help you with your problem?

Mark [X] ONE answer.

- Yes → SKIP to question 19.
- No → GO TO question 16.

16. Why wasn't the employee able to help? → GO TO question 19.

17. Why didn't you try to use your **my Social Security** account to request a benefit verification letter online?

Mark [X] **ALL** that apply.

- I thought it would be quicker to go to the office.
- I did not have access to the Internet.
- I do not have a printer.
- I'm concerned about privacy/security.
- I thought it would be too hard or complicated.
- Some other reason (**Please explain**): _____

→ GO TO question 17a.

17a. When requesting a benefit verification letter, do you prefer to receive service in person?

Mark [X] **ONE** answer.

- Yes → GO TO question 18.
- No → SKIP TO question 19.

18. Among the following reasons given below, please choose the one best response that explains why in-person service appeals to you.

Mark [X] **ONE** answer.

- I can get answers to my questions right away.
- It creates a record of my transaction.
- Someone can be held accountable if something goes wrong.
- It's more convenient to go to an office.
- I'm worried I wouldn't be able to do it myself.
- I like being served by someone I am familiar with.
- Some other reason (**Please explain**): _____

→ GO TO question 19.

VISITING SOCIAL SECURITY

Please rate the service you received when you visited the Social Security office.

| Mark [X] ONE answer for every item. | Excellent | Very Good | Good | Fair | Poor | Very Poor |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 19. Office <u>location</u> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Office <u>hours</u> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. <u>Signs/instructions</u> explaining how to check in when you got to the office | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. Office <u>comfort</u> (seating, temperature, etc.) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 23. Office <u>appearance</u> (clean, pleasant, etc.) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24. Office <u>privacy</u> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 25. <u>Courtesy</u> of the staff | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 26. <u>Waiting time</u> to be served in the office | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Mark [X] ONE answer. | Less than 10 minutes | Between 10 and 30 minutes | Between 31 and 60 minutes | More than 60 minutes |
|---|--------------------------|---------------------------|---------------------------|--------------------------|
| 27. How long did you wait to be served? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

28. Did you have to visit the office more than once to get the service you needed?

Mark [X] ONE answer.

Yes → GO TO question 29.
No

| Mark [X] <u>ONE</u> answer. | Excellent | Very Good | Good | Fair | Poor | Very Poor |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 29. Overall, how would you rate the service you received when you <u>visited</u> the office? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

USING YOUR *my Social Security* ACCOUNT ON SOCIAL SECURITY'S WEBSITE

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

Mark [X] ONE answer.

- Yes → GO TO question 31.
- No → SKIP to question 32.

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

Mark [X] ALL that apply.

- Request a replacement Social Security card
- Check the status of an application or appeal
- Get my Social Security Statement
- Get a benefit verification letter
- Report your wages if you work
- Change your address or phone number
- Start or change direct deposit of your benefit payment
- Request a replacement Medicare card
- Get a replacement SSA-1099 or SSA-1042S for tax season
- Get personalized retirement benefit estimates
- Opt out of mailed notices
- Access the Representative Payee Portal

→ SKIP to question 34.

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

Mark [X] ONE answer.

- It is easier to understand things explained by a person.
- I can get questions answered right away by a person.
- I am concerned about security or privacy of my information.
- My computer is too old/Internet service is too slow.
- I don't have a computer, printer, or Internet service.
- I am locked out of my account.
- I don't have the necessary computer skills or experience.
- I am concerned it might be too hard or complicated.
- Some other reason I won't use *my Social Security* account
(Please explain): _____
- I can't think of any reason why I won't use it.

→ GO TO question 33.

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

Mark [X] ALL that apply.

- Call the National 800 Number

- Call a local office
- Visit a local office



→ **GO TO question 34.**

34. Social Security is constantly striving to provide excellent service and we would like to get your ideas about how we could improve services. If you would be willing to help Social Security, please provide your contact information below.

Home Phone Number: _____

Cell Phone Number: _____

Email Address: _____

Thank you for taking the time to complete this survey. Social Security will use your answers to improve our services. Please return the completed questionnaire in the postage-paid envelope as soon as possible to:

Social Security Survey
[Contractor Return Address]

| | |
|--|---|
| <p>PRIVACY ACT STATEMENT</p> <p>The Social Security Administration is authorized to collect the information for this survey under Executive Order 12862, "Setting Customer Service Standards." Your response to these questions is strictly voluntary. The information you provide will be used to help us improve the service that we give you. Your response will not be disclosed to any other government or private agency.</p> | <p>PAPERWORK REDUCTION ACT STATEMENT</p> <p>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 do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 10 minutes to read the instructions, gather the facts and answer the questions. You may send comments on our time estimate above to: Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.</p> <p><i>Send <u>only</u> comments relating to our time estimate to this address, not the completed form.</i></p> |
| <p>OMB Control No: 0960-0526 Expiration Date: TBD</p> | |