FISCAL YEAR 2021
NATIONAL 800 NUMBER CALLER SURVEY

Intro 1

Hello, my name is (*first and last name)* and I'm calling from *(insert c*ontractor *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 c*ontractor *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 5 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.   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 <u>reach</u> the type of service you wanted. Would you say it was:

(Read rating scale. Enter one response.)

a.   Very easy

b.   Somewhat easy

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).*

3.   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 6.)*

C.   Don't know/don't remember   *(Skip to question 6.)*

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

(Do not read responses. Enter one response.)

A. Yes   *(Skip to question 11.)*

B. No

C. Don't know/don't remember   *(Skip to question 11.)*

5. 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 11.)*

c. Don't know/don't remember   *(Skip to question 11.)*

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

(Do not read responses. Enter one response.)

A.   Yes   *(Skip to question 9.)*

B.   No, the system told me all agents were busy and to call back later *(Skip to question 11.)*

C.   No

d.   Don't know/don't remember   *(Skip to question 11.)*

7. 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.) (Go to question 8.)*

b. Have Social Security call you back *(Pause for response.) (Go to question 9.)*

C. Hang up, or   *(Pause for response.) (Skip to question 11.)*

D. Did something else happen   *(Record response.)   (Skip to question 11.)*

E. Don't know/don't remember   *(Do not read.)   (Skip to question 11.)*

8. How long did you wait on hold until someone answered your call?

(Do not read. Enter one response.)

A.   0-15 minutes

B.   16-30 minutes

C.   Over 30 minutes

D.   Don't know/don't remember   *(Do not read.)*

9. Now I'd like to ask you about your satisfaction with the service the agent gave you. 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.)*

10. 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

11. 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

B. Very good

C. Goood

D. Fair

E. Poor, or

F. Very poor

G. Don't know/don't remember   *(Do not read.)*

12. Did this interaction increase your confidence in Social Security's 800 number service?
(Do not read responses. Enter one response.)

A. Yes

B. No

C. Don't know

13. We would like to ask you about the reason you called the National 800 Number. What was the <u>main</u> type of business you called about that day? Was it about:

(Read responses. <u>Stop</u> as soon as responder makes a selection. Enter one response.)

A. Filing an application for benefits.   *(Pause for response.)*

B. Checking the status of an application you already filed.   *(Pause for response.)*

C. Changing your information such as your address, phone number or banking information. *(Pause for response.)*

D. An issue related to a change in your benefit amount or non-receipt of your payment. *(Pause for response.)*

e. An issue related to an overpayment or underpayment.   *(Pause for response.)*

f. Replacing your Social Security Card.   *(Pause for response.)*

g. Requesting a Proof of Income or Benefit Statement.   *(Pause for response.)*

h. Reporting a death.   *(Pause for response.)*

I. An issue related to your Medicare benefits.   *(Pause for response.)*

J. Replacing your Medicare Card, or   *(Pause for response.)*

k. Reporting fraud.   *(Pause for response.)*

L. Some other business   *(Record response.)*

M. Don't know/don't remember   *(Do not read.)*

14. 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 16.)*

C. Don't know/don't remember   *(Skip to question 16.)*

15. 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.)*

E. Don't know/don't remember   *(Do not read.)*

16.   Are you more or less likely to use service options like telephone, internet, or video since the global pandemic in 2020?

A. Much more likely

B. More likely

C. Unchanged

D. Less likely, or

E. Much less likely

F. Don't know   *(Do not read.)*

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

Read: Social Security estimated that this survey would take less than 5 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 5-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).