

Office of Quality Performance

**Field Office Caller
Survey Report
FY 2009/FY 2008**



February 2010

FY 2009/FY 2008 Field Office (FO) Caller Survey

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FY 2009/FY 2008 Field Office (FO) Caller Survey

Executive Summary

This report provides analysis of the Office of Quality Performance (OQP) FO Caller Surveys for fiscal years (FY) 2009 and 2008. Satisfaction rates from these surveys were used in calculating each year's performance indicator for overall satisfaction of individuals who do business with SSA. The [Performance Indicator Reports](#) for both FYs 2009 and 2008 were previously published on OQP's website and included satisfaction rates for key aspects of FO telephone service as well as the overall satisfaction rate. Because the results of the surveys were essentially the same and the FY 2009 data are available, we have combined the more detailed analysis for both FYs into one report, with an emphasis on FY 2009 performance.

The FO Caller Survey is conducted annually with a sample of individuals who called one of about 50 randomly selected FOs during the month of April. In FY 2009, 1,300 individuals participated in the survey; in FY 2008, there were 1,100 responders.

Key findings were:

Overall Satisfaction Rate

The FY 2009 overall satisfaction rate for FO telephone service was 78 percent excellent, very good or good (E/VG/G); the FY 2008 rate was nearly the same at 79 percent. The satisfaction rate has remained stable at this level for the last few years. However, small declines that were not statistically significant in themselves have had a cumulative effect over time: The current rate is significantly lower than the highest E/VG/G rate of 83 percent last recorded in FY 2005 and in FY 2003 when the annual survey was implemented.

Satisfaction with Access

Satisfaction with access to FO telephone service, a key driver of overall satisfaction, continued to reflect the downward trend that has taken place over the last five years. The access rating in FY 2009 was 66 percent E/VG/G, not different from the FY 2008 rate of 68 percent, but a significant 9-percentage points lower than the high of 75 percent achieved in FY 2004.

Reported Busy Rate

More than half of callers reported receiving a busy message in an earlier unsuccessful attempt to reach the FO in both FYs 2009 (58 percent) and 2008 (55 percent). In FY 2004, when access was rated at 75 percent E/VG/G, only 44 percent of survey responders reported receiving a busy message.

Satisfaction with Hold Time

Time spent on hold waiting to be served was the lowest rated aspect of FO telephone service. In FY 2009, just 59 percent of callers who waited on hold were satisfied with the length of their wait; the rate was similar in FY 2008 at 57 percent.

Satisfaction with Employee Performance

Satisfaction with employee performance remained very favorable in both FYs. Although the courtesy rating dipped significantly in FY 2008 to 88 percent E/V/G/G, it returned to prior levels with a rating of 93 percent in FY 2009. Ratings of the other employee attributes – helpfulness, job knowledge and clarity of explanations – were stable from one year to the next, with the FY 2009 rates for each at about 90 percent E/V/G/G.

FY 2009/FY 2008 Field Office (FO) Caller Survey

Background and Methodology

This report provides analysis of the Office of Quality Performance (OQP) FO Caller Surveys for fiscal years (FY) 2009 and 2008. Satisfaction rates from these surveys were used in calculating each year's performance indicator for overall satisfaction of individuals who do business with SSA. The [Performance Indicator Reports](#) for both FYs 2009 and 2008 were previously published on OQP's website and included satisfaction rates for key aspects of FO telephone service as well as the overall satisfaction rate. Because the results of the surveys were essentially the same and the FY 2009 data are available, we have combined the more detailed analysis for both FYs into one report, with an emphasis on FY 2009 performance.

The FO Caller Survey is conducted annually with a sample of individuals who called one of about 50 randomly selected FOs during the month of April. In FY 2009, 1,300 individuals participated in the survey; in FY 2008, there were 1,100 responders. Survey responders participated in a telephone interview asking them about their experience calling the FO, rating various aspects of the service received and their satisfaction with FO telephone service overall. Further description of the sampling and methodology for the survey, including discussion of the response rate and precision of the estimates, appears in tab A.

Survey Results

The discussion below highlights key results of the FY 2009 FO Caller Survey. Results for FY 2008 are also noted and comparisons with previous years are made where pertinent. Throughout the discussion, when the term "significant" is used, it means "statistically significant at the 95-percent confidence level." The term "satisfaction" refers to combined ratings of excellent, very good and good (E/VG/G), while "dissatisfaction" refers to combined ratings of fair, poor and very poor (F/P/VP).

Tab B contains an annotated questionnaire displaying response percentages and the total number of responders for all survey questions for both FYs 2009 and 2008. The number of responders for each question can vary since not every question applies to each participant. As a result, percentages shown reflect the proportion of those who actually provided substantive responses to each question. (Responses such as "don't know" or "no opinion" are not generally considered substantive responses for purposes of this survey.)

Tab C provides comparisons of ratings based on the type of business the caller conducted. The five broad categories used are: Social Security number (SSN), initial claims, postentitlement, appeals and "other." Note that we had planned to provide a similar comparison of ratings for English and Spanish speakers, but there were an insufficient number of Spanish-speaking survey responders (FY 2009 – 8; FY 2008 - 17) for such a breakout.

Overall Satisfaction with FO Telephone Service

The overall satisfaction rate for FO telephone service in FY 2009 was 78 percent E/VG/G. The FY 2008 rate was nearly the same at 79 percent. As illustrated below, satisfaction with FO telephone service has been stable for several years. However, the current rate is significantly lower than the highest satisfaction level of 83 percent E/VG/G achieved in FYs 2003 and 2005. Note that the apparent drop in the rate for FY 2006 was not statistically significant.

A [textual description](#) follows the full report.

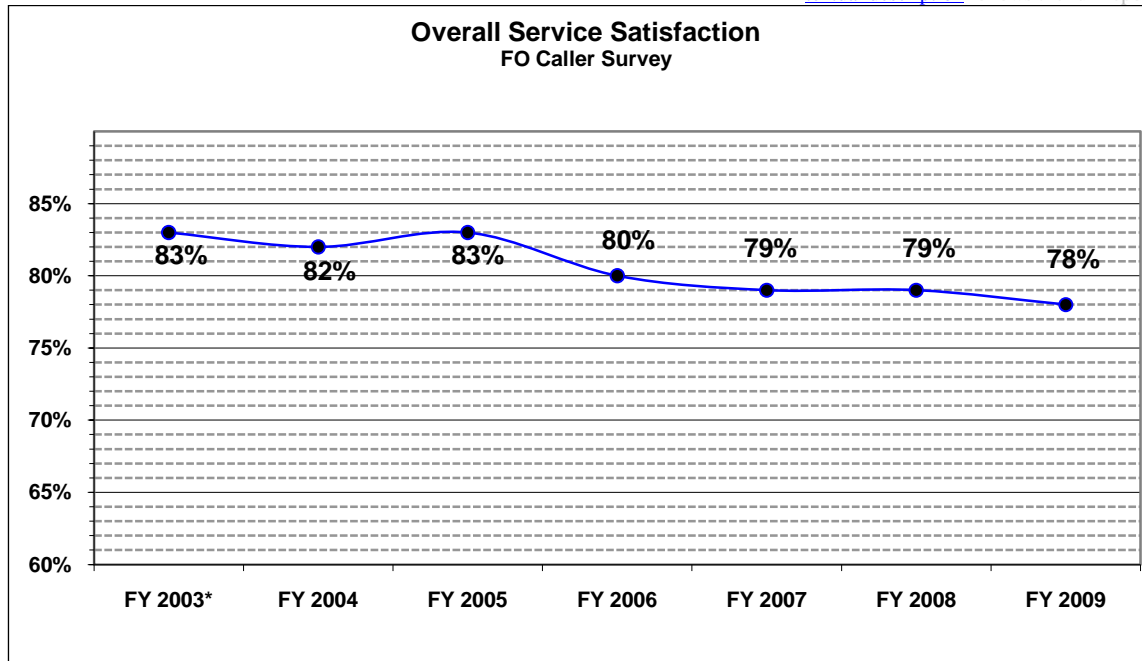


Figure 1

*FY 03 was the first year the survey was conducted on an annual basis. Prior to that, the survey was conducted semi-annually.

In the FY 2009 survey, dissatisfied callers mainly attributed their low overall rating to problems with access, citing trouble getting through to the office (22 percent of reasons) and long waits on hold (14 percent). Not receiving a callback in response to a voicemail message was another source of dissatisfaction for a sizeable group (16 percent). Some callers described problems with the service they received after they reached the FO, including agents who didn't answer their questions (18 percent); and not being able to resolve their problem (10 percent). The primary reasons for dissatisfaction were similar in FY 2008.

Satisfaction with Access to FO Telephone Service

At 66 percent E/VG/G, satisfaction with access to FO telephone service in FY 2009 continued to reflect the downward trend that has taken place gradually over the last five years. Satisfaction with access began to slip in FY 2005, but the decline from the FY 2004 high of 75 percent was not statistically significant until FY 2008. The FY 2008 and FY 2009 rates were not significantly different from each other.

A [textual description](#) follows the full report.

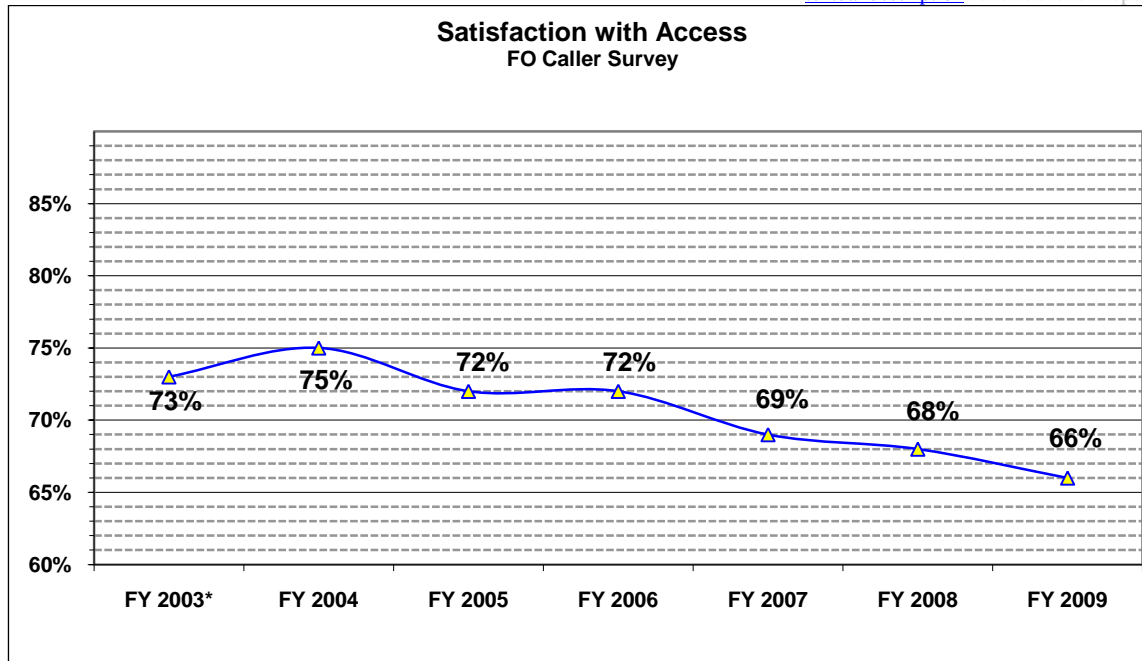


Figure 2

*FY 03 was the first year the survey was conducted on an annual basis. Prior to that, the survey was conducted semi-annually.

Satisfaction with Employee Attributes

All employee attributes were highly rated in FY 2009. Satisfaction with courtesy, which had dipped significantly to 88 percent in FY 2008, returned to previous levels in FY 2009 with an E/VG/G rating of 93 percent. Ratings of other employee attributes have remained stable over the last three years.

Satisfaction with Employee Attributes			
Aspect of Service	E/VG/G Rating		
	FY 2007	FY 2008	FY 2009
Courtesy	94%	88% ¹	93% ²
Job knowledge	92	90	90
Helpfulness	88	87	90
Clear Explanations	88	87	89

¹ Significant difference between FY 2008 and FY 2007.

² Significant difference between FY 2009 and FY 2008.

Earlier Attempts to “Get Through” to the FO

Over half the responders in the FY 2009 survey (58 percent) reported that they had tried to reach the FO in an earlier call, but found the lines were busy or were told to call back later. The proportion was similar in FY 2008 (55 percent). In FY 2007, it had appeared that the reported busy rate was on the decline, dropping significantly to 45 percent from 51 percent the previous year, but this improvement was not sustained.

Callers' inability to get through to the FO in an earlier attempt had a negative influence on their ratings of telephone access and FO telephone service overall. Among the callers who had this experience in FY 2009, only 49 percent were satisfied with FO telephone access. Callers who got through on their first try gave a substantially higher access rating of 79 percent E/VG/G. The gap in satisfaction with overall service, while not as large, was still significant: The overall rating from callers who were unsuccessful getting through in an earlier call was 71 percent E/VG/G compared with an 87 percent overall satisfaction rate for those who called only once.

Upfront Automated Message

When asked to rate the upfront automated message they heard when they reached the FO, 89 percent of callers in FY 2009 said it was very or somewhat easy (VE/SE) to understand. The FY 2008 rate was nearly the same, 87 percent VE/SE.

Among the small group of callers who had difficulty understanding the upfront message, most complained that the menu was confusing or unclear (26 percent); the menu was too long with too many options (21 percent), or the options offered in the automated message did not fit their situations (16 percent). Another 12 percent felt the recording quality was poor. The remainder of reasons for dissatisfaction with the automated message covered a variety of issues, such as the desire to speak directly with an agent and complaints that "the machine couldn't understand me."

Choice of Service Option

The majority of callers in the FY 2009 survey reported that they wanted to speak to an agent, more often staying on the line to speak to the next available agent (44 percent) than entering an extension for a particular employee (33 percent). However, the proportion of callers reporting they wanted to speak to a specific employee in FY 2009 was significantly higher than in FY 2008 (26 percent).

Only 7 percent of the FY 2009 responders indicated they chose to use one of the automated services offered in the FO. The remaining 15 percent said they hung up after listening to the menu, with most intending to call again, either the FO (8 percent) or the 800 number (6 percent). Just 1 percent said they went to SSA's website after hanging up.

Speaking to an Agent

Among responders who continued with the call after listening to the upfront message, in the FY 2009 survey, 71 percent reported they did speak with an agent during the call. Callers who spoke to an agent were highly satisfied with FO telephone service overall, giving an E/VG/G rating of 86 percent. Results were essentially the same in FY 2008.

The proportion of callers who said they were connected immediately to an agent was similar whether they dialed the extension of a particular employee (39 percent) or chose the option to speak to the next available agent (40 percent). Of the remaining callers who were placed on hold, the great majority in FY 2009 (85 percent) indicated they waited to speak with an agent. This was significantly higher than in FY 2008 (74 percent), when more callers opted to hang up instead of waiting (16 percent in FY 2008 compared with 10 percent in FY 2009).

In FY 2009, 78 percent of callers said the agent handled their business completely during their call; this was similar to the 75 percent business complete rate seen in the FY 2008 survey. The overall service rating was 94 percent E/VG/G among callers who were able to

complete their transaction with the agent during the call. Their counterparts who still had outstanding business at the end of the call gave a rating of only 56 percent E/VG/G.

Waiting on Hold

At 59 percent E/VG/G, waiting time to be served was the lowest rated aspect of FO telephone service in the FY 2009 survey. The FY 2008 result was similar, with just 57 percent of responders satisfied with the length of their wait on hold.

An unfavorable opinion of the amount of time spent on hold had a significant effect on callers' rating of access to FO telephone service. In the FY 2009 survey, 81 percent of the callers who considered the length of time they spent on hold as E/VG/G also rated access as E/VG/G. In contrast, only 30 percent of callers who rated time on hold as F/P/VP rated access as E/VG/G.

Poor time on hold ratings also resulted in lower overall satisfaction with FO telephone service. Ninety-four percent of callers who rated time on hold as E/VG/G also gave an E/VG/G overall service rating. On the other hand, the overall service rating among callers who were dissatisfied with the time spent on hold was just 60 percent E/VG/G.

Using Voicemail

The proportion of callers who left a voicemail message was the same in both FYs 2009 and 2008, 24 percent. Satisfaction with overall service was much lower among these callers than among callers who spoke to an agent. The E/VG/G overall rating from callers who left a voicemail message was 66 percent, significantly lower than the 86 percent rating from callers who were served by an agent.

In FY 2009, most callers (92 percent) who left a voicemail message said they expected the FO to call them back. This proportion was significantly higher than in the prior two years (FY 2008 - 77 percent; FY 2007 - 80 percent). However, only 58 percent of callers in FY 2009 and 55 percent in FY 2008 (not a significant difference) said they received a return call. These rates were both down significantly from 69 percent in FY 2007. Perceptions of FO telephone service overall were significantly higher among responders who were called back (80 percent E/VG/G) compared with those who said they were not (44 percent E/VG/G).

Among the responders who indicated they received a return call from the FO, almost three-quarters (72 percent) received their call the same day or the next day.

Future Contacts

For handling future SSA business, 80 percent of callers in the FY 2009 survey indicated a preference for dealing with the local FO again: 65 percent said they would call and 15 percent expected to visit. A much smaller proportion of callers said they would contact the 800 number (14 percent) for their future business. Only 3 percent said they would use the Internet or email and the remainder of responders would write or "do something else."

Caller preferences were nearly the same in the FY 2008 survey, except that a significantly larger proportion, 19 percent, said they would visit the FO.

Internet Use

In the FY 2009 survey, 52 percent of FO callers said they currently use a personal computer, up significantly from the FY 2008 rate of 47 percent. Among this group, the vast majority (93 percent) indicated they also use the Internet. This translates to 48 percent of

all FO callers, significantly higher than the 43 percent Internet use rate in the FY 2008 survey. Sixty-two percent of the Internet users in the FY 2009 survey stated they had visited Social Security's web site at some time.

When asked if they would like to conduct any of their Social Security business online, 64 percent of Internet users in the FY 2009 survey said they were very or somewhat interested. The level of interest in FY 2008 appeared lower, but was not significantly different at 59 percent.

Comments

The last question in the survey asked callers if they had any comments or suggestions about FO telephone service. In FY 2009, over one-third of callers provided a response, with almost 25 percent offering compliments about their experience. Among the larger group of callers who voiced complaints, the vast majority described problems with access. By far, the most common frustration was encountering continuous busy signals. Long waits on hold were also frequently mentioned, as was failure to receive a callback in response to a voicemail message. Callers commenting about their difficulty getting served often recommended that SSA hire more staff to answer the phones. A small group of callers thought the automated message could be improved and shortened, while others noted that they are always happier if they can speak to a person.

Summary

Satisfaction with FO telephone service, while stable over the last few years, has gradually slipped from the highest rate achieved historically. The FY 2009 rate of 78 percent E/VG/G was significantly lower than the high of 83 percent recorded for FYs 2005 and 2003, when the annual survey was implemented.

A key factor in satisfaction with FO telephone service is the perception of access. Like satisfaction with service overall, satisfaction with access has declined gradually. Year-to-year drops of a few percentage points from the FY 2004 high of 75 percent have not been significant, but over time have amounted to a significant 9-point decline: the FY 2009 E/VG/G rating was down to 66 percent.

Dissatisfaction with access in the FY 2009 survey was linked to:

- Unsuccessful attempts to reach the FO in an earlier call. In the FY 2009 survey, 58 percent of responders reported that when they attempted to reach the FO, they received a busy message and had to call back later. In FY 2004, when access was rated at 75 percent E/VG/G, only 44 percent of survey responders reported receiving a busy message.
- Dissatisfaction with time spent on hold waiting to be served. Callers who were satisfied with the length of time they waited gave an access rating of 81 percent E/VG/G. Callers who were dissatisfied with hold time were in sharp contrast, with an access rating of just 30 percent E/VG/G. In the FY 2009 survey, 41 percent of callers who waited on hold were dissatisfied with the length of time they had to wait.

Use of voicemail is another factor affecting satisfaction with FO telephone service. In the FY 2009 survey, 24 percent of callers reported that they left a voicemail message. Most expected a return call (92 percent), but only 58 percent received one. Overall satisfaction among callers who received the expected callback was nearly 40 percentage points higher (80 percent E/VG/G) than among those who did not (44 percent E/VG/G).

Textual Description – Graph Details

Note: This section was not part of the original report. It has been added only to provide the following information, which is presented in the report in the form of graphics, for the purpose of complying with section 508 of the Rehabilitation Act of 1973.

[Figure 1](#) – Overall Service Satisfaction -- FO Caller Survey

	FY 2003*	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009
FO Caller Survey	83%	82%	83%	80%	79%	79%	78%

[Figure 2](#) – Satisfaction with Access -- FO Caller Survey

	FY 2003*	FY 2004	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009
FO Caller Survey	73%	75%	72%	72%	69%	68%	66%

Survey Methodology

Sample Selection and Methodology

The samples for the fiscal year (FY) 2009 and 2008 FO Caller Surveys were selected from incoming calls received in about 50 randomly selected FOs nationwide during the month of April each year. These FOs were a subset of about 100 randomly selected offices participating in the Office of Quality Performance's (OQP) FO Telephone Service Evaluation for the FY. (Because of the costs associated with installing the necessary caller identification equipment to record telephone numbers of callers for sampling purposes, only a subset of FOs can be included in the survey.)

Caller identification equipment was installed on all of the incoming lines in participating FOs, including general inquiry and callback lines. Calls initiated by the FO, such as teleclaims, were not subject to sample selection. At the close of each business day during the survey period, a file was produced for each FO containing the incoming telephone numbers for that day. These files were received daily by OQP and each day a random sample of calls was selected from all of the FOs. Over the course of a 4-week period in the month of April, each year OQP selected a total of 4,000 calls for the survey. During the survey period, OQP also received management information counts for the volume of calls received daily by each participating FO. These counts were used to weight survey results so that the findings presented in this report would represent the universe of calls received by the participating FOs.

Response Rate

Survey interviews were conducted for OQP by a private contractor, Synovate. To ensure as clear a recollection of the FO call as possible, OQP provided Synovate with sample files twice each week; contacts for the surveys were initiated promptly upon receipt of each sample file. Only the caller's telephone number, date of the call and name of the FO called were provided to Synovate, as callers' names were not available. OQP required Synovate to make up to 15 attempts to contact and interview sampled callers in an effort to maximize the response rate.

Results presented in this report are based on responses obtained during interviews with 1,300 individuals in FY 2009 and 1,100 in FY 2008. The response rate for the FY 2009 survey was 47 percent, up significantly from 41 percent in FY 2008.

The response rate is calculated based on an adjustment of the original sample to eliminate calls that are determined to be "out of scope" after contact is initiated. "Out of scope" calls are mainly those originating from business or public telephones (where it is generally impossible to identify the person who made the call) and calls from nonworking numbers. Other calls considered "out of scope" include those made by respondents who were unable to participate due to an impairment, language barrier, or permanent unavailability (death, in jail, hospital, etc.); numbers blocked by caller ID; personal calls to SSA employees; telephone numbers belonging to facsimile machines; and calls to SSA that were made by mistake. For the FY 2009 survey, the adjusted sample size was 2,772; for FY 2008, it was 2,685.

In both FYs, the sampled telephone numbers classified as belonging to nonresponders reflected individuals who declined to participate in the survey, could not be reached after multiple attempts, or did not make (or remember making) the sampled call and did not know who had. A comparison of reasons for nonresponse in the FY 2009 and FY 2008

surveys revealed some small but significant shifts, with express refusals rising in FY 2009 and “unable to reach” declining. We believe these shifts were indicative of increased diligence on the part of the contractor to make contact with someone at the sampled telephone number, as evidenced by the significant improvement in the response rate for FY 2009.

Questionnaire

The questionnaire for the FO Caller Survey focused on satisfaction with the service received on the day of the sampled call. Along with rating overall service, callers rated access to service and various employee attributes, such as courtesy and job knowledge, based on their experience during the sampled call. The survey utilized SSA’s standard six-point rating scale (excellent, very good, good, fair, poor, very poor) to measure satisfaction. When a “satisfaction rating” is presented in the report, it represents the combined total of excellent, very good and good (E/VG/G) ratings. In addition to obtaining satisfaction ratings, the survey gathered factual information about the caller’s experience that might influence satisfaction.

Approximate Sampling Variability

The following table provides the approximate sampling variability for the data included in this report. To use this table, locate the nearest sample size and percentage estimate. If you need to estimate the sampling variability for a percentage estimate less than 50 percent, subtract the percentage estimate from 100 percent and use the result. Use the sample size closest to the full sample for the pertinent subgroup or the full number of responders to the particular question.

Estimating Sampling Variability

PERCENTAGE ESTIMATE										
SAMPLE SIZE	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%
50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9
100	4.3	5.9	7.0	7.8	8.5	9.0	9.3	9.6	9.8	9.8
150	3.5	4.8	5.7	6.4	6.9	7.3	7.6	7.8	8.0	8.0
200	3.0	4.2	4.9	5.5	6.0	6.4	6.6	6.8	6.9	6.9
250	2.7	3.7	4.4	5.0	5.4	5.7	5.9	6.1	6.2	6.2
300	2.5	3.4	4.0	4.5	4.9	5.2	5.4	5.5	5.6	5.7
400	2.1	2.9	3.5	3.9	4.2	4.5	4.7	4.8	4.9	4.9
500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4
600	1.7	2.4	2.9	3.2	3.5	3.7	3.8	3.9	4.0	4.0
700	1.6	2.2	2.6	3.0	3.2	3.4	3.5	3.6	3.7	3.7
800	1.5	2.1	2.5	2.8	3.0	3.2	3.3	3.4	3.4	3.5
1000	1.4	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1
1200	1.2	1.7	2.0	2.3	2.5	2.6	2.7	2.8	2.8	2.8

For example, to determine the sampling variability for the percentage of responders in the FY 2009 survey giving FO telephone service an E/VG/G rating of 78 percent, go to the row that is closest to the number of responders providing a rating, 972 (1,000) and then to the column closest to 78 percent (80 percent) and read the sampling variability (± 2.5 percent). This means that the approximate 95-percent confidence level interval around the 78 percent satisfaction rating ranges from 75.5 percent (78 percent minus 2.5 percent) to 80.5 percent (78 percent plus 2.5 percent).

Annotated Questionnaire

Survey of Field Office Callers Fiscal Years (FY) 2009 and 2008 All Responders

1. What was the main reason for your call?

2009 (R = 1,114)	2008 (R = 1,059)	
22%*	26%*	Applying for benefits
39*	31*	Reporting a change affecting benefits/asking a question
8*	11*	Social Security Statement/benefit estimate/earnings issue (<i>Skip to 3</i>)
4	6	Social Security number (SSN) card (<i>Skip to 3</i>)
2	3	Filing appeal (<i>Skip to 3</i>)
5	4	Medicare information or replacement card (<i>Skip to 3</i>)
4	3	Review of case
2	3	Overpayment of benefits
3	2	Representative payee situation
3	2	Proof of current payments
2	2	To discuss the economic stimulus package/economic recovery payment (<i>Skip to 3</i>)
5	7	Something else (<i>Skip to 3</i>)

* Statistically significant difference between FYs

2. What kind of benefits were you calling about? Please answer 'yes' or 'no' as I read each one, in case your call was about more than one kind of benefit:

2009 (R = 774) 1,092 responses	2008 (R = 579) 766 responses	
21%	20%	Retirement/Survivors
36*	43*	Disability
28*	23*	Supplemental Security Income (SSI)
9	8	Medicare
7	7	Medicaid

* Statistically significant difference between FYs

3. Now, thinking about how easy it was to reach the (XYZ Social Security office) the day you called, would you rate how quickly you got through as:

2009 (R = 1,044)	2008 (R = 835)	
21%	23%	Excellent
19	19	Very good
27	26	Good
66	68	Excellent/Very Good/Good
14	12	Fair
8	8	Poor
12	11	Very poor
34	32	Fair/Poor/Very Poor

4. Did you try to call the (XYZ Social Security office) earlier that day and receive a busy signal or recording that all the lines were busy?

2009 (R = 1,231)	2008 (R = 1,009)	
58%	55%	Yes
42	45	No

5. When you called the office, you reached an automated message with information about their telephone service. I'd like to know how easy or hard you thought it was to understand this message. Would you say understanding the automated message was:

2009 (R = 1,242)	2008 (R = 1,023)	
60%	59%	Very easy (<i>Skip to 7</i>)
30	28	Somewhat easy (<i>Skip to 7</i>)
89	87	Very Easy/Somewhat Easy
5*	8*	Somewhat hard
5	5	Very hard
11	13	Somewhat hard/Very Hard

* Statistically significant difference between FYs

6. Why did you feel it was hard to understand the automated message?

2009 (R = 115) 129 responses	2008 (R = 105) 108 responses	
21%*	33%*	Too many options; menu is too long
26	18	Explanations of options were confusing, unclear
16	20	Options did not seem to fit the situation
12	9	Recording quality poor (too fast, not loud enough, words garbled)
1	2	Non-English speaking
25	18	Other

* Statistically significant difference between FYs

7. After you heard the automated message, what did you do? Did you:

2009 (R = 1,167)	2008 (R = 963)	
33%*	26%*	Enter the extension of the person you were calling
7	7	Use an automated service (including option to speak to a representative) (<i>Skip to 9</i>)
44	48	Stay on the line (<i>Skip to 11</i>)
8*	12*	Hang up and call the local office later (<i>Skip to 26</i>)
6	6	Hang up and call the 800 number (<i>Skip to 26</i>)
1	1	Hang up and go to SSA's web site on the Internet (<i>Skip to 26</i>)

* Statistically significant difference between FYs

8. What happened after that? Did you:

2009 (R = 370)	2008 (R = 270)	
39%	38%	Speak to the representative (<i>Skip to 18</i>)
55	58	Leave a message on voice mail (<i>Skip to 14</i>)
6	4	Hang up without leaving a message (<i>Skip to 17</i>)

9. Which service did you choose (including option to speak to a representative)?

2009 (R = 63)	2008 (R = 62)	
4%	10%	Office hours and directions to the local office
8	14	Request an SSN/change a name on a Social Security card
13	24	Make an appointment to file for benefits
5	2	Report a change of address
1	7	Request a Social Security Statement/benefit estimate
0	3	Request a replacement Medicare card
1	5	Report a change that might affect your SSI check
0	5	Request proof of payments you currently receive
18	0	Something else
50*	30*	Speak to a representative (<i>Skip to 11</i>)

* Statistically significant difference between FYs

Which service did you choose (excluding option to speak to a representative)?

2008 (R = 41)	
15%	Office hours and directions to the local office
21	Request an SSN/change a name on a Social Security card
34	Make an appointment to file for benefits
2	Report a change of address
11	Request a Social Security Statement/benefit estimate
4	Request a replacement Medicare card
7	Report a change that might affect your SSI check
7	Request proof of payments you currently receive
0	Something else

FY 2009 results not displayed - too few responders to yield statistically reliable data.

10. Thinking about the automated service you used, did it handle the reason for your call completely that day?

2008 (R = 54)	
50%	Yes (<i>Skip to 24</i>)
50	No (<i>Skip to 17</i>)

FY 2009 results not displayed - too few responders to yield statistically reliable data.

Questions 11 – 12 only apply to callers who stayed on the line (question 7) or who chose to speak to a representative after listening to the automated services (question 9).

11. What happened after that? Were you:

2009 (R = 534)	2008 (R = 451)	
60%	64%	Placed on hold
40	36	Connected immediately to a representative (<i>Skip to 18</i>)

12. After being placed on hold, what did you do? Did you:

2009 (R = 319)	2008 (R = 271)	
85%*	74%*	Wait and then speak to a representative (<i>Skip to 14</i>)
4*	10*	Wait and then get routed to voice mail
10*	16*	Hang up (<i>Skip to 17</i>)

* Statistically significant difference between FYs

13. How would you rate the amount of time on hold before someone answered your call?
Would you rate the amount of time as:

2009 (R = 267)	2008 (R = 200)	
8%*	15%*	Excellent
20	14	Very good
31	28	Good
59	57	Excellent/Very Good/Good
18	22	Fair
13	10	Poor
11	10	Very poor
41	43	Fair/Poor/Very poor

* Statistically significant difference between FYs

14. When you left your message on voice mail, did you:

2009 (R = 220)	2008 (R = 176)	
92%*	77%*	Ask someone to call you back
5*	16*	Report information <i>(Skip to 24)</i>
2*	7*	Do something else <i>(Skip to 24)</i>

* Statistically significant difference between FYs

15. Was your call returned?

2009 (R = 193)	2008 (R = 141)	
58%	55%	Yes
42	45	No <i>(Skip to 17)</i>

16. Were you called back?

2009 (R = 100)	2008 (R = 77)	
36%	39%	The same day
36	33	The next work day
22	28	Later, but still within about a week
6	1	Over a week later

(All skip to Q18.)

17. Then what did you do, or what do you plan to do, about your Social Security business? Did you or will you:

2009 (R = 153)	2008 (R = 141)	
15%	15%	Call the 800 number
39	43	Call the local office again
31	25	Visit the local Social Security office
1	<1	Use the Internet or email
0	1	Send a letter or FAX
10	11	Wait for SSA contact
2	1	Do something else
1	3	Do nothing about it

(All skip to Q24.)

Questions 18 – 23 apply only to callers who spoke to a representative.

Now I'd like to ask you several questions about your satisfaction with the service the representative gave you.

18. First, how would you rate the courtesy of the representative? Was it:

2009 (R = 761)	2008 (R = 599)	
53%	52%	Excellent
25*	19*	Very good
15	16	Good
93*	88*	Excellent/Very Good/Good
3*	8*	Fair
2	2	Poor
2	2	Very poor
7*	12*	Fair/Poor/Very poor

* Statistically significant difference between FYs

19. How well would you say the representative knew his/her job? Would you rate the representative's job knowledge as:

2009 (R = 755)	2008 (R = 582)	
48%	45%	Excellent
26	26	Very good
16	19	Good
90	90	Excellent/Very Good/Good
5	6	Fair
3	2	Poor
2	2	Very poor
10	10	Fair/Poor/Very poor

20. How would you rate the helpfulness of the representative during your call? Was it:

2009 (R = 757)	2008 (R = 593)	
45%	46%	Excellent
27	23	Very good
18	19	Good
90	87	Excellent/Very Good/Good
5	7	Fair
3	3	Poor
3	2	Very poor
10	13	Fair/Poor/Very poor

21. How clear were the explanations the representative gave you? Would you rate the clarity of the explanations as:

2009 (R = 748)	2008 (R = 590)	
41%	41%	Excellent
27	30	Very good
20	17	Good
89	87	Excellent/Very Good/Good
5	5	Fair
4	6	Poor
2	1	Very poor
11	13	Fair/Poor/Very poor

22. Was the representative able to take care of your business completely during your call?

2009 (R = 748)	2008 (R = 592)	
78%	75%	Yes (<i>Skip to Q24</i>)
22	25	No

23. Then what did you do, or what do you plan to do, to complete your business with Social Security? Did you or will you:

2009 (R = 147)	2008 (R = 138)	
8%	10%	Call Social Security's 800 number
27	25	Call the local Social Security office again
26	32	Visit the local Social Security office
3	1	Use the Internet or email
1	1	Send a letter or FAX
24	16	Wait for Social Security to contact you or mail something to you
9	11	Do something else
2	6	Do nothing about it

24. Overall, how would you rate the service the day you called the (XYZ Social Security office)? Was it:

2009 (R = 972)	2008 (R = 801)	
34%	35%	Excellent (<i>Skip to Q26</i>)
23	23	Very good (<i>Skip to Q26</i>)
22	20	Good (<i>Skip to Q26</i>)
78	79	Excellent/Very Good/Good
9	7	Fair
6	7	Poor
7	7	Very poor
22	21	Fair/Poor/Very poor

25. Why did you rate the telephone service in this office as fair, poor or very poor?

2009 (R = 213) 303 responses	2008 (R = 150) 199 responses	
22%	20%	It was too hard to get through
14	15	Wait time too long
18	16	Representative didn't answer the question/didn't explain things well
8	7	Representative was not courteous
10*	5*	Social Security failed to take the requested action/problem not solved
3	4	Don't like having to listen to automated messages or pressing numbers
2	2	Don't like leaving a message in voicemail
3*	9*	Transferred too many times/got the runaround
0	0	Recording was hard to understand
16	20	Employee never called back/slow to respond
4	2	Something else

* Statistically significant difference between FYs

26. If you contact Social Security again, what are you most likely to do? Will you:

2009 (R = 1,139)	2008 (R = 959)	
14%	13%	Call the 800 number
65	62	Call your local office
15*	19*	Visit you local office
3	2	Use the Internet or email
1	1	Write a letter
0	<1	Send a FAX
2	2	Do something else

* Statistically significant difference between FYs

27. First, do you use a personal computer at all?

2009 (R = 1,141)	2008 (R = 969)	
52%*	47%*	Yes
48*	53*	No (<i>Skip to Q31</i>)

* Statistically significant difference between FYs

28. And do you currently use the Internet?

2009 (R = 605)	2008 (R = 441)	
93%	92%	Yes
7	8	No (<i>Skip to Q31</i>)

29. Have you ever visited Social Security's Internet site?

2009 (R = 554)	2008 (R = 399)	
62%	65%	Yes
38	35	No

30. How interested are you in using the Internet to conduct any of your Social Security business? Are you:

2009 (R = 558)	2008 (R = 400)	
25%	24%	Very interested
39	35	Somewhat interested
36	41	Not at all interested

31. Do you have any comments or suggestions about the (XYZ Social Security office's) telephone service?

2009 (R = 1,157)	2008 (R = 974)	
40%	35%	Yes
60	65	No

Ratings Comparisons by Business Segment

The business segment is derived from the reason for call offered by responders; some responders did not provide a reason for call and therefore are not represented in a business segment. In addition, all responders in a segment did not provide satisfaction ratings for every item. Results are displayed below only where 40 or more responders in a segment provided a rating for the item. In FY 2009, the number of responders in the SSN and appeals segments was insufficient to display results. In FY 2008, the number of responders in the appeals segment was insufficient, as was the number in the SSN segment for all items except for the overall rating.

In both FYs 2009 and 2008, satisfaction was markedly higher among responders in the initial claims segment, both for service overall and other aspects of service.

FY 2009 FO Caller Survey			
E/VG/G Ratings by Business Segment			
	Initial Claims (R = 214)	Postentitlement (R = 450)	Other (R = 208)
Overall Service	86%*	77%	75%
Access	77*	65	65
Courtesy	96*	93	91
Job Knowledge	94*	91	85
Helpfulness	94*	89	88
Clarity of Explanations	91	89	89

* Statistically significant difference between segments compared to lowest rating in bold for this aspect of service.

FY 2008 FO Caller Survey				
E/VG/G Ratings by Business Segment				
	Initial Claims (R = 196)	Postentitlement (R = 336)	SSN (R = 43)	Other (R = 188)
Overall Service	88%*	75%	80%	77%
Access	77*	63	--	67
Courtesy	93*	87	--	83
Job Knowledge	92	87	--	89
Helpfulness	92*	85	--	86
Clarity of Explanations	90	85	--	88

* Statistically significant difference between segments compared to lowest rating in bold for this aspect of service.