# FY 2007 SURVEY OF FIELD OFFICE CALLERS

**Office of Quality Performance**

**Office of Quality Review**

**August 2008**

# FY 2007 SURVEY OF FIELD OFFICE (FO) CALLERS

**Executive Summary**

This report provides the results of the Office of Quality Performance's (OQP) FY 2007 Survey of Field Office (FO) Callers. The survey gathered satisfaction data that were combined with results from OQP's FY 2007 surveys of 800 number callers and office visitors to provide the Agency's performance measure for overall satisfaction of people who do business with SSA. The combined results were reported to the Agency in OQP's memorandum, "Overall Service Satisfaction: FY 2007 Performance Indicator Report," dated November 2007.

The FY 2007 survey involved telephone interviews with 846 callers who had called one of 48 randomly selected FOs during the month of April 2007. Key findings were:

- The overall FO telephone service satisfaction rate in FY 2007 was 79 percent excellent, very good or good (E/VG/G), nearly the same as the FY 2006 rating of 80 percent.

- Ratings of employee attributes, courtesy, job knowledge, helpfulness and clear explanations ranged from 88 percent to 94 percent E/VG/G, maintaining the same positive levels of satisfaction reported in previous FO Caller surveys.

- In FY 2007 there was a significant decrease in the proportion of callers who said they tried to call the FO earlier but got a busy signal or were told that all lines were busy (FY 2007 - 45 percent; FY 2006 - 51 percent). The FY 2007 percentage is more in line with results reported for years prior to FY 2006 when "busy rates" ranged from 40 to 46 percent.

- While a similar proportion of callers in FY 2007 and FY 2006 were placed on hold before being connected to an agent (about 60 percent), their satisfaction with the time they waited declined significantly in FY 2007 to 53 percent, down from 67 percent in the FY 2006 survey.

- Twenty-six percent of callers said they completed their FO contact by leaving a voicemail message. The majority expected a return call and 69 percent indicated that they were contacted by the FO. This was a significant improvement compared to the 54 percent of callers in the FY 2006 survey who said they received a callback as desired. Callers reported waiting somewhat longer to be contacted by the FO in FY 2007, but the differences were not significant because of the small number of responders.

- Among callers who spoke to an agent, the proportion reporting that they were able to complete their business during their call (71 percent) was significantly lower compared to FY 2006 (80 percent). This decline may be attributable to a significant 9 percentage point increase in calls related to applying for benefits, which tend to involve scheduling an appointment for an interview at a later date.

The preceding bullets describe significant differences in both positive and negative caller experiences and perceptions of various aspects of FO telephone service.  The divergent nature of these changes mitigated the impact of any one factor, with the result that callers' perceptions of FO telephone service overall and access to service recorded in the FY 2007 survey were not significantly changed from FY 2006.

# FY 2007 SURVEY OF FIELD OFFICE (FO) CALLERS

**Background and Methodology**

This report provides the results of the Survey of FO Callers conducted by the Office of Quality Performance (OQP) for fiscal year (FY) 2007. These results were included in the calculation of the FY 2007 performance measure for overall satisfaction of individuals who do business with SSA, which was reported in OQP's memorandum, "Overall Service Satisfaction: FY 2007 Performance Indicator Report," dated November 2007. The Survey of FO Callers is conducted annually, along with similar surveys of 800 number callers and office visitors, to produce satisfaction data for this performance measure.

The FY 2007 Survey of FO Callers was conducted with 846 individuals who had called one of 48 randomly selected FOs throughout the month of April 2007. 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 2007 FO Caller Survey. Comparisons with FY 2006 results are made where pertinent. Note that when the term "significant" is used in the discussion, 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. 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 (16) for such a breakout.

Overall Satisfaction with FO Telephone Service

- The overall FO telephone service satisfaction rate in FY 2007 was 79 percent E/VG/G, consistent with the FY 2006 rating of 80 percent.

- Among callers who were not satisfied with FO telephone service, the main source of dissatisfaction involved access, either because callers had a hard time getting through (26 percent) or because they waited on hold too long (17 percent).  In FY 2007 callers were much more often dissatisfied because they felt the FO did not provide a complete and clear explanation, 16 percent compared to 8 percent in FY 2006.  Failure to receive a callback after leaving a voice mail message was a significantly less frequent source of dissatisfaction in FY 2007 (14 percent) than in FY 2006 (23 percent).  FY 2007 also saw a significant decline in complaints from callers that the FO failed to take action to resolve their problem (FY 2007 - 9 percent; FY 2006 - 17 percent).

Rating Other Aspects of FO Telephone Service

- While the FY 2007 rating of FO telephone access was a few percentage points lower (69 percent E/VG/G), it did not constitute a significant change from the FY 2006 rate of 72 percent.

- Callers remained highly satisfied with FO employee performance in FY 2007, giving E/VG/G ratings from 88 percent for helpfulness and clear explanations to 94 percent for courtesy.  The table below illustrates the combined E/VG/G and the "excellent" ratings for the FY 2007 and FY 2006 surveys; none of the small differences between the two years were significant.

| Satisfaction with Employee Attributes | | | | |
|---|---|---|---|---|
| Aspect of Service | E/VG/G Rating | | Excellent Rating | |
| | FY 2006 | FY 2007 | FY 2006 | FY 2007 |
| Courtesy | 95% | 94% | 53% | 56% |
| Job knowledge | 93 | 92 | 48 | 47 |
| Helpfulness | 91 | 88 | 47 | 44 |
| Clear Explanations | 91 | 88 | 47 | 43 |

Earlier Attempts to "Get Through" to the FO

- In the FY 2007 survey, 45 percent of callers said they tried to reach the FO in an earlier call, but found the lines were busy or were told to call back later.  While this still represents a considerable proportion of callers, it is significantly lower than the 51 percent "busy rate" reported in FY 2006 and more in line with percentages reported for years prior to FY 2006.

| Survey Year | Percent Reporting Unable to Get Through to FO Earlier |
|---|---|
| 2007 | 45% |
| 2006 | 51 |
| 2005 | 42 |
| 2004 | 44 |
| 2003 | 46 |
| 2002 | 40 |

- As might be expected, inability to get through to the FO on an earlier call had a negative influence on ratings of telephone access as well as on ratings of FO telephone service overall. Among the callers who had this experience, 44 percent were satisfied with FO telephone access. These numbers are in contrast to the access rating of 81 percent E/VG/G from callers who got through on their first try.

- The overall satisfaction rating for callers who unsuccessfully tried to get through earlier (64 percent) was 23 percentage points lower than the rating from responders who had to call only once (87 percent), a significant difference.

Ease of Understanding the Automated Message

- When asked to rate the upfront automated message they encountered when calling the FO, 89 percent of callers said it was very or somewhat easy (VE/SE) to understand, nearly identical to the 88 percent VE/SE reported in FY 2006.

- Among the small group of callers who had difficulty understanding the upfront message, 28 percent felt the recording quality was poor. This was a significant increase from FY 2006 where this problem accounted for only 8 percent of the reasons given by callers. Callers' comments did not provide any insights that might explain the increase. In FY 2007, there were also complaints that the menu was too long with too many options (25 percent), the menu was confusing or unclear (22 percent) or that the options offered in the automated message did not fit callers' situations (15 percent).

Choice of Service Option

- As in past surveys of this population, the majority of callers in the FY 2007 survey initially chose to speak to an agent. Just under one-third (29 percent) entered the extension of a specific employee, while 46 percent stayed on the line to speak to the next available agent.

- In addition to agent service, some FOs offer automated service options, which vary at their discretion. Six percent of callers said they chose to use one of the automated service options available in the FO they contacted. The actual number of responders in this group (only 21 people) is too small to produce statistically reliable data. Therefore, this report does not discuss which automated services these callers used or their satisfaction with those services.

- The remaining survey responders, 19 percent, said they hung up after listening to the menu, deciding to contact SSA (generally the FO) again at another time.

Speaking to an Agent

- About 70 percent of FO callers said they actually spoke to an agent during the sampled call. Among callers who entered an extension to speak to a particular employee, approximately one-third (31 percent) successfully reached that person. Similar proportions were reported in the FY 2006 survey.

- Forty percent of callers who chose the option to speak to the next available agent were connected immediately. Of the remainder who were placed on hold, more than three-quarters (78 percent) chose to wait and speak with an agent. The experience of callers in FY 2006 was similar. Callers who spoke to an agent were extremely satisfied with FO telephone service overall, giving an E/VG/G rating of 87 percent.

- In FY 2007, 71 percent of callers said the agent handled their business completely during their call, down significantly from 80 percent in FY 2006. This decline in the perception that the business was completed may be linked to some significant shifts in the reasons for call: In FY 2007, the percentage of calls related to applying for benefits rose to 31 percent, up from 22 percent in FY 2006. Calls related to reporting a postentitlement change declined from 38 percent to 33 percent. Since calls about applying for benefits often involve scheduling an appointment for an interview at a later date, callers may tend to perceive this type of business as incomplete. A report of a postentitlement change (e.g., a change of address or direct deposit) is more likely to be taken care of during the call.

- The overall service rating was 96 percent E/VG/G for callers who were able to complete their transactions with an agent, compared to just 65 percent for their counterparts who said they still had outstanding business at the end of their call.

Waiting on Hold

- When asked about their satisfaction with time spent on hold, callers gave significantly lower ratings in FY 2007 (53 percent E/VG/G) than in FY 2006 (67 percent E/VG/G). However, this decline cannot be linked to any increase in the proportion of callers placed on hold, which was about 60 percent in both FY 2006 and FY 2007.

- As might be expected, a negative view of the wait on hold had a significant impact on ratings of access to FO telephone service. Of the callers who considered the length of time they spent on hold as E/VG/G, 83 percent also rated access as E/VG/G, compared to only a 26 percent E/VG/G access rating from callers who were dissatisfied with time on hold.

- Poor time on hold ratings also had a negative effect on overall satisfaction with FO telephone service. Ninety-five percent of callers who rated time on hold as E/VG/G also gave an E/VG/G overall service rating. In contrast, only 59 percent of their counterparts who were dissatisfied with time on hold reported an E/VG/G overall service rating.

Using Voicemail

- Twenty-six percent of callers said they left a voicemail message to complete their FO contact.  Being routed to voicemail was another experience that resulted in lower overall satisfaction among FO callers.  The E/VG/G overall rating from callers who left a voicemail message was 72 percent, significantly lower than the 87 percent rating from those who spoke to an agent.

- In FY 2007, 80 percent of callers who left a voicemail message expected a return call (the remaining 20 percent said they did not), down significantly from 92 percent in FY 2006.  This change in caller expectation may have contributed to the significant increase in the proportion of callers indicating they had been called back by the FO:  Among callers who wanted a return call, in FY 2007, 69 percent reported they had received one compared to 54 percent in FY 2006.  (This finding is consistent with the decrease in the number of complaints related to failure to receive a return call from callers who were dissatisfied with FO telephone service overall, as reported above.)  Not surprisingly, overall satisfaction was substantially higher among responders who were called back (87 percent E/VG/G) than among those who said they were not (37 percent E/VG/G).

- Among the responders who indicated they received a return call from the FO, most (79 percent) received their call the same day or the next day.  Although differences were not significant because of the small number of responders, it took somewhat longer to receive a callback in FY 2007 compared to FY 2006.

Preference for Future Contacts

- When asked about future contacts, FO callers continued to indicate a strong inclination for handling business through the FO again.  At 62 percent, calling the FO was the primary method preferred.  Another 19 percent of responders said they would visit the FO to do business.  Altogether, 81 percent of responders said they would prefer to deal with the FO if they had future SSA business.

- Calling the 800 number was the preferred future contact method of 13 percent of callers.  Just 3 percent said they would use the Internet or email; another 2 percent said they would write or "do something else."  Preferred methods for future contacts were similar in FY 2006 and FY 2007.

Internet Use

- Forty-nine percent of callers said they currently use a personal computer.  Among this group, the vast majority (93 percent) indicated they also use the Internet.  This translates to 45 percent of all FO callers who use the Internet, a significant increase over the 37 percent reported in FY 2006.  Fifty-eight percent of the Internet users in the survey stated they had visited Social Security's web site at some time.

- In spite of increased use of the Internet among FO callers, similar proportions of Internet users in the FY 2007 (62 percent) and FY 2006 (57 percent) surveys expressed an interest in using the Internet to conduct some of their Social Security business.

Other Comments or Suggestions

- The last question on the survey asked callers if they had any comments or suggestions about the FO telephone service they received from SSA. Analysis of those responses found that the main issue (about one-third of comments) was related to telephone access, with many responders complaining of long hold times or problems with reaching an SSA employee directly by phone.

- About one-quarter of those commenting were critical about the service they received expressing some frustration with calls not returned and/or unresolved issues relating to benefits.

- Fifteen percent of comments were from satisfied callers who had comments like: "I like this office because the customer service is excellent and I can ask the most complicated questions and they can help me."

- Just under ten percent of those commenting felt that staffing increases at SSA were necessary in order to provide better service: "I wish they had more people to answer calls because I waited a long time."

Summary

A comparison of survey data from FY 2007 and FY 2006 reflected significant differences in both positive and negative caller experiences and perceptions of various aspects of FO telephone service.

- In FY 2007, the "busy rate" of 45 percent (i.e., callers who said they tried to reach the FO in an earlier call, but found the lines were busy or were told to call back later) was significantly lower than the 51 percent reported in FY 2006.

- In both FY 2007 and FY 2006, similar proportions of callers who opted to speak to an agent were placed on hold (about 60 percent). However, satisfaction with the amount of time spent on hold for an agent declined significantly from 67 percent in FY 2006 to 53 percent in FY 2007.

- Among callers who left a voicemail message and expected a return call, there was a significant increase in the proportion indicating that their calls were in fact returned by the FO (FY 2007 – 69 percent; FY 2006 – 54 percent). Callers reported waiting somewhat longer to be contacted by the FO in FY 2007; i.e., in FY 2007, 39 percent were called back the same day while in FY 2006 the figure was 46 percent. However, the differences were not significant because of the small number of responders to these questions.

- Significantly fewer of the callers in FY 2007 who spoke to an agent reported that they were able to handle their business to completion (71 percent) compared to their counterparts in FY 2006 (80 percent).

The divergent nature of these changes mitigated the impact of any one issue, resulting in no significant impact on callers' broader perceptions of FO telephone service: Overall satisfaction was nearly identical (FY 2007 - 79 percent; FY 2006 - 80 percent) and ratings of access, varied by only three percentage points (FY 2007 - 69 percent; FY 2006 - 72 percent).

# TAB A – SURVEY METHODOLOGY

## Sample Selection and Methodology

The fiscal year (FY) 2007 sample for the Survey of FO Callers was selected from incoming calls received in 48 randomly selected FOs nationwide during the month of April 2007. These 48 FOs were a subset of the 110 randomly selected offices participating in the Office of Quality Performance's (OQP) FO Telephone Service Evaluation for FY 2007. (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 the 48 FOs. Over the course of a 4-week period in April 2007, OQP selected a total of 2,583 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 48 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 survey 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 846 sampled callers. This represents a response rate of 49 percent, after adjusting the original sample size of 2,572 to 1,763 by eliminating calls made by respondents who were unable to participate due to an impairment, language barrier or who were permanently unavailable (due to death, jail, hospital, etc.) as well as those who called SSA by mistake. Calls originating from business or public telephones (where it is generally impossible to identify the person who made the call), nonworking numbers or numbers blocked by caller ID, personal calls to SSA employees and telephone numbers belonging to facsimile machines were also eliminated. The remaining 48 percent of sampled telephone numbers classified as belonging to nonresponders mainly reflected individuals who declined to participate in the survey, could not be reached after multiple attempts or did not make the sampled call and did not know who had. A comparison of reasons for nonresponse in the FY 2007 and FY 2006 surveys revealed an essentially stable distribution of the various reasons, an indication that the responder/nonresponder populations have remained consistent.

**Questionnaire**

The questionnaire for the Survey of FO Callers 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 giving FO telephone service an E/VG/G rating of 79 percent, go to the row that is closest to the number of responders providing a rating, 649 (700) and then to the 80 percent column and read the sampling variability (±3.0 percent). This means that the approximate 95-percent confidence level interval around the 79 percent satisfaction rating ranges from 76.0 percent (79 percent minus 3.0 percent) to 82.0 percent (79 percent plus 3.0 percent).

# Tab B – Annotated Questionnaire

## Survey of Field Office Callers
## Fiscal Year 2007

**Note:**   **Percentages may not add to 100 percent due to rounding.  Similarly, for rating questions, individual and combined points of the scale may differ due to rounding.**

   **The number of responses is shown in ( ).**

1.   **What was the main reason for your call?  (828)**

| | |
|---|---|
| 31% | Applying for benefits |
| 33 | Reporting a change affecting benefits/asking a question |
| 5 | Social Security Statement/benefit estimate/earnings issue *(Skip to 3)* |
| 8 | Social Security number (SSN)/card *(Skip to 3)* |
| 3 | Filing appeal *(Skip to 3)* |
| 5 | Medicare information or replacement card *(Skip to 3)* |
| 3 | Review of case |
| 1 | Overpayment of benefits |
| 4 | Representative payee situation |
| 2 | Proof of current payments |
| 5 | Something else |

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:  (515 responders gave 922 responses)**

| | |
|---|---|
| 22% | Retirement/Survivors |
| 33 | Disability |
| 24 | Supplemental Security Income (SSI) |
| 13 | Medicare |
| 8 | Medicaid |

**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 though as: (697)**

| | |
|---|---|
| 26% | Excellent |
| 20 | Very good |
| 23 | Good |
| *69* | *Excellent/Very Good/Good* |
| 12 | Fair |
| 8 | Poor |
| 11 | Very poor |
| *31* | *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? (801)**

| | |
|---|---|
| 45% | Yes |
| 55 | 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: (811)**

| | |
|---|---|
| 57% | Very easy *(Skip to 7)* |
| 30 | Somewhat easy *(Skip to 7)* |
| *86* | *Very Easy/Somewhat Easy* |
| 7 | Somewhat hard |
| 4 | Very hard |
| *11* | *Somewhat hard/Very Hard* |
| 3 | Did not hear an automated message/someone answered the phone *(Skip to 18)* |

**6.** **Why did you feel it was hard to understand the automated message? (71 responders gave 75 responses)**

| | |
|---|---|
| 25% | Too many options; menu is too long |
| 22 | Explanations of options were confusing, unclear |
| 15 | Options did not seem to fit the situation |
| 28 | Recording quality poor (too fast, not loud enough, words garbled) |
| 3 | Non-English speaking |
| 6 | Other |

**7. After you heard the automated message, what did you do?  Did you: (759)**

| | |
|---|---|
| 29% | Enter the extension of the person you were calling |
| 6* | Use an automated service (including option to speak to a representative) *(Skip to 9)* |
| 46 | Stay on the line  *(Skip to 11)* |
| 10 | Hang up and call the local office later *(Skip to 26)* |
| 7 | Hang up and call the 800 number  *(Skip to 26)* |
| 1 | Hang up and go to SSA's web site on the Internet *(Skip to 26)* |

*Excluding option to speak to a representative, 4% of responders selected an automated service.

**8. What happened after that?  Did  you:  (221)**

| | |
|---|---|
| 31% | Speak to the representative *(Skip to 18)* |
| 65 | Leave a message on voice mail  *(Skip to 14)* |
| 4 | Hang up without leaving a message *(Skip to 17)* |

**9. Which service did you choose (including option to speak to a representative)?   (37)**

| |
|---|
| Data not displayed because number of responses (**R=37**) too small to yield statistically reliable data |

**Which service did you choose (excluding option to speak to a representative)? (21)**

| |
|---|
| Data not displayed because number of responses (**R=21**) too small to yield statistically reliable data |

**10. Thinking about the automated service you used, did it handle the reason for your call completely that day?  (36)**

| |
|---|
| Data not displayed because number of responses (**R=36**) too small 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:  (362)**

| | |
|---|---|
| 60% | Placed on hold |
| 40 | Connected immediately to a representative *(Skip to 18)* |

**12. After being placed on hold, what did you do?  Did you:  (202)**

| | |
|---|---|
| 78% | Wait and then speak to a representative *(Skip to 14)* |
| 4 | Wait and then get routed to voice mail |
| 18 | Hang up *(Skip to 17)* |

**13. How would you rate the amount of time on hold before someone answered your call?  Would you rate the amount of time as:  (150)**

| | |
|---|---|
| 7% | Excellent |
| 17 | Very good |
| 30 | Good |
| *53* | *Excellent/Very Good/Good* |
| 25 | Fair |
| 10 | Poor |
| 11 | Very poor |
| *47* | *Fair/Poor/Very poor* |

**Questions 14 – 16 only apply to callers who used voicemail.**

**14. When you left your message on voice mail, did you:  (148)**

| | |
|---|---|
| 80% | Ask someone to call you back |
| 17 | Report information  *(Skip to 24)* |
| 3 | Do something else *(Skip to 24)* |

**15. Was your call returned?   (132)**

| | |
|---|---|
| 69% | Yes |
| 31 | No *(Skip to 17)* |

**16. Were you called back?  (84)**

| | |
|---|---|
| 39% | The same day |
| 40 | The next work day |
| 16 | Later, but still within about a week |
| 5 | Over a week later |

*(All skip to 18)*

**17. Then what did you do, or what do you plan to do, about your Social Security business? Did you or will you: (108)**

| | |
|---|---|
| 9% | Call the 800 number |
| 31 | Call the local office again |
| 40 | Visit the local Social Security office |
| 0 | Use the Internet or email |
| <1 | Send a letter or FAX |
| 15 | Wait for SSA contact |
| 1 | Do something else |
| 4 | Do nothing about it |

*(All skip to 24)*

**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: (494)**

| | |
|---|---|
| 56% | Excellent |
| 21 | Very good |
| 17 | Good |
| *94* | *Excellent/Very Good/Good* |
| 4 | Fair |
| 1 | Poor |
| 1 | Very poor |
| *6* | *Fair/Poor/Very poor* |

**19. How well would you say the representative knew his/her job? Would you rate the representative's job knowledge as: (489)**

| | |
|---|---|
| 47% | Excellent |
| 28 | Very good |
| 17 | Good |
| *92* | *Excellent/Very Good/Good* |
| 4 | Fair |
| 2 | Poor |
| 2 | Very poor |
| *8* | *Fair/Poor/Very poor* |

**20. How would you rate the helpfulness of the representative during your call?  Was it: (494)**

| | |
|---|---|
| 44% | Excellent |
| 25 | Very good |
| 19 | Good |
| *88* | *Excellent/Very Good/Good* |
| 5 | Fair |
| 4 | Poor |
| 3 | Very poor |
| *12* | *Fair/Poor/Very poor* |

**21. How clear were the explanations the representative gave you?  Would you rate the clarity of the explanations as:  (487)**

| | |
|---|---|
| 43% | Excellent |
| 28 | Very good |
| 17 | Good |
| *88* | *Excellent/Very Good/Good* |
| 6 | Fair |
| 4 | Poor |
| 3 | Very poor |
| *12* | *Fair/Poor/Very poor* |

**22. Was the representative able to take care of your business completely during your call? (494)**

| | |
|---|---|
| 71% | Yes *(Skip to 24)* |
| 29 | 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:  (134)**

| | |
|---|---|
| 13% | Call Social Security's 800 number |
| 36 | Call the local Social Security office again |
| 22 | Visit the local Social Security office |
| 0 | Use the Internet or email |
| 6 | Send a letter or FAX |
| 19 | Wait for Social Security to contact you or mail something to you |
| 3 | Do something else |
| 2 | Do nothing about it |

**24.  Overall, how would you rate the service the day you called the (XYZ Social Security office)?  Was it:  (649)**

| | |
|---|---|
| 35% | Excellent *(Skip to 26)* |
| 26 | Very good *(Skip to 26)* |
| 18 | Good *(Skip to 26)* |
| *79* | *Excellent/Very Good/Good* |
| 7 | Fair |
| 6 | Poor |
| 8 | Very poor |
| *21* | *Fair/Poor/Very poor* |

**25.  Why did you rate the telephone service in this office as fair, poor or very poor? (142 responders gave 177 responses)**

| | |
|---|---|
| 26% | It was too hard to get through |
| 17 | Wait time too long |
| 16 | Representative didn't answer the question/didn't explain things well |
| 6 | Representative was not courteous |
| 9 | Social Security failed to take the requested action/problem not solved |
| 3 | Don't like having to listen to automated messages or pressing numbers |
| 1 | Don't like leaving a message in voicemail |
| 2 | Transferred too many times/got the runaround |
| 0 | Recording was hard to understand |
| 14 | Employee never called back/slow to respond |
| 4 | Something else |

**26.  If you contact Social Security again, what are you most likely to do?  Will you:  (776)**

| | |
|---|---|
| 13% | Call the 800 number |
| 62 | Call your local office |
| 19 | Visit you local office |
| 3 | Use the Internet or email |
| 1 | Write a letter |
| 0 | Send a FAX |
| 2 | Do something else |

**We would like to ask you a few questions about using a personal computer and the Internet.**

**27. First, do you use a personal computer at all? (773)**

| | |
|---|---|
| 49% | Yes |
| 51 | No *(Skip to 31)* |

**28. And do you currently use the Internet? (380)**

| | |
|---|---|
| 93% | Yes |
| 7 | No *(Skip to 31)* |

**29. Have you ever visited Social Security's Internet site? (350)**

| | |
|---|---|
| 58% | Yes |
| 42 | No |

**30. How interested are you in using the Internet to conduct any of your Social Security business? Are you: (357)**

| | |
|---|---|
| 26% | Very interested |
| 36 | Somewhat interested |
| 38 | Not at all interested |

**31. Do you have any comments or suggestions about the (XYZ Social Security office's) telephone service? (779)**

| | |
|---|---|
| 37% | Yes |
| 63 | No |

## Tab C - Ratings Comparisons by Segment

| | Initial Claims (R = 187) | Postentitlement (R = 275) | Other (R = 61) |
|---|---|---|---|
| **Overall Service** | **80%** | **80%** | 83% |
| **Access** | 70 | **65** | 82* |
| **Courtesy** | **92** | 94 | 99* |
| **Job Knowledge** | 91 | **90** | 99 |
| **Helpfulness** | **88** | 89 | 95 |
| **Clarity of Explanations** | **89** | **89** | 92 |

[a] Too few responders in the SSN and Appeals segments to display ratings.
   Segment not determined for 97 responders who did not provide reason for call.
 * For each aspect of service, statistically significant difference compared to lowest rating in bold.