ACL conducts an annual survey of individuals who receive one-on-one assistance from a SHIP or SMP program. We collect 800 responses per year, and typically contact about 2000 individuals to collect our 800 responses. Given the amount of available data in the STARS and SIRS data systems, we contact less than 10% of the individuals who received service. Occasionally (once or twice per year) an individual who receives a survey call is uncertain about the call and thinks it is a scam. We have specific information in the survey’s introduction to ensure it is a legitimate collection of information, but to minimize concerns from contacted individuals we have provided two separate scripts that program staff can use.

The first – “Message to individuals who received one-on-one assistance” (page 2) – can be read to individuals after they finish a one-on-one assistance visit. Your staff can read this message to everyone who receives service at specific times each year (see the message on page 2 below).

The second – “General Information for individuals who contact your state/territory (page 3)” – is information you can use if someone calls you and asks if the survey is legitimate. In most years you will not receive such a call, but if you receive such a request please use the script on page 3 and/or contact ACL.

Message to individuals who received one-on-one assistance

(SHIP survey calls are made during two separate windows each year, and SMP calls are made during one window. **You only need to read the script during the open windows listed below**.)

* SHIP Open Enrollment Period: October 15 to November 25
* SHIP Non-Open Enrollment Period: March 1 to March 31
* SMP: January 1 to June 30

**Script:**

Thank you for visiting with us today. I hope the information I’ve provided has been helpful. My agency is currently conducting a customer satisfaction survey, so you might receive a phone call in the next week or two asking about your satisfaction with the help you’ve received today. The number associated with this survey will contain a local area code, and the caller ID will be listed as “Ironwood Insights”. The individual calling you will also reference an “OMBControl Number” (***0985-0057***), which will let you know that the survey questions are legitimate.

If you are contacted, you will only be asked about your experience with this counseling session and won’t have to provide any sensitive personal information.

Thanks again for contacting us and please let us know if you need additional assistance.

General Information for individuals who contact your State/Territory

(*If someone contacts you asking about a customer satisfaction survey, you should pass along the following information. 1-2 times per year one of the potential survey respondents is apprehensive about completing a survey and escalates the issue to their local SHIP/SMP office.)*

Hello. We are currently conducting a customer satisfaction survey to understand the strengths and weaknesses of our program’s one-on-one assistance to potential Medicare beneficiaries and their representatives. We conduct this survey by phone and use specific information to make sure you remember the assistance you received. Specifically, we reference the date of service, the counselor who provided you with service, and the name of our agency to make sure you understand which assistance you should evaluate.

Once we have confirmed the specific assistance you received, we provide two additional pieces of information before beginning the formal survey.

First, we ask each individual if he/she would like to complete the survey. If they answer “No”, we thank them for their time and hang up the phone. If they answer “Yes” we read the following description of the survey:

***This survey collection has been approved by the Office of Management and Budget (OMB) and will expire on July 31, 2023. The OMB Control Number for this survey is 0985-0057. If you would like to comment on this survey or confirm that this is a valid collection, please contact Shefy Simon from the Survey Team at 202-795-7572.***

The details provided – including the expiration date and OMB control number – ensure that the collection of information is valid. If you have any additional questions please let us know, and we will put you in contact with the person best positioned to address your concerns.

Thank you.