

**Generic Clearance of Customer Satisfaction Surveys  
Qualitative Surveys  
Basic Required Elements**

**Title of Survey**

***Pre- and Post-Training Questions for the Representative Payee Training***

**Description of Activity**

**Background**

As part of the Patient Protection and Affordable Care Act, President Obama signed the Elder Justice Act into law on March 23, 2010. The Elder Justice Act provides federal resources to “Prevent, detect, treat, understand, intervene in and, where appropriate, prosecute elder abuse, neglect and exploitation.”

In support of the Elder Justice Act and the efforts of the Elder Justice Coordinating Council, we, at SSA, are working collaboratively to develop an interdisciplinary training that will train and equip representative payees with the tools to serve our beneficiaries and better safeguard them against potential abuse and financial exploitation. We are designing this training to heighten representative payee awareness about the signs of elder abuse and exploitation; how to recognize the signs of adult diminished cognitive capacity; and effective strategies for interacting with the banking community. To develop this training, we partnered with: the Administration on Aging within the Administration for Community Living; the Consumer Protection Financial Protection Bureau; Senior Corps programs funded by the Corporation for National and Community Service; Anne Arundel County Department of Social Services; the City of Chicago Department of Family & Support Services; Wells Fargo and their Financial Education Program Hands On Banking; the National Adult Protective Services Association; and Rush University.

We worked together to develop an informative and helpful training that will assist representative payees with the critical task of serving as a representative payee. In addition, we want to ensure that representative payees have key information that will help them protect vulnerable adults and the elderly from abuse, neglect, and financial exploitation. This training collaboration will help with our collective efforts to protect our vulnerable adults and elderly population.

**Description of Survey**

- Because the test group for this new training is small (fewer than 100), the surveys will be administered individually as we identify participants and they complete each training module.

- There are 14 pre-training questions designed to measure baseline knowledge, and we will administer this survey to the representative payees in this study prior to receiving training.
- In addition to the 14 pre-training questions, each module has between two and four post-training questions we will ask respondents to answer after viewing the training.
- SSA will conduct the surveys with SSA's Office of Research Evaluation and Statistics (ORES) responsible for providing the survey materials and analyzing the responses and SSA's Office of Learning (OL) responsible for delivery and collection. We will administer all surveys on paper with the pre-training surveys delivered prior to the delivery of the training videos, and each post-training survey delivered with the training videos.
- We will conduct the survey on a rolling basis beginning in September 2015 and ending after all of the identified participants (fewer than 100) have viewed the training.
- OL will collect the surveys and securely deliver them to ORES where ORES staff will analyze and aggregate them to produce a report regarding the efficiency and efficaciousness of the training.
- We designed the questions (see below) to assess the effect of the training on the respondents' knowledge and understanding of the following topic areas:
  - SSA Representative Payee Technical Training
  - Elder Abuse and Financial Exploitation
  - Hands On Banking (a training unit on financial literacy)
  - Decline of Cognitive Ability

### **Sharing Results of the Study**

- SSA will use the results of this study internally to determine the efficaciousness and efficiency of the proposed training plan for representative payees

### **Payment to Survey Participants**

- We will not provide payment to respondents.

### **Use of Survey Results**

- SSA will use these surveys to measure the efficiency and efficaciousness of the proposed training program for Representative Payees.

### **Burden Hour Computation**

- Attached are the pre- and post-training questions we plan to ask of the training participants. We will review their responses to gauge whether the training was effective in increasing the participants' level of knowledge in these areas. Our goal is to use the training as a means to improve representative payees' knowledge.
- We estimate it will take an average of 80 minutes to view the training modules:

- o **Rep Payee Technical Training:** 35 minutes, 53 seconds
  - o **Hands On Banking (Wells Fargo):** 13 minutes 26 seconds
  - o **NAPSA – Elder Abuse:** 15 minutes 34 seconds
  - o **Decline of Cognitive Ability:** 15 minutes
- We estimate that it will take an average of 25 minutes to complete the training module surveys:
    - o **Rep Payee Technical Training:** 5 minutes
    - o **Hands On Banking (Wells Fargo):** 10 minutes
    - o **NAPSA – Elder Abuse:** 5 minutes
    - o **Decline of Cognitive Ability:** 5 minutes
  - The total burden hours will be 175 burden hours annually for 100 trainees who complete the survey with 133 of those for the training and 42 for the surveys.

**Copy of Survey Script**

- The following is a copy of the proposed questions we will ask prior to viewing the training and after viewing training. We propose sending all of the 14 pre-training questions to the representative payees identified for this study, once they we identify them, to establish a baseline. We will then provide the post-training survey questions with each module individually and use differences in the pre- and post-responses to measure the effectiveness of the training.

**Pre- and Post-Training Questions for the Representative Payee Training**

The intent of the interdisciplinary training offered in the representative payee training is to increase representative payees’ awareness of signs that indicate that beneficiaries under their care are targets of potential personal abuse/neglect or of financial exploitation/scams. SSA designed the following questions to gauge the extent to which representative payees can (a) recognize signs that indicate personal abuse/neglect or financial exploitation/scams and (b) take appropriate action to prevent or stop the abuse.

NOTE: The following questions are for representative payees before AND after they complete the interdisciplinary training offered.

**SSA Representative Payee Technical Training**

Pre-training questions:

1. Have you previously served as a representative payee?
  - a. Yes
  - b. No
2. Have you previously had training about the roles and responsibilities of being a representative payee?

- a. Yes
- b. No

3. I feel that I have the knowledge and ability to carry out the roles and responsibilities of a representative payee.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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4. I know where to obtain information (e.g., via websites or via other resources) about the representative payee program, including my duties as a representative payee.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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Post-training questions:

As a result of this training:

1. I feel that I have the knowledge and ability to carry out the roles and responsibilities of a representative payee.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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2. I know where to obtain information (e.g., websites or via other resources) about the representative payee program, including my duties as a representative payee.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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3. Is there anything that you would change about this training? (free format response)

**Elder Abuse and Financial Exploitation**

Pre-training questions:

1. Have you previously had training on recognizing the signs of elder abuse or financial exploitation?

- a. Yes
- b. No

2. I am able to recognize the signs of abuse or neglect of the vulnerable adult(s) or senior(s) whom I am serving.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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3. I am able to recognize the signs of financial exploitation of the vulnerable adult(s) or senior(s) whom I am serving.

Strongly	Agree	Neither Agree	Disagree	Strongly
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Agree		nor Disagree		Disagree
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4. I know where to obtain information on the appropriate action(s) to take in the event the adult or senior whom I am serving is a target of personal abuse/neglect.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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5. I know where to obtain information on the appropriate action(s) to take in the event the adult or senior whom I am serving is a target of financial exploitation.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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Post-training questions:

As a result of this training:

1. I am able to recognize the signs of abuse or neglect of the vulnerable adult(s) or senior(s) whom I am serving.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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2. I am able to recognize the signs of financial exploitation of the vulnerable adult(s) or senior(s) whom I am serving.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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3. I know where to obtain information on the appropriate action(s) to take in the event the vulnerable adult or senior whom I am serving is a target of personal abuse/neglect.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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4. I know where to obtain information on the appropriate action(s) to take in the event the vulnerable adult or senior whom I am serving is a target of financial exploitation.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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5. Is there anything that you would change about this training? (free format response)

**Hands-on Banking**

Pre-training questions:

1. Have you previously had training on this subject about interacting with the banking community?
- Yes
  - No

2. I understand how to interact with the banking community in my role as a representative payee when necessary.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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Post-training questions:

As a result of this training:

1. I understand how to interact with the banking community in my role as a representative payee when necessary.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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2. I feel that the information and resources in this training provided me with valuable information to assist me in serving as a representative payee.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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3. Would you recommend this training?  
 a. Yes  
 b. No

4. Is there anything that you would change about this training? (free format response)

**Decline of Cognitive Ability**

Pre-training questions:

1. Have you had any prior training on recognizing the signs or symptoms of a decline in cognitive ability (e.g., due to the onset of a serious cognitive disorder—such as dementia or Alzheimer’s disease— that may reduce an individual’s ability to engage in decision making)?

1. Yes  
 2. No

2. I am able to recognize the signs or symptoms of a decline in cognitive ability.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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3. I am able to access resources if the vulnerable adult or senior whom I am serving exhibits a decline in cognitive ability.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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Post-training questions:

As a result of this training:

1. I am able to recognize the signs or symptoms of a decline in cognitive ability.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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2. I am able to access resources if the vulnerable adult or senior whom I am serving exhibits a decline in cognitive ability.

Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
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a.

3. Is there anything that you would change about this training? (free format response)