

SCHULMAN, RONCA AND BUCUVALAS, INC.
145 EAST 32ND STREET
NEW YORK, NEW YORK 10016

STUDY NUMBER 3291

OMB No. 0960-XXXX
Exp Date:

SOCIAL SECURITY ADMINISTRATION
ONLINE SERVICES INTERNET PANEL STUDY

OMB Control Number: 0960-XXXX

The Privacy Act requires us to notify you that we are authorized to collect this information by section 702 of the Social Security Act. You do not have to provide the information requested. This survey is not part of the official Social Security benefits eligibility determination, and the information you provide will in no way affect your current or future benefits. However, the data you provide will be used to help us evaluate our initiatives to increase and improve Social Security's online services. Your individual answers will be kept completely confidential.

This information collection meets the requirements of 44 U.S.C. 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take you about 15 minutes to answer the questions. You may send comments on our time estimate above to **SSA, 6401 Security Blvd., Baltimore, MD 21235-6401**. Send only comments relating to our time estimate to this address, not the completed form.

Thank you for taking part in this important project. The Social Security Administration is conducting a survey to help improve its service to the public. This survey is being conducted for Social Security by an independent research organization, SRBI, which will assure the confidentiality of all respondents. The names and email addresses of survey respondents will not be provided to Social Security or anyone else. Your participation is very important to help the Social Security Administration meet the needs of the public.

If you have any problems completing the survey, please e-mail SSAStudyManager@SRBI.com or call 1-800-659-5432 and ask for the Social Security study manager at extension 3291.

NOTE: SKIP AND OTHER INSTRUCTIONS THAT ARE HIGHLIGHTED WILL BE USED BY THE CATI PROGRAMERS AND WILL NOT BE SEEN BY THE RESPONDENTS.

1. First, what is your age?

- Less than 50 **SCREEN OUT - SKIP TO "THANK YOU" AND END**
- 50-54
- 55-59
- 60-64
- 65-67
- 68 or older **SCREEN OUT - SKIP TO "THANK YOU" AND END**
- Refused **SCREEN OUT - SKIP TO "THANK YOU" AND END**

2. What is your current work status? **MARK ALL THAT APPLY.**

- Employed full or part time
- Self-employed
- In the military full-time **SKIP TO Q16**
- Unemployed **SKIP TO Q16**
- Retired **SKIP TO Q16**
- Student **SKIP TO Q16**
- Homemaker **SKIP TO Q16**
- Disabled **SKIP TO Q16**
- Refused **SCREEN OUT - SKIP TO "THANK YOU" AND END**

3. In what state do you work?

INSERT DROP DOWN LIST OF STATES

IF SELF-EMPLOYED IN Q2 SKIP TO Q7

4. Including yourself, about how many employees would you say work for your company at your location?

- 1-9
- 10-19
- 20-49
- 50-99
- 100-249
- 250-499
- 500-999
- 1,000 or more
- Don't know/Not Sure

56. Does your company have more than one location?

- Yes
- No **SKIP TO Q7**

6. How many employees would you say work for your company at ALL locations?

- 1-9
- 10-19
- 20-49
- 50-99
- 100-249
- 250-499
- 500-999
- 1,000 or more
- Don't know/Not sure

7. When do you plan to retire?

- Within 1 year
- Within the next 1 to 2 years
- Within the next 3 to 4 years
- Within the next 5 to 6 years
- Within the next 7 to 10 years
- More than 10 years from now

8. How much planning have you done for your retirement?

- A lot
- Some
- Only a little
- None

IF SELF-EMPLOYED IN Q2 SKIP TO Q16.

9. Does your employer have a human resources or personnel department?

- Yes
- No **SKIP TO Q11**
- Don't know **SKIP TO Q11**

IF ONLY 1 IN Q5 SKIP TO Q11.

10. Is there a human resources or personnel office at your job site or is it located at another site?

- At my job site only
- At another site only
- At both my job site and at another location

11. How much information on retirement planning, benefits or other retirement issues has your employer given you?

- A lot
- Some
- Only a little
- None

12. How satisfied are you with the information your employer has given you on retirement planning, benefits, or other retirement issues?

- Very satisfied
- Somewhat satisfied
- Only a little satisfied
- Not satisfied at all

13. Has your employer ever given you information about any of the following aspects of your Social Security benefits? **MARK ALL THAT APPLY**

- Retirement
- Disability
- Family/Survivor information
- Medicare
- Social Security Statement (your Personal Earnings information)
- Social Security Web site (www.socialsecurity.gov)
- Other, specify _____
- None of these

SECONDARY MENU FOR RETIREMENT

What aspects of retirement were provided?

- General information
- Application for filing on the Internet
- Benefit calculators on the Internet
- Other, specify _____

SECONDARY MENU FOR DISABILITY

What aspects of disability were provided?

- General information
- Application for filing on the Internet
- Other, specify _____

14. Does your employer have a Web site for employees?

- Yes
- No **SKIP TO Q16**
- Not sure **SKIP TO Q16**

15. Does your employer's Web site have a link to the Social Security Online Web site (www.socialsecurity.gov)?

- Yes
- No
- Don't know

16. Have you ever used the following services offered by Social Security? **MARK ALL THAT APPLY**

- Call the Social Security toll free telephone number
- Visit the local Social Security walk-in office
- E-mail Social Security
- Send regular mail to Social Security
- Visit the Social Security Web site (www.socialsecurity.gov)
- Attend seminars by Social Security staff
- Visit the Social Security booth at a community event
- Other, specify _____
- None of these

FOR EACH ITEM MARKED IN Q16 ASK THE FOLLOWING:

17. When was the most recent time you used **[INSERT ITEM]**?

- Less than 1 year ago
- 1 to 2 years ago
- 3 to 5 years ago
- More than 5 years ago
- Not sure

18. Have you ever gotten ANY information or instructions about Social Security benefits, eligibility, or the application process from any of the following persons or places? **MARK ALL THAT APPLY**

- Social Security statement (your personal earnings information)
- Financial advisor
- Accountant or tax preparer
- Radio, television or other media
- Friends or family
- Workplace
- Employer Web site
- Other government office or Web site
- Other Web site, specify _____
- Other, specify _____
- None of these

19. Did you know that you could apply for Social Security benefits on the Internet?

- Yes
- No

SKIP TO Q22

20. Where have you seen or heard about applying for Social Security benefits on the Internet? **MARK ALL THAT APPLY**

- Social Security Administration
- At work
- Friends or family
- Radio
- Television/cable
- Newspapers
- Magazines
- Employer's Web site
- Other Web site, specify _____
- Seminars or meetings
- Other, specify _____
- Not sure

SECONDARY MENU FOR SOCIAL SECURITY ADMINISTRATION

How did you learn about this from the Social Security Administration?

- Called the Social Security toll free telephone number
- Visited the local Social Security walk-in office
- Social Security statement
- Social Security employee
- E-mailed Social Security
- Sent regular mail to Social Security
- Visited the Social Security Web site
(www.socialsecurity.gov)
- Attended seminars by Social Security staff
- Visited the Social Security booth at a community event
- Other, specify _____
- None of these

21. When was the most recent time you heard or read about filing for Social Security Benefits on the Internet?

- Within the last 6 months
- About 1 year ago
- 1 to 2 years ago
- 3 to 5 years ago
- More than 5 years ago
- Not sure

IF USED WEB SITE IN Q16, ASK Q22. ELSE SKIP TO Q25.

22. Approximately how many times did you visit the Social Security Web site (www.socialsecurity.gov) during the past 12 months? Your best estimate is fine.

- Once
- Twice
- Three times
- Four times
- Five or more times

23. In the past 12 months, did you use the Social Security Web site (www.socialsecurity.gov) for any of the following reasons? **MARK ALL THAT APPLY**

- Get general information about Social Security
- Get an answer to a specific benefits question
- See what forms and publications were available
- Obtain a specific form
- Obtain a specific publication
- Get an estimate of my retirement benefits (using the benefits calculator)
- Filing for benefits on the Internet
- Learn what is new at Social Security
- Other, specify _____
- None of these

IF "GET AN ESTIMATE OF MY RETIREMENT BENEFITS" IN Q23 ASK Q24. ELSE SKIP TO Q25.

24. When you got an estimate of your retirement benefits did you key in the earnings history from your Social Security Statement?

- Yes
- No

25. How likely would you be to use the Social Security Web site (www.socialsecurity.gov) in the future?

- Definitely will
- Probably will
- Probably will not
- Definitely will not

26. Would you recommend the Social Security Web site (www.socialsecurity.gov) to a family member or friend?

- Definitely would
- Probably would
- Probably would not
- Definitely would not

27. When you are ready to file for your Social Security benefits, would you prefer to ...

- File on the Internet
- File by telephone
- File in person at a Social Security office

IF "FILE ON THE INTERNET" IN Q27 USE "WHY WOULD YOU ..." IN Q28. IF "FILE-ON THE INTERNET" NOT MENTIONED IN Q27 USE "WHY WOULDN'T YOU..." IN Q28.

28. Why (would you/wouldn't you) prefer to file on the Internet for Social Security benefits?

29. In your opinion, what could Social Security do to encourage people like you to file for Social Security benefits on the Internet?

IF "FILE-ON THE INTERNET" IN Q27 SKIP TO 31. ELSE ASK Q30.

30. Do you think you would be more likely to file on the Internet if you knew that personal assistance was available on the phone or at a Social Security office? Would you be ...

- A lot more likely to file on the Internet
- Somewhat more likely to file on the Internet
- It wouldn't make a difference

IF "IT WOULDN'T MAKE A DIFFERENCE" ASK Q31. ELSE SKIP TO D1.

31. Why wouldn't it make any difference?

Now I have some final questions for classification purposes.

D1. Are you ...

- Male
- Female

D2. What is the highest level of education you have completed?

- Grade school
- Some high school
- High school diploma/GED
- Some college
- College graduate (4 year)
- Post-graduate degree
- Don't know

D3. What is your current marital status?

- Married
- Separated
- Divorced
- Widowed
- Single, never married

D4. What is your annual household income?

- \$24,999 or less
- \$25,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$149,999
- \$150,000 or more

D5. Do you have Internet access at home, at work, both or neither?

- Home only
- Work only
- Both
- Neither

IF D5 EQUALS "BOTH" ASK D6. ELSE SKIP TO D8.

D6. Where do you use the Internet most often?

- Home
- Work
- Library
- Somewhere else, specify _____

IF D5 EQUALS "NEITHER" ASK D7. ELSE SKIP TO D8.

D7. Where do you use the Internet most often?

- Library
- Somewhere else, specify _____

D8. Thinking about your use of the Internet over the past year, which of the following activities did you do online monthly or more frequently? **MARK ALL THAT APPLY**

- E-mail
- Viewed a bill or statement
- Online banking
- Pay bills
- Research travel
- View health sites
- View job classifieds
- Other, specify _____
- None of these

D9. Do any of these activities require you to use a PIN (personal identification number) and password?

- Yes
- No
- Don't know

D10. Have you ever made purchases online?

- Yes
- No

D11. Have you ever filed your federal or state taxes online?

- Yes
- No

D12. Have you ever applied for any government service or benefit program online?

- Yes
- No

D13. Have you ever renewed your motor vehicle license online?

- Yes
- No
- Not available in my state

D14. How comfortable are you conducting personal and/or financial business on the Internet?

- Very comfortable
- Somewhat comfortable
- Only a little comfortable
- Not comfortable at all

D15. Have you ever visited the Web site for the following? **MARK ALL THAT APPLY**

- FirstGov.gov
- White House
- U.S. Congress (Senate.gov or House.gov)
- Centers of Medicare and Medicaid Services (CMS)
- Department of Veterans Affairs (VA)
- Army, Navy, Air Force, Marines (DOD)
- Centers for Disease Control (CDC)
- Environmental Protection Agency (EPA)
- Food and Drug Administration (FDA)
- Federal Housing Administration (FHA)
- Department of Homeland Security
- Immigration and Naturalization Service (INS)
- Internal Revenue Service (IRS)
- Other federal government Web site
- Other state government Web site
- Other local government Web site
- None of these

Thank you for all of your help. That completes the interview.

When you have completed this survey, please click on the SUBMIT button.

SUBMIT