

Usability Questions: Screen Shots Retirement Estimator

The following questions will be asked after each screen shot:

1. What were you expecting to happen here?
2. Is something on the screen causing confusion?
3. What do you think you should do next?
4. Can you tell me what you were thinking?
5. What do you want to accomplish here?
6. How did you feel about that process?
7. What are you feeling? And why?
8. Tell me about your thinking here.
What's going on?

RETIREMENT ESTIMATOR (RE) SCREENS



DECEMBER 15, 2009

Retirement Estimator (RE)

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Retirement Estimator (RE)

1.0 RE APPLICATION WEB PAGES

1.1 CREATE YOUR RETIREMENT BENEFIT ESTIMATE WEB PAGE (RP003)

The **Create Your Retirement Benefit Estimate** page allows users to receive a snap shot of estimated retirement benefits.

The screenshot shows the 'Benefit Calculators' page on Social Security Online. The page title is 'Create Your Retirement Benefit Estimate'. It includes a sidebar with a link 'When can I receive Social Security Retirement benefits?'. The main content area explains that the estimator calculates benefits based on actual earnings history, future earnings information, and age. It also lists that the estimator can produce a quick retirement 'Estimate' and create additional scenarios. A form field is provided for 'Enter your last year's earnings (wages and/or net self-employment income) if covered by Social Security:' with a dollar sign and an example: 'Example: 40000 or 40,000 or 0'. A 'Create Estimate' button is located at the bottom right of the form area. The footer contains 'FIRSTGov', 'Privacy Policy | Website Policies & Other Important Information | Site Map', and 'Need Larger Text?'.

1.2 YOUR RETIREMENT BENEFIT ESTIMATE WEB PAGE (RP004)

Your Retirement Benefit Estimate page displays the estimate results for the user and allows them to create additional scenarios.

Retirement Estimator (RE)

Social Security Online
www.socialsecurity.gov

Benefit Calculators

Your Retirement Benefit Estimate

At your current earnings rate, if you stop working and start receiving Social Security benefits...

At your current age, your monthly benefit will be about... **\$750.00**.

At age 70, your monthly benefit will be about... **\$1,586.00**.

Assumptions: We estimate your benefits using your average earnings over your working lifetime. We also assume that as you continue to work you will make about the same as you entered for last year's earnings. The estimates are similar to the estimates you receive in your annual [Social Security Statement](#). These estimates do not include [Medicare](#) premiums or other amounts that may be deducted from your benefit.

More Information

- [Retirement Benefits By Year of Birth](#)
- [When is the Best Age to Start Receiving Retirement Benefits?](#)
- [Receiving Social Security Benefits While Working](#)
- [Learn More About Other Family Disability and Survivor Benefits](#)
- [Ready to Apply for Retirement Benefits?](#)
- [More Charts and Calculators](#)
- [Request a Social Security Statement](#)

Previous Log Out Print / Save Create Additional Scenarios

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1.3 RETIREMENT ESTIMATOR WEB PAGE (RP005)

The **Retirement Estimator** page allows the user to create scenarios using different retirement ages and earnings.

Social Security Online
www.socialsecurity.gov

Benefit Calculators

Retirement Estimator

Scenarios in two easy steps

Create Additional Retirement Scenarios

Create and compare additional retirement estimates in two easy steps:

1. Change the age you expect to stop work, and/or
2. Adjust your anticipated future earnings.

Step One: Select the age at which you will stop working:

Step Two: Estimate your average annual earnings up to your stop work age: \$
Example: 40000 or 40,000 or 0

Previous Create Scenarios

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Retirement Estimator (RE)

1.4 YOUR ADDITIONAL RETIREMENT SCENARIOS WEB PAGE (RP006)

The **Your Additional Retirement Scenarios** page allows the users to create two more retirement scenarios based on their ages and earnings when they retire.

The screenshot shows the 'Benefit Calculators' section on the Social Security Online website. The page title is 'Your Additional Retirement Scenarios'. It displays 'Scenario One' results: based on a stop work age of 52 and average future annual earnings of \$52,000.00, the estimated Social Security benefit is \$530.00 per month as of age 62. A note states that the estimate is based on the later of the user's current age or their 'stop work' age, with a default of age 62 if both are prior to 62.

The 'Create Additional Scenarios' section allows users to define two more scenarios. Each scenario requires a 'Stop Work Age' (selected via a dropdown) and 'Average Future Annual Earnings' (entered in a text box). An example of '40000 or 40,000 or 0' is provided for the earnings field. A 'Create Scenarios' button is located below the input fields.

The 'More Information' section contains links for 'Ready to Apply for Retirement Benefits?', 'More charts and calculators', and 'Request a Social Security Statement'.

A table summarizes the scenarios and results:

	Scenarios		Results	
	Stop Work Age	Future Earnings	Monthly Benefit	As Of
1.	52	\$52,000.00	\$530.00	Age 62

Navigation buttons include 'Previous', 'Print / Save', and 'Logout'. The footer contains the 'FIRSTGov' logo, links for 'Privacy Policy', 'Website Policies & Other Important Information', and 'Site Map', and a 'Need Larger Text?' link.

1.5 YOUR RETIREMENT BENEFIT ESTIMATE – PRINTER FRIENDLY VERSION WEB PAGE (RP007)

The **Your Retirement Benefit Estimate – Printer Friendly Version** page allows the users to print their retirement estimate in a printer friendly version. This page can be reached via the “Print/Save” hyperlink on RP004 or RP006.

Retirement Estimator (RE)

Your Retirement Benefit Estimate - Printer Friendly Version

For instructions on how to print, save, or view the saved file, please refer to the [Print/Save Guide](#).

Your Retirement Benefit Estimate

At your current earnings rate, if you stop working and start receiving Social Security benefits...

At your current age, your monthly benefit will be about...**\$1,442.00**.

At age 70, your monthly benefit will be about...**\$1,485.00**.

Assumptions: We estimate your benefits using your average earnings over your working lifetime. We also assume that as you continue to work you will make about the same as you entered for last year's earnings. The estimates are similar to the estimates you receive in your annual [Social Security Statement](#). These estimates do not include [Medicare](#) premiums or other amounts that may be deducted from your benefit.

Your Additional Retirement Scenarios

Scenario One: Based on a stop work age of 70, and average future annual earnings of **\$77,777.00**, your estimated Social Security benefit will be **\$1,485.00** per month as of age 70.

Note: Your estimate is based on the later of your current age or your "stop work" age. If both ages are prior to age 62, we provide an estimate at age 62, which is the earliest age at which you can receive retirement benefits.

	Scenarios		Results	
	Stop Work Age	Future Earnings	Monthly Benefit	As Of
1.	70	\$77,777.00	\$1,485.00	Age 70
2.	71	\$78,111.00	\$1,573.00	Age 71
3.	72	\$79,222.00	\$1,663.00	Age 72

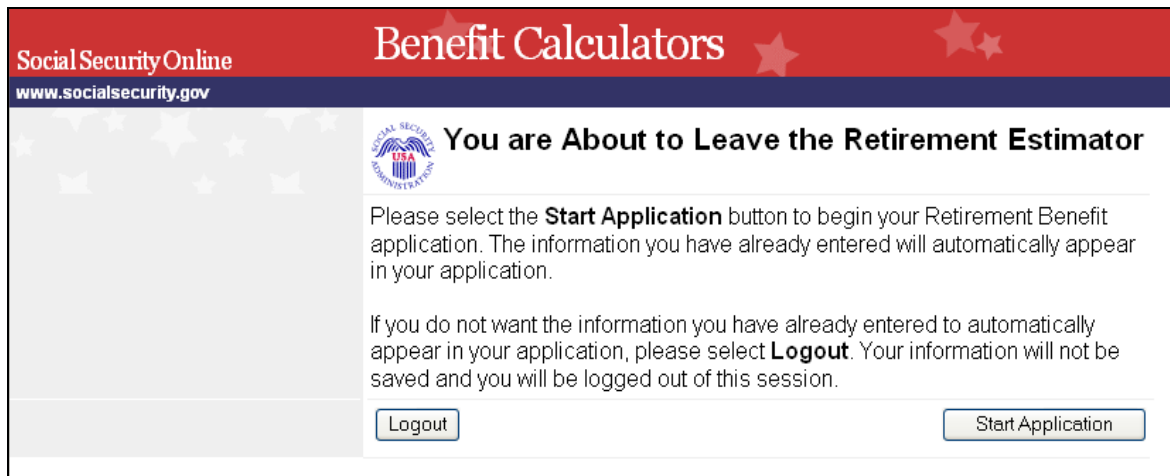
Close this window to return to the application.

Retirement Estimator (RE)

2.0 RE MESSAGE WEB PAGES

2.1 YOU ARE ABOUT TO LEAVE THE RETIREMENT ESTIMATOR WEB PAGE (MSG005)

This page alerts the user that they have chosen to leave RE and begin a new Retirement Benefit (iRRet) application.



The screenshot shows the top of the Social Security Online website. The header is red with 'Social Security Online' and 'www.socialsecurity.gov' on the left, and 'Benefit Calculators' with three stars on the right. Below the header is a white box with a light blue background on the left side. On the right side of the white box, there is a Social Security Administration logo and the heading 'You are About to Leave the Retirement Estimator'. Below the heading, there is a paragraph of text: 'Please select the **Start Application** button to begin your Retirement Benefit application. The information you have already entered will automatically appear in your application.' Below this is another paragraph: 'If you do not want the information you have already entered to automatically appear in your application, please select **Logout**. Your information will not be saved and you will be logged out of this session.' At the bottom of the white box, there are two buttons: 'Logout' on the left and 'Start Application' on the right.

2.2 UNABLE TO COMPLETE YOUR REQUEST AT THIS TIME WEB PAGE (MSG027)

The “Unable to Complete Your Request at this Time” page will be displayed after a request can not be processed due to a system error. This page informs the users that their request can not be processed at this time.

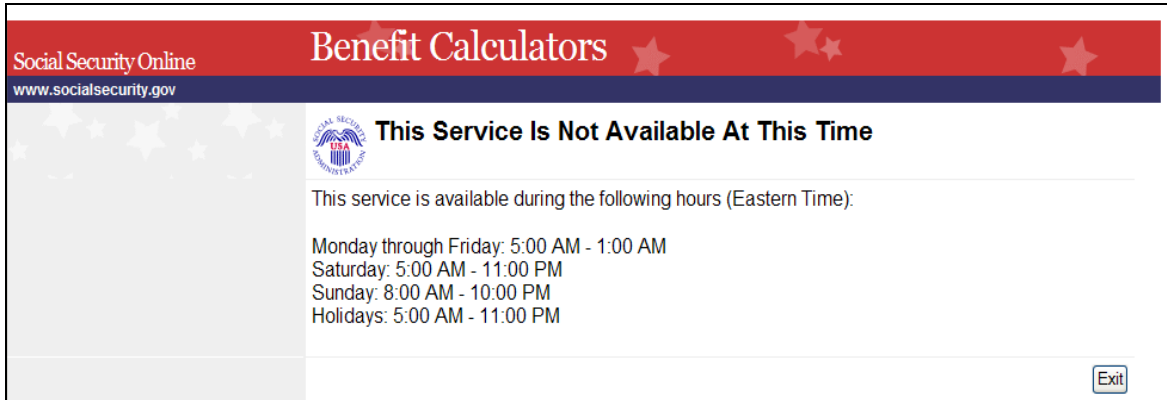


The screenshot shows the top of the Social Security Online website. The header is red with 'Social Security Online' and 'www.socialsecurity.gov' on the left, and 'Benefit Calculators' with three stars on the right. Below the header is a white box with a light blue background on the left side. On the right side of the white box, there is a Social Security Administration logo and the heading 'Unable to Complete Your Request at this Time'. Below the heading, there is a paragraph of text: 'We are sorry for the inconvenience but we cannot process your request at this time. If you wish to make your request, you may try again later.' Below this is another paragraph: 'If you need additional information, you may call us at **1-800-772-1213**.' Below that is a third paragraph: 'If you are deaf or hard-of-hearing, call our toll-free TTY number, **1-800-325-0778**, Monday through Friday between 7 a.m. and 7 p.m.' At the bottom right of the white box, there is an 'Exit' button.

Retirement Estimator (RE)

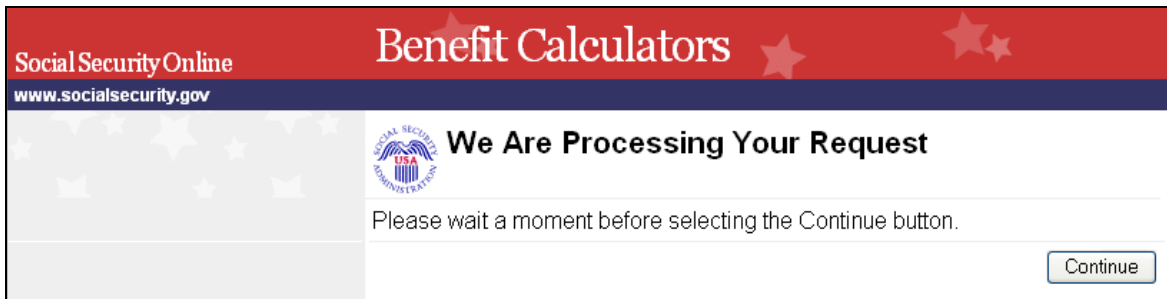
2.3 THIS SERVICE IS NOT AVAILABLE AT THIS TIME WEB PAGE (MSG028)

The “**This Service Is Not Available At This Time**” page will be displayed when a request is made during unavailable hours. (Hours outside of what is shown below in LC-2). This page informs user that the service they are requesting is not available at that time.



2.4 WE ARE PROCESSING YOUR REQUEST WEB PAGE (MSG030)

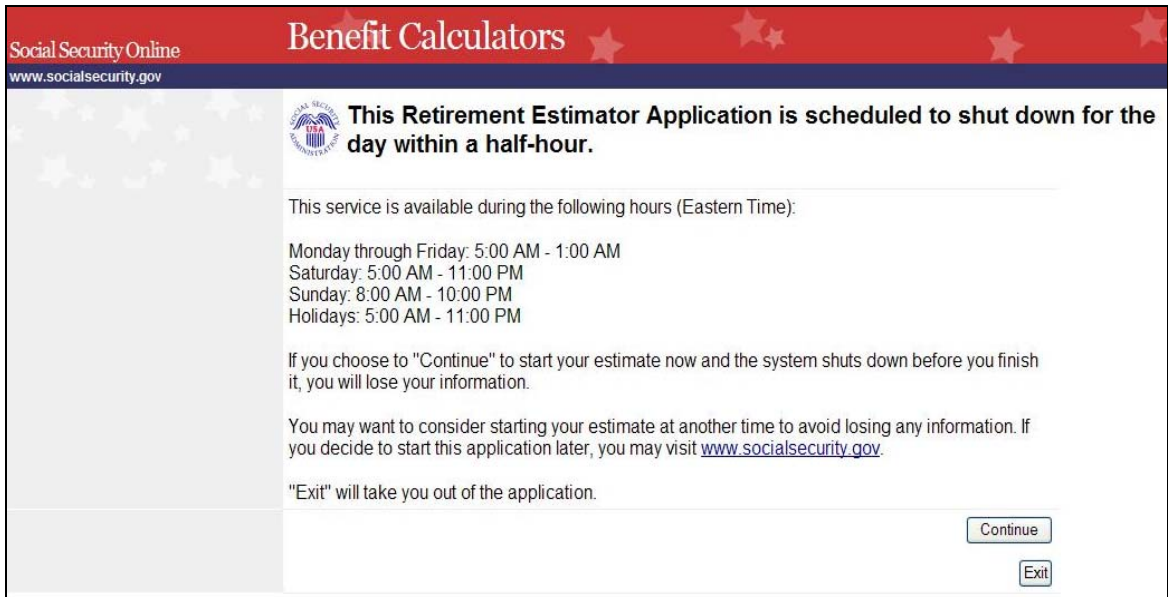
The **We Are Processing Your Request** page will be displayed when Java Script is disabled and when the user performs multiple clicks on the same button while the next page is loading. This page informs the users that their request is being processed.



2.5 THIS RETIREMENT ESTIMATOR APPLICATION IS SCHEDULED TO SHUT DOWN ... (MSG045)

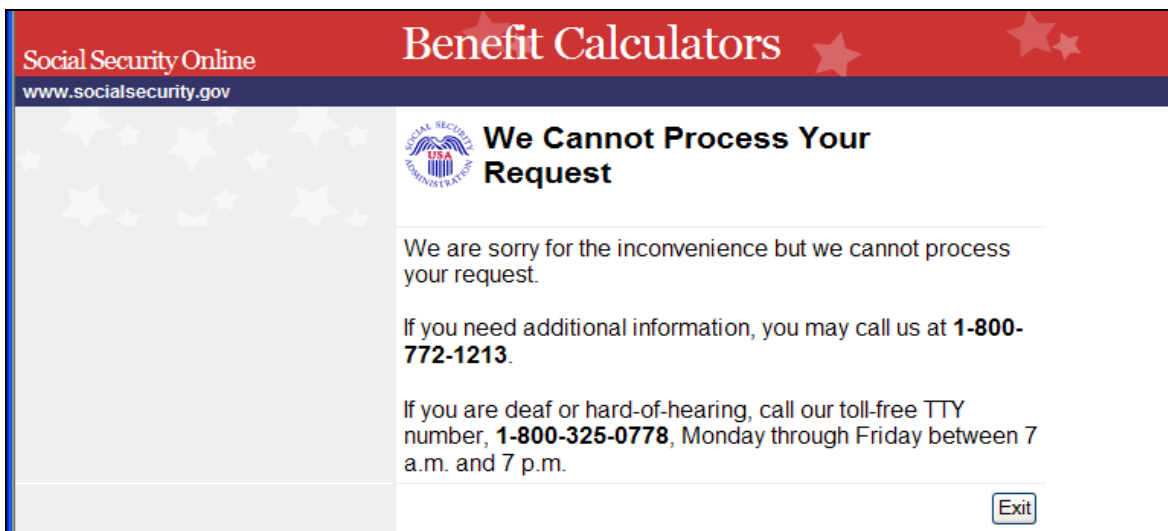
This page informs the users that the Retirement Estimator will be shutting down within half an hour.

Retirement Estimator (RE)



2.6 WE CANNOT PROCESS YOUR REQUEST WEB PAGE (MSG067)

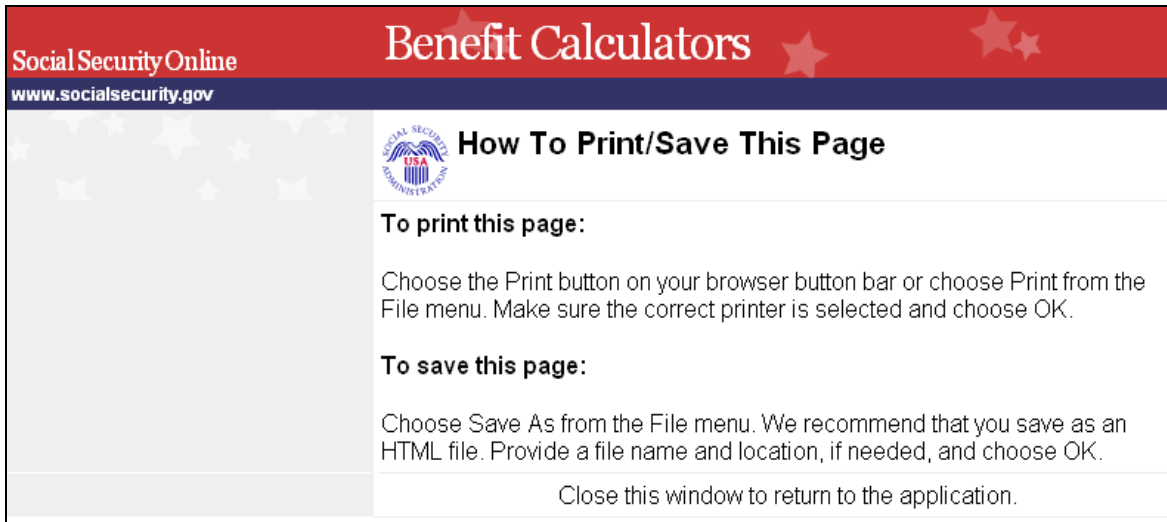
This page alerts the users that the system is not able to continue with their request. This page is displayed when any application specific permanent exclusion occurs.



2.7 HOW TO PRINT/SAVE THIS PAGE WEB PAGE (MSG073)


This page informs the user how to use the print/save page.

Retirement Estimator (RE)



Social Security Online
www.socialsecurity.gov

Benefit Calculators

 **How To Print/Save This Page**

To print this page:

Choose the Print button on your browser button bar or choose Print from the File menu. Make sure the correct printer is selected and choose OK.

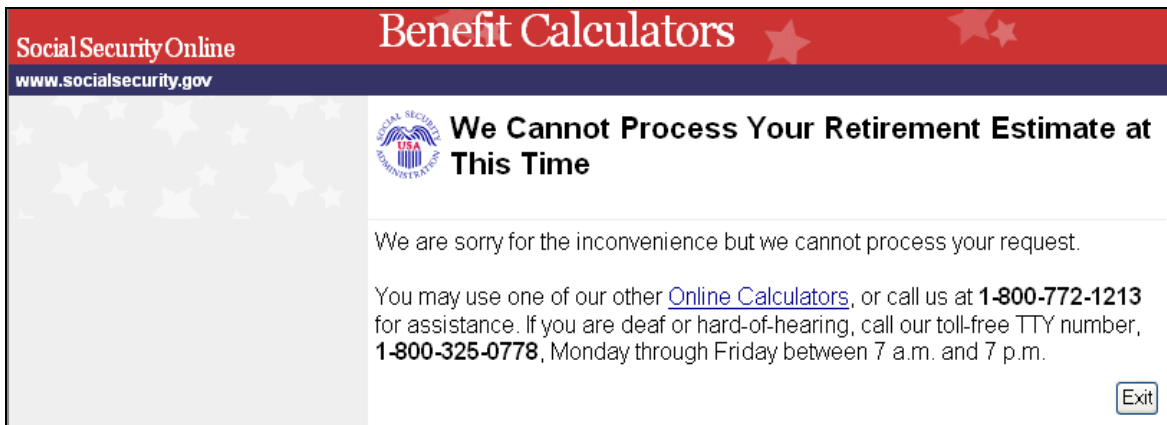
To save this page:

Choose Save As from the File menu. We recommend that you save as an HTML file. Provide a file name and location, if needed, and choose OK.

Close this window to return to the application.


2.8 WE CANNOT PROCESS YOUR RETIREMENT ESTIMATE AT THIS TIME WEB PAGE (MSG105)

This page alerts the user that we are unable to continue with their request.



Social Security Online
www.socialsecurity.gov

Benefit Calculators

 **We Cannot Process Your Retirement Estimate at This Time**

We are sorry for the inconvenience but we cannot process your request.

You may use one of our other [Online Calculators](#), or call us at **1-800-772-1213** for assistance. If you are deaf or hard-of-hearing, call our toll-free TTY number, **1-800-325-0778**, Monday through Friday between 7 a.m. and 7 p.m.