

Spanish Retirement Estimator– Usability/Focus Group Moderator’s Guide

I. Ground Rules, Introductions and Warm-up – 5 minutes

Read Paperwork Reduction Act Statement:

Paperwork Reduction Act Statement – This focus group, cleared under OMB No. 0960-0526, meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. Participation in this focus group is voluntary. We estimate that it will take 2 hours to complete the focus group. Send only comments on our time estimate to: SSA, 6401 Security Blvd., Baltimore, MD 21235-6401.

II. Step 1 – Exploratory Phase - 15 minutes

- Before we get started, I’d like to take the “internet temperature” of the group.
- How often do you use the Internet for any reason? (Select only one)
 - ___ 20 or more hours per week
 - ___ 10 – 19 hours per week
 - ___ 1 – 9 hours per week
 - ___ Never
- If you use the Internet:
 - Which of the following activities do you do online? (Select all that apply)

<input type="checkbox"/> Banking and/or investing	<input type="checkbox"/> Read the news
<input type="checkbox"/> Shopping/Travel	<input type="checkbox"/> Email
<input type="checkbox"/> Government information	<input type="checkbox"/> Games
<input type="checkbox"/> Search for topical information	<input type="checkbox"/> Maps, directions
- Has anyone used the internet to conduct government business? What kind?
- Do you normally use the internet in Spanish or do you primarily use it in English?
Note to moderator: record responses

SSA Website

1. Have you ever visited SSA’s website, www.socialsecurity.gov?
Probe: What services do SSA offer online?
 - 1a. If yes, what was the reason for your visit?

2. Have you ever visited www.segurosocial.gov/espanol?
- 2a. If yes, what was the reason for your visit?
3. Were you aware that you can obtain an estimate of your retirement earnings on the website? *Probe: For those who say yes, ask how did they become aware*

Social Security is enhancing the ways that the Spanish-speaking public can do business with us using the Internet. We have invited you here to get your impression of one of these services. We would like you to break into separate spaces to review this online service in Spanish. Afterwards, we'll come back together to talk about your experiences.

III. Usability Testing – one-on-one sessions – 45-60 minutes

IV. Focus Group Sessions (Shared Impressions and Experiences – 45-60 minutes)

Moderator will have paper copies of the screenshots as reference to share with participants.

Retirement Estimator Form

3. What is your overall impression of the Spanish version of the Retirement Estimator?
4. Did the questions make sense?
Probe: For those who said the questions didn't make sense, ask what made it difficult to understand?
5. Did you understand the questions in the Spanish Retirement Estimator?

5a. If no, what changes would you suggest for the language?
6. Would you recommend this service to others?
Probe: Why or why not?
7. On a scale of 1-5 with 1 being 'Does Not Meet' and 5 being 'Fully Meets', how does this process meet your expectations of the level of service that a government website should provide?

This question will be asked for the sessions with younger participants (age 30 -49)

8. How likely are you to use the Spanish Retirement Estimator as a planning and savings tool for your retirement?
Probe: Likely, Very likely, unlikely. Ask for reasons for responses

General Questions

9. How long did it take you to complete the Spanish Retirement Estimator?
Probe to get the participant's perception of how long it took to complete.
10. Would you prefer, using the online estimator, visiting the Social Security field office or calling the 1-800 number? *Please explain*
11. Do you feel you would be able to help others in completing this online service?
(i.e. relatives, friends, or other professional relationships)

Recommendations

12. How can we improve this online service?
Probe: Use existing responses provided in question 5a

V. Closing/Thank You

The Social Security Administration thanks you for your time. Your opinion is important to us and we appreciate your valuable feedback on this project.