

# Disability Internet Claim

## Proposed Moderator Guide

### I. Introduction/Welcome

- Good evening. My name is Arlen and I will be moderating our session today. I am employed by ICF Macro, a research firm located near Washington, DC. We have been hired by the Social Security Administration (SSA) to moderate this discussion. You have been invited here because the Social Security Administration is interested in hearing your opinions about filing for disability benefits online using the Social Security Administration's iClaim disability application.

Today I will be showing you different pages of the:

- Online Disability Benefit Application,
- Adult Disability Report, and
- Medical Release Form.

To do this, I will be projecting on the screen the different pages of the disability iClaim application that SSA would like you to look at.

- Focus groups are being conducted in three cities across the country: Miami, Dallas, and Los Angeles. SSA is conducting the focus groups as part of a review that was requested by Congress. Therefore, your opinions are very valuable to us.
  - When you came in today, you reviewed and signed an informed consent form for your participation in this discussion. (*Moderator holds up a blank copy.*) Does anyone have any questions about what you signed?
  - To help make our session run as smoothly as possible, I'd like to review some ground rules for our discussion:
    1. We are audiotaping (not videotaping) our discussion today. The tapes will be transcribed, and I will use the transcription to prepare my report to SSA. Your names will never appear in any report I write.
    2. Please do not engage in side conversations. We need everyone to hear what the others are saying, and we need everything that's said to be heard easily on the tape.
    3. We would like to hear from everyone in the group, but you don't have to answer every question.
    4. There is no evaluation. There are no right and wrong answers. We expect differences in how people see things, and we need to know about these differences.
    5. Feel free to disagree or question each other. The purpose of a group session is for us to learn things that we don't get from one-on-one discussions. If someone says something you disagree with, please let me know.
    6. There are some observers behind the one-way mirror. They want to hear what you have to say about the topics we'll discuss. I don't want you to feel constrained by their presence. As I said, everything you say here today will be confidential. They have signed an observer confidentiality form.
    7. If anyone needs to use the restroom, they are located (*Moderator—specify*). There is no need to stop the discussion.
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8. Your participation is voluntary. Therefore, at any point you may leave the room.
9. If you have a cell phone, please turn it off or set to vibrate.
10. We estimate that our discussion will last about two hours.

Do you have any questions before we get started?

Before we begin, I want to let you know that I'm not an expert on the Social Security Administration's disability benefits and/or the application. My job as a moderator is to:

1. Help guide the flow of our discussion
2. Make sure everyone's comments are heard
3. Ensure that we cover all the questions I have in this guide. Because we have lots to cover in the next two hours, I may have to interrupt our discussion from time to time and move us along to make sure we cover all the items I have in my guide.

## II. Self Introductions and Icebreaker

- Let's begin with introductions. Please introduce yourself—your first name only—and tell us if you have ever visited the SSA website ([www.socialsecurity.gov](http://www.socialsecurity.gov)) and, if you have, were you able to find what you were looking for?

## III. Disability Benefit Application

We are going to go through the Online Disability Benefit Application. There will be times that I'll stop and ask you for your thoughts and opinions about specific items on a page. Other times I'm going to move more quickly through the application. In front of you are some pages that have been stapled together. They should be face-down right now. These handouts are some of the pages that we will spend more time talking about. I thought it might be easier for you to see these pages up close so you won't always have to look at the screen. I'll tell you when to turn the pages over. They are all labeled "Handout 1," "Handout 2," "Handout 3," etc. Does anyone have any questions before we begin?

Directions/Questions	Page to Show on Screen/Handouts
<p><b>Let's look at the first page of the online Disability Benefit Application. Please turn over your packet in front of you. This is the first handout. Please take a minute or two to read it. [HO-1]</b></p>	<p><b>Page 1</b></p>
<p>1. What is the first thing you noticed on this page?</p>	<p><b>Page 1</b></p>
<p>2. If you wanted to begin the application process online, what's the first thing you would do?</p> <p><i>Moderator, see how many say "Review the Adult Disability Checklist"</i></p>	<p><b>Page 1</b></p>
<p>3. <b>[As some of you mentioned], some may click on Step 1: Review the Adult Disability Checklist.</b></p>	<p><b>Page 29</b></p> <p><b>HO-2</b></p>

Directions/Questions	Page to Show on Screen/Handouts
<p><b>Moderator—click on Step 1: Adult Disability Checklist.</b></p> <p><b>Please take a look at Handout 2.</b></p> <ul style="list-style-type: none"> <li>Is this what you expected to see when I clicked on the Adult Disability Checklist?</li> </ul> <p>Probe: For those who say it's different, ask what they expected to see.</p>	
<p>4. <b>Moderator—click on the “Close this window” link at the bottom of the page to return to homepage (page 1).</b></p> <ul style="list-style-type: none"> <li>Now that you've seen the checklist, what is the next thing you would do if you wanted to apply for disability benefits?</li> </ul> <p><b>[Note two options. Participants can suggest clicking on Step 2: Fill out the online application or click the red button: Apply Online for Disability Benefits.]</b></p> <p><b>Moderator—click on Step 2: Fill out the online Disability Benefit Application</b></p>	Page 1
<p>5. <b>Take a minute and look at Handout 3: Welcome to the Social Security Benefit Application.</b></p> <ul style="list-style-type: none"> <li>Now that you've looked at this page, what is the first thing you would do?</li> </ul> <p>Probe: Did participants notice the “Before you begin...” and “Using this application” link? If yes, what would they click on? <ul style="list-style-type: none"> <li>What would you click on if you wanted to begin your application?</li> </ul> <p>Probe: Are any of the instructions in the “To Start the Application Process” box confusing or hard to understand?</p> </p>	Page 2 HO-3
<p>6. <b>Moderator—click on Apply for Benefits.</b></p> <p><b>This is where you would enter information about yourself. You'll notice this says, “page 1 of 3.” I'm going to let you see the questions on each of the three pages. Let me know if you have any questions or comments about what you see.</b></p>	Pages 3, 4, & 5
<p>7. <b>Okay, let's say you entered all your information. The next thing you will see is the Application Number page (show page 6). Please look at Handout 4 and read the text that is highlighted in yellow.</b></p> <ul style="list-style-type: none"> <li>How likely would you be to print this page?</li> </ul>	Page 6 HO-4

- What would you do if you didn't have a printer?
- Let's say you wanted to come back and finish the application later. What would you do?
  - Is it clear that you must have your application number in order to finish your application later? What would you do if you misplaced that number?

Probe: If it is unclear, ask what is unclear.

If appropriate, ask: Can you offer any suggestions about how the instructions could be more clearly written?

**Moderator—click "Next."**

**8. This is the Benefit Information Section. Take a minute and look at this.**

- Did anyone notice the "More Info" link under "Supplemental Security Income (SSI)"?
  - Would you click on it?

***If nobody says they would click on the SSI "More Info" link, the moderator should click on it.***

**Please take a minute and read this.**

***When everyone is finished, close the window, go back to page 7, and point out the question "Do you intend to apply for Supplemental Security Income?"***

- Did the additional information you just read help you determine how you should respond to the question "Do you intend to apply for Supplemental Security Income?"

Probe: For those who say no, ask, "What other information would be helpful?"

**Moderator—click "Next."**

**9. Now we are going to look at questions about the applicant's ability to work. Please take a minute and look at this page.**

- What do you think is being asked of you by the question, "Are these illnesses, injuries, or conditions related to work in any way?"

Page 7

<http://www.socialsecurity.gov/hlp/isba/10/hlp-isba076-ssi.htm>

Page 8

Directions/Questions	Page to Show on Screen/Handouts
<p><i>Moderator—click “Next.”</i></p> <p>10. <b>This page asks for information about any dependents.</b></p> <ul style="list-style-type: none"> <li>• The first item is, “Do you have a parent who receives one-half support from you?” What does “one-half support” mean to you?</li> </ul> <p>Probe: Is this clear? Would it be helpful to have a “More Info” link for additional information?</p>	<p><b>Page 9</b></p>
<p><i>Moderator—click “Next.”</i></p> <p>11. <b>This page normally provides a summary of all information provided throughout the application. However, we are only showing you a limited amount of summary information. Take a minute and review this page.</b></p> <ul style="list-style-type: none"> <li>• If this was your summary and you found a mistake or, for example noticed that you forgot to enter your e-mail address, what would you do?</li> </ul> <p>Probe: Do participants notice the “Edit” buttons? Would anyone use the “Previous” button to make changes?</p>	<p><b>Page 10</b></p>
<p><i>Moderator—click “Next.”</i></p> <p>12. <b>Take a minute and read this page (Send this application Section).</b></p> <ul style="list-style-type: none"> <li>• What does it mean to you when you click the “Sign Now” button?</li> <li>• What do you expect to see when you click “Sign Now”?</li> <li>• Is it clear that once you click “Sign Now” you cannot change the information you provided?</li> </ul> <p>Probe: If it is unclear, ask how the instructions could be more clearly written.</p>	<p><b>Page 11</b></p>
<p><i>Moderator—click “Sign Now.”</i></p> <p>13. <b>Let’s take a minute and read this page (Receipt Section).</b></p> <ul style="list-style-type: none"> <li>• What are your thoughts about this page?</li> <li>• What documents do you need to provide to SSA?</li> <li>• Are you more likely to mail the documents to SSA or would you prefer to bring them in and why? <ul style="list-style-type: none"> <li>▪ When you decide to mail or bring the documents to a Social Security</li> </ul> </li> </ul>	<p><b>Page 12</b></p>

Directions/Questions	Page to Show on Screen/Handouts
<p>office and don't know where one is, how would you go about locating a Social Security office?</p> <p><i>Moderator—click “Next.”</i></p>	
<p>14. <b>This is Handout 5 in your packet. Please take a minute or two and read this page.</b></p> <ul style="list-style-type: none"> <li>• You'll notice that there is a confirmation number for your claim. Do you think you are finished with the process of filing for benefits?</li> </ul> <p>Probe: Did you notice the first sentence, “Thank you for completing one of the <b>three</b> steps in the Disability Application Process?”</p> <ul style="list-style-type: none"> <li>• On <b>Handout 5</b>, there is a confirmation number for your claim. Turn back to <b>Handout 4</b>. It gives you the application number. What do you think is the difference between the application number and the confirmation number?</li> <li>• What are the next steps in the Disability Application process?</li> <li>• How would you get to the Adult Disability Report?</li> <li>• How would you find the Medical Release Form (SSA-827)?</li> </ul> <p><i>Moderator—click on “Continue to Adult Disability Report.”</i></p>	<p><b>Page 13</b></p> <p><b>HO-5</b></p> <p><b>HO-4</b></p>
<p>15. <b>Take a look at this page. (Welcome to the Social Security Adult Disability Report)</b></p> <ul style="list-style-type: none"> <li>• What's the first thing you would do? <ul style="list-style-type: none"> <li>• Probe: Did anyone notice the “How this Report Works” link? If so, would you click on it? What would you expect to find if you clicked on the link?</li> </ul> </li> <li>• When you click on the “Start Report” button, what do you think you are starting?</li> </ul> <p><i>Moderator—click on “Start Report.”</i></p>	<p><b>Page 14</b></p>
<p>16. <b>As you can see, this is the page for entering your contact information and your language preference. If you were filling out an actual application, this would be on one page that you'd have to scroll down to complete. For our purposes today, it's on two pages. (Moderator—show both pages.)</b></p> <ul style="list-style-type: none"> <li>• Does anyone have any comments about the information you are</li> </ul>	<p><b>Pages 15 &amp; 16</b></p>

Directions/Questions	Page to Show on Screen/Handouts
<p>asked to provide?</p> <p><b>Moderator—click “Next.”</b></p> <p>17. <b>This is Handout 6 in your packet. Please take a minute or two to read it.</b></p> <ul style="list-style-type: none"> <li>• If you had to stop working on your Adult Disability Report, what would you do? <ul style="list-style-type: none"> <li>▪ How would you go about continuing the Adult Disability Report at another time?</li> </ul> <p style="margin-left: 40px;">Probe: Do you understand the instructions on how to reenter the Adult Disability Report?</p> </li> <li>• When you get to this page, you receive your reentry number. Is it clear what this is for? <ul style="list-style-type: none"> <li>▪ Is it clear that this Reentry Number is different from the Application Number you received when completing the online Disability Benefit Application portion? <b>Refer participants to Handouts 4 and 5.</b></li> </ul> <p style="margin-left: 40px;">Probe: If something is unclear, ask what is unclear and how it could be made clearer.</p> </li> </ul> <p><b>Moderator—click “Next.”</b></p>	<p>Page 17</p> <p>HO-6</p> <p>HO-4 &amp; HO-5</p>
<p>18. <b>Take a minute to read the page shown on the screen (Doctor’s and Other Healthcare Professionals).</b></p> <ul style="list-style-type: none"> <li>• Are the instructions for completing this section clear/understandable to you? <p style="margin-left: 40px;">Probe: If something is unclear, ask what is unclear and how the instructions could be more clearly written.</p> </li> <li>• What action would you take to enter information about a doctor/healthcare professional?</li> <li>• The second bullet says, “Include only the people who have treated you for the conditions related to your disability.” Which doctors/healthcare professionals would you include? <p style="margin-left: 40px;">Probe: Would you list only the ones you are <u>currently</u> seeing for your condition, or would you list <u>all</u> of the doctors you have seen for your condition, regardless of how long ago?</p> </li> </ul>	<p>Page 18</p>

Directions/Questions	Page to Show on Screen/Handouts
<p><i>Moderator—click “Add Doctor/Healthcare Professional.”</i></p>	
<p>19. <b>Take a minute or two to read Handout 7. It's four pages long.</b></p> <ul style="list-style-type: none"> <li>• As you can see, this is a long portion of the disability report. I'd like to go through it section by section and ask you if you understand the information you need to provide. Is there anything that is confusing or unclear? Let's begin with— <ul style="list-style-type: none"> <li>▪ Doctor/Healthcare Professional Details</li> <li>▪ Treatment Dates with this Doctor/Healthcare Professional</li> <li>▪ Tests Ordered by this Doctor/Healthcare Professional</li> <li>▪ Medicines Recommended or Prescribed by this Doctor/Healthcare Professional</li> <li>▪ Medical conditions treated by this Doctor/Healthcare Professional</li> <li>▪ Treatment from this Doctor/Healthcare Professional</li> </ul> </li> <li>• What would you do if you didn't have all the information you needed to fill out this section (e.g., doctor's address)? <ul style="list-style-type: none"> <li>▪ From what you've seen, does SSA adequately inform you about what information you need to gather in order to fill out this section of the Adult Disability Report? <b>Refer participants to Handout 2.</b></li> </ul> <p>I'm going to demonstrate what happens if you click on the “Sign Off (finish later)” button.</p> </li> </ul>	<p><b>Page 19, 20, 21, &amp; 22</b></p>
	<p><b>HO-7 (4 pages)</b></p>
	<p><b>HO-2</b></p>
<p><i>Moderator—click “Sign Off (finish later)”.</i></p>	
<p>20. <b>If you clicked the “Sign Off” button, you would see this page. This is Handout 8 in your packet. Please take a minute to look at it.</b></p> <ul style="list-style-type: none"> <li>• What would you do if you saw this page?  Probe: Print a copy and/or save this page?</li> <li>• Is it clear what you'll have to do if you decide to finish the Adult Disability Report later and cannot find your reentry number?  Probe: If something is unclear, ask what is unclear and how the instructions could be more clearly written.</li> </ul>	<p><b>Page 28</b></p>
	<p><b>HO-8</b></p>
	<p><a href="https://secure.ssa.gov/apps6z/radr/radr-fe">https:// secure.ssa.gov/ apps6z/radr/radr- fe</a></p>



I'm going to show you what would happen if you decided to come back to this report later. I'm going to click on this link [*point to hyperlink*]. If you were at home, this is the URL you would type in.

- What would you do if you wanted to return to your Adult Disability Report?

*Moderator—click on “Go Back to Report I Already Started.”*

You would enter your Social Security number and the reentry number: D49514239 in the “Reentry Number” box.

- Does anyone have any questions about how the go back to a report that we started?

*Moderator—close the browser and click on “Cancel, return to report.”*

21. **The next section of the report is “Medicines.”**

Page 23

- What medicines would you enter in this section?

Probe: In other words, would you list a history of all the medications you've **ever** taken for the condition or only the medications you are **currently** taking?

- In the previous section (Doctors and Other Healthcare Professionals) of the Report, you could list up to 3 medications each doctor/healthcare professional recommended or prescribed. Would you list these same medications in this section of the Report, or only additional medications? (*Moderator, refer participants to HO 7, page 3.*)
- What would you do if you needed to add another medication?

*Moderator, click on Add Medicine*

22. **Take a look at this page (Medicine Details).**

Page 24

- Does anyone have any questions or comments about this page?
- Why do you think they included an option to “Add Doctor/Healthcare Professional” on this page?

*Moderator, click “Done with this Medicine”*

23. **This brings us to the Printing Instructions. Please take a couple of minutes and review Handout 9.**

Page 25

Directions/Questions	Page to Show on Screen/Handouts
<ul style="list-style-type: none"> <li>• After reading this page, what would you do next?</li> </ul> <p>Probe: Are the instructions clear? If something is unclear, ask what is unclear and how the instructions could be more clearly written.</p> <p>Probe: Would you access the Medical Release Form to print, sign, and bring/mail it to SSA? Do you understand that the Medical Release Form must be submitted before SSA can process your application?</p> <p><b>Moderator—click on “Cover Sheet” in the “What You Need To Do Next” section.</b></p>	<p><b>HO-9</b></p>
<p>24. • Take a minute and review this page (Cover Sheet).</p> <ul style="list-style-type: none"> <li>▪ Now that you’ve looked at this page, do you have any questions or comments about what you see?</li> </ul> <p><b>Moderator—click on “Previous” to go back to the Printing Instructions.</b></p> <ul style="list-style-type: none"> <li>▪ Now that you’ve seen the Cover Sheet, what is the next thing you would do?</li> </ul> <p>Probe: Would you click on the link to print the Medical Release Form?</p> <p><b>Moderator—click on the link to the “Medical Release Form” in the “What You Need To Do Next” section. Note that a new window will open with a PDF file.</b></p> <ul style="list-style-type: none"> <li>• Please take a minute to review Handout 10 (Medical Release Form).</li> <li>▪ Now that you’ve read through the Medical Release Form, is there anything about it that is confusing or unclear?</li> </ul> <p>Probe: If something is unclear, ask what is unclear.</p> <p><b>Moderator, close the Medical Release Form and return to the Printing Instructions.</b></p> <p><b>Moderator, click Next</b></p>	<p><b>Page 26</b></p> <p><a href="http://www.ssa.gov/online/ssa-827.pdf">http://www.ssa.gov/online/ssa-827.pdf</a></p> <p><b>HO-10 (2-pages)</b></p>
<p>25. <b>Take a minute and review this page (Submit Report).</b></p> <ul style="list-style-type: none"> <li>• What action are you taking when you click the “submit” button?</li> <li>• Is it clear that once you click “Submit” you cannot change the</li> </ul>	<p><b>Page 27</b></p>

Directions/Questions	Page to Show on Screen/Handouts
<p>information you provided?</p> <p>Probe: If not, ask what is unclear and how the instructions could be more clearly written.</p>	

26. Now you've had an opportunity to see portions of the online Disability Benefit application, Adult Disability report, and Medical Release Form. If you were filing for Disability benefits, do you think you would do it online or would you call or go into your local Social Security office?

Probe: Would you complete the Disability Benefit Application online or would you call or go into your local Social Security office and why?

Would you complete the Adult Disability Report online or would you call or go into your local Social Security office and why?

- If you would choose to complete the process online, would you complete the Disability Benefit Application and Adult Disability Report all at the same time and mail the required documents immediately? Or, would you space out the process (e.g. complete one part, wait awhile to complete the next part, and wait awhile to mail the required documents)?

#### IV. False Close

We're finished going through the online Disability Benefit Application, Adult Disability Report, and Medical Release Form! As I mentioned earlier, there are some observers watching our discussion. I'm going to step out of the room for a minute and see if there are any other questions they would like me to ask.

#### V. Recommendations/Suggestions

27. Before we close, does anyone have any other recommendations/suggestions that you would like to share about applying online for disability benefits?

***We will use the Paperwork Reduction Act statement below with each of these focus groups:***

**Paperwork Reduction Act Statement** - This focus group, 0960-0526, meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. We estimate that it will take about 120 minutes to conduct these focus groups. ***Send only comments relating to our time estimate to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.***

