

FY 2010 PROSPECTIVE CLIENT SURVEY
PRENOTICE POSTCARD

Dear Future Social Security Customer:

Social Security expects a growing retirement population in the coming years, one that may want to do business with us differently from the people we now serve. That's why we are asking you to participate in a survey to tell us about your preferences and expectations for good service.

In a few days, you will receive a questionnaire in the mail from [Contractor], who is conducting the survey for Social Security. As you will see, the questionnaire covers a wide variety of topics, such as how you want to be able to contact us, how you plan on filing for retirement benefits, and what kinds of services you think should be available.

Please watch your mail for the envelope from [Contractor]. We hope that you will take the time to answer our survey and look forward to receiving your reply.

Ronald T. Raborg
Deputy Commissioner for Quality Performance
Social Security Administration

FY 2010 PROSPECTIVE CLIENT SURVEY
INITIAL COVER LETTER

Dear Future Social Security Customer:

As I noted in my recent postcard, Social Security is conducting a survey to help prepare for the expected increase in the retirement population in the coming years. You are one of only a small number of people across the country age 50 to 64 who were chosen to receive the enclosed questionnaire. While you are not required to respond, your opinions are very valuable. Your answers will help us make important decisions about how Social Security can best serve you.

Please be assured that [Contractor], who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses. The barcode on this survey is only used to let us know whether you have returned your survey, so we don't send you reminder letters.

Please return your completed survey as soon as possible in the postage-paid envelope provided.

If you have a question about Social Security benefits, please visit our web site at www.socialsecurity.gov or call our toll-free information line at 1-800-772-1213.

We appreciate your taking time out of your busy schedule to answer our survey.

Sincerely,

Ronald T. Raborg
Deputy Commissioner for Quality Performance
Social Security Administration

FY 2010 PROSPECTIVE CLIENT SURVEY
FOLLOW-UP POST CARD

SURVEY REMINDER

About two weeks ago [Contractor] sent you a questionnaire to find out how you would like to do business with Social Security in the future.

- **If you have already mailed back your completed questionnaire**, we thank you for your quick response.
- However, **if you have not yet returned the questionnaire**, we would appreciate it if you could take some time to complete it and send it back as soon as possible.
- **If you no longer have the questionnaire**, you don't need to do anything. [Contractor] will be mailing another one to you shortly.

Thank you for sharing your opinions with us.

Ronald T. Raborg
Deputy Commissioner for Quality Performance
Social Security Administration

FY 2010 PROSPECTIVE CLIENT SURVEY
FOLLOW-UP COVER LETTER

Dear Future Social Security Customer:

Several weeks ago [Contractor] sent you a survey questionnaire designed to help Social Security prepare to serve the country's growing retirement population. We haven't yet heard from you and it's very important that we gather opinions from as many people as possible. If you recently mailed in your completed questionnaire, please discard this letter. We sincerely appreciate your help and look forward to receiving your response.

However, if you have not yet returned your questionnaire, we ask that you take some time now to complete it and send it back. For your convenience, we have enclosed another questionnaire along with a postage-paid return envelope.

Please be assured that [Contractor], who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses.

If you have a question about Social Security benefits, please visit our web site at www.socialsecurity.gov or call our toll-free information line at 1-800-772-1213.

We would appreciate receiving your completed survey as soon as possible.

Sincerely,

Ronald T. Raborg
Deputy Commissioner for Quality Performance
Social Security Administration

FY 2010 PROSPECTIVE CLIENT SURVEY
CLOSEOUT LETTER

Dear Future Social Security Customer:

Recently we mailed you a survey questionnaire to find out how you would like to do business with Social Security in the future. If you have already completed and returned the questionnaire, please accept our sincere thanks.

If you have not yet had time, we hope you will turn to it right away. We are wrapping up the survey and would like to include your opinions, but we need your quick response. We think it's extremely important to hear from everyone who was selected to participate in this survey.

Please be assured that [Contractor], who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will not report any individual responses.

If you have a question about Social Security benefits, please visit our web site at www.socialsecurity.gov or call our toll-free information line at 1-800-772-1213.

Thank you for your help.

Sincerely,

Ronald T. Raborg
Deputy Commissioner for Quality Performance
Social Security Administration

Looking Ahead: How Should Social Security Serve You?

BEFORE YOU START:

Do you currently receive, or have you applied for Social Security benefits of any kind in the last 5 years?

Mark (X) one answer.

- Yes → STOP!** You do not need to complete this survey. Please leave the rest of the survey blank and return it in the enclosed envelope with only this box marked. Thank you for your time.
- No → CONTINUE READING.**

ABOUT OUR SURVEY

Social Security expects more people to retire in the coming years. Many of these people may want to do business with us differently from the people we now serve. To prepare for the future, Social Security needs your help! This survey asks about your expectations for good service – how you want to be able to contact Social Security, how you plan to file for retirement benefits, and what kinds of services you think we should have available.

- If you have trouble filling out this questionnaire, you may have someone help you. The answers you give, however, should be based only on your own feelings and opinions about your future interactions with Social Security and about good customer service. The survey should take about 20 minutes to finish.
- Answer all questions as directed. You may be told to skip over some questions. When that happens, you will see an arrow with a note telling you what question to answer next:

Example: Yes
 No → **SKIP to Question 1.**

INSTRUCTIONS FOR MARKING YOUR ANSWERS

- Use a pen with blue or black ink or a number 2 pencil.
- Make no stray marks.
- Do not use a pen with ink that soaks through the paper.
- Keep all entries within the appropriate boxes.

YOUR PREVIOUS EXPERIENCE WITH SOCIAL SECURITY

1. Do you remember receiving a statement from Social Security in the last 12 months about your Social Security earnings and your estimated benefit amount? (People usually receive this statement, known as the Social Security Statement, in the mail about 3 months before their birthday.)

Mark (X) one answer.

- Yes
 No → **SKIP to Question 4.**

2. Social Security is considering other ways to provide you with your Social Security Statement. How would you prefer to receive it?

Mark (X) one answer.

- By regular mail
- Through secure e-mail
- View it online through a secure website

3. How easy or hard was it to understand the information on the Social Security Statement?

Mark (X) an answer from 1 to 5, where 1 means "very easy" and 5 means "very hard."	Very Easy				Very Hard
	1	2	3	4	5
I found understanding the Social Security Statement ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Have you contacted Social Security in the past 12 months for any reason?

Mark (X) one answer.

- Yes
- No → **SKIP to Question 7**

5. How did you contact Social Security?

Mark (X) all answers that apply.

- Visited a local office
- Called a local office
- Called the national 800 number
- Used e-mail or the Internet
- Used regular mail

6. Overall, how satisfied were you with the way your business was handled by Social Security?

Mark (X) an answer from 1 to 5, where 1 means "very satisfied" and 5 means "very dissatisfied."	Very Satisfied				Very Dissatisfied
	1	2	3	4	5
Thinking about the way Social Security handled my business, I was ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR DOING BUSINESS WITH SOCIAL SECURITY IN THE FUTURE

For questions 7-10, please enter your first (1) and second (2) choice to indicate how you would like to contact Social Security in the future for the type of business described.

Select one method of contact as your first choice and one as your second choice for each type of business.

7. For the following business you might have right now, how would you prefer to contact Social Security?

	An Automated Phone Service	An Agent on a National 800 Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or E-mail
To replace a lost Social Security card, I would prefer ...						
<u>First</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Second</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To correct mistakes in earnings shown on my Social Security statement, I would prefer ...						
<u>First</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Second</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Now imagine that you are getting ready to retire in a year or two. How would you prefer to contact Social Security to get information about retiring?

	An Automated Phone Service	An Agent on a National 800 Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or E-mail
To get information from Social Security, I would prefer ...						
<u>First</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Second</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. After you get all the information you need and you are ready to apply for retirement benefits, how would you prefer to contact Social Security in connection with your application?

	An Automated Phone Service	An Agent on a National 800 Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or E-mail
To actually complete the application for retirement benefits, I would prefer...						
<u>First</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>Second</u> choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	An Automated Phone Service	An Agent on a National 800 Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or E-mail
To schedule an appointment to speak with someone about my application, I would prefer ...						
First choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To check on my application while it's being processed, I would prefer ...						
First choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Now imagine that you are receiving retirement benefits from Social Security. For business related to the Social Security benefit you are receiving, such as changing your address or getting a statement of the total benefits you received in the last year, how would you prefer to contact Social Security?

	An Automated Phone Service	An Agent on a National 800 Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or E-mail
To <u>change</u> information on my Social Security records, I would prefer ...						
First choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To <u>get</u> information from my Social Security records, I would prefer ...						
First choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second choice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S PHONE SERVICE

11. A common method of conducting business with Social Security is by phone, both through automated systems and talking with an agent. Although it may not have been your first or second choice in questions 7-10, do you think you would **ever** call Social Security to conduct your business in the future?

Mark (X) one answer.

- Yes
 No → **SKIP to Question 14.**

12. Social Security uses an automated phone system to direct callers to agents and to provide some services. Listed below are some features that people may associate with good **automated phone service**. We are interested in which ones are most important to you.

Mark (X) an answer from 1 to 5, where 1 means "very important" and 5 means "not as important."	Very Important			Not As Important	
	1	2	3	4	5
A system <u>where I describe</u> the service I need in my own words	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A system that <u>prompts me</u> with what to say to get the service I need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A touchtone system where I <u>press phone buttons</u> to get the service I need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to use more than one service without having to call back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to speak to an agent <u>or</u> have an agent call me back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to get <u>general information</u> about Social Security through an automated service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to get <u>personal information</u> about my Social Security record through an automated service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to use an automated phone service to schedule an appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to take care of my business completely through an automated phone service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A receipt or confirmation that my action or change has been successfully received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automated services available on nights and weekends as well as normal business hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. Social Security strives to have helpful, courteous, and knowledgeable agents on its phone lines, and to serve you quickly. Listed below are some other features that people may associate with good phone service when **talking to an agent**. We are interested in which ones are most important to you.

Mark (X) an answer from 1 to 5, where 1 means "very important" and 5 means "not as important."	Very Important			Not As Important	
	1	2	3	4	5
An estimate of how long my wait on hold will be	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Music or informational messages to listen to while I'm on hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to transfer to the right agent to handle my business without having to call back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to complete my business with only one call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to speak to the same agent if I have to call more than once to complete my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mark (X) an answer from 1 to 5, where 1 means “very important” and 5 means “not as important.”

	Very Important			Not As Important	
	1	2	3	4	5
Ability to ask an agent to call me back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to have the agent schedule an appointment for me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agent at a local office to handle my call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agents available on nights and weekends as well as normal business hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY’S IN-OFFICE SERVICE

14. People can also choose to visit their local Social Security office. Although it may not have been your first or second choice in questions 7-10, do you think you would **ever** visit an office to conduct your business with Social Security in the future? .

Mark (X) one answer.

- Yes
- No

➔ **SKIP to Question 16.**

15. Social Security knows that it is important to have convenient, comfortable offices with helpful, courteous, and knowledgeable agents who serve you quickly. Listed below are some other features that people may associate with good **in-office** service. We are interested in knowing which are most important to you.

Mark (X) an answer from 1 to 5, where 1 means “very important” and 5 means “not as important.”

	Very Important			Not As Important	
	1	2	3	4	5
Office I can easily reach by public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office I can easily reach by car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An estimate of how long I’ll have to wait to be seen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A separate line in the office for simple business, like dropping off documents or other information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to complete my business with only one visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to see the same agent if I have to visit more than once to complete my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offices open on nights and weekends as well as normal business hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S INTERNET AND E-MAIL SERVICE

16. Internet and e-mail are increasingly popular ways to do business. Although they may not have been your first or second choices in questions 7-10, do you think you would **ever** use the Internet or e-mail to contact or do business with Social Security in the future?

Mark (X) one answer.

- Yes
 No → **SKIP to Question 22.**

17. Listed below are some features that people may associate with good **Internet and e-mail service**. We are interested in which ones are most important to you when doing business with Social Security.

Mark (X) an answer from 1 to 5, where 1 means "very important" and 5 means "not as important."	Very Important			Not As Important	
	1	2	3	4	5
Ability to send personal information via secure e-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to view personal information on a secure website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to use the Internet or e-mail to schedule an appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downloadable forms that I can print and mail to Social Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online forms that I can fill out and send electronically to Social Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website services available 24 hours a day, 7 days a week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to "chat" with an agent to get immediate help with Social Security's Internet services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to call an agent to get immediate help with Social Security's Internet services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An e-mail or other electronic confirmation that my action or change has been successfully received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. Social Security currently offers people two ways to ensure their electronic business is secure by verifying their identify. Depending on the particular type of service they need, they can either use a PIN/password or provide personal information that is matched against Social Security’s records. This second method is known as “knowledge-based authentication.” We’d like to know how convenient you find each of these methods.

Mark (X) an answer from 1 to 5, where 1 means “very convenient” and 5 means “not at all convenient.”

	Very Convenient			Not At All Convenient	
	1	2	3	4	5
Using a PIN/password to do business online is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Answering questions about my personal information to do business online (knowledge-based authentication) is...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. Social Security is currently refining its authentication process. In addition to providing your name and Social Security number, how comfortable would you be providing each item below in order to do business electronically with Social Security?

Mark (X) an answer from 1 to 5, where 1 means “very comfortable” and 5 means “not at all comfortable.”

	Very Comfortable			Not At All Comfortable	
	1	2	3	4	5
Your address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your date of birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your place of birth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your mother’s maiden name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your driver’s license number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your bank account number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your credit card number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other information only you know the answer to, such as the name of your first pet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. To verify your identity, Social Security would need to match the personal information you give against other records. Listed below are different kinds of records that Social Security could match with. How comfortable would you be with each?

Mark (X) an answer from 1 to 5, where 1 means "very comfortable" and 5 means "not at all comfortable."	Very Comfortable			Not At All Comfortable	
	1	2	3	4	5
Checking against Social Security's <u>own records</u>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking against records from <u>other Federal agencies</u> , like the Internal Revenue Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking against records from other <u>State and local government agencies</u> , like Motor Vehicle departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking against records from <u>private companies</u> , like banks or credit bureaus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. Sometimes, Social Security's efforts to keep your information private and secure may make it less convenient for you to do business electronically with us. How do you think Social Security should balance security and convenience for its electronic services?

Mark (X) an answer from 1 to 5, where 1 means "more security" and 5 means "more convenience."	More Security			More Convenience	
	1	2	3	4	5
Balancing security and convenience, I prefer...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR DEFINITION OF TIMELY SERVICE FOR SOCIAL SECURITY BUSINESS

22. Now we'd like to know your definition of timely service. For the following types of services and actions, please mark (X) the box that best describes the amount of time you think is **reasonable** to wait.

A reasonable time for me to wait:	Same day	Next day	About 2-3 days	About 1 week	About 2 weeks	More than 2 weeks
To get an appointment in a local office is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A reasonable time for me to wait:	Less than 5 minutes	5 to 10 minutes	11 to 20 minutes	21 to 30 minutes	31 to 45 minutes	More than 45 minutes
To be seen in an office without an appointment is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be seen in an office with an appointment is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A reasonable time for me to wait:	Less than 1 minute	1 to 3 minutes	4 to 5 minutes	5 to 10 minutes	11 to 20 minutes	More than 20 minutes
To speak to an agent on the phone is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A reasonable time for me to wait:	Same day	Next day	About 2-3 days	About 1 week	About 2 weeks	More than 2 weeks
For an agent to call me back when I leave a phone message is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To get a response when I ask a question via e-mail or the Internet is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GETTING READY FOR RETIREMENT

23. Currently, are you employed full-time, part-time, or are you not employed for pay?

Mark (X) one answer.

- Full time
- Part time
- Not currently employed for pay

24. How soon do you plan to retire?

Mark (X) one answer.	I'm already retired	Within the next 12 months	1 to 5 years	6 to 10 years	11 to 15 years	More than 15 years	No plans to retire
I plan to retire in...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

25. Other than your annual Social Security Statement which shows your earnings and estimated benefits, have you gotten any information from Social Security about retirement benefits?

Mark (X) one answer.

- Yes
- No → **SKIP to Question 29.**

26. How did you get that information from Social Security?

Mark (X) all answers that apply.

- Visited Social Security's website
- Called Social Security's national 800 number
- Called a local Social Security office
- Visited a local Social Security office
- Sent an e-mail to Social Security
- Some other way **Please explain:** _____

27. Did you get any information about Social Security retirement benefits from anywhere **other than** Social Security?

Mark (X) one answer.

- Yes
- No → **SKIP to Question 29.**

28. Where did you get that information?

Mark (X) all answers that apply.

- Senior citizens organization, such as AARP
- Accountant or financial advisor
- Employer or union
- Media (newspaper, magazine, TV, or radio)
- Friends or relatives
- Government agency other than Social Security
- Attorney
- Someplace else **Please explain:** _____

A LITTLE MORE ABOUT YOU

29. To better understand your answers, Social Security would like to know a little more about you. Do you currently use the Internet?

Mark (X) one answer.

- Yes
- No → **SKIP to Question 36.**

30. How would you rate your level of experience using the Internet?

Mark (X) an answer from 1 to 5, where 1 means "very experienced" and 5 means "not at all experienced."	Very Experienced			Not At All Experienced	
	1	2	3	4	5
I would rate my level of experience using the Internet as ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. The list below describes different activities people can do on the Internet using a personal/laptop computer **or** a wireless handheld device. Please tell us whether you do each of the online activities listed below often, sometimes, or never using the type of device shown.

Mark (X) one answer for each item. Often Sometimes Never

Using a personal or laptop computer, I...

- | | | | |
|-----------------------------|--------------------------|--------------------------|--------------------------|
| Send e-mail | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Instant Message or chat | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Look for information online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Make purchases online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank or pay bills online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Mark (X) one answer for each item. Often Sometimes Never

Using a "wireless" handheld device (cell phone, Blackberry, iPhone, etc.), I...

- | | | | |
|-----------------------------|--------------------------|--------------------------|--------------------------|
| Send e-mail | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Text or chat | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Look for information online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Make purchases online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank or pay bills online | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

32. Have you ever filed an application online, for example, a loan or insurance application?

Mark (X) one answer.

- Yes
 No

33. Social Security currently offers an online application on its website that people can use to file for retirement benefits. When you're ready to file, how likely would you be to use Social Security's Internet application?

Mark (X) an answer from 1 to 5, where 1 means "very likely" and 5 means "not at all likely."	Very Likely					Not At All Likely				
	1	2	3	4	5	1	2	3	4	5
For me, filing for Social Security's retirement benefits over the Internet is...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

34. What is the **main** reason why you **might be likely** to use the online retirement application?

Mark (X) ONLY one answer.

- Can do it any time of day
- Can take as much time as I need
- Don't have to wait to speak to someone, either on the phone or in person
- Don't have to travel to the office
- Can have all my records at hand or can look something up if I need to
- Some other reason you might use it **Please explain:** _____
- Can't think of any reason why I would use it

35. What is the **main** reason why you **might not be likely** to use the online retirement application?

Mark (X) ONLY one answer.

- Easier to understand things explained by a person
- Can get questions answered right away by a person
- Concerned about security and/or privacy of my information
- Computer is too old/Internet service is too slow
- Don't have the necessary computer skills or experience
- Concerned online application might be too hard, complicated
- Some other reason you might not use it **Please explain:** _____
- Can't think of any reason why I wouldn't use it

36. And for the final question, what is the highest level of education you have completed?

Mark (X) one answer.

- Not a high school graduate
- High school graduate or GED
- Trade/technical/vocational school graduate
- Some college
- College graduate
- Graduate degree or postgraduate training

* * * * *

Thank you for your time and attention with this survey. Social Security will use your answers to plan for the future! Please return the completed questionnaire in the postage-paid envelope as soon as possible to:

Social Security Survey
Contractor Name
Contractor Address

<p>PRIVACY ACT STATEMENT</p> <p>The Social Security Administration is authorized to collect the information for this survey under Executive Order 12862, "Setting Customer Service Standards." Your response to these questions is strictly voluntary. The information you provide will be used to help us improve the service that we give you. Your response will not be disclosed to any other government or private agency.</p>	<p>PAPERWORK REDUCTION ACT STATEMENT</p> <p>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 about 20 minutes to read the instructions, gather the facts and answer the questions. You may send comments on our time estimate above to: Social Security Administration, 1338 Annex Building, Baltimore, MD 21235-6401.</p>
<p>OMB Control No: 0950-0526 Expiration Date: August 2012</p>	<p><i>Send <u>only</u> comments relating to our time estimate to this address, not the completed form.</i></p>