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Date: Fill In Date



Welcome and Thank You Text

Directions:

This welcome text is shown at the top of the questionnaire window and the thank you text at the bottom. This is a good place to mention the site/company/agency name so the visitor knows whom they are taking the survey for. Feel free to modify the standard Welcome text shown in the box below.

Welcome Text

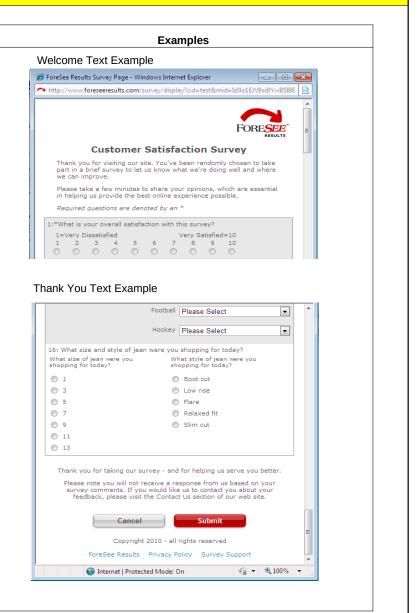
Thank you for using the Retirement Estimator on the Social Security Administration web site. Please take a minute or two and tell us what we're doing well and where we need to do better. The feedback you provide will help us improve our site and serve you better in the future.

We keep all of your answers strictly confidential. Your participation in this survey will not affect your eligibility for benefits or any business you have with Social Security.

Thank You Text

Thank you for taking our survey - and for helping us serve you better.

Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our web site, http://www.socialsecurity.gov/pgm/reach.htm



SSA Retirement Estimator v3

MID: AshNI5IMsplFJJMYA9c9JA==

Date: 8/16/2010



| ELEMENTS (drivers of satisfaction) Site Performance (if applicable) (2,1-Poor, 10=Excellent, Don't Know) Please rate the consistency of speed from page-to-page on this online Retirement Estimator. Please rate the ability to load pages without getting errors on this online Retirement Estimator? Please rate the ability to load pages without getting errors on this online Retirement Estimator. Look and Feel (1-Poor, 10=Excellent, Don't Know) Please rate the visual appeal of this online Retirement Estimator. Please rate the visual appeal of this online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the instructions to complete this online Retirement Estimator. Please rate the number of steps for entering the information into the online Retirement Estimator. Please rate the number of steps for entering the information into the online Retirement Estimator. Please rate the number of steps for entering the information into the online Retirement Estimator. Please rate the number of steps for entering the information into the online Retirement Estimator. Please rate the number of steps for entering the information into the online Retiremen | | CSI methodology to determine scores and | mpaoto | |
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| (1=Very Unlikely, 10=Very Likely) Please rate how quickly pages load on this online Retirement Estimator. Please rate the consistency of speed from page-to-page on this online Retirement Estimator? Please rate the ability to load pages without getting errors on this online Retirement Estimator. Look and Feel (1=Very Unlikely, 10=Very Likely) 14 How likely are you to apply for Social Security Beneficiations? Look and Feel (1=Very Unlikely, 10=Very Likely) 15 How likely are you to apply for Social Security Beneficiations? Recomment (1=Very Unlikely, 10=Very Likely) 16 How likely are you to apply for Social Security Beneficiations? Recomment (1=Very Unlikely, 10=Very Likely) 17 How likely are you to recommend this online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the readability of the online Retirement Estimator. Please rate the clarity of the instructions to complete this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | ELEMENTS (drivers of satisfaction) | CUSTOMER SATISFACTION | | FUTURE BEHAVIORS |
| Retirement Estimator? Please rate the consistency of speed from page-to-page on this online Retirement Estimator. Please rate the ability to load pages without getting errors on this online Retirement Estimator. Look and Feel (1-Poor, 10=Excellent, Don't Know) Please rate the visual appeal of this online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the readability of the online Retirement Estimator. Please rate the clarity of the instructions to complete this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | | ntisfaction | | |
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| Estimator. Look and Feel (1-Poor, 10=Excellent, Don't Know) Please rate the visual appeal of this online Retirement Estimator. Please rate the layout of the online Retirement Estimator. Please rate the readability of the online Retirement Estimator. Please rate the readability of the online Retirement Estimator. On-Line Application Process (1-Poor, 10=Excellent, Don't Know) Please rate the clarity of the instructions to complete this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | | | | |
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| Someone else? Return (if applicable) (1=Very Unlikely, 10=Very Likely) 16 How likely are you to return to the Retirement Estimator. On-Line Application Process (1=Poor, 10=Excellent, Don't Know) Please rate the clarity of the instructions to complete this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | ;, Don't Know) | | | y, 10=Very Likely) |
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| On-Line Application Process (1=Poor, 10=Excellent, Don't Know) Please rate the clarity of the instructions to complete this online Retirement Estimator. Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | of the online Retirement Estimator. | | Return (if applic | cable) y, 10=Very Likely) |
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| Please rate the simplicity of completing this online Retirement Estimator. Please rate the number of steps for entering the information into the online | | | 17 How likely are yo | ou to use other online applications on the So |
| Please rate the number of steps for entering the information into the online | ity of completing this online Retirement Estimator | | Security web si | te? |
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SSA Retirement Estimator v3

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Date: 8/16/2010



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| Model questions utilize ELEMENTS (drivers of satisfaction) | the ACSI methodology to determine scores an CUSTOMER SATISFACTION | future Behaviors |
| Site Performance (If applicable) | Satisfaction | Apply online for Benefits |
| (1=Poor, 10=Excellent, Don't Know) Please rate how quickly pages load on this online Retirement Estimator. | 10 What is your overall satisfaction with the online Retirement Estimator? | (1=Very Unlikely, 10=Very Likely) 13 How likely are you to apply for Social Security Benefits online? |
| Please rate the consistency of speed from page-to-page on this online Retirement Estimator. | 11 How well does the online Retirement Estimator meet your expectations? | Apply in field office for Benefits (1=Very Unlikely, 10=Very Likely) |
| Please rate the ability to load pages without getting errors on this online Retirement Estimator. | l ' | |
| Look and Feel (1=Poor, 10=Excellent, Don't Know) | | Recommend (1=Very Unlikely, 10=Very Likely) |
| Please rate the visual appeal of this online Retirement Estimator. | | 15 How likely are you to recommend this online Retirement Estimate someone else? |
| Please rate the layout of the online Retirement Estimator. | | Return (if applicable) (1=Very Unlikely, 10=Very Likely) |
| Please rate the readability of the online Retirement Estimator. | | 16 How likely are you to return to the Retirement Estimator? |
| On-Line Application Process (1=Poor, 10=Excellent, Don't Know) | | Use Other SSA Applications (1=Very Unlikely, 10=Very Likely) |
| Please rate the clarity of the instructions to complete this online Retirement Estimator. | | 17 How likely are you to use other online applications on the Social Security web site? |
| Please rate the simplicity of completing this online Retirement Estimator. | | |
| Please rate the number of steps for entering the information into the online Retirement Estimator. | | |
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SSA Retirement Estimator v3

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Date: 12/6/2010



| ELEMENTS (drivers of satisfaction) | CUSTOMER SATISFACTION | FUTURE BEHAVIORS |
|--|--|--|
| Site Performance (If applicable) (1=Poor, 10=Excellent, Don't Know) | Satisfaction | Apply online for Benefits (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar la rapidez con la que descargan las páginas en este Calculador de beneficios por jubilación. Favor de calificar la consistencia de la rapidez para moverse de una página a la otra en este Calculador de beneficios por jubilación. Favor de calificar la capacidad para descargar las páginas sin errores en este Calculador de beneficios por jubilación. Look and Feel (1=Poor, 10=Excellent, Don't Know) Favor de calificar el atractivo visual de este Calculador de beneficios por jubilación. | 2Cuál es su impresión general de este Calculador de beneficios por jubilación? ¿Con qué exactitud cumple con sus expectativas este Calculador? ¿Cómo compararía el Calculador de beneficios por jubilación con su idea de un procedimiento ideal por Internet? | 2 Cuáles son las posibilidades de que solicite los beneficio Social usando la Internet? Apply in field office for Benefits (1=Very Unlikely, 10=Very Likely) 14 ¿Cuáles son las posibilidades de que solicite los beneficio Social visitando la oficina local del Seguro Social? Recommend (1=Very Unlikely, 10=Very Likely) ¿Cuáles son las posibilidades que recomiende este Calcubeneficios por jubilación a otra persona? Return (if applicable) |
| Favor de calificar el diseño de este Calculador de beneficios por jubilación. Favor de calificar la legibilidad de Calculador de beneficios por jubilación. On-Line Application Process (1=Poor, 10=Excellent, Don't Know) Favor de calificar la claridad de las instrucciones para contestar las preguntas de Calculador de beneficios por jubilación. Favor de calificar la sencillez de las preguntas de este Calculador de beneficios por jubilación. Favor de calificar la cantidad de pasos a seguir para ingresar la información | | (1=Very Unlikely, 10=Very Likely) 16 ¿Cuáles son las posibilidades de que regrese a este Calcubeneficios por jubilación? Use Other SSA Applications (1=Very Unlikely, 10=Very Likely) 17 ¿Cuáles son las posibilidades de que use otras solicitude sitio de Internet del Seguro Social? |
| requerida en este Calculador de beneficios por jubilación. | | |

SSA Retirement Estimator v3

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Date: 12/6/2010



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| ELEMENTS (drivers of satisfaction) | the ACSI methodology to determine scores and CUSTOMER SATISFACTION | FUTURE BEHAVIORS |
| Site Performance (If applicable) (1=Poor, 10=Excellent, Don't Know) | Satisfaction | Apply online for Benefits (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar la rapidez con la que descargan las páginas en este Calculador de beneficios por jubilación. | 20 ¿Cuál es su impresión general de este Calculador de beneficios por jubilación? | 2 ¿Cuáles son las posibilidades de que solicite los beneficios de Social usando la Internet? |
| Favor de calificar la consistencia de la rapidez para moverse de una página a la otra en este Calculador de beneficios por jubilación. | 2Con qué exactitud el Calculador de beneficios por jubilación esatisfizo sus expectaciones?> ¿Con qué exactitud cumple con sus expectativas este Calculador? | Apply in field office for Benefits (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar la capacidad para descargar las páginas sin errores en este Calculador de beneficios por jubilación. | 12 ¿Cómo compararía el Calculador de beneficios por jubilación con su idea de un procedimiento perfecto?> ¿Cómo compararía el Calculador de beneficios por jubilación con su idea de un | 14 ¿Cuáles son las posibilidades de que solicite los beneficios de Social visitando la oficina local del Seguro Social? |
| Look and Feel (1=Poor, 10=Excellent, Don't Know) | procedimiento ideal por Internet? | Recommend (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar el atractivo visual de este Calculador de beneficios por jubilación. | | 15 ¿Cuáles son las posibilidades que recomiende este Calculado beneficios por jubilación a otra persona? |
| Favor de calificar el diseño de este Calculador de beneficios por jubilación. | | Return (if applicable) (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar la legibilidad de Calculador de beneficios por jubilación. On-Line Application Process | | 16 ¿Cuáles son las posibilidades de que regrese a este Calculado beneficios por jubilación? Use Other SSA Applications |
| (1=Poor, 10=Excellent, Don't Know) | | (1=Very Unlikely, 10=Very Likely) |
| Favor de calificar la claridad de las instrucciones para contestar las preguntas de Calculador de beneficios por jubilación. | | ¿Cuáles son las posibilidades de que use otras solicitudes en sitio de Internet del Seguro Social? |
| Favor de calificar la sencillez de las preguntas de este Calculador de beneficios por jubilación. | | |
| Favor de calificar la cantidad de pasos a seguir para ingresar la información requerida en este Calculador de beneficios por jubilación. | | |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTI | ON LIST | | | | | |
|------------------|---------------|---|--|---------|---------------------------------|-----------|----------|-------------------------|---|
| | Skip Logic | | Answer Choices | | | Single or | Required | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | Ý/N | Special Instructions | CQ Label |
| EDO05315 | | How did you first learn about the Retirement Estimator? | Search engine | | Radio button, one-up vertical | Single | Y | OPS Group | Learned about F |
| | | | Linked from another website | | | | | | |
| | | | From an SSA representative | | | | | | |
| | | | SSA publication | | | | | | |
| | | | From my Annual Social Security Statement | | | | | | |
| | | | Newspaper, magazine or other media | | | | | | |
| | | | My employer or Human Resources department | | | | | | |
| | | | My financial advisor | | | | | | |
| | | | Word of mouth | | | | | | |
| | | | Other, please specify | С | | | | | |
| EDO05316 | С | Other learned about | | | 5.11 .400 . | | | OPS Group | Other learned |
| ED00E04E | | U | V | | Text field, <100 char | Cinale | N | Obia Lania Onessa | about |
| EDO05317 | | Have you ever sought advice on retirement/financial | Yes | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| ED00E310 | | planning or saving strategies? | No Family/Extend | | Charlebox and un vertical | N.A. dei | V | Chin Logio Croup | Advise Comme |
| EDO05318 | D | From what source have you sought advice on retirement/financial planning or saving strategies. | Family/Friend Financial professional | - | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| | | l'etirement/intaricial planning or saving strategies. | Internet | - | | | | | |
| | | | Other | + | | | | | |
| EDO05319 | | Which statement best describes how you completed the | I completed it for myself without assistance from anyone else | | Radio button, one-up vertical | Single | Y | | Assistance |
| LDOUSSIS | | Retirement Estimator? | | | readio buttori, one-up vertical | Sirigie | ' ' | | Assistance |
| | | | I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional | 1 | | | | | |
| | | | I completed it for someone else | 1 | | | | | |
| | | | Other | 1 | | | | | |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | | | Radio button, one-up vertical | Single | Y | Skip Logic Group | Help Decision |
| | | | No | A | | | | | |
| CQLiv001008 9 | Α | Please tell us why the Retirement Estimator did not help you decide at what age to claim benefits. | | | Text area, no char limit | | N | Skip Logic Group | OE_Didn't hel decide age to claim |
| EDO05321 | | At what age do you plan to file for benefits? | 62 | | Drop down, select one | Single | Y | Skip Logic Group | Age to File |
| | | | 63 | | · | | | Change to Skip Logic so | Ĭ |
| | | | 64 | | | | | that it can be a drop | |
| | | | 65 | | | | | down question. | |
| | | | 66 | | | | | | |
| | | | 67 | | | | | | |
| | | | 68 | | | | | | |
| | | | 69 | | | | | | |
| | | | 70 | | | | | | |
| | | | 71 or older | | | | | | |
| | | | Unsure | | | | | | |
| | | | Other, please specify | E | | | | | |
| EDO05322 | E | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months | 1 | Radio button, one-up vertical | Single | Y | | Expect to File |
| | | | 1 to 3 years | 1 | | 1 | | | |
| | | | More than 3 but less than 6 years | 4 | | 1 | | | |
| | | | More than 6 years | 4 | | 1 | | | |
| | | | Don't Know | | | ļ | | | |
| EDO05324 | | How do you plan to file for retirement benefits? | I prefer to file my retirement application online | 4 | Radio button, one-up vertical | Single | Y | | How to File |
| | | | By telephone interview | 4 | | 1 | | | |
| | | | Face-to-face in my local SSA field office | 4 | | | | | |
| | | | Online with telephone or in-person assistance, if needed | 4 | | 1 | | | |
| EDO05325 | | | Don't Know | | Dadia button, one un vertical | Cinala | V | | Assemplish C- |
| ED005325 | | Did you accomplish your primary purpose in using the | Yes | - | Radio button, one-up vertical | Single | Y | | Accomplish Goa |
| | | | No | F | | | | | |

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blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

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|--------------|---------------|---|--|---------|---|-----------|----------|-------------------------|--------------------------|
| | Skip Logic | | Answer Choices | | | Single or | Required | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | Y/N | Special Instructions | CQ Label |
| 4 | | \ | Still Trying | F | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | .,,, | | |
| EDO05326 | F | If you did not accomplish your primary purpose in using the | , , | | Text area, no char limit | Single | N | | OE_Did not |
| | | Retirement Estimator, please tell us why you were not able to | | | | | | | accomplish |
| | | do so. | | | | | | | |
| ACQLiv001009 | | How would you describe your navigation experience on the SSA site today prior to arriving at the Retirement Estimator? | | | Checkbox, one-up vertical | Multi | Υ | OPS Group | Navigation Experience |
| 3 | | (Please select all that apply) | I had no difficulty navigating/browsing to the Retirement Estimator I had difficulty finding the links to the Retirement Estimator | - | | | | | Experience |
| | | (| Links often did not take me where I expected | + | | | | | |
| | | | l experienced technical difficulties (error messages, broken links, etc.) | 1 | | | | | |
| | | | I had a navigation difficulty not listed above: | A | | | | | |
| ACQLiv001009 | Α | Other navigation difficulty | , | | Text field, <100 char | | N | OPS Group | Other Difficulty |
| 4 | | | | | | | | | |
| EDO05327 | | Have you ever used the SSA Retirement Planner? | Yes | _ | Radio button, one-up vertical | Single | Υ | | RE Planner |
| | | | No | 4 | | | | | |
| EDO05328 | | What do you plan to do next in regard to getting answers | Don't know what that is Nothing, the Retirement Estimator provided what I needed | | Radio button, one-up vertical | Single | Y | | Do Next |
| 20003328 | | vinat do you plan to do next in regard to getting answers | Call Social Security's 800 number | 1 | nadio button, one-up vertical | Sirigile | T | | DO MEXI |
| | | | Call my local Social Security office | + | | | | | |
| | | | Visit my local Social Security office | 1 | | | | | |
| | | | Try finding the answers on the Social Security website | 1 | | | | | |
| | | | Try the Retirement Estimator again | | | | | | |
| | | | Don't Know | | | | | | |
| EDO06581 | | What is your preferred language for conducting business with | English | | Radio button, one-up vertical | Single | Υ | OPS Group | Preferred language |
| | | the Social Security Administration? | Spanish | | | | | | |
| EDO06582 | A | Other preferred language | Other, please specify | A | | | | OPS Group | Other learned |
| ED000362 | ^ | Other preferred language | | | Text field, <100 char | | N | OF3 Gloup | about |
| EDO05329 | | What is your age? | Under 18 | | Drop down, select one | Single | N | | Age |
| | | _ | 18-20 | 1 | | | | | |
| | | | 21-30 |] | | | | | |
| | | | 31-40 | | | | | | |
| | | | 41-50 | | | | | | |
| | | | 51-55 | 4 | | | | | |
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| | | | 63 | 1 | | | | | |
| | | | 64 | 4 | | | | | |
| | | | 65 66 | + | | | | | |
| | | | 67 or older | 1 | | | | | |
| | | | Prefer not to answer | 1 | | | | | |
| EDO05330 | | Where do you live? | Alabama | | Drop down, select one | Single | N | Skip Logic Group | Location |
| | | | Alaska | | | | | Change to Skip Logic so | |
| | | | Arizona | | | | | that it can be a drop | |
| | | | Arkansas | | | | | down question. | |
| | | | California | - | | | | | |
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| | | | Delaware | | | | | | |
| | | | District of Columbia | 1 | | | | | |
| | | | Florida | | | | | | |
| | | | Georgia | | | | | | |
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pink: ADDITION blue + -->: REWORDING

| | | | SSA Retirement Estimator v3 CUSTOM QUESTIC | N LIST | | | | | |
|----------|---------------|---|---|---------|-------------------------|-----------|----------|---|-----------------|
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| | Skip Logic | | Answer Choices | | | Single or | Required | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | Y/N | Special Instructions | CQ Label |
| | | | Louisiana Maine | | | | | | |
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| | | | Pennsylvania | | | | | | |
| | | | Rhode Island | | | | | | |
| | | | South Carolina | | | | | | |
| | | | South Dakota Tennessee | | | | | | |
| | | | Texas | | | | | | |
| | | | Utah | | | | | | |
| | | | Vermont | | | | | | |
| | | | Virginia | | | | | | |
| | | | Washington West Virginia | | | | | | |
| | | | Wisconsin | | | | | | |
| | | | Wyoming | | | | | | |
| | | | American Samoa | | | | | | |
| | | | Guam Northern Mariana Islanda | | | | | | |
| | | | Northern Mariana Islands Puerto Rico | | | | | | |
| | | | US Virgin Islands | | | | | | |
| | | | Bajo Nuevo Bank | | | | | | |
| | | | Baker Island | | | | | | |
| | | | Howland Island Jarvis Island | | | | | | |
| | | | Johnston Atoll | | | | | | |
| | | | Kingman Reef | | | | | | |
| | | | Midway Atoll | | | | | | |
| | | | Navassa Island Palmyra Atoll | | | | | | |
| | | | Serranilla Bank | | | | | | |
| | | | Wake Island | | | | | | |
| | | | Other - Please specify | G | | | | | |
| | G | Please specify where you live. | No high cohool | | Text field, <100 char | Cir!- | N | Skip Logic Group | Other Location |
| EDO05332 | | What is the highest level of education you have completed? | No high school Some high school | | Drop down, select one | Single | N | Skip Logic Group Change to Skip Logic so | Education |
| | | | High school diploma or equivalent | | | | | that it can be a drop | |
| | | | Some college, but no degree | | | | | down question. | |
| | | | Associate's degree | | | | | | |
| | | | Bachelor's degree | | | | | | |
| | | | Master's degree Professional degree (MD, JD, etc) | | | | | | |
| | | | Doctorate degree (MD, 3D, etc) | | | | | | |
| | | | Prefer not to answer | | | | | | |
| | | | Other, please specify | Х | | | | | |
| EDO05333 | Х | Please specify the highest level of education you have | | | Text field, <100 char | | N | Skip Logic Group | Other Education |
| | | completed. | | | | | | | |

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pink: ADDITION

Date: 10/6/2010

| SSA Retirement Estimator v3 CUSTOM QUESTION LIST | | | | | | | | |
|--|---------------|---------------|----------------------------|---------|-------------------------|-----------|--|--|
| | Skip Logic | | Answer Choices | | | Single or | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | | |

| Required Y/N | Special Instructions |
|-----------------|----------------------|

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underlined & italicized: RE-ORDER

MID: VAdII9VQFstVQBhNYFkAxw== Date: 10/6/2010 pink: ADDITION
blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

Skip
Logic
QID Label Question Text

Single or (limited to 50 characters)

Skip to Type (select from list)

| Required Y/N | Special Instructions |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTION | ON LIST | | | | | |
|-----------------|------------------------|---|---|---------|---|------------------------------|----------------------|--|------------------------------|
| QID ED005315 | Skip Logic Label | Question Text How did you first learn about the Retirement Estimator? | Answer Choices (limited to 50 characters) Search engine | Skip to | Type (select from list) Radio button, one-up vertical | Single or Multi Single | Required Y/N Y | Special Instructions OPS Group | CQ Label Learned about RE |
| | | | Search engine Linked from another website From an SSA representative SSA publication From my Annual Social Security Statement Newspaper, magazine or other media My employer or Human Resources department My financial advisor Word of mouth Other, please specify | С | Raulo button, one-up ventical | Single | ' | | |
| EDO05316 | С | Other learned about | | | Text field, <100 char | | N | OPS Group | Other learned about |
| EDO05317 | | Have you ever sought advice on retirement/financial planning or saving strategies? | Yes No | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| EDO05318 | D | From what source have you sought advice on retirement/financial planning or saving strategies. | Family/Friend Financial professional Internet Other | | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| EDO05319 | | Which statement best describes how you completed the Retirement Estimator? | I completed it for myself without assistance from anyone else I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional I completed it for someone else Other | | Radio button, one-up vertical | Single | Y | | Assistance |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | | | Radio button, one-up vertical | Single Cha | Y Inging to a sk | Skip Logic Group ip logic questions | Help Decision |
| | Α | Please tell us why the Retirement Estimator did not help you decide at what age to claim benefits. | No . | A | Text area, no char limit | | N | Skip Logic Group | OE_Didn't help decide age to |
| EDO05321 | | At what age do you plan to file for benefits? | 62 63 64 65 66 67 68 69 70 71 or older Unsure | | Drop down, select one | Single | Y | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | Age to File |
| EDO05322 | E | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months 1 to 3 years More than 3 but less than 6 years More than 6 years Don't Know | | Radio button, one-up vertical | Single | Y | | Expect to File |
| EDO05324 | | How do you plan to file for retirement benefits? | I prefer to file my retirement application online By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed Don't Know | | Radio button, one-up vertical | Single | Y | | How to File |
| EDO05325 | | Did you accomplish your primary purpose in using the | Yes | _ | Radio button, one-up vertical | Single | Y | | Accomplish Goal |

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| SSA Retirement Estimator v3 CUSTOM (| QUESTION LIST |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTI | JN LIST | | | | | |
|----------|------------------------|--|---|---------|-------------------------------|--------------------|-----------------|---|--------------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) Still Trying | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05326 | F | If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able to do so. | Sun rrying | - | Text area, no char limit | Single | N | | OE_Did not accomplish |
| | | How would you describe your navigation experience on the SSA site today prior to arriving at the Retirement Estimator? (Please select all that apply) please note the bolding of the word 'prior' | I had no difficulty navigating/browsing to the Retirement Estimator I had difficulty finding the links to the Retirement Estimator Links often did not take me where I expected I experienced technical difficulties (error messages, broken links, etc.) Dad a navigation difficulty not listed above: | A | Radio button, one-up vertical | Multi | Υ | OPS Group | Navigation Experience |
| | ۸ | Other pavigation difficulty | i nau a navigation difficulty not listed above. | A | Text field. <100 char | | N | ODS Croup | Other Difficulty |
| EDO05327 | A | Have you ever used the SSA Retirement Planner? | Yes No Don't know what that is | | Radio button, one-up vertical | Single | Y | OPS Group | RE Planner |
| EDO05328 | | What do you plan to do next in regard to getting answers | Nothing, the Retirement Estimator provided what I needed Call Social Security's 800 number Call my local Social Security office Visit my local Social Security office Try finding the answers on the Social Security website Try the Retirement Estimator again Don't Know | | Radio button, one-up vertical | Single | Y | | Do Next |
| EDO06581 | | What is your preferred language for conducting business with the Social Security Administration? | English Spanish | | Radio button, one-up vertical | Single | Y | OPS Group | Preferred language |
| | | | Other, please specify | Α | | | | | |
| EDO06582 | Α | Other preferred language | | | Text field, <100 char | | N | OPS Group | Other learned about |
| ED005330 | | What is your age ? | Under 18 18-20 21-30 31-40 41-50 51-55 56 57 58 59 60 61 62 63 64 65 66 67 or older Prefer not to answer | | Drop down, select one | Single | N | Skip Logic Crown | Age |
| ED005330 | | Where do you live? | Alabama Alaska Arizona Arkansas California Colorado Connecticut Delaware District of Columbia Florida Georgia Hawaii Idaho Illinois Indiana Iowa Kansas Kentucky Louisiana Maine | | Drop down, select one | Single | N | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | Location |

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTIC | N LIST | | | | | |
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| | | | | | | | | | |
| | | | | | | | | | |
| | Skip | | | | | | | | |
| | Logic | | Answer Choices | | | Single or | Required | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | Ý/N | Special Instructions | CQ Label |
| | | | Maryland | | | | | | |
| | | | Massachusetts | | | | | | |
| | | | Michigan Minnesota | | | | | | |
| | | | Mississippi | | | | | | |
| | | | Mississippi Missouri | | | | | | |
| | | | Montana | | | | | | |
| | | | Nebraska | | | | | | |
| | | | Nevada | | | | | | |
| | | | New Hampshire | | | | | | |
| | | | New Jersey | | | | | | |
| | | | New Mexico | | | | | | |
| | | | New York | | | | | | |
| | | | North Carolina | | | | | | |
| | | | North Dakota | | | | | | |
| | | | Ohio | | | | | | |
| | | | Oklahoma | | | | | | |
| | | | Oregon | | | | | | |
| | | | Pennsylvania | | | | | | |
| | | | Rhode Island | | | | | | |
| | | | South Carolina | | | | | | |
| | | | South Dakota | | | | | | |
| | | | Tennessee | | | | | | |
| | | | Texas | | | | | | |
| | | | Utah | | | | | | |
| | | | Vermont Virginia | | | | | | |
| | | | Washington | | | | | | |
| | | | West Virginia | | | | | | |
| | | | Wisconsin | | | | | | |
| | | | Wyoming | | | | | | |
| | | | American Samoa | | | | | | |
| | | | Guam | | | | | | |
| | | | Northern Mariana Islands | | | | | | |
| | | | Puerto Rico | | | | | | |
| | | | US Virgin Islands | | | | | | |
| | | | Bajo Nuevo Bank | | | | | | |
| | | | Baker Island | | | | | | |
| | | | Howland Island | | | | | | |
| | | | Jarvis Island | | | | | | |
| | | | Johnston Atoll | | | | | | |
| | | | Kingman Reef | | | | | | |
| | | | Midway Atoll | | | | | | |
| | | | Navassa Island | | | | | | |
| | | | Palmyra Atoll | | | | | | |
| | | | Serranilla Bank | | | | | | |
| | | | Wake Island Other - Please specify | G | | | | | |
| EDO05331 | G | Please specify where you live. | Опісі - гісазе бреспу | | Text field, <100 char | | N | Skip Logic Group | Other Location |
| EDO05331 | Ĭ | What is the highest level of education you have completed? | No high school | | Drop down, select one | Single | N | Skip Logic Group | Education |
| | | man and manage to | Some high school | | | O. Igic | | Change to Skip Logic so | Luddullon |
| | | | High school diploma or equivalent | | | | | that it can be a drop | |
| | | | Some college, but no degree | | | | | down question. | |
| | | | Associate's degree | | | | | | |
| | | | Bachelor's degree | | | | | | |
| | | | Master's degree | | | | | | |
| | | | Professional degree (MD, JD, etc) | | | | | | |
| | | | Doctorate degree (PhD) | | | | | | |
| | | | Prefer not to answer | | | | | | |
| | | | Other, please specify | Х | | | | | |
| EDO05333 | Х | Please specify the highest level of education you have | | | Text field, <100 char | | N | Skip Logic Group | Other Education |
| | | completed. | | | | | | | |

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pink: ADDITION

Date: 10/6/2010

| | | | SSA Retirement Estimator v3 CUSTOM QUESTIO | ON LIST | | | |
|-----|---------------|---------------|--|---------|-------------------------|-----------|--|
| | Skip Logic | | Answer Choices | | | Single or | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | |

| Required Y/N | Special Instructions |
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underlined & italicized: RE-ORDER

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blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

Skip
Logic
QID Label Question Text

Single or (limited to 50 characters)

Skip to Type (select from list)

| Required Y/N | Special Instructions |
|-----------------|----------------------|

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTI | ON LIST | | | | | |
|----------|------------------------|---|--|---------|-------------------------------|--------------------|-----------------|--|---------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05315 | Labei | | | Skip to | | | Y | | |
| | | How did you first learn about the Retirement Estimator? | Search engine Linked from another website From an SSA representative SSA publication From my Annual Social Security Statement Newspaper, magazine or other media My employer or Human Resources department My financial advisor Woord of mouth Other, please specify | С | Radio button, one-up vertical | Single | Ý | OPS Group | Learned about RE |
| EDO05316 | С | Other learned about | | | Text field, <100 char | | N | OPS Group | Other learned about |
| EDO05317 | | Have you ever sought advice on retirement/financial planning or saving strategies? | Yes No | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| EDO05318 | D | From what source have you sought advice on retirement/financial planning or saving strategies. | Family/Friend Financial professional Internet Other | | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| EDO05319 | | Which statement best describes how you completed the Retirement Estimator? | I completed it for myself without assistance from anyone else I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional I completed it for someone else Other | | Radio button, one-up vertical | Single | Y | | Assistance |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | Yes No | | Radio button, one-up vertical | Single | Y | | Help Decision |
| EDO05321 | | At what age do you plan to file for benefits? | 62 63 64 65 66 67 68 69 70 71 or older Unsure Other, please specify | E | Drop down, select one | Single | Y | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | |
| EDO05322 | Е | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months 1 to 3 years More than 3 but less than 6 years More than 6 years Don't Know | | Radio button, one-up vertical | Single | Y | | Expect to File |
| EDO05324 | | How do you plan to file for retirement benefits? | I prefer to file my retirement application online By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed Don't Know | | Radio button, one-up vertical | Single | Y | | How to File |
| EDO05325 | | Did you accomplish your primary purpose in using the | Yes No Still Trying | F | Radio button, one-up vertical | Single | Y | | Accomplish Goal |

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| SSA Retirement Estimator v3 CUSTOM Q | UESTION LIST |
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| | | | SSA Retirement Estimator v3 COSTOM QUESTIC | NI LIST | | | | | |
|----------|------------------------|---|--|---------|---|--------------------|-----------------|--------------------------------------|-----------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05326 | F | If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able to | | | Text area, no char limit | Single | N | | OE_Did not accomplish |
| EDO05327 | | do so. Have you ever used the SSA Retirement Planner? | Yes | | Radio button, one-up vertical | Single | Y | | RE Planner |
| LDOUSSEI | | liave you ever used the SSA Netherneric Flamer: | No | | radio button, one-up ventical | Sirigie | ' | | INE Flammer |
| EDO05328 | | What do you plan to do nout in regard to gotting analysis | Don't know what that is Nothing, the Retirement Estimator provided what I needed | | Dadio button, one un vertical | Cinala | Y | | Do Next |
| ED005328 | | What do you plan to do next in regard to getting answers | Call Social Security's 800 number | | Radio button, one-up vertical | Single | Ť | | Do Next |
| | | | Call my local Social Security office | | | | | | |
| | | | Visit my local Social Security office Try finding the answers on the Social Security website | | | | | | |
| | | | Try the Retirement Estimator again | | | | | | |
| | | | Don't Know | | | | | | |
| EDO06581 | | What is your preferred language for conducting business with the Social Security Administration? | English Spanish | | Radio button, one-up vertical | Single | Y | OPS Group | Preferred langua |
| | | | Other, please specify | Α | | | | | |
| EDO06582 | Α | Other preferred language | | | T . C . L | | | OPS Group | Other learned |
| EDO05329 | | What is your age? | Under 18 | | Text field, <100 char Drop down, select one | Single | N N | | about Age |
| -D000020 | | What is your age : | 18-20 | | Drop down, Sciect one | Sirigic | | | , ngc |
| | | | 21-30 | | | | | | |
| | | | 31-40 41-50 | | | | | | |
| | | | 51-55 | | | | | | |
| | | | 56 | | | | | | |
| | | | <u>57</u> 58 | | | | | | |
| | | | 59 | | | | | | |
| | | | 60 61 | | | | | | |
| | | | 62 | | | | | | |
| | | | 63 | | | | | | |
| | | | 64 65 | | | | | | |
| | | | 66 | | | | | | |
| | | | 67 or older | | | | | | |
| DO05330 | | Where do you live? | Prefer not to answer Alabama | | Drop down, select one | Single | N | Skip Logic Group | Location |
| | | | Alaska | | , | | | Change to Skip Logic so | |
| | | | Arizona Arkansas | | | | | that it can be a drop down question. | |
| | | | California | | | | | · | |
| | | | Colorado Connecticut | | | | | | |
| | | | Delaware | | | | | | |
| | | | District of Columbia | | | | | | |
| | | | Florida Georgia | | | | | | |
| | | | Hawaii | | | | | | |
| | | | Idaho | | | | | | |
| | | | Illinois Indiana | | | | | | |
| | | | Iowa | | | | | | |
| | | | Kansas Kentucky | | | | | | |
| | | | Louisiana | | | | | | |
| | | | Maine | | | | | | |
| | | | Maryland Massachusetts | | | | | | |
| | | | Michigan | | | | | | |
| | | | Minnesota | | | | | | |
| | | | Mississippi Missouri | | | | | | |
| | | | Montana | | | | | | |

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTIO | ON LIST | | | | | |
|---|------------------------|---|---|---------|-------------------------|--------------------|-----------------|-------------------------|-----------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| | | | Nebraska | | | | | | |
| | | | Nevada | | | | | | |
| | | | New Hampshire | | | | | | |
| | | | New Jersey | | | | | | |
| | | | New Mexico | | | | | | |
| | | | New York | | | | | | |
| | | | North Carolina | | | | | | |
| | | | North Dakota | | | | | | |
| | | | Ohio | | | | | | |
| | | | Oklahoma | | | | | | |
| | | | Oregon | | | | | | |
| | | | Pennsylvania | | | | | | |
| | | | Rhode Island | | | | | | |
| | | | South Carolina | | | | | | |
| | | | South Dakota | | | | | | |
| | | | Tennessee | | | | | | |
| | | | Texas | | | | | | |
| | | | Utah | | | | | | |
| | | | Vermont | | | | | | |
| | | | Virginia | | | | | | |
| | | | Washington | | | | | | |
| | | | West Virginia | | | | | | |
| | | | Wisconsin | | | | | | |
| | | | Wyoming | | | | | | |
| | | | American Samoa | | | | | | |
| | | | Guam | | | | | | |
| | | | Northern Mariana Islands | | | | | | |
| | | | Puerto Rico | | | | | | |
| | | | US Virgin Islands | | | | | | |
| | | | Bajo Nuevo Bank | | | | | | |
| | | | Baker Island | | | | | | |
| | | | Howland Island | | | | | | |
| | | | Jarvis Island | | | | | | |
| | | | Johnston Atoll | | | | | | |
| | | | Kingman Reef | | | | | | |
| | | | Midway Atoll | | | | | | |
| | | | Navassa Island | | | | | | |
| | | | Palmyra Atoll Serranilla Bank | | | | | | |
| | | | Serraniia Bank Wake Island | | | | | | |
| | | | Other - Please specify | G | | | | | |
| DO05331 | G | Please specify where you live. | Other - Please specify | G | Text field, <100 char | | N | Skip Logic Group | Other Location |
| DO05331 DO05332 | | What is the highest level of education you have completed? | No high school | | Drop down, select one | Single | | Skip Logic Group | Education |
| J G J J J J J J J J J J J J J J J J J J | | vinacio nigriest level of education you have completed? | Some high school | | Drop down, select one | Sirigic | | Change to Skip Logic so | Luucanon |
| | | | High school diploma or equivalent | | | | | that it can be a drop | |
| | | | Some college, but no degree | | | | | down question. | |
| | | | Associate's degree | | | | | | |
| | | | Bachelor's degree | | | | | | |
| | | | Master's degree | | | | | | |
| | | | Professional degree (MD, JD, etc) | | | | | | |
| | | | Professional degree (MD, JD, etc) Doctorate degree (PhD) | | | | | | |
| | | | | | | | | | |
| | | | Prefer not to answer Other, please specify | х | | | | | |
| EDO05333 | х | Please specify the highest level of education you have | Other, piease specify | ^ | Text field, <100 char | | N | Skip Logic Group | Other Education |
| | | ir iease specify the highest level of education you have | | | Frent Heid, \100 Chai | | IN | OKIP LUGIC GLUUP | Other Education |

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pink: ADDITION

Date: 10/6/2010

| | | | SSA Retirement Estimator v3 CUSTOM QUESTIO | ON LIST | | | |
|-----|---------------|---------------|--|---------|-------------------------|-----------|--|
| | Skip Logic | | Answer Choices | | | Single or | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | |

| Required Y/N | Special Instructions |
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blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

Skip
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QID Label Question Text

Single or (limited to 50 characters)

Skip to Type (select from list)

| Required Y/N | Special Instructions |
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blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

Skip
Logic
QID Label Question Text

Single or (limited to 50 characters)

Skip to Type (select from list)

| Required Y/N | Special Instructions |
|-----------------|----------------------|

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTIO | ON LIST | | | | | |
|----------|------------------------|---|--|---------|-------------------------------|--------------------|-----------------|--|------------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05315 | | How did you first learn about the Retirement Estimator? | Search engine Linked from another website | | Radio button, one-up vertical | Single | Y | OPS Group | Learned about RE |
| | | | From an SSA representative SSA publication From my Annual Social Security Statement Newspaper, magazine or other media | | | | | | |
| | | | My employer or Human Resources department My financial advisor Word of mouth | | | | | | |
| | | | Other, please specify | С | | | | | |
| EDO05316 | С | Other learned about | | | Text field, <100 char | | N | OPS Group | Other learned about |
| EDO05317 | | Have you ever sought advice on retirement/financial | Yes | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| EDO05318 | D | planning or saving strategies? From what source have you sought advice on retirement/financial planning or saving strategies. | No Family/Friend Financial professional | | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| | | | Internet Other | | | | | | |
| EDO05319 | | Which statement best describes how you completed the Retirement Estimator? | I completed it for myself without assistance from anyone else I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional | | Radio button, one-up vertical | Single | Y | | Assistance |
| | | | I completed it for someone else Other | | | | | | |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | | | Radio button, one-up vertical | Single | Y | | Help Decision |
| EDO05321 | | At what age do you plan to file for benefits? | No 62 63 64 65 66 67 68 69 77 0 71 or older | | Drop down, select one | Single | Y | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | Age to File |
| | | | Other, please specify | E | | | | | |
| EDO05322 | E | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months 1 to 3 years More than 3 but less than 6 years More than 6 years Don't Know | | Radio button, one-up vertical | Single | Y | | Expect to File |
| EDO05324 | | How do you plan to file for retirement benefits? | I prefer to file my retirement application online By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed Don't Know | | Radio button, one-up vertical | Single | Y | | How to File |
| EDO05325 | | Did you accomplish your primary purpose in using the | Yes No Still Trying | F | Radio button, one-up vertical | Single | Y | | Accomplish Goal |
| EDO05326 | F | If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able to do so. | | | Text area, no char limit | Single | N | | OE_Did not accomplish |

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| | SSA Retirement Estimator v3 CUSTOM QUESTIC | N LIST |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTIC | ON LIST | | | | | |
|----------|------------------------|--|---|---------|--|--------------------|-----------------|-------------------------|---------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05327 | | Have you ever used the SSA Retirement Planner? | Yes | | Radio button, one-up vertical | Single | Y | | RE Planner |
| | | | No Don't know what that is | | | | | | |
| EDO05328 | | What do you plan to do next in regards to getting answers | Nothing, the Retirement Estimator provided what I needed | | Radio button, one-up vertical | Single | Y | | Do Next |
| | | What do you plan to do next in regards to getting answers about your estimated retirement?> What do you plan to do next in regard to getting answers about your estimated retirement benefits? | Call Social Security's 800 number Call my local Social Security office Visit my local Social Security office Try finding the answers on the Social Security website Try the Retirement Estimator again Don't Know | | | | | | |
| EDO06581 | | What is your preferred language for conducting business with | English | | Radio button, one-up vertical | Single | Υ | OPS Group | Preferred language |
| 2200001 | | the Social Security Administration? | Spanish | | radio batori, one ap vertical | Cirigio | i i | or o ordap | |
| | | | Other, please specify | Α | | | | | |
| EDO06582 | Α | Other preferred language | | | | | | OPS Group | Other learned |
| EDO05329 | | What is your age ? | Under 18 | | Text field, <100 char Drop down, select one | Single | N N | | <u>about</u> Age |
| LD003329 | | your age: | 18-20 | | Drop down, select one | Jingle | I IN | | Age |
| | | | 21-30 | | | | | | |
| | | | 31-40 | | | | | | |
| | | | 41-50 | | | | | | |
| | | | 51-55 | | | | | | |
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| | | | 64 | | | | | | |
| | | | 65 | | | | | | |
| | | | 66 | | | | | | |
| | | | 67 or older Prefer not to answer | | | | | | |
| EDO05330 | | Where do you live? | Alabama | | Drop down, select one | Single | N | Skip Logic Group | Location |
| | | | Alaska | | | | | Change to Skip Logic so | |
| | | | Arizona | | | | | that it can be a drop | |
| | | | Arkansas | | | | | down question. | |
| | | | California Colorado | | | | | | |
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| | | | Nevada New Hampshire | | | | | | |
| | | | I VO V Tramporii C | | | | | | |

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| Skip Logic Question Text Answer Choices ((limited to 50 characters) New Jersey New Medoco New York North Carolina North Dabkota Ohio Oklahoma Oregon Pernsylvania Rhode Island South Carolina South Dakkota Tennessee Texas Utah Vermont Winginia Washington West Virignia West Virignia Wisconsin Wyoning American Samoa Guam Northern Mariana Islands Puerto Rico | d Special Instructions CQ Label |
|---|---|
| New Mexico New York North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Temessee Texas Utah Vermont Virginia Washington West Virginia Washington West Virginia Misconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico | |
| New York North Dakota North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico | |
| North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming American Samoa Guam Northem Mariana Islands Peners Islands | |
| North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Penets Virgina | |
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| Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico | |
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| Washington West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico | |
| West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico | |
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| Guam Northern Mariana Islands Puerto Rico | |
| Northern Mariana Islands Puerto Rico | |
| Puerto Rico | |
| | |
| US Virgin Islands | |
| Bajo Nuevo Bank | |
| Baker Island | |
| Howland Island | |
| Jarvis Island | |
| Johnston Atoll | |
| Kingman Reef | |
| Midway Atoli | |
| Navassa Island | |
| Palmyra Atoli Palmyra | |
| Serranilla Bank | |
| Wake Island | |
| Other - Please specify G | |
| ED005331 G Please specify where you live. Text field, <100 char N | Skip Logic Group Other Location |
| ED005332 What is the highest level of education you have completed? No high school Drop down, select one Single N | Skip Logic Group Education |
| Some high school | Change to Skip Logic so |
| High school diploma or equivalent | that it can be a drop down question. |
| Some college, but no degree | down question. |
| Associate's degree | |
| Bachelor's degree | |
| Master's degree | |
| Professional degree (MD, JD, etc) | |
| Doctorate degree (PhD) Deformed to converge | |
| Prefer not to answer Other, please specify X | |
| ED005333 X Please specify the highest level of education you have Text field, <100 char N | Skip Logic Group Other Education |
| ED009333 A rease specify the ingress rever or education you have completed. | |

Social Security Administration
SSA Retirement Estimator v3
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| | Skip Logic | | Answer Choices | | | Single or | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | |

| Required Y/N | Special Instructions |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTIC | ON LIST | | |
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| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi |

| Required Y/N | Special Instructions |
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| | | | SSA Retirement Estimator v3 CUSTOM QUESTION | ON LIST | | | | | |
|-----------------|------------------------|---|---|---------|---|------------------------------|----------------------|--|---------------------------------------|
| QID ED005312 | Skip Logic Label | Question Text What is your preferred speaking language? | Answer Choices (limited to 50 characters) English | Skip to | Type (select from list) Radio button, one up vertical | Single or Multi Single | Required Y/N ¥ | Special Instructions Skip Logic Group | CQ Label Pref. Language |
| | | - | Spanish Other, please-specify | A B | | | | | |
| EDO05313 | B | What other language do you speak? | - | | Text field, <100 char | | N | Skip Logic Group | Other Lang. |
| EDO05314 | A | What other SSA internet service would you like to see in Spanish? (check all that apply) | File a Claim File an Appeal Apply for Medicare Subsidy Business Services Online | | Checkbox, one-up-vertical | Multi | N | Skip Logic Group | SSA Services |
| EDO05315 | | How did you first learn about the Retirement Estimator? | Search engine Linked from another website From an SSA representative SSA publication From my Annual Social Security Statement Newspaper, magazine or other media My employer or Human Resources department My financial advisor Word of mouth Other, please specify | С | Radio button, one-up vertical | Single | Y | OPS Group | Learned about RE |
| EDO05316 | С | Other learned about | | | Text field, <100 char | | N | OPS Group | Other learned about |
| EDO05317 | | Have you ever sought advice on retirement/financial planning or saving strategies? | Yes No | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| EDO05318 | D | From what source have you sought advice on retirement/financial planning or saving strategies. | Family/Friend Financial professional Internet Other | | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| EDO05319 | | Which statement best describes how you completed the Retirement Estimator? | I completed it for myself without assistance from anyone else I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional Other | | Radio button, one-up vertical | Single | Y | | Assistance |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | | | Radio button, one-up vertical | Single | Y | | Help Decision |
| EDO05321 | | At what age do you plan to file for benefits? | 62 63 64 65 66 67 68 69 70 71 or older Other, please specify | E | Drop down, select one | Single | Y | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | Age to File |
| EDO05322 | Е | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months 1 to 3 years More than 3 but less than 6 years More than 6 years Don't Know | | Radio button, one-up vertical | Single | Y | | Expect to File |
| EDO05324 | | How do you plan to file for retirement benefits? | I prefer to file my retirement application online By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed | | Radio button, one-up vertical | Single | Y | | How to File |

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| SSA Retirement | Estimator v3 CUSTO | OM QUESTION LIST |
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| | Skip | | | | | | | | |
| | Logic | | Answer Choices | | | Single or | Required | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | Ý/N | Special Instructions | CQ Label |
| FDOOFOOF | | Did in | Don't Know | | Dadia hattan ana ana anti-al | Circula | V | | A |
| EDO05325 | | Did you accomplish your primary purpose in using the Retirement Estimator? | Yes No | F | Radio button, one-up vertical | Single | Y | | Accomplish Goa |
| | | | Still Trying | F | | | | | |
| EDO05326 | F | If you did not accomplish your primary purpose in using the | Still Tryllig | | Text area, no char limit | Single | N | | OE Did not |
| LDC03320 | | Retirement Estimator, please tell us why you were not able to | | | Text area, no chai innit | Single | | | accomplish |
| | | do so. | | | | | | | , |
| EDO05327 | | Have you ever used the SSA Retirement Planner? | Yes | | Radio button, one-up vertical | Single | Y | | RE Planner |
| | | , | No | 1 | , , , , , , , | | | | |
| | | | Don't know what that is | 1 | | | | | |
| EDO05328 | | What do you plan to do next in regards to getting answers | Nothing, the Retirement Estimator provided what I needed | | Radio button, one-up vertical | Single | Y | | Do Next |
| | | about your estimated retirement? | Call Social Security's 800 number | 1 | | | | | |
| | | | Call my local Social Security office | 1 | | | | | |
| | | | Visit my local Social Security office |] | | | | | |
| | | | Try finding the answers on the Social Security website | 1 | | | | | |
| | | | Try the Retirement Estimator again |] | | | | | |
| | | | Don't Know | | | | | | |
| EDO05329 | | What is your age? | Under 18 | | Drop down, select one | Single | N | | Age |
| | | | 18-20 |] | | | | | |
| | | | 21-30 | | | | | | |
| | | | 31-40 | 1 | | | | | |
| | | | 41-50 | | | | | | |
| | | | 51-55 | | | | | | |
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| | | | 62 | | | | | | |
| | | | 63 | 1 | | | | | |
| | | | 64 | - | | | | | |
| | | | 65 | - | | | | | |
| | | | 66 67 or older | - | | | | | |
| | | | Prefer not to answer | - | | | | | |
| EDO05330 | | Where do you live? | Alabama | | Drop down, select one | Single | N | Skip Logic Group | Location |
| ED005330 | | where do you live? | Alaska | - | Drop down, select one | Sirigle | IN | Change to Skip Logic so | Location |
| | | | Arizona | 1 | | | | that it can be a drop | |
| | | | Arkansas | - | | | | down question. | |
| | | | California | - | | | | 4 | |
| | | | Colorado | | | | | | |
| | | | Connecticut | | | | | | |
| | | | Delaware | | | | | | |
| | | | District of Columbia | | | | | | |
| | | | Florida | 1 | | | | | |
| | | | Georgia | 1 | | | | | |
| | | | Hawaii | | | | | | |
| | | | Idaho | 1 | | | | | |
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Date: 3/1/2008

EDO05333

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completed.

Please specify the highest level of education you have

SSA Retirement Estimator v3 CUSTOM QUESTION LIST Logic Label Required Y/N **Answer Choices** Single or Skip to Type (select from list) Multi Special Instructions CQ Label QID **Question Text** (limited to 50 characters) Nevada New Hampshire New Jersey New Mexico New York North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming American Samoa Guam Northern Mariana Islands Puerto Rico US Virgin Islands Bajo Nuevo Bank Baker Island Howland Island Jarvis Island Johnston Atoll Kingman Reef Midway Atoll Navassa Island Palmyra Atoll Serranilla Bank Wake Island Other - Please specify EDO05331 Please specify where you live. Text field, <100 char N Skip Logic Group Other Location EDO05332 What is the highest level of education you have completed? No high school Drop down, select one Single Skip Logic Group Education Some high school Change to Skip Logic so that it can be a drop High school diploma or equivalent down question. Some college, but no degree Associate's degree Bachelor's degree Master's degree Professional degree (MD, JD, etc) Doctorate degree (PhD) Prefer not to answer Other, please specify

Text field, <100 char

N

Skip Logic Group

Other Education

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| SSA Retirement Estimator v3 CUSTOM QUESTION LIST | | | | | | | | |
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| | Skip | | Answer Choices | | | Single or | | |
| QID | Logic Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | | |
| ENEDO05312 | | What is your preferred speaking language? | English | | Radio button, one up vertical | Single | | |

| Required | |
|----------|----------------------|
| Y/N | Special Instructions |
| ¥ | Skip Logic Group |

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| | SSA Retirement Estimator v3 CUSTOM QUESTION LIST | | | | | | | | | | |
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| | | | | | | | | | | | |
| | Skip | | | | | | a | | | | |
| QID | Logic Label | Question Text | | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | | | | |
| SPEDO05312 | | ¿Cuál es su preferencia de idioma al hablar? | Inglés | | | Radio button, one-up vertical | Single | | | | |

| Required | |
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| Y/N | Special Instructions |
| ¥ | Skip Logic Group |

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTI | ON LIST | | | | | |
|----------|------------------------|---|---|---------|-------------------------------|--------------------|-----------------|---|---------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05312 | | | English Spanish Other, please specify | A B | Radio button, one-up vertical | Single | | Skip Logic Group | Pref. Language |
| EDO05313 | В | What other language do you speak? | | | Text field, <100 char | | N | Skip Logic Group | Other Lang. |
| EDO05314 | A | Spanish? (check all that apply) | File a Claim File an Appeal Apply for Medicare Subsidy Business Services Online | | Checkbox, one-up vertical | Multi | N | Skip Logic Group | SSA Services |
| EDO05315 | | | Search engine Linked from another website From an SSA representative SSA publication From my Annual Social Security Statement Newspaper, magazine or other media My employer or Human Resources department My financial advisor Word of mouth Other, please specify | С | Radio button, one-up vertical | Single | Y | | Learned about Ri |
| EDO05316 | С | Other learned about | | | Text field, <100 char | | N | OPS Group | Other learned about |
| EDO05317 | | Have you ever sought advice on retirement/financial planning or saving strategies? | Yes No | D | Drop down, select one | Single | Y | Skip Logic Group | Sought Advice |
| EDO05318 | D | From what source have you sought advice on retirement/financial planning or saving strategies. | Family/Friend Financial professional Internet Other | | Checkbox, one-up vertical | Multi | Y | Skip Logic Group | Advice Source |
| EDO05319 | | Which statement best describes how you completed the Retirement Estimator? | I completed it for myself without assistance from anyone else I completed it for myself with assistance from a friend or family member I completed it for myself with assistance from a professional Other | | Radio button, one-up vertical | Single | Y | | Assistance |
| EDO05320 | | Did the Retirement Estimator help you decide at what age to claim benefits? | | | Radio button, one-up vertical | Single | Y | | Help Decision |
| EDO05321 | | | 62 63 64 65 66 67 68 69 70 71 or older Other, please specify | E | Drop down, select one | Single | Y | Skip Logic Group Change to Skip Logic so that it can be a drop down question. | Age to File |
| EDO05322 | E | Please specify the age at which you intend to file for benefits. | | | Text field, <100 char | | N | Skip Logic Group | Other Age |
| EDO05323 | | When do you expect to file for retirement benefits? | Within 12 months 1 to 3 years More than 3 but less than 6 years More than 6 years Don't Know | | Radio button, one-up vertical | Single | Y | | Expect to File |
| EDO05324 | | How do you plan to file for retirement benefits? | l prefer to file my retirement application online By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed | | Radio button, one-up vertical | Single | Y | | How to File |

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| | | | SSA Retirement Estimator v3 CUSTOM QUESTION | ON LIST | | | | | |
|----------|------------------------|--|---|---------|---------------------------------|--------------------|-----------------|---|-------------------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| EDO05325 | | | Don't Know | | Radio button, one-up vertical | CiI | Y | | A - - - - - |
| ED005325 | | Did you accomplish your primary purpose in using the Retirement Estimator? | Yes No | F | Radio button, one-up vertical | Single | Ť | | Accomplish Goa |
| | | | Still Trying | F | | | | | |
| EDO05326 | F | If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able to do so. | | | Text area, no char limit | Single | N | | OE_Did not accomplish |
| EDO05327 | | Have you ever used the SSA Retirement Planner? | Yes | | Radio button, one-up vertical | Single | Y | | RE Planner |
| | | | No | | | | | | |
| EDO05328 | | What do you plan to do next in regards to getting answers | Don't know what that is Nothing, the Retirement Estimator provided what I needed | | Radio button, one-up vertical | Single | Y | | Do Next |
| DO05326 | | about your estimated retirement? | Call Social Security's 800 number | | Radio buttori, orie-up vertical | Sirigle | Ť | | Do Next |
| | | , | Call my local Social Security office | 1 | | | | | |
| | | | Visit my local Social Security office | | | | | | |
| | | | Try finding the answers on the Social Security website | | | | | | |
| | | | Try the Retirement Estimator again | | | | | | |
| DO05329 | | M/hat is your age? | Don't Know | | Drop down colect and | Cinala | N.I | | A === |
| -DO03329 | | What is your age ? | Under 18 18-20 | - | Drop down, select one | Single | N | | Age |
| | | | 21-30 | | | | | | |
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| | | | 66 | | | | | | |
| | | | 67 or older | | | | | | |
| | | | Prefer not to answer | | | | | | |
| DO05330 | | Where do you live? | Alabama | ↓ (| Drop down, select one | Single | N | Skip Logic Group | Location |
| | | | Alaska Arizona | | | | | Change to Skip Logic so that it can be a drop | |
| | | | Arkansas | | | | | down question. | |
| | | | California | | | | | · | |
| | | | Colorado | | | | | | |
| | | | Connecticut | | | | | | |
| | | | Delaware District of Columbia | - | | | | | |
| | | | District of Columbia Florida | - | | | | | |
| | | | Georgia | 1 | | | | | |
| | | | Hawaii | | | | | | |
| | | | Idaho | | | | | | |
| | | | Illinois | | | | | | |
| | | | Indiana | - | | | | | |
| | | | lowa Kansas | 1 | | | | | |
| | | | Kentucky | 1 | | | | | |
| | | | Louisiana | | | | | | |
| | | | Maine | | | | | | |
| | | | Maryland | | | | | | |
| | | | Massachusetts | - | | | | | |
| | | | Michigan Minnesota | - | | | | | |
| | | | Mississippi | | | | | | |
| | | | | | | | | | |
| | | | Missouri | | | | | | |
| | | | Missouri Montana Nebraska | | | | | | |

red & strike-through: DELETE underlined & italicized: RE-ORDER pink: ADDITION

| | | | SSA Retirement Estimator v3 CUSTOM QUESTIC | N LIST | | | | | |
|----------|------------------------|--|--|---------|--------------------------|--------------------|-----------------|--------------------------------------|-----------------|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | Required Y/N | Special Instructions | CQ Label |
| אַיט | Label | Aneanou Levr | Nevada | σκιρ το | Type (Select Holli list) | walt | 1719 | Special motitudions | CQ Lauei |
| | | | New Hampshire | | | | | | |
| | | | New Jersey | | | | | | |
| | | | New Mexico | | | | | | |
| | | | New York North Carolina | | | | | | |
| | | | North Dakota | | | | | | |
| | | | Ohio | | | | | | |
| | | | Oklahoma | | | | | | |
| | | | Oregon | | | | | | |
| | | | Pennsylvania | | | | | | |
| | | | Rhode Island | | | | | | |
| | | | South Carolina | | | | | | |
| | | | South Dakota | | | | | | |
| | | | Tennessee | | | | | | |
| | | | Texas | | | | | | |
| | | | Utah | | | | | | |
| | | | Vermont | | | | | | |
| | | | Virginia | | | | | | |
| | | | Washington West Virginia | | | | | | |
| | | | Wisconsin | | | | | | |
| | | | Wyoming | | | | | | |
| | | | American Samoa | | | | | | |
| | | | Guam | | | | | | |
| | | | Northern Mariana Islands | | | | | | |
| | | | Puerto Rico | | | | | | |
| | | | US Virgin Islands | | | | | | |
| | | | Bajo Nuevo Bank | | | | | | |
| | | | Baker Island | | | | | | |
| | | | Howland Island | | | | | | |
| | | | Jarvis Island | | | | | | |
| | | | Johnston Atoll | | | | | | |
| | | | Kingman Reef | | | | | | |
| | | | Midway Atoll Navassa Island | | | | | | |
| | | | Palmyra Atoli | | | | | | |
| | | | Serranilla Bank | | | | | | |
| | | | Wake Island | | | | | | |
| | | | Other - Please specify | G | | | | | |
| | G | Other location> Please specify where you live. | | | Text field, <100 char | | N | Skip Logic Group | Other Location |
| EDO05332 | | What is the highest level of education you have completed? | | | Drop down, select one | Single | N | Skip Logic Group | Education |
| | | | Some high school | | | | | Change to Skip Logic so | |
| | | | High school diploma or equivalent | | | | | that it can be a drop down question. | |
| | | | Some college, but no degree | | | | | down question. | |
| | | | Associate's degree Bachelor's degree | | | | | | |
| | | | Master's degree | | | | | | |
| | | | Professional degree (MD, JD, etc) | | | | | | |
| | | | Doctorate degree (ND) | | | | | | |
| | | | Prefer not to answer | | | | | | |
| | | | Other, please specify | х | | | | | |
| | Х | Other education level> Please specify the highest level of | ., ., | | Text field, <100 char | | N | Skip Logic Group | Other Education |
| EDO05333 | | other education lever> riease specify the muliest level of | | | rext field, \100 criai | | | Skip Logic Group | Other Education |

red & strike-through: DELETE underlined & italicized: RE-ORDER

MID: JU89h10NUtR9V44MIk9ldA==

pink: ADDITION

Date: 3/1/2008

| SSA Retirement Estimator v3 CUSTOM QUESTION LIST | | | | | | | | | |
|--|---------------|---|----------------------------|---------|-------------------------------|-----------|--|--|--|
| | | | | | | | | | |
| | Skip Logic | | Answer Choices | | | Single or | | | |
| QID | Label | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi | | | |
| ENEDO05312 | | What is your preferred speaking language? | English | | Radio button, one-up vertical | Single | | | |

| Requ | | |
|------|---|----------------------|
| Y/ | N | Special Instructions |
| Y | , | Skip Logic Group |

MID: VAdli9VQFstVQBhNYFkAxw==

3/1/2008

Date:

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underlined & italicized: RE-ORDER

pink: ADDITION

| SSA Retirement Estimator v3 CUSTOM QUESTION LIST | | | | | | | | |
|--|------------------------|--|--|---------|-------------------------------|--------------------|--|--|
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi | | |
| SPEDO05312 | | ¿Cuál es su preferencia de idioma al hablar? | Inglés | | Radio button, one-up vertical | Single | | |

| Required | |
|----------|----------------------|
| Y/N | Special Instructions |
| | Special Instructions |
| Υ | Skip Logic Group |