

## 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 planning to file for retirement benefits, how you want to be able to contact us, and what kinds of services you think we should have available.

Please watch your mail for the envelope from *[Contractor]*. We hope that you will take the time to answer our questions and help us serve you well in the future. We look forward to hearing your opinions.

Michelle A. King  
Deputy Commissioner for Budget, Finance, Quality, and Management  
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  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 an increasing number of 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 planning to file for retirement benefits, your expectations for good service, how you want to be able to contact Social Security, 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.
- Do not use a pen with ink that soaks through the paper.

## GETTING READY FOR RETIREMENT

1. One of the tools people can use to get ready for retirement is the Social Security Statement. It shows your Social Security earnings for all the years that you worked and an estimate of your future benefit amount. Do you remember getting a Social Security Statement?

Mark  one answer.

- Yes  
 No → **SKIP to Question 4.**

2. How did you get your Social Security Statement?

Mark  one answer.

- It came in the mail from Social Security
- I used a “my Social Security” account to get one on Social Security’s website
- Both through the mail **and** on Social Security’s website

3. How would you rate the usefulness of the Social Security Statement?

Mark <input checked="" type="checkbox"/> an answer from 1 to 5, where 1 means “very useful” and 5 means “not at all useful.”	Very Useful		Not at all Useful		
	1	2	3	4	5
I found the Social Security Statement .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Social Security has another tool online, the Retirement Benefit Estimator (<http://www.ssa.gov/estimator/>), that you can use to find out how much your monthly retirement benefit will be. Have you ever used the online Retirement Benefit Estimator?

Mark  one answer.

- Yes
- No → **SKIP** to Question 6.

5. How would you rate the usefulness of the Retirement Benefit Estimator?

Mark <input checked="" type="checkbox"/> an answer from 1 to 5, where 1 means “very useful” and 5 means “not at all useful.”	Very Useful		Not at all Useful		
	1	2	3	4	5
I found Social Security’s online Retirement Benefit Estimator .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Besides the Social Security Statement or the online Retirement Benefit Estimator, have you ever gotten any other information about Social Security retirement benefits?

Mark  one answer.

- Yes
- No → **SKIP** to Question 8.

7. Where did you get that information?

Mark  **all answers that apply.**

- Spoke to a Social Security employee on the phone or in person
- Social Security's website
- Website other than Social Security's
- Senior citizens organization, such as AARP
- Accountant or financial advisor
- Employer or union
- Friends or relatives
- Local seminars or meetings
- Traditional media (newspaper, magazine, TV, or radio)
- Social networking site like Facebook or Twitter
- Government agency other than Social Security
- Someplace else **Please explain:** \_\_\_\_\_

**YOUR RETIREMENT PLANS**

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

Mark  **one answer.**

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

9. At what age do you plan to stop (or did you stop) working?

Mark <input checked="" type="checkbox"/> one answer.	Before Age 62	62 – 65	66 – 67	At 68 or older	No plans to stop working
I plan to stop (or I stopped) working....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. The various options for claiming Social Security retirement benefits are displayed in the table below. After reviewing these options, please **mark**  the box that best describes when you plan to claim benefits.\*

At Age 62	Between 62 and your Full Retirement Age	At your Full Retirement Age 66 or 67	Between your Full Retirement Age and Age 70	At Age 70 or Older
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maximum reduction in monthly benefit	Some reduction in monthly benefit	Full unreduced monthly benefit	Some increase in monthly benefit	Maximum increase in monthly benefit

\*For more information about these options go to <http://www.socialsecurity.gov/retire2/applying1.htm>.

**YOUR PREFERENCES FOR DOING BUSINESS WITH SOCIAL SECURITY IN THE FUTURE**

For questions 11-14, please **mark**  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.

11. 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 toll-free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email
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 on my Social Security record, 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"/>

12. 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 toll-free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email
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"/>

13. 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 toll-free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email
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 toll-free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email
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"/>

14. 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 toll-free Number	An Agent on a Local Phone Number	A Visit to a Local Office	Regular Mail	Internet or Email
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**

15. 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 11-14, do you think you would **ever** call Social Security to conduct your business in the future?

Mark  one answer.

- Yes  
 No → **SKIP to Question 21.**

16. 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 <input checked="" type="checkbox"/> 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 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"/>

17. 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 <input checked="" type="checkbox"/> 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"/>
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"/>
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"/>
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"/>

18. When you call Social Security, would you prefer to speak to an agent on the national toll-free number or in a local office?

Mark  one answer.

- National toll-free number
- Local office
- No preference

→ **SKIP to Question 20 .**

19. Please **briefly** explain the reason for your preference:

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20. Now we would like to know your definition of timely **phone** service. For the following actions, please mark  the box that best describes the amount of time you think is **reasonable** to wait.

A reasonable time for me to wait:	Less than 1 minute	1 to 3 minutes	4 to 5 minutes	6 to 10 minutes	11 to 20 minutes	More than 20 minutes
To speak to <b>an agent on the phone</b> 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 hour	More than 1 hour but same day	Next day	2 to 3 days	More than 3 days	A week or more
For an agent to <b>call me back</b> 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"/>

**YOUR PREFERENCES FOR SOCIAL SECURITY'S IN-OFFICE SERVICE**

21. People can also choose to visit their local Social Security office. Although it may not have been your first or second choice in questions 11-14, do you think you would **ever** visit an office to conduct your business with Social Security in the future?

Mark  one answer.

- Yes
- No

→ **SKIP to Question 24.**



22. 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 <input checked="" type="checkbox"/> 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"/>
Office with convenient parking.....	<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"/>

23. Now we would like to know your definition of timely **in-office** service. For the following actions, please mark  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 <b>get an appointment</b> 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 <b>without</b> 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 <b>with</b> an appointment is .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. In some instances, Social Security offers in person service “virtually.” Using video equipment, a person can see and speak to a Social Security employee working in a different location. The video equipment may be located in a Social Security office, or in other public places like a library or community center. If Social Security offered you the opportunity to use this video service, how likely would you be to do that?

Mark <input checked="" type="checkbox"/> 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	
For me, using video service for Social Security business is ....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**YOUR PREFERENCES FOR DOING SOCIAL SECURITY BUSINESS VIA INTERNET AND EMAIL**

25. Internet and email are other ways people may want to do business. Although they may not have been your first or second choices in questions 11-14, do you think you would **ever** use the Internet or email to contact or do business with Social Security in the future?

Mark  one answer.

- Yes  
 No → **SKIP to Question 30.**

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

Mark <input checked="" type="checkbox"/> 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 email.....	<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 email 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"/>
Internet 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 email 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"/>

27. Now we would like to know your definition of timely **Internet/email** service. For the following action, please mark  the box that best describes the amount of time you think is **reasonable** to wait.

A reasonable time for me to wait:	Less than 1 hour	More than 1 hour but same day	Next day	2 to 3 days	More than 3 days	A week or more
To <b>get a response</b> when I ask a question via email or the Internet is .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

28. For certain types of business on Social Security’s website, people must verify their identity through our online 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 <input checked="" type="checkbox"/> 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 current 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"/>
Part of your bank account number.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part of your credit card number.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other personal information from your records, such as previous addresses or phone numbers.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

29. 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 <input checked="" type="checkbox"/> 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"/>

**PRIVACY OF YOUR PERSONAL INFORMATION**

30. No matter how you choose to do business with us, in person, by phone, or online, Social Security takes great care to protect your personal information. How confident are you that the information in your Social Security records is secure?

Mark <input checked="" type="checkbox"/> an answer from 1 to 5, where 1 means “very confident” and 5 means “not at all confident.”	Very Confident		Not at all confident		
	1	2	3	4	5
I would rate my level of confidence in the security of my Social Security records as.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**A LITTLE MORE ABOUT YOU**

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

Mark  one answer.

- Yes
- No → **SKIP to Question 41.**

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

Mark <input checked="" type="checkbox"/> 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"/>

33. How do you access the Internet? Do you use:

Mark  one answer.

- Only** a personal or laptop computer
- Only** a wireless handheld device like a smartphone or tablet
- Both** a personal or laptop computer **and** a wireless handheld device

34. 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 <input checked="" type="checkbox"/> one answer for each item.	Often	Sometimes	Never
<b><u>Using a personal or laptop computer, I...</u></b>			
Send email.....	<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"/>
Live chat online.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Facebook, Twitter, etc. ....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mark <input checked="" type="checkbox"/> one answer for each item.	Often	Sometimes	Never
<b><u>Using a wireless handheld device, I...</u></b>			
Send email.....	<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"/>
Live chat online.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use Facebook, Twitter, etc. ....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

35. One other type of business people can do online is file an application, for example, a loan or insurance application. Have you ever filed any type of application online?

Mark  one answer.

- Yes  
 No

36. Social Security offers a service called “my Social Security” ([www.socialsecurity.gov/myaccount](http://www.socialsecurity.gov/myaccount)) where people can create a secure online account with a user name and password to conduct various types of business. For example, people can view a record of their earnings and get an estimate of their monthly benefit online. Have you already created your “my Social Security” account?

Mark  one answer.

- Yes → **SKIP to Question 38.**  
 No

37. How likely would you be to create a “my Social Security” account?

Mark <input checked="" type="checkbox"/> 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
For me, creating a “my Social Security” account for Social Security business is .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

38. Social Security also offers an online application on its website that people can use to file for retirement benefits. When you are ready to file, how likely would you be to use Social Security’s Internet application?

Mark <input checked="" type="checkbox"/> 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
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"/>

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

Mark  **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

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

Mark  **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

41. Because of a medical condition, people sometimes need special accommodations to handle their Social Security business. Whether you choose to do business with Social Security in person, on the phone, or online, would you need Social Security to provide special accommodations because of a medical condition?

Mark  **one answer.**

- Yes
- No → **SKIP to Question 43.**

42. Would you need special accommodations because of a:

Mark  **all answers that apply.**

- Physical impairment (for example, wheelchair access)
- Visual impairment (for example, large print or Braille documents)
- Hearing impairment (for example, sign language interpreter or video relay)
- Other impairment (for example, a learning disability)

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

Mark  **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

44. If you have any other comments for Social Security, please provide them here:

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\* \* \* \* \*

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**  
ICF International  
980 Beaver Creek Drive, Martinsville VA, 24112

<p><b>PRIVACY ACT STATEMENT</b></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><b>PAPERWORK REDUCTION ACT STATEMENT</b></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, 6401 Security Blvd., Baltimore, MD 21235-6401.</p>
<p><b>OMB Control No:</b> 0960-0526 <b>Expiration Date:</b> TBD</p>	<p><i>Send <u>only</u> comments relating to our time estimate to this address, not the completed form.</i></p>

## 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.

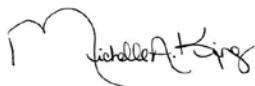
Please be assured that [*Contractor*], who is conducting this survey for us, will only give your responses to my staff here at Social Security and will not use them for any other purpose. Social Security will report the survey results by summarizing the answers of everyone who takes the survey; we will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

A handwritten signature in black ink that reads "Michelle A. King". The signature is written in a cursive style with a large, stylized initial "M".

Michelle A. King  
Deputy Commissioner for Budget, Finance, Quality, and Management  
Social Security Administration

Enclosures



## 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.

Michelle A. King  
Deputy Commissioner for Budget, Finance, Quality, and Management  
Social Security Administration

## 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](http://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,

A handwritten signature in black ink that reads "Michelle A. King". The signature is written in a cursive style with a large, stylized initial "M".

Michelle A. King  
Deputy Commissioner for Budget, Finance, Quality, and Management  
Social Security Administration

Enclosures

## 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](http://www.socialsecurity.gov) or call our toll-free information line at 1-800-772-1213.

Thank you for your help.

Sincerely,

A handwritten signature in black ink that reads "Michelle A. King". The signature is written in a cursive style with a large, stylized initial "M".

Michelle A. King  
Deputy Commissioner for Budget, Finance, Quality, and Management  
Social Security Administration

Enclosures