

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

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, your preference for contacting Social Security, and what kinds of services you think we should have available. The survey should take about 15 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.
- Make no stray marks.
- Keep all entries within the appropriate boxes.

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 **my Social Security** account to get one on Social Security's website

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

Mark <input checked="" type="checkbox"/> one answer.	Very Useful	Somewhat Useful	Not Very Useful	Not at All Useful
I found the Social Security Statement ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Besides the Social Security Statement, have you ever gotten any other information about Social Security retirement benefits?

Mark one answer.

- Yes
 No → **SKIP to Question 8.**

5. 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

6. Currently, are you working full-time, part-time, or not working for pay?

Mark one answer.

- Full time
 Part time
 Not currently working for pay

7. 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"/>

8. Displayed in the table below are the various options for claiming Social Security retirement benefits. 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 CONTACTING SOCIAL SECURITY IN THE FUTURE

For questions 9 through 12, please mark to indicate how you would like to contact Social Security in the future.

Select one as your preferred contact method for each type of service or activity.

9. For the following services, how would you prefer to contact Social Security?

To replace a lost Social Security card, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<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 to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. How would you prefer to contact Social Security to get information about retiring?

To get information from Social Security, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. 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?

To complete the application for retirement benefits, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To schedule an appointment to speak with someone about my application, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<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 to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. For services related to the Social Security benefits you may receive in the future, 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?

To change information on my Social Security records, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To get information from my Social Security records, I would prefer to...

Speak on the Phone with an Employee at a National Teleservice Center	Speak on the Phone with an Employee at a Local Office	Visit a Local Office	Use the Internet or Email	None of These
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S PHONE SERVICE

13. Although it may not have been your preferred contact method in questions 9 through 12, do you think you would **ever** call Social Security for your service needs in the future?

Mark one answer.

Yes

No → **SKIP to Question 16.**

14. Listed below are some features that people may associate with good phone service when **speaking with an employee**. We are interested in which ones are most important to you.

Mark <input checked="" type="checkbox"/> one answer.	Very Important	Somewhat Important	Not Very Important	Not at All Important
To get an estimate of how long I will have wait on hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to transfer to an employee without having to call back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to complete my all of my service needs with only one call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to speak to the same employee if I have to call more than once to complete my transaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to ask an employee to call me back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to have an employee schedule an appointment for me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. For the following actions, please mark the box that best describes the amount of time you think is **reasonable** to wait on the phone.

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 an employee on the phone is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A reasonable time for me to wait:	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 employee to call me back when I leave a phone message is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S IN-OFFICE SERVICE

16. Although it may not have been your preferred contact method in questions 9 through 12, do you think you would **ever** visit a Social Security office for your service needs in the future?

Mark one answer.

Yes

No

➔ **SKIP to Question 19.**

17. Listed below are some 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"/> one answer.	Very Important	Somewhat Important	Not Very Important	Not at All Important
An office I can easily reach by car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An office with convenient parking	<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"/>
A separate line in the office for quick transactions, like dropping off documents or other information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able to complete my service needs with only one visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To be able see the same agent if I have to visit more than once to complete my transaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. For the following actions, please mark the box that best describes the amount of time you think is **reasonable** to wait in a local office.

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

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

YOUR PREFERENCES FOR CONTACTING SOCIAL SECURITY VIA INTERNET AND EMAIL

19. Although they may not have been your preferred contact method in questions 9 through 12, do you think you would **ever** use the Internet or email to contact Social Security for your service needs in the future?

Mark one answer.

Yes

No → **SKIP to Question 25.**

20. 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 receiving services from Social Security.

Mark <input checked="" type="checkbox"/> one answer.	Very Important	Somewhat Important	Not Very Important	Not at All Important
Ability to view and send personal information on a secure website or email	<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"/>
Downloadable forms that I can print and mail to Social Security	<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"/>
Internet services available 24 hours a day, 7 days a week	<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"/>

21. 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 get a response 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"/>

22. For some services 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 get service from Social Security online?

Mark <input checked="" type="checkbox"/> one answer.	Very Comfortable	Somewhat Comfortable	Not Very Comfortable	Not at All Comfortable
Your current address	<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"/>
Your place of birth	<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"/>
Your driver's license number	<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"/>
Part of your credit card number	<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"/>

23. 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"/> one answer.	Very Comfortable	Somewhat Comfortable	Not Very Comfortable	Not at All Comfortable
Checking against Social Security <u>records</u>	<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"/>
Checking against records from other <u>State and local government agencies</u> ,	<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"/>

24. 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"/> one answer.	Very Confident	Somewhat Confident	Not Very Confident	Not at All Confident
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"/>

YOUR EXPERIENCE USING THE INTERNET AND ONLINE SERVICES

25. Do you currently use the Internet?

Mark one answer.

- Yes
- No → **SKIP to Question 34.**

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

Mark <input checked="" type="checkbox"/> one answer.	Very Experienced	Somewhat Experienced	Not Very Experienced	Not at All Experienced
I would rate my level of experience using the Internet as	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. 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

28. Have you ever filed any type of application online?

Mark one answer.

- Yes
- No

29. Social Security offers a service called *my Social Security* (www.socialsecurity.gov/myaccount) where people can create a secure online account with a user name and password to receive various types of service. For example, people can view a record of their earnings and get an estimate of their monthly benefit online. Have you already created an online account with Social Security?

Mark one answer.

- Yes → **SKIP to Question 34.**
- No

30. How likely would you be to create a **my Social Security** account?

Mark <input checked="" type="checkbox"/> one answer.	Very Likely	Somewhat Likely	Not Very Likely	Not at All Likely
For me, creating a my Social Security account to receive services from Social Security is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. 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"/> one answer.	Very Likely	Somewhat Likely	Not Very Likely	Not at All Likely
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"/>

32. 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

33. 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
- Some other reason you might not use it **Please explain:** _____
- Can't think of any reason why I wouldn't use it

34. Do you own a cell phone?

Mark one answer.

- Yes
- No → **END SURVEY.**

35. Do you use a cell phone to send and receive text messages?

Mark one answer.

- Yes
- No

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

Social Security Survey
[Contractor Return Address]

<p>PRIVACY ACT STATEMENT</p> <p>The Social Security Administration is authorized to collect the information for this survey under Executive Order 12862, "Setting Customer Service Standards." Your response to these questions is strictly voluntary. The information you provide will be used to help us improve the service that we give you. Your response will not be disclosed to any other government or private agency.</p>	<p>PAPERWORK REDUCTION ACT STATEMENT</p> <p>This information collection meets the requirements of 44 U.S.C. § 3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 20 minutes to read the instructions, gather the facts and answer the questions. You may send comments on our time estimate above to: Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.</p>
<p>OMB Control No: 0960-0526 Expiration Date:</p>	<p><i>Send <u>only</u> comments relating to our time estimate to this address, not the completed form.</i></p>