MID: AshNI5IMsplFJJMYA9c9JA==

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**

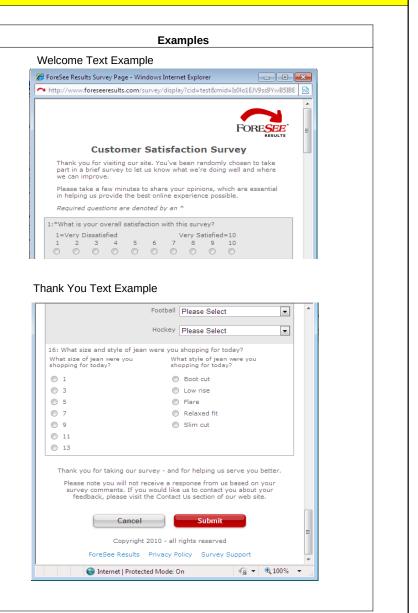
Thank you for using the Retirement Estimator on the Social Security Administration web site. Please take a minute or two and tell us what we're doing well and where we need to do better. The feedback you provide will help us improve our site and serve you better in the future.

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



Model Name SSA Retirement Estimator

Model ID

Partitioned Yes - 2 MQ
Date 8/19/2019

Red & Strike Through: Delete

<u>Underlined & Italicized</u>: Re-order Pink: Addition

Blue: Reword



| rmance (1=Poor, 10=Excellent, Don't Know) e the speed that pages and content loaded for you.  e the consistency of complete loading of pages and content.  e the responsiveness of the pages to your actions.  Feel (1=Poor, 10=Excellent, Don't Know) e the visual appeal of the pages that you visited.  e the spacing between items on the pages that you visited.  e the legibility of the pages that you visited.  In (1=Poor, 10=Excellent, Don't Know) e the ease of finding what you were looking for.  e the page layout on displaying content and links where you could | 17  | Satisfaction - Overall Satisfaction - Expectation s Satisfaction - Ideal  | (1=Very Dissatisfied, 10=Very Satisfied)  How well does this application meet your expectations?   | 20  |   | Recommend (1=Very Unlikely, 10=Very Likely) How likely are you to recommend this application to someone else Use Other Online Services (1=Very Unlikely, 10=Very Likely) How likely are you to use other Social Security online services? |
|---|---|---|--|---|---|---|
| e the speed that pages and content loaded for you.  e the consistency of complete loading of pages and content.  e the responsiveness of the pages to your actions.  Feel (1=Poor, 10=Excellent, Don't Know)  e the visual appeal of the pages that you visited.  e the spacing between items on the pages that you visited.  e the legibility of the pages that you visited.  In (1=Poor, 10=Excellent, Don't Know)  e the ease of finding what you were looking for.  | 17  | - Overall Satisfaction - Expectation s Satisfaction   | What is your overall satisfaction with this application? (1=Very Dissatisfied, 10=Very Satisfied)  How well does this application meet your expectations? (1=Falls Short, 10=Exceeds)  How does this application compare to your idea of an ideal application? | 20  | Use Other<br>Online   | How likely are you to recommend this application to someone else  Use Other Online Services (1=Very Unlikely, 10=Very Likely)   |
| e the responsiveness of the pages to your actions.  Feel (1=Poor, 10=Excellent, Don't Know)  e the visual appeal of the pages that you visited.  e the spacing between items on the pages that you visited.  e the legibility of the pages that you visited.  n (1=Poor, 10=Excellent, Don't Know)  e the ease of finding what you were looking for.  |   | Expectation<br>s<br>Satisfaction  | expectations? (1=Falls Short, 10=Exceeds)  How does this application compare to your idea of an ideal application?   |   | Use Other<br>Online   |   |
| Feel (1=Poor, 10=Excellent, Don't Know) e the visual appeal of the pages that you visited. e the spacing between items on the pages that you visited. e the legibility of the pages that you visited.  n (1=Poor, 10=Excellent, Don't Know) e the ease of finding what you were looking for.  | 18  |   | ideal application?   |   | Online  | How likely are you to use other Social Security online services?  |
| e the visual appeal of the pages that you visited.  e the spacing between items on the pages that you visited.  e the legibility of the pages that you visited.  n (1=Poor, 10=Excellent, Don't Know) e the ease of finding what you were looking for.  |   |   |  |   |   |   |
| e the <b>spacing</b> between items on the pages that you visited.  e the <b>legibility</b> of the pages that you visited.  n (1=Poor, 10=Excellent, Don't Know)  e the <b>ease of finding</b> what you were looking for.  |   |   |  |   |   |   |
| e the <b>legibility</b> of the pages that you visited.  n (1=Poor, 10=Excellent, Don't Know) e the ease of finding what you were looking for.   |   |   |  |   |   |   |
| n (1=Poor, 10=Excellent, Don't Know) e the ease of finding what you were looking for.   |   |   |  |   |   |   |
| e the <b>ease of finding</b> what you were looking for.   |   |   |  |   |   |   |
| e the <b>page layout</b> on displaying content and links where you could  |   |   |  |   |   |   |
|   |   |   |  |   |   |   |
| e the <b>links</b> on taking you where you needed to go.  |   |   |  |   |   |   |
| nation (1=Poor, 10=Excellent, Don't Know)   |   |   |  |   |   |   |
| e the <b>relevance</b> to your interests of the information that you found.   |   |   |  |   |   |   |
| e the <b>thoroughness</b> of the information that you found.  |   |   |  |   |   |   |
| e the <b>readability</b> of the information that you found.   |   |   |  |   |   |   |
| Management (1=Poor, 10=Excellent, Don't Know) e the simplicity of account management on this site.  |   |   |  |   |   |   |
| e the <b>efficiency</b> of account management on this site.   |   |   |  |   |   |   |
| e the presentation of <b>essential account information</b> .  |   |   |  |   |   |   |
| e 1   | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site. | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site. | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site.  | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site. | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site. | the readability of the information that you found.  unagement (1=Poor, 10=Excellent, Don't Know) the simplicity of account management on this site.  the efficiency of account management on this site.                                   |

Model Instance Name: SSA Retirement Estimator v4

MID: xAxNcEo455ZVQ1FNIUNsog4C

Partitioned (Y/N)? N

FPI Included(Y/N)?

NOTE: All non-partitioned surveys will NOT be imputed and the elements will be rotated as a default unless otherwise specified and approved by Research.



Element rotation scheme has been added

Date: 7/19/2013

#### SSA Retirement Estimator v4 Model questions utilize the ACSI methodology to determine scores and impacts ELEMENTS (drivers of satisfaction) CUSTOMER SATISFACTION FUTURE BEHAVIORS MQ Label MQ Label MQ Label Apply in Office Apply in office for Benefits (1=Very Unlikely, 10=Very Likely) ook and Feel (1=Poor, 10=Excellent, Don't Know) Look and Feel Please rate the visual appeal of this online Retirement Estimator. - Appeal What is your overall satisfaction with the online How likely are you to apply for Social Security Benefits in the field Overall Retirement Estimator? (1=Very Dissatisfied, 10=Very Satisfied) Apply Online Apply online for Benefits (1=Very Unlikely, 10=Very Likely) Look and Feel Please rate the balance of graphics and text in this online Retirement Estimator. Satisfaction xpectations low well does the online Retirement Estimator meet our expectations? (1=Falls Short, 10=Exceeds) Look and Feel Please rate the readability of the pages in this online Retirement Estimator. - Readability Satisfaction How does the online Retirement Estimator compare to your idea of an ideal online process? (1=Not Very Close, 10=Very Close) How likely are you to apply for Social Security Benefits online? ecommend (1=Very Unlikely, 10=Very Likely) =Poor, 10=Excellent, Don't Know) Please rate how quickly pages load in this online Retirement Estimator. Site Performance Loading How likely are you to recommend this online Retirement Estimator to lease rate the consistency of speed from page to page in this online Retirement Return (if applicable) (1=Very Unlikely, 10=Very Likely) Site Performance Consistency Please rate the **ability to load pages without getting error messages** in this online Retirement Estimator. Site Performance -Errors How likely are you to return to the Retirement Estimator? lain Language (1=Poor, 10=Excellent, Don't Know) Use Other Online Use Other SSA Applications (1=Very Unlikely, 10=Very Likely) ervices Plain Language -Clear lease rate the clarity of the wording in the online Retirement Estimator. How likely are you to use other Social Security online services? Plain Language -Understandab ease rate how well you understand the wording in the online Retirement Plain Language Concise ease rate the online Retirement Estimator on its use of short, clear sentences.

SSA Retirement Estimator v4

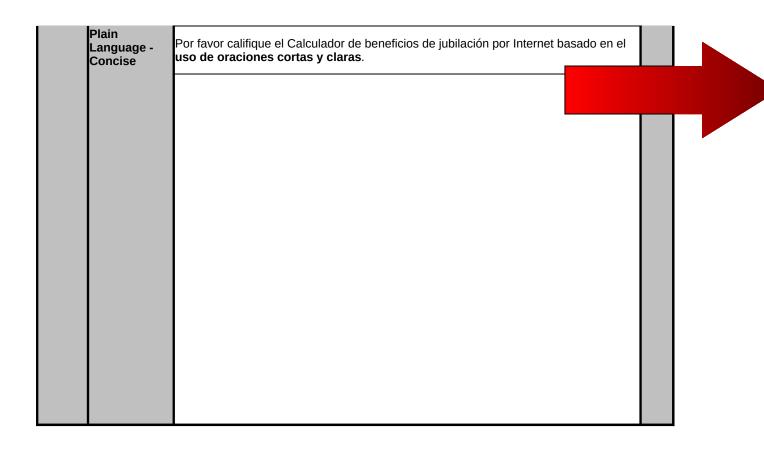
MID: p00ldwE4ssR1MA9UUtZ5Ng4C

Partitioned (Y/N)?N

FPI Included(Y/N)?

Date: 7/19/2013

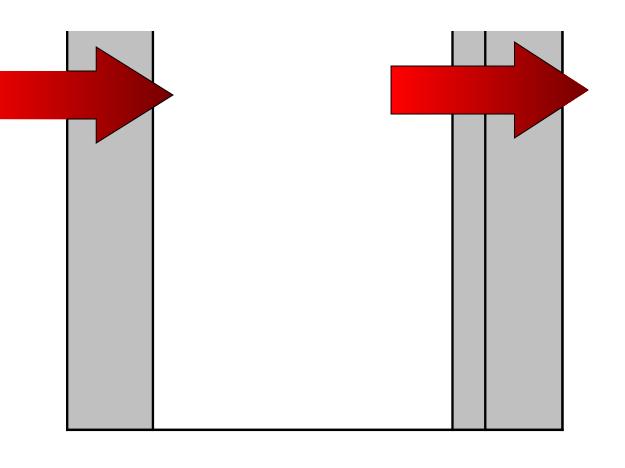
| MQ Label                                  | ELEMENTS (drivers of satisfaction)   |  |
|---|--|--|
| _   | Apariencia y función (1=Mala, 10=Excelente, No sé)   |  |
| Look and Feel                             |  |  |
| - Appeal                                  | Por favor califique la <b>apariencia</b> del Calculador de beneficios de jubilación por Internet.  |  |
| Look and Feel                             |  |  |
| - Balance                                 | Por favor califique el <b>equilibrio entre gráficas y texto</b> del Calculador de beneficios de jubilación por Internet.                               |  |
| Look and Feel<br>- Readability            |  |  |
| ,   | Por favor califique la <b>fluidez del texto</b> del Calculador de beneficios de jubilación por<br>Internet.  |  |
|   | Rendimiento del sitio de Internet (1=Mala, 10=Excelente, No sé)  |  |
| Site<br>Performance -<br>Loading          | Por favor califique la <b>rapidez con que suben las páginas</b> el Calculador de beneficios<br>de jubilación por Internet.                             |  |
| Site                                      |  |  |
| Performance -<br>Consistency              | Por favor califique la <b>consistencia de la rapidez para moverse de una página a la otra</b> del Calculador de beneficios de jubilación por Internet. |  |
| Site<br>Performance -                     |  |  |
| Errors                                    | Por favor califique la <b>capacidad para subir las páginas sin que reciba un error</b> del<br>Calculador de beneficios de jubilación por Internet.     |  |
|   | Simpleza del vocabulario (1=Malo, 10=Excelente, No sé)   |  |
| Plain                                     |  |  |
| Language -                                | Por favor califique la <b>claridad de las palabras usadas</b> en el Calculador de beneficios<br>de jubilación por Internet.                            |  |
| Plain<br>Language -<br>Understandab<br>le | Por favor califique <b>su comprensión de las palabras usadas</b> en el Calculador de<br>beneficios de jubilación por Internet.                         |  |
| lle                                       |  |  |



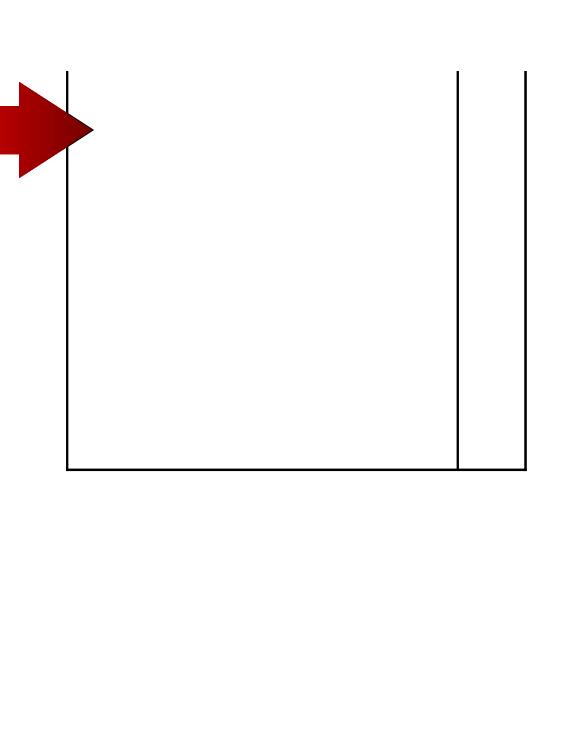
# Element rotation scheme has been added

# **SSA Retirement Estimator v4**

| MQ Label                       | CUSTOMER SATISFACTION   | MQ Label                        |
|--------------------------------|---|---------------------------------|
|                                | Satisfacción  | Apply in<br>Office              |
| Satisfaction -<br>Overall      | ¿Cómo calificaría su <b>satisfacción en general</b> del<br>Calculador de beneficios de jubilación por Internet?<br>(1=Totalmente insatisfecho, 10=Totalmente satisfecho)      |                                 |
| Satisfaction -<br>Expectations | ¿Con cuánta exactitud el Calculador de beneficios de jubilación por Internet <b>satisfizo sus expectativas</b> ? (1=No llenó mis expectativas, 10=Totalmente satisfecho)      | Apply Online                    |
| Satisfaction -<br>Ideal        | ¿Cómo se compara el Calculador de beneficios de jubilación por Internet con lo que se imaginaría que sería su programa de computadora ideal? (1=No se asemeja, 10=Se asemeja) |                                 |
|                                |   | Recommend                       |
|                                |   | Return                          |
|                                |   | Use Other<br>Online<br>Services |
|                                |   |                                 |



| FUTURE BEHAVIORS  | FPI<br>Y? |
|---|-----------|
| /isitar la oficina local para solicitar los beneficios (1=Muy<br>mprobablemente, 10=Muy probablemente)                                  |           |
| Cuáles son las posibilidades de que visite la oficina personalmente<br>a oficina local del Seguro Social para solicitar los beneficios? |           |
| Solicitar los beneficios de Seguro Social por Internet (1=Muy<br>mprobablemente, 10=Muy probablemente)                                  |           |
| Cuáles son las posibilidades de que <b>solicite los beneficios de</b><br>Seguro Social usando la Internet?                              |           |
| Recomendar (1=Muy improbablemente, 10=Muy probablemente)  |           |
| Cuáles son las posibilidades de que le recomiende el Calculador de peneficios de jubilación por Internet a otra persona?                | •         |
| Regresar (si procede) (1=Muy improbablemente, 10=Muy<br>probablemente)  |           |
| Cuáles son las posibilidades de que <b>regrese a usar el Calculador d</b><br>peneficios de jubilación por Internet?                     | e         |
| Jsar por Internet otros programas de computadora del Seguro<br>Social (1=Muy improbablemente, 10=Muy probablemente)                     |           |
|   |           |



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 | Model questions utilize the ACSI methodology to determine scores and impacts |                       |                      |  |  |  |  |
|--|--|-----------------------|----------------------|--|--|--|--|
| (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           |                      |  |  |  |  |
| Please rate the ability to load pages without getting errors on this online Retirement Estimator.  Look and Feel (1=Very Unlikely, 10=Very Likely)  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.  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 mumber of steps for entering the information into the online   |  |                       | 13 How likely are yo | ou to <b>apply for Social Security Benefits onlin</b>  |  |  |  |
| 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   |  |                       |                      |  |  |  |  |
| (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 layout 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 number of steps for entering the information into the online   |  |                       |                      | ou to <b>apply for Social Security Benefits in the</b> |  |  |  |
| 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)                                     |  |  |  |
| 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 number of steps for entering the information into the online  (1=Very Unlikely, 10=Very Likely)  16 How likely are you to return to the Retirement Estimator (1=Very Unlikely, 10=Very Likely)  17 How likely are you to use other online applications of Security web site?   | appeal of this 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 number of steps for entering the information into the online  | of the online Retirement Estimator.  |                       | Return (if applic    | cable)<br>y, 10=Very Likely)                           |  |  |  |
| (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  | ility 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  |  |                       |                      |  |  |  |  |
| Please rate the <b>simplicity of completing</b> this online Retirement Estimator. Please rate the <b>number of steps</b> for entering the information into the online  |  |                       | 17 How likely are yo | ou to use other online applications on the So          |  |  |  |
| Please rate the <b>number of steps</b> 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

MID: JU89h10NUtR9V44MIk9ldA==

Date: 8/16/2010



| · ·  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
| 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<br>(1=Very Unlikely, 10=Very Likely)                                |  |  |  |  |  |
| Please rate the <b>ability to load pages without getting errors</b> on this online Retirement Estimator.     | l '  |  |  |  |  |  |  |
| Look and Feel<br>(1=Poor, 10=Excellent, Don't Know)  |  | Recommend<br>(1=Very Unlikely, 10=Very Likely)   |  |  |  |  |  |
| Please rate the <b>visual appeal</b> of this online Retirement Estimator.                                    |  | 15 How likely are you to recommend this online Retirement Estimate someone else?                       |  |  |  |  |  |
| Please rate the <b>layout</b> of the online Retirement Estimator.  |  | Return (if applicable)<br>(1=Very Unlikely, 10=Very Likely)  |  |  |  |  |  |
| Please rate the <b>readability</b> of the online Retirement Estimator.                                       |  | 16 How likely are you to return to the Retirement Estimator?   |  |  |  |  |  |
| On-Line Application Process<br>(1=Poor, 10=Excellent, Don't Know)  |  | Use Other SSA Applications<br>(1=Very Unlikely, 10=Very Likely)  |  |  |  |  |  |
| Please rate the <b>clarity of the instructions</b> 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 <b>simplicity of completing</b> this online Retirement Estimator.                            |  |  |  |  |  |  |  |
| Please rate the <b>number of steps</b> for entering the information into the online<br>Retirement Estimator. |  |  |  |  |  |  |  |
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SSA Retirement Estimator v3

MID: VAdII9VQFstVQBhNYFkAxw==

Date: 12/6/2010



| ELEMENTS (drivers of satisfaction)   | CUSTOMER SATISFACTION  | FUTURE BEHAVIORS   |
|--|--|--|
| Site Performance (If applicable)<br>(1=Poor, 10=Excellent, Don't Know)   | Satisfaction   | Apply online for Benefits<br>(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.                  | <ul> <li>2Cuál es su impresión general de este Calculador de beneficios por jubilación?</li> <li>¿Con qué exactitud cumple con sus expectativas este Calculador?</li> <li>¿Cómo compararía el Calculador de beneficios por jubilación con su idea de un procedimiento ideal por Internet?</li> </ul> | 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

MID: VAdli9VQFstVQBhNYFkAxw==

Date: 12/6/2010



| Madal quantiana utiliza  | the ACCI methodology to determine ecores and  | d imposts   |
|--|---|---|
| ELEMENTS (drivers of satisfaction)   | the ACSI methodology to determine scores and CUSTOMER SATISFACTION  | FUTURE BEHAVIORS  |
| Site Performance (If applicable)<br>(1=Poor, 10=Excellent, Don't Know)   | Satisfaction  | Apply online for Benefits<br>(1=Very Unlikely, 10=Very Likely)  |
| Favor de calificar la <b>rapidez con la que descargan las páginas</b> en este Calculador de beneficios por jubilación.                             | 20 ¿Cuál es su <b>impresión general</b> 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 <b>consistencia de la rapidez para moverse de una página a la otra</b> 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<br>(1=Very Unlikely, 10=Very Likely)   |
| Favor de calificar la <b>capacidad para descargar las páginas sin errores</b> en este<br>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<br>¿Cuáles son las posibilidades de que solicite los beneficios de<br>Social visitando la oficina local del Seguro Social? |
| Look and Feel<br>(1=Poor, 10=Excellent, Don't Know)  | procedimiento ideal por Internet?   | Recommend<br>(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)<br>(1=Very Unlikely, 10=Very Likely)   |
| Favor de calificar la <b>legibilidad</b> 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 <b>claridad de las instrucciones</b> para contestar las preguntas de<br>Calculador de beneficios por jubilación.             |   | ¿Cuáles son las posibilidades de que use otras solicitudes en<br>sitio de Internet del Seguro Social?                         |
| Favor de calificar la <b>sencillez de las preguntas</b> de este Calculador de beneficios por jubilación.   |   |   |
| Favor de calificar la <b>cantidad de pasos a seguir</b> para ingresar la información<br>requerida en este Calculador de beneficios por jubilación. |   |   |
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|            |      |   | SSA Retirement Estimator V4 COSTOM QUESTIC            | N LIST  |                               |          |                  |                          |
|------------|------|---|---|---------|-------------------------------|----------|------------------|--------------------------|
|            | Skip |   |   |         | _ , , , , , , , ,             | Required | Special          |                          |
| QID        | From | Question Text   | Answer Choices  | Skip to |                               | Y/N      | Instructions     | CQ Label                 |
| BJL2254    |      | How did you first learn about the Retirement Estimator?   | Social media (e.g., Blog, Facebook, Twitter, etc.)    |         | Radio button, one-up vertical | Y        | Skip Logic Group | learned about R          |
|            |      |   | Online search engine or other website (e.g., Google)  |         |                               |          |                  |                          |
|            |      |   | Linked from another website                           | C2      |                               |          |                  |                          |
|            |      |   | An online ad (Banner/Image)                           |         |                               |          |                  |                          |
|            |      |   | A newspaper or magazine article                       |         |                               |          |                  |                          |
|            |      |   | A newspaper or magazine ad                            |         |                               |          |                  |                          |
|            |      |   | An email from Social Security                         |         |                               |          |                  |                          |
|            |      |   | My Social Security Statement                          |         |                               |          |                  |                          |
|            |      |   | Social Security employee                              |         |                               |          |                  |                          |
|            |      |   | Relative or friend                                    |         |                               |          |                  |                          |
|            |      |   | Social Security event                                 |         |                               |          |                  |                          |
|            |      |   | My employer or Human Resources department             |         |                               |          |                  |                          |
|            |      |   | My financial advisor                                  |         |                               |          |                  |                          |
|            |      |   | Word of mouth   |         |                               |          |                  |                          |
|            |      |   | Other, please specify                                 | С       |                               |          |                  |                          |
| BJL2255    | С    | Please specify how you first learned about the Retirement Estimator.  |   |         | Text field, <100 char         | N        | Skip Logic Group | Other learned about      |
| STE0050206 | C2   | Please specify the website that led you to the Retirement Estimator   |   |         | Text field, <100 char         | N        | Skip Logic Group | OE_Website               |
| STE0050207 |      | How often do you use the Retirement Estimator?  | This was the first time                               |         | Radio button, one-up vertical | Y        |                  | Frequency                |
|            |      |   | Every few months or less often                        |         |                               |          |                  |                          |
|            |      |   | Monthly   |         |                               |          |                  |                          |
|            |      |   | I use the Retirement Estimator more than once a month |         |                               |          |                  |                          |
| JAC0123788 |      | When do you expect to file for retirement benefits?   | Within 6 months                                       |         | Radio button, one-up vertical | Y        |                  | Expect to File           |
|            |      |   | Within 12 months                                      |         |                               |          |                  |                          |
|            |      |   | Within 1 to 3 years                                   |         |                               |          |                  |                          |
|            |      |   | More than 3 but less than 6 years                     |         |                               |          |                  |                          |
|            |      |   | Don't know at this time                               |         |                               |          |                  |                          |
| BJL2264    |      | How do you plan to file for retirement benefits?  | Online  |         | Radio button, one-up vertical | Y        |                  | How to File              |
|            |      |   | Online with telephone or in-person assistance         |         |                               |          |                  |                          |
|            |      |   | By telephone interview                                |         |                               |          |                  |                          |
|            |      |   | At my local Social Security office                    |         |                               |          |                  |                          |
|            |      |   | Don't know at this time                               |         |                               |          |                  |                          |
| STE0057596 |      | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?        | Yes   |         | Radio button, one-up vertical | Y        | Skip Logic Group | RE Based on<br>Earnings  |
|            |      | Journal Jecumy earnings record:   |   |         |                               |          |                  |                          |
|            |      |   | No  | G       |                               |          |                  |                          |
| STE0057597 | G    | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record? |   |         | Text area, no char limit      | N        | Skip Logic Group | OE_Not based on earnings |
|            |      |   |   |         |                               |          |                  |                          |

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| QID         | Skip<br>From | Question Text   | Answer Choices   | Skip to | Type (select from list)               | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
|-------------|--------------|---|--|---------|---------------------------------------|-----------------|-------------------------|--------------------------------------|
| RCH4677Q059 |              | Please indicate your level of agreement with the following statements about your interaction today: I am satisfied with the service I received from the Social Security Administration. | 1=Strongly Disagree  |         | Radio Button, Scale, No don't<br>know | Y               |                         | A11-Satisfied                        |
|             |              |   | 2  |         |                                       |                 |                         |                                      |
|             |              |   | 4  |         |                                       |                 |                         |                                      |
|             |              |   | Strongly Agree=5   |         |                                       |                 |                         |                                      |
| RCH4677Q060 |              | This interaction increased my confidence in the Social Security Administration.   | 1=Strongly Disagree  |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Trust                            |
|             |              |   | 2  | _       |                                       |                 |                         |                                      |
|             |              |   | 4  | -       |                                       |                 |                         |                                      |
|             |              |   | Strongly Agree=5   |         |                                       |                 |                         |                                      |
| RCH4677Q061 |              | My need was addressed.  | 1=Strongly Disagree  |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Quality                          |
|             |              |   | 2  | -       |                                       |                 |                         |                                      |
|             |              |   | 4  | 1       |                                       |                 |                         |                                      |
|             |              |   | Strongly Agree=5   |         |                                       |                 |                         |                                      |
| RCH4677Q062 |              | It was easy to complete what I needed to do.  | 1=Strongly Disagree  |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Ease                             |
|             |              |   | 2  |         |                                       |                 |                         |                                      |
|             |              |   | 4  | +       |                                       |                 |                         |                                      |
|             |              |   | Strongly Agree=5   |         |                                       |                 |                         |                                      |
| RCH4677Q063 |              | It took a reasonable amount of time to do what I needed to do.  | 1=Strongly Disagree  |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Speed                            |
|             |              |   | 2  |         |                                       |                 |                         |                                      |
|             |              |   | 3  |         |                                       |                 |                         |                                      |
|             |              |   | 4<br>Strongly Agree=5  | -       |                                       |                 |                         |                                      |
| STE0061399  |              | Have you registered for a <i>my</i> Social Security   | Yes  |         | Radio button, one-up                  | Υ               | Skip Logic              | Have mySSA                           |
|             |              | account?  |  |         | vertical                              |                 |                         | Account                              |
|             |              |   | No   | Α       |                                       |                 |                         |                                      |
| STE0061400  | A            | What is the <u>main reason</u> you have <i>not</i> registered for a <i>my</i> Social Security account?  | I plan to register for a <i>my</i> Social Security account today.                  |         | Radio button, one-up<br>vertical      | Y               | Skip Logic              | Why Not Have<br>mySSA<br>Account     |
|             |              |   | I plan to register for a <i>my</i> Social Security account in the near future.     |         |                                       |                 |                         |                                      |
|             |              |   | I tried to register for a <i>my</i> Social Security account, but was unsuccessful. |         |                                       |                 |                         |                                      |
|             |              |   | I am not sure why I need a <i>my</i> Social Security account.                      |         |                                       |                 |                         |                                      |
|             |              |   | I do not want a <i>my</i> Social Security account.                                 |         |                                       |                 |                         |                                      |
|             |              |   | Other, please specify  | AA      |                                       |                 |                         |                                      |
| STE0061424  | AA           | Please tell us why you have not registered for a my Social Security account.  |  |         | Text field, no char limit             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |

| Social Security A | dministration          |               |   |      |
|-------------------|------------------------|---------------|---|------|
| SSA Retirement E  | stimator v4            |               |   |      |
| MID: p00ldwE4ss   | R1MA9UUtZ5Ng4          |               |   |      |
| Date:             | 10/6/2010              |               |   |      |
|                   |                        |               |   |      |
|                   |                        | \$            | SSA Retirement Estimator v4 CUSTOM QUESTION |      |
| OID               | Skip<br>Logic<br>Label | Ouestion Text |   | <br> |

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| LIST   |         |                         |                 |                         |
|--|---------|-------------------------|-----------------|-------------------------|
| Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Required<br>Y/N | Special<br>Instructions |

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| QID        | Skip<br>From | Question Text   | Answer Choices                                       | Skip to | Type (select from list)           | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
|------------|--------------|---|--|---------|-----------------------------------|-----------------|-------------------------|--------------------------------------|
| JAC0123847 |              | How did you connect to SSA today?   | Desktop  |         | Radio button, one up<br>verticalb | ¥               |                         | How Connecte<br>with SSA             |
|            |              |   | Laptop   |         |                                   |                 |                         |                                      |
|            |              |   | Smartphone   |         |                                   |                 |                         |                                      |
|            |              |   | <del>Tablet</del>                                    |         |                                   |                 |                         |                                      |
| JAC0123850 |              | From where did you connect to SSA today?  | At home  |         | Radio button, one-up<br>verticalb | ¥               | Skip Logic Group        | From Where Connected w               |
|            |              |   | In office / place of employment                      |         |                                   |                 |                         |                                      |
|            |              |   | At a friend or relative's place                      |         |                                   |                 |                         |                                      |
|            |              |   | Public library                                       | A       |                                   |                 |                         |                                      |
|            |              |   | Social Security Office                               |         |                                   |                 |                         |                                      |
|            |              |   | Social Security Kiosk                                | B       |                                   |                 |                         |                                      |
|            |              |   | Other agency   |         |                                   |                 |                         |                                      |
|            |              |   | Other, please specify                                | е       |                                   |                 |                         |                                      |
| JAC0123859 | A            | Did you connect through a unique Social<br>Security icon featured on the computer's<br>desktop? | Yes  |         | Radio button, one-up<br>vertical  | ¥               | Skip Logic Group        | Use SSA Icor                         |
|            |              |   | No   | AA      |                                   |                 |                         |                                      |
| JAC0123862 | AA           | How did you link to the SSA website?  |  |         | Text area, no char limit          | H               | Skip Logic Group        | OE_How<br>Linked to SS/<br>(library) |
| JAC0123856 | В            | Please describe the location.   |  |         | Text area, no char limit          | N               | Skip Logic Group        | OE_Location (                        |
| JAC0123854 | e            | Please tell us how and from where you connected with SSA during your visit today.               |  |         | Text area, no char limit          | N               | Skip Logic Group        | OPS_How<br>Connected with<br>SSA     |
| BJL2254    |              | How did you first learn about the Retirement Estimator?   | Social media (e.g., Blog, Facebook, Twitter, etc.)   |         | Radio button, one-up vertical     | Y               | Skip Logic Group        | earned about                         |
|            |              |   | Online search engine or other website (e.g., Google) |         |                                   |                 |                         |                                      |
|            |              |   | Linked from another website                          | C2      |                                   |                 |                         |                                      |
|            |              |   | An online ad (Banner/Image)                          |         |                                   |                 |                         |                                      |
|            |              |   | A newspaper or magazine article                      |         |                                   |                 |                         |                                      |
|            |              |   | A newspaper or magazine ad                           |         |                                   |                 |                         |                                      |
|            |              |   | An email from Social Security                        |         |                                   |                 |                         |                                      |
|            |              |   | My Social Security Statement                         |         |                                   |                 |                         |                                      |
|            |              |   | Social Security employee                             |         |                                   |                 |                         |                                      |
|            |              |   | Relative or friend                                   |         |                                   |                 |                         |                                      |
|            |              |   | Social Security event                                |         |                                   |                 |                         |                                      |
|            |              |   | My employer or Human Resources department            |         |                                   |                 |                         |                                      |
|            |              |   | My financial advisor                                 |         |                                   |                 |                         |                                      |
|            |              |   | Word of mouth  |         |                                   |                 |                         |                                      |
|            |              |   | Other, please specify                                | — с     |                                   |                 |                         |                                      |
| BJL2255    | С            | Please specify how you first learned about the Retirement Estimator.                            |  |         | Text field, <100 char             | N               | Skip Logic Group        | Other learned                        |

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| QID                   | Skip<br>From | Question Text   | Answer Choices  | Skip to | Type (select from list)          | Required<br>Y/N | Special<br>Instructions | CQ Label  |
|-----------------------|--------------|---|---|---------|----------------------------------|-----------------|-------------------------|---|
| STE0050206            | C2           | Please specify the website that led you to the Retirement Estimator   |   |         | Text field, <100 char            | N               | Skip Logic Group        | OE_Website  |
| STE0050207            |              | How often do you use the Retirement Estimator?  | This was the first time                               |         | Radio button, one-up vertical    | Y               |                         | Frequency   |
|                       |              |   | Every few months or less often                        |         |                                  |                 |                         |   |
|                       |              |   | Monthly   |         |                                  |                 |                         |   |
|                       |              |   | I use the Retirement Estimator more than once a month |         |                                  |                 |                         |   |
| JAC0123788            |              | When do you expect to file for retirement benefits?   | Within 6 months                                       |         | Radio button, one-up vertical    | Y               |                         | Expect to File                                    |
|                       |              |   | Within 12 months                                      |         |                                  |                 |                         |   |
|                       |              |   | Within 1 to 3 years                                   |         |                                  |                 |                         |   |
|                       |              |   | More than 3 but less than 6 years                     |         |                                  |                 |                         |   |
|                       |              |   | Don't know at this time                               |         |                                  |                 |                         |   |
| BJL2264               |              | How do you plan to file for retirement benefits?  | Online  |         | Radio button, one-up vertical    | Y               |                         | How to File                                       |
|                       |              |   | Online with telephone or in-person assistance         |         |                                  |                 |                         |   |
|                       |              |   | By telephone interview                                |         |                                  |                 |                         |   |
|                       |              |   | At my local Social Security office                    |         |                                  |                 |                         |   |
|                       |              |   | Don't know at this time                               |         |                                  |                 |                         |   |
| <del>LIV0073004</del> |              | Did you review your Social Security Statement before using the Retirement Estimator?  | Yes, I reviewed my paper Social Security Statement.   |         | Radio button, one-up<br>vertical | ¥               | Skip Logic Group        | Review SS<br>Statement                            |
|                       |              |   | Yes, I reviewed my online Social Security Statement   | A<br>B  |                                  |                 |                         |   |
| L IV (0.07200E        | Α            | Did you have difficulty paying ting between your  |   | 6       | Dadia button and un              | ¥               | Chin Logio Croup        | Difficulty  |
| LIV0073005            | A            | Did you have difficulty navigating between your online Social Security Statement and the Retirement Estimator?                | <del>Yes</del>  | 6       | Radio button, one up<br>vertical | <del>*</del>    | Skip Logic Group        | Difficulty Navigating Between RE                  |
|                       |              |   | No  |         |                                  |                 |                         | and Statement                                     |
| LIV0073006            | E            | Please describe the difficulty you had navigating between your online Social Security Statement and the Retirement Estimator. |   |         | Text area, no char limit         | N               | Skip Logic Group        | OE_Difficulty Navigating Between RE and Statement |
| LIV0073008            | В            | Do you plan to review your online Social Security Statement next?   | <del>Yes</del>  |         | Radio button, one-up             | ¥               | Skip Logic Group        | Plan to Review<br>SS Statement                    |
|                       |              |   | No  |         |                                  |                 |                         |   |
| BJL2265               |              | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                               | <del>Yes</del>  |         | Radio button, one-up<br>vertical | ¥               | Skip Logic Group        | Accomplish<br>Goal                                |
|                       |              |   |   |         |                                  |                 |                         |   |
|                       |              |   | No No   | F       |                                  |                 |                         |   |
| BJL2266               | F            | What other benefit estimates were you trying to obtain?   |   |         | Text area, no char limit         | N               | Skip Logic Group        | OE_Did not accomplish                             |
|                       |              |   |   |         |                                  |                 |                         |   |
| STE0057596            |              | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?      | Yes   |         | Radio button, one-up<br>vertical | Y               | Skip Logic Group        | RE Based on<br>Earnings                           |
|                       |              |   |   |         |                                  |                 |                         |   |
|                       |              |   | No  | G       |                                  |                 |                         |   |

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| QID                   | Skip<br>From | Question Text   | Answer Choices   | Skip to     | Type (select from list)               | Required<br>Y/N | Special<br>Instructions | CQ Label                 |
|-----------------------|--------------|---|--|-------------|---------------------------------------|-----------------|-------------------------|--------------------------|
| STE0057597            | G            | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   |  |             | Text area, no char limit              | N               | Skip Logic Group        | OE_Not based on earnings |
| RCH4677Q059           |              | Please indicate your level of agreement with the following statements about your interaction today: I am satisfied with the service I received from the Social Security Administration. | 1=Strongly Disagree  |             | Radio Button, Scale, No don't<br>know | Y               |                         | A11-Satisfied            |
|                       |              |   | 2<br>3<br>4<br>Strongly Agree=5  | _           |                                       |                 |                         |                          |
| RCH4677Q060           |              | This interaction increased my confidence in the Social Security Administration.   | 1=Strongly Disagree  |             | Radio Button, Scale, No don't know    | Y               |                         | A11-Trust                |
|                       |              |   | 2<br>3<br>4  | _           |                                       |                 |                         |                          |
| RCH4677Q061           |              | My need was addressed.  | Strongly Agree=5 1=Strongly Disagree   |             | Radio Button, Scale, No don't know    | Y               |                         | A11-Quality              |
|                       |              |   | 2<br>3<br>4<br>Strongly Agree=5  | _<br>_<br>_ |                                       |                 |                         |                          |
| RCH4677Q062           |              | It was easy to complete what I needed to do.  | 1=Strongly Disagree<br>2   |             | Radio Button, Scale, No don't know    | Y               |                         | A11-Ease                 |
|                       |              |   | 3<br>4<br>Strongly Agree=5   |             |                                       |                 |                         |                          |
| RCH4677Q063           |              | It took a reasonable amount of time to do what I needed to do.  | 1=Strongly Disagree  |             | Radio Button, Scale, No don't know    | Y               |                         | A11-Speed                |
|                       |              |   | 2<br>3<br>4  | _<br>_<br>_ |                                       |                 |                         |                          |
| BJL2267               |              | How would you describe your navigation experience on the SSA site today <b>prior</b> to   | Strongly Agree=5<br>I had no difficulty navigating/browsing to the Retirement<br>Estimator   |             | Checkbox, one-up vertical             | ¥               | Skip Logic Group        | Navigation<br>Experience |
|                       |              | arriving at the Retirement Estimator? (Please select all that apply)  | I had difficulty finding the links to the Retirement Estimator I had difficulty because the links did not take me where I expected                     |             |                                       |                 |                         |                          |
|                       |              |   | Had difficulty-because   experienced technical difficulties<br>(error messages, broken links, etc.)<br>  Had a navigation difficulty not listed above: | A           |                                       |                 |                         |                          |
| <del>BJL2268</del>    | A            | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  |  |             | Text area, no char limit              | N               | Skip Logic Group        | Other Difficulty         |
| <del>JAC0123896</del> |              | Have you used any other SSA resources for your retirement planning? (Please select all that apply)  | Your Online Social Security Statement in the my Social Security pages Social Security's Online Retirement Planner                                      |             | Checkbox, one-up vertical             | ¥               | Skip Logic Group        | Other<br>Resources       |

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blue + -->: REWORDING

#### SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Required Special QID From **Question Text Answer Choices** Skip to Type (select from list) Ϋ́/N Instructions CQ Label Other Social Security Calculators offered on ssa.gov Frequently Asked Questions (FAQ) on ssa.gov Other resources on the SSA website Lused resources outside of ssa.gov A I did not use any resources to prepare at this time **Mutually Exclusive** JAC0123897 OPS Other Please describe what other resources you used Text area, no char limit Skip Logic Group to help prepare/plan for your retirement. Resources JAC0123898 After visiting the Retirement Estimator today. Nothing, the Retirement Estimator provided what I needed Radio button, one-up Skip Logic Group Do Next Y/N vhat do vou plan to do next? <del>rertical</del> Try the Retirement Estimator again (at a later time) am ready to file for Social Security Retirement Benefits Browse the SSA website will call Social Security's 1-800 number will visit my local Social Security Office I do not know what I will do next at this time STE0061399 Have you registered for a *my* Social Security Radio button, one-up Υ Skip Logic Have mySSA account? vertical Account Α STE0061400 What is the **main reason** you have *not* I plan to register for a my Social Security account today. Radio button, one-up Υ Skip Logic Why Not Have registered for a my Social Security account? mySSA vertical Account I plan to register for a my Social Security account in the near future. I tried to register for a my Social Security account, but was unsuccessful. I am not sure why I need a my Social Security account. I do not want a my Social Security account. Other, please specify AA STE0061424 Please tell us why you have not registered for a OPS\_Why Not Text field, no char limit Ν Skip Logic my Social Security account. Have mySSA Account

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|            |              |   | SSA Retirement Estimator v4 CUSTOM QUESTI            | ION LIST |                                |                 |                         |                                      |
|------------|--------------|---|--|----------|--------------------------------|-----------------|-------------------------|--------------------------------------|
| QID        | Skip<br>From | Question Text   | Answer Choices                                       | Skip to  | Type (select from list)        | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
| JAC0123847 |              | How did you connect to SSA today?   | Desktop  |          | Radio button, one-up verticalb | Y               |                         | How Connected with SSA               |
|            |              |   | Laptop   |          |                                |                 |                         |                                      |
|            |              |   | Smartphone   |          |                                |                 |                         |                                      |
|            |              |   | Tablet   |          |                                |                 |                         |                                      |
| JAC0123850 |              | From where did you connect to SSA today?  | At home  |          | Radio button, one-up verticalb | Y               | Skip Logic Group        | From Where<br>Connected with<br>SSA  |
|            |              |   | In office / place of employment                      |          |                                |                 |                         |                                      |
|            |              |   | At a friend or relative's place                      |          |                                |                 |                         |                                      |
|            |              |   | Public library                                       | Α        |                                |                 |                         |                                      |
|            |              |   | Social Security Office                               |          |                                |                 |                         |                                      |
|            |              |   | Social Security Kiosk                                | В        |                                |                 |                         |                                      |
|            |              |   | Other agency   |          |                                |                 |                         |                                      |
|            |              |   | Other, please specify                                | С        |                                |                 |                         |                                      |
| JAC0123859 | A            | Did you connect through a unique Social<br>Security icon featured on the computer's<br>desktop? | Yes  |          | Radio button, one-up vertical  | Y               | Skip Logic Group        | Use SSA Icon                         |
|            |              |   | No   | AA       |                                |                 |                         |                                      |
| JAC0123862 | AA           | How did you link to the SSA website?  |  |          | Text area, no char limit       | N               | Skip Logic Group        | OE_How<br>Linked to SSA<br>(library) |
| JAC0123856 | В            | Please describe the location.   |  |          | Text area, no char limit       | N               | Skip Logic Group        | OE_Location of Kiosk                 |
| JAC0123854 | С            | Please tell us how and from where you connected with SSA during your visit today.               |  |          | Text area, no char limit       | N               | Skip Logic Group        | OPS_How<br>Connected with<br>SSA     |
| BJL2254    |              | How did you first learn about the Retirement Estimator?   | Social media (e.g., Blog, Facebook, Twitter, etc.)   |          | Radio button, one-up vertical  | Y               | Skip Logic Group        | earned about RI                      |
|            |              |   | Online search engine or other website (e.g., Google) |          |                                |                 |                         |                                      |
|            |              |   | Linked from another website                          | C2       |                                |                 |                         |                                      |
|            |              |   | An online ad (Banner/Image)                          |          |                                |                 |                         |                                      |
|            |              |   | A newspaper or magazine article                      |          |                                |                 |                         |                                      |
|            |              |   | A newspaper or magazine ad                           |          |                                |                 |                         |                                      |
|            |              |   | An email from Social Security                        |          |                                |                 |                         |                                      |
|            |              |   | My Social Security Statement                         |          |                                |                 |                         |                                      |
|            |              |   | Social Security employee                             |          |                                |                 |                         |                                      |
|            |              |   | Relative or friend                                   |          |                                |                 |                         |                                      |
|            |              |   | Social Security event                                |          |                                |                 |                         |                                      |
|            |              |   | My employer or Human Resources department            |          |                                |                 |                         |                                      |
|            |              |   | My financial advisor                                 |          |                                |                 |                         |                                      |
|            |              |   | Word of mouth  |          |                                |                 |                         |                                      |
|            |              |   | Other, please specify                                | С        |                                |                 |                         |                                      |
| BJL2255    | С            | Please specify how you first learned about the Retirement Estimator.                            |  |          | Text field, <100 char          | N               | Skip Logic Group        | Other learned about                  |

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| QID        | Skip<br>From | Question Text   | Answer Choices  | Skip to | Type (select from list)       | Required<br>Y/N | Special<br>Instructions | CQ Label   |
|------------|--------------|---|---|---------|-------------------------------|-----------------|-------------------------|--|
| STE0050206 | C2           | Please specify the website that led you to the Retirement Estimator   |   |         | Text field, <100 char         | N               | Skip Logic Group        | OE_Website                                       |
| STE0050207 |              | How often do you use the Retirement Estimator?  | This was the first time                               |         | Radio button, one-up vertical | Y               |                         | Frequency  |
|            |              |   | Every few months or less often<br>Monthly             |         |                               |                 |                         |  |
|            |              |   | I use the Retirement Estimator more than once a month | _       |                               |                 |                         |  |
| JAC0123788 |              | When do you expect to file for retirement   | Within 6 months                                       |         | Radio button, one-up          | Υ               |                         | Expect to File                                   |
| JAC0123700 |              | benefits?   |   |         | vertical                      | '               |                         | Lxpect to 1 lie                                  |
|            |              |   | Within 12 months                                      |         |                               |                 |                         |  |
|            |              |   | Within 1 to 3 years                                   |         |                               |                 |                         |  |
|            |              |   | More than 3 but less than 6 years                     |         |                               |                 |                         |  |
|            |              |   | Don't know at this time                               |         |                               |                 |                         |  |
| BJL2264    |              | How do you plan to file for retirement benefits?  | Online  |         | Radio button, one-up vertical | Y               |                         | How to File                                      |
|            |              |   | Online with telephone or in-person assistance         |         |                               |                 |                         |  |
|            |              |   | By telephone interview                                |         |                               |                 |                         |  |
|            |              |   | At my local Social Security office                    |         |                               |                 |                         |  |
|            |              |   | Don't know at this time                               |         |                               |                 |                         |  |
| LIV0073004 |              | Did you review your Social Security Statement before using the Retirement Estimator?  | Yes, I reviewed my paper Social Security Statement.   |         | Radio button, one-up vertical | Y               | Skip Logic Group        | Review SS<br>Statement                           |
|            |              |   | Yes, I reviewed my online Social Security Statement   | Α       |                               |                 |                         |  |
|            |              |   | No  | — ̂в    |                               |                 |                         |  |
| LIV0073005 | A            | Did you have difficulty navigating between your   | Yes   | C       | Radio button, one-up          | Y               | Skip Logic Group        | Difficulty                                       |
| LIV0073003 | ^            | online Social Security Statement and the Retirement Estimator?  | Tes   |         | vertical                      | r               | Skip Logic Group        | Navigating<br>Between RE                         |
|            |              |   | No  |         |                               |                 |                         | and Statemen                                     |
| LIV0073006 | С            | Please describe the difficulty you had navigating between your online Social Security Statement and the Retirement Estimator. |   |         | Text area, no char limit      | N               | Skip Logic Group        | OE_Difficulty Navigating Between RE and Statemen |
| LIV0073008 | В            | Do you plan to review your online Social  | Yes   |         | Radio button, one-up          | Y               | Skip Logic Group        | Plan to Review                                   |
|            |              | Security Statement next?  | No  | _       | vertical                      |                 |                         | SS Statement                                     |
| D.11.000E  |              | Pitth Pater of Edition 11   |   |         | De die le meet een ee         |                 | 01:-1:-0                | A  |
| BJL2265    |              | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                               | Yes   |         | Radio button, one-up vertical | Y               | Skip Logic Group        | Accomplish<br>Goal                               |
|            |              |   | No  | F       |                               |                 |                         |  |
| BJL2266    | F            | What other benefit estimates were you trying to   |   |         | Text area, no char limit      | N               | Skip Logic Group        | OE_Did not                                       |
|            |              | obtain?   |   |         |                               |                 |                         | accomplish                                       |
| STE0057596 |              | Do you believe the retirement estimate(s)   | Yes   |         | Radio button, one-up          | Y               | Skip Logic Group        | RE Based on                                      |
| 3.2003/330 |              | provided to you was/were based on your entire Social Security earnings record?  |   |         | vertical                      | ,               | Simp Logic Group        | Earnings   |
|            |              |   | No  | G       |                               |                 |                         |  |
|            |              |   | INU   | G       |                               |                 |                         |  |

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| QID        | Skip<br>From | Question Text   | Answer Choices  | Skip to | Type (select from list)               | Required<br>Y/N | Special<br>Instructions | CQ Label                    |
|------------|--------------|---|---|---------|---------------------------------------|-----------------|-------------------------|-----------------------------|
| STE0057597 | G            | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   |   |         | Text area, no char limit              | N               | Skip Logic Group        | OE_Not based<br>on earnings |
|            |              | Please indicate your level of agreement with the following statements about your interaction today: I am satisfied with the service I received from the Social Security Administration. | 1=Strongly Disagree   |         | Radio Button, Scale, No don't<br>know | Y               |                         | A11-Satisfied               |
|            |              |   | 2=Disagree<br>3=Neutral   |         |                                       |                 |                         |                             |
|            |              |   | 4=Agree   |         |                                       |                 |                         |                             |
|            |              |   | 5=Strongly Agree  |         |                                       |                 |                         |                             |
|            |              | This interaction increased my confidence in the Social Security Administration.   | 1=Strongly Disagree   |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Trust                   |
|            |              |   | 2=Disagree  |         |                                       |                 |                         |                             |
|            |              |   | 3=Neutral   |         |                                       |                 |                         |                             |
|            |              |   | 4=Agree   |         |                                       |                 |                         |                             |
|            |              |   | 5=Strongly Agree  |         |                                       |                 |                         |                             |
|            |              | My need was addressed.  | 1=Strongly Disagree   |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Quality                 |
|            |              |   | 2=Disagree  |         |                                       |                 |                         |                             |
|            |              |   | 3=Neutral   | _       |                                       |                 |                         |                             |
|            |              |   | 4=Agree   | _       |                                       |                 |                         |                             |
|            |              | It was easy to complete what I needed to do.  | 5=Strongly Agree<br>1=Strongly Disagree   |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Ease                    |
|            |              |   | 2=Disagree  | _       | KITOW                                 |                 |                         |                             |
|            |              |   | 3=Neutral   |         |                                       |                 |                         |                             |
|            |              |   | 4=Agree   | +       |                                       |                 |                         |                             |
|            |              |   | 5=Strongly Agree  |         |                                       |                 |                         |                             |
|            |              | It took a reasonable amount of time to do what I needed to do.  | 1=Strongly Disagree   |         | Radio Button, Scale, No don't know    | Y               |                         | A11-Speed                   |
|            |              |   | 2=Disagree  |         |                                       |                 |                         |                             |
|            |              |   | 3=Neutral<br>4=Agree  | _       |                                       |                 |                         |                             |
|            |              |   | 5=Strongly Agree  | +       |                                       |                 |                         |                             |
| BJL2267    |              | How would you describe your navigation experience on the SSA site today <b>prior</b> to   | I had no difficulty navigating/browsing to the Retirement Estimator                                   |         | Checkbox, one-up vertical             | Y               | Skip Logic Group        | Navigation<br>Experience    |
|            |              | arriving at the Retirement Estimator? (Please   | I had difficulty finding the links to the Retirement Estimator  | -       |                                       |                 |                         | Experience                  |
|            |              | select all that apply)  | I had difficulty because the links did not take me where I expected                                   | _       |                                       |                 |                         |                             |
|            |              |   | l had difficulty because I experienced technical difficulties<br>(error messages, broken links, etc.) |         |                                       |                 |                         |                             |
|            |              |   | I had a navigation difficulty not listed above:   | Α       |                                       |                 |                         |                             |
| BJL2268    | A            | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  |   |         | Text area, no char limit              | N               | Skip Logic Group        | Other Difficult             |
| JAC0123896 |              | Have you used any other SSA resources for your retirement planning? (Please select all that   |   |         | Checkbox, one-up vertical             | Y               | Skip Logic Group        | Other<br>Resources          |
|            |              | apply)  | Social Security's Online Retirement Planner   |         |                                       |                 |                         |                             |

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#### SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Required Special QID From **Question Text Answer Choices** Skip to Type (select from list) Ϋ́/N Instructions CQ Label Other Social Security Calculators offered on ssa.gov Frequently Asked Questions (FAQ) on ssa.gov Other resources on the SSA website I used resources outside of ssa.gov Α I did not use any resources to prepare at this time Mutually Exclusive JAC0123897 Ν OPS Other Please describe what other resources you used Text area, no char limit Skip Logic Group to help prepare/plan for your retirement. Resources JAC0123898 After visiting the Retirement Estimator today, Nothing, the Retirement Estimator provided what I needed Radio button, one-up Υ Skip Logic Group Do Next Y/N what do you plan to do next? vertical Try the Retirement Estimator again (at a later time) am ready to file for Social Security Retirement Benefits Browse the SSA website will call Social Security's 1-800 number I will visit my local Social Security Office I do not know what I will do next at this time STE0061399 Have you registered for a *my* Social Security Radio button, one-up Υ Skip Logic Have mySSA account? vertical Account Α Why Not Have STE0061400 What is the **main reason** you have *not* I plan to register for a my Social Security account today. Radio button, one-up Υ Skip Logic registered for a my Social Security account? mySSA vertical Account I plan to register for a my Social Security account in the near future. I tried to register for a *my* Social Security account, but was unsuccessful. I am not sure why I need a my Social Security account. I do not want a my Social Security account. Other, please specify AA STE0061424 Please tell us why you have not registered for a Text field, no char limit OPS\_Why Not Skip Logic my Social Security account. Have mySSA Account

| Social Security A | dministration          |               |   |      |
|-------------------|------------------------|---------------|---|------|
| SSA Retirement E  | stimator v4            |               |   |      |
| MID: p00ldwE4ss   | R1MA9UUtZ5Ng4          |               |   |      |
| Date:             | 10/6/2010              |               |   |      |
|                   |                        |               |   |      |
|                   |                        | \$            | SSA Retirement Estimator v4 CUSTOM QUESTION |      |
| OID               | Skip<br>Logic<br>Label | Ouestion Text |   | <br> |

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| LIST   |         |                         |                 |                         |
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| Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Required<br>Y/N | Special<br>Instructions |

Social Security Administration
SSA Retirement Estimator v4

MID: p00ldwE4ssR1MA9UUtZ5Ng4C

Date: 10/6/2010

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|     |                        |               | SSA Retirement Estimator v4 CUSTOM QUESTION L | ST      |  |
|-----|------------------------|---------------|---|---------|--|
| QID | Skip<br>Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters)  | Skip to |  |

| Type (select from list) | Required<br>Y/N | Special<br>Instructions |
|-------------------------|-----------------|-------------------------|

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| Decktop computer/apptop from my home  Please-fell-us-how and from where you connected with 55A during your visit boday?  Decktop computer/apptop from a hierard or relative's home.  Public computer workstation in a bitary Public computer workstation in a bitary Public computer workstation in some other appropriate appropriate or programments office.  Public computer workstation in some other appropriate or programments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments office.  Sign Express loads located in a public space or governments of the control of the computer's located on the computer's located  |            |       |   | SSA Retirement Estimator v4 CUSTOM QUESTIO   | N LIST  |                                     |     |                     |                                     |
|--|------------|-------|---|--|---------|-------------------------------------|-----|---------------------|-------------------------------------|
| Please each us how and from where you connected with SSA during your visit adalys?  Deskipp computer injury from a friend or relative's hone and from the state of the computer visit and your visit and  | QID        | Logic | Question Text                               |  | Skip to | Type (select from list)             |     |                     | CQ Label                            |
| Deskips computer intend or relative's intended with SSA during your visit today?  Deskips computer intend or relative's harve believe's harve  |            |       |   | Desktop computer/laptop from my home   |         |                                     |     |                     |                                     |
| Desktop computeringings from a form of reclative's home.  Desktop computeringings from my place of employment.  Public computer workstood in a Bibtroy Public computer workstood in a Bibtroy Public computer workstood in the Computer's Public computer workstood in  |            |       |   |  |         | <del>vertical</del>                 |     |                     | How Connect                         |
| Public computer workstation in a library   Public computer worksta   | TE0076430  |       | connected with SSA during your visit today? |  |         |                                     | ¥   | Group               | with SSA                            |
| Public computer workstation in a fibrary Public computer workstation in some other agency/bood approximation (e.g., scaled service, Molet Vehicle administration, Flosoring agency) and public services. Molet Vehicle administration, Flosoring agency vehicle activities.  Public computer workstation made available at my-local Social Security office SSA Express klock located in a public space or governmental office. Other (please specify)  TED076432 AA Hove did you connect through a unique Social Security incontrol to the SSA website?  TED076432 AA Hove did you ink to the SSA website?  Please desire is low and from where you connected with SSA during your-visit today?  Form where did you connect to SSA today?  From where did you connect to SSA today?  A home  Prome where did you connect to SSA today?  A home  A home  Prome where did you connect to SSA today?  A home  A h |            |       |   |  |         |                                     |     | Randomize           |                                     |
| Public computer wertstation in some other agency/special agraparization (e.g., position evides) evides (Administration - housing agency - heoptal-cite.)  Public computer werkstation made available at my-local scottage of general production and computer services and computers of the computer werkstation and evailable at my-local scottage of general production and computers of the computers of deside p?  No   |            |       |   | Desktop computer/laptop from my place of employment  |         |                                     |     |                     |                                     |
| againzation (e.g., social services, Motor Vehicle Administration, Trough agrey, Hospita, rice) Public computer workstation made available at my local Social Security office SSA Express Most Monated in a public Space or grow-minertal diffice Other (please specify)  Yes  TE0076431 A  Did you connect through a unique Social Security of Restarced on the computer's dealing?  No  Text area, no char limit  From where did you connect to SSA today?  Please tell us how and from where you connected with SSA during your vest today?  A how did you connect to SSA today?  From where did you connect to SSA today?  A home  From where did you connect to SSA today?  A home  A home |            |       |   |  | A       |                                     |     |                     |                                     |
| Social Security office  Social Security icon featured on the computer's desktop?  From where did you connect to SSA today?  From where did you connect to SS |            |       |   | organization (e.g., social services, Motor Vehicle   |         |                                     |     |                     |                                     |
| SSA Express violate located in a public space or generating and provided in a public space or generating and pr |            |       |   |  |         |                                     |     |                     |                                     |
| Pid you connect through a unique Social Security icon featured on the computer's decktop?   Pescentify icon featured on the computer's decktop?   Pescentification icon featured o   |            |       |   |  | В       |                                     |     |                     |                                     |
| Sceutily-lean-featured-on-the-computer's desktop?  No  AA  Social Security in conficient for place of employment At home  From where did you connect to SSA today?  From where did you connect to SSA today?  A bound or relative's place of employment At a fined or relative's place Public literary Social Security into fice specify Did you connect through a unique Social Security into fine factories  A bound in you connect through a unique Social Security into fine factories  A bound in you connect through a unique Social Security into fine factories  A bound into the SSA website?  A bound in office / place of employment At a fined or relative's place Public literary Social Security into sk Other agency Other, places specify  A bound into the SSA website?  A bound in office / place of employment At a fined or relative's place Public literary Social Security into sk Other agency Other, places specify  A bound into the SSA website?  A bound into the SSA  |            |       |   |  | e       |                                     |     |                     |                                     |
| ### AA How did you connect to SSA today?  From where did you connect to  |            |       |   | <del>Yes</del>   |         |                                     |     |                     |                                     |
| From where did you connect to SSA today?   Promote or realized in the security Kinds   Promote or realized i   | TE0076431  |       |   |  |         | <del>vertical</del>                 | ¥   | Skip Logic<br>Group | Use SSA Ic                          |
| ### A How did you link to the SSA website?    From where did you connect to SSA today?   From where did you connect to SSA today?   From where did you connect through a unique Social Security (Social Security ( |            |       |   | NO CONTRACTOR OF THE CONTRACTO | AA      | Tout area no char limit             |     |                     |                                     |
| FE0076434 B Please describe the location:  Text area, no char limit N Skip Logic Group  Please tell us how and from where you connected with SSA during your visit today?  Desktop  Laptop Smart Phone Tablet  At home  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Klosk Other agency Other, please specify  Yes  Did you connect through a unique Social Security icon featured on the computer's desktop?  No  Text area, no char limit N Skip Logic Group  Radio button, one-up verticalb Y Skip Logic Group  Skip Logic Group  A A  Radio button, one-up verticalb  Y Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Yes  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Text area, no char limit N Skip Logic Group  Skip Logic Group  Text area, no char limit N Skip Logic Group  Text area, no char limit N Skip Logic Group  Text area, no char limit N Skip Logic Group  Text area, no char limit  | TE0076422  | ^^    | How did you link to the SSA website?        |  |         | <del>Text area, no char ilmit</del> | N   |                     | OE_How<br>Linked to Si<br>(library) |
| TE0076433 B Please describe the location:    Few tacks and from where you connected with SSA during your visit today?  | 1120010402 | 777   | Frow did you link to the 35% Website:       |  |         | Text area no char limit             | 14  |                     | OE Location                         |
| TE0076434 G Please tell us how and from where you connected with SSA during your visit today?  Desktop  Desktop  Laptop Smart Phone Tablet  At home  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security (filice  | TE0076433  | В     | Please describe the location.               |  |         |                                     | N   |                     | Kiosk                               |
| How did you connect to SSA today?  Laptop Smart Phone Tablet  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Nice Social Security Nice Social Security Nice At desktop?  Did you connect through a unique Social Security icon featured on the computer's desktop?  Radio button, one-up verticalb  Y Skip Logic Group From W Connect SSA  A  B  C  Radio button, one-up verticalb  Y Skip Logic Group Use SS.  Text area, no char limit  Text area, no char limit  Skip Logic Group Use SS.   | TE0076424  |       |   |  |         | <del>Text area, no char limit</del> | N   |                     | OPS_Hov<br>Connected v              |
| How did you connect to SSA today?  Laptop Smart Phone Tablet At home  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Mosk Other agency Other, please specify  Pys  Py Skip Logic Group  From W Connect SSA  A  B  Did you connect through a unique Social Security icon featured on the computer's desktop?  Pys  Radio button, one-up verticalb  Y Skip Logic Group  From W Connect SSA  A  A  B  Did you connect through a unique Social Security icon featured on the computer's desktop?  No  AA  Fext area, no char limit Skip Logic Group Use SS  Use SS  OE_Hot Linked t  | 10070434   | ₩.    | Connected with SSA during your visit today? |  |         | Padio button, one un                | 14  | Group               | <del>55A</del>                      |
| Laptop Smart Phone Tablet  At home  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Office Social Security Klosk Other agency Other, please specify  A bid you connect through a unique Social Security icon featured on the computer's desktop?  A How did you link to the SSA website?    A B   A   A   |            |       | How did you connect to SSA today?           | Desktop  |         |                                     |     |                     | How Connec                          |
| Smart Phone Tablet  At home  Radio button, one-up verticalb  Y  Skip Logic Group  From Where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Office Social Security (Other agency Other agency Other, please specify  Yes  Radio button, one-up verticalb  Y  Skip Logic Group  From W  Connect SSA  B  B  Other agency Other, please specify  Yes  Radio button, one-up vertical  Y  Skip Logic Group  Vertical  Y  Skip Logic Group  Vertical  Yes  Radio button, one-up vertical  Y  Skip Logic Group  Use SS.  A  How did you link to the SSA website?  N  Skip Logic Group  Use SS.   |            |       | Tion and you connect to con today.          | Lanton   | 1       |                                     | · · |                     | , mar cor                           |
| Tablet  At home  From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Office Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  Did you link to the SSA website?  A How did you link to the SSA website?  From Wertical  A Radio button, one-up vertical  Y Skip Logic SSA  A Radio button, one-up vertical  Y Skip Logic SSA  From W Connect SSA  A A  Text area, no char limit Skip Logic C Linked tt  |            |       |   |  |         |                                     |     |                     |                                     |
| From where did you connect to SSA today?  In office / place of employment At a friend or relative's place Public library Social Security Office Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  A How did you link to the SSA website?  Vertical  A Skip Logic Group  Skip Logic Connect SSA  A Radio button, one-up vertical Y Skip Logic Group  Text area, no char limit Skip Logic Connect Connect SSA  A Pow did you link to the SSA website?  Vertical  A Text area, no char limit Skip Logic Group  OE How Linked tr (library)  |            |       |   |  |         |                                     |     |                     |                                     |
| In office / place of employment At a friend or relative's place Public library Social Security Office Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's A desktop?  Did you connect through a unique Social Security icon featured on the computer's A desktop?  Radio button, one-up vertical Yes  Radio button, one-up vertical Y Skip Logic Group Use SS.  AA  Text area, no char limit Skip Logic Linked tt Linked tt (library) (library) (library) (library)   |            |       |   | At home  |         |                                     |     |                     | From Where Connected v              |
| At a friend or relative's place Public library Social Security Office Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  A B B C C Radio button, one-up vertical Yes  No AA  Text area, no char limit Skip Logic Group OE How Linked tt (library)   |            |       | From where did you connect to SSA today?    | In office / place of ampleyment  | -       |                                     | Y   | Group               | SSA                                 |
| Public library Social Security Office Social Security Klosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  A How did you link to the SSA website?  |            |       |   |  |         |                                     |     |                     |                                     |
| Social Security Office Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  A How did you link to the SSA website?  Social Security Office Social Security Kiosk Other agency Other, please specify  Yes  Radio button, one-up vertical Yes Skip Logic Group Use SS.  AA  Text area, no char limit Skip Logic Linked t (library)   |            |       |   |  | Δ       |                                     |     |                     |                                     |
| Social Security Kiosk Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  A How did you link to the SSA website?  Social Security Kiosk Other, please specify Yes  Radio button, one-up vertical Yes  Radio button, one-up vertical Y Skip Logic Group Use SSA  OE How Linked t Glibrary)   |            |       |   |  | _ ^     |                                     |     |                     |                                     |
| Other agency Other, please specify  Did you connect through a unique Social Security icon featured on the computer's desktop?  No  AA  How did you link to the SSA website?  Other agency Other, please specify  Yes  Radio button, one-up vertical  Y Skip Logic Group  Text area, no char limit  N Skip Logic Linked t (library)   |            |       |   |  | В       |                                     |     |                     |                                     |
| Did you connect through a unique Social Security icon featured on the computer's desktop?  No  AA  How did you link to the SSA website?  Yes  No  AA  Radio button, one-up vertical  Y Skip Logic Group  Use SS.  Text area, no char limit  Skip Logic Group  OE_How Skip Logic Linked to Group  (library)   |            |       |   | -  |         |                                     |     |                     |                                     |
| Security icon featured on the computer's  A desktop?  No  AA  Text area, no char limit  Skip Logic Group Use SS.  DE_Hou Skip Logic Linked t Group  OE_Hou Skip Logic (library)  |            |       |   | Other, please specify  | С       |                                     |     |                     |                                     |
| No AA Text area, no char limit Skip Logic Linked t (library)  AA How did you link to the SSA website?  No OE_How Linked t (library)  |            |       | Security icon featured on the computer's    | Yes  |         |                                     |     | Skip Logic          |                                     |
| Text area, no char limit  AA How did you link to the SSA website?  Text area, no char limit  Skip Logic Linked t (library)   |            | A     | desktop?                                    | No   | ΔΔ      |                                     | Y   | Group               | Use SSA Ico                         |
| Skip Logic Linked t  AA How did you link to the SSA website?  N Group (library)  |            |       |   |  | ^^      | Text area, no char limit            |     |                     | OF How                              |
| AA How did you link to the SSA website? N Group ((library)   |            |       |   |  |         | and an out of the original market   |     | Skip Logic          | Linked to SS                        |
| Text area no char limit Skip Logic OE Log  |            | AA    | How did you link to the SSA website?        |  |         |                                     | N   |                     |                                     |
| B Please describe the location.  |            |       |   |  |         | Text area, no char limit            |     | Skip Logic          | OE_Location                         |

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|            |                        |  | SSA Retirement Estimator v4 CUSTOM QUESTIC   | N LIST   |                                  |                                       |                         |                                  |
|------------|------------------------|--|--|----------|----------------------------------|---------------------------------------|-------------------------|----------------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)   | Skip to  | Type (select from list)          | Required<br>Y/N                       | Special<br>Instructions | CQ Label                         |
|            | С                      | Please tell us how and from where you connected with SSA during your visit today:    |  |          | Text area, no char limit         | N                                     | Skip Logic<br>Group     | OPS_How<br>Connected with<br>SSA |
| BJL2254    |                        | How did you first learn about the Retirement Estimator?                              | Search engine  |          | Radio button, one-up vertical    | Y                                     | Skip Logic Group        | earned about F                   |
|            |                        |  | SSA publication  |          |                                  |                                       |                         |                                  |
|            |                        |  | Newspaper, magazine or other media   |          |                                  |                                       |                         |                                  |
|            |                        |  | Social media (e.g., Facebook, Twitter, blog, etc.) (e.g., Blog, Facebook, Twitter, etc.) |          |                                  |                                       |                         |                                  |
|            |                        |  | Online search engine or other website (e.g., Google)                                     |          |                                  |                                       |                         |                                  |
|            |                        |  | Linked from another website  | C2       |                                  |                                       |                         |                                  |
|            |                        |  | An online ad (Banner/Image)  |          |                                  |                                       |                         |                                  |
|            |                        |  | A newspaper or magazine article  |          |                                  |                                       |                         |                                  |
|            |                        |  | A newspaper or magazine ad   |          |                                  |                                       |                         |                                  |
|            |                        |  | An email from Social Security  |          |                                  |                                       |                         |                                  |
|            |                        |  | From my Annual Social Security Statement My Social Security Statement                    |          |                                  |                                       |                         |                                  |
|            |                        |  | From an SSA representative Social Security employee                                      | 1        |                                  |                                       |                         |                                  |
|            |                        |  | Relative or friend   | -        |                                  |                                       |                         |                                  |
|            |                        |  | Social Security event  | -        |                                  |                                       |                         |                                  |
|            |                        |  | My employer or Human Resources department  | -        |                                  |                                       |                         |                                  |
|            |                        |  | My financial advisor   |          |                                  |                                       |                         |                                  |
|            |                        |  | Word of mouth  |          |                                  |                                       |                         |                                  |
|            |                        |  | Other, please specify  | С        |                                  |                                       |                         |                                  |
| BJL2255    | С                      | Please specify how you first learned about the Retirement Estimator.                 |  |          | Text field, <100 char            | N                                     | Skip Logic Group        | Other learned about              |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement Estimator                  |  |          | Text field, <100 char            | N                                     | Skip Logic Group        |                                  |
| STE0050207 |                        | How often do you use the Retirement Estimator?                                       | This was the first time  |          | Radio button, one-up<br>vertical | Y                                     |                         | Frequency                        |
| 0120000201 |                        | Estimator:   | Every few months or less often   |          |                                  |                                       |                         | Trequency                        |
|            |                        |  | Monthly  |          |                                  |                                       |                         |                                  |
|            |                        |  | I use the Retirement Estimator more than once a month                                    |          |                                  |                                       |                         |                                  |
|            |                        |  | <del>Weekly-</del>   |          |                                  |                                       |                         |                                  |
|            |                        |  | Several times a week   |          |                                  |                                       |                         |                                  |
|            |                        |  | Daily/more than once a day   |          |                                  |                                       |                         |                                  |
| BJL2263    |                        | When do you expect to file for retirement  | NASistaire 12 months   | -        | Radio button, one-up             | ¥                                     |                         | Expect to File                   |
|            |                        | benefits?  | Within 12 months 1 to 3 years  | 1        |                                  |                                       |                         |                                  |
|            |                        |  | More than 3 but less than 6 years  | 1        |                                  |                                       |                         |                                  |
|            |                        |  | 6 years or more  |          |                                  |                                       |                         |                                  |
|            |                        |  | Don't Know   | 1        |                                  |                                       |                         |                                  |
|            |                        | When do you expect to file for retirement  | Within 6 months  |          | Radio button, one-up             | Y                                     |                         | Expect to File                   |
|            |                        | benefits?  | Within 12 months   | 4        |                                  |                                       |                         |                                  |
|            |                        |  | Within 1 to 3 years  | 4        |                                  |                                       |                         |                                  |
|            |                        |  | More than 3 but less than 6 years  |          |                                  |                                       |                         |                                  |
| BJL2264    |                        | How do you plan to file for retirement he file?                                      | Don't know at this time  |          | Dadio hutton and                 | \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | -                       | How to E2-                       |
| BJL2264    |                        | How do you plan to file for retirement benefits?                                     | I prefer to file my retirement application online Online                                 |          | Radio button, one-up vertical    | Y                                     |                         | How to File                      |
|            |                        |  | Online with telephone or in-person assistance, if needed                                 |          |                                  |                                       |                         |                                  |
|            |                        |  | By telephone interview   |          |                                  |                                       |                         |                                  |
|            |                        |  | Face-to-face in my local SSA field office At my local Social                             | <u>u</u> |                                  |                                       |                         |                                  |
|            |                        |  | Security office  | -        |                                  |                                       |                         |                                  |
| LIV0073004 |                        | Did you review your Coaid Coaywity Ct-t  | Don't Know Don't know at this time   |          | Dadia huttan ana ur              |                                       | Clair Lagia C           | Daview CC                        |
| LIV0073004 |                        | Did you review your Social Security Statement before using the Retirement Estimator? | Yes, I reviewed my paper Social Security Statement.                                      |          | Radio button, one-up vertical    | Y                                     | Skip Logic Group        | Review SS<br>Statement           |

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pink: ADDITION blue + -->: REWORDING

| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)          | Required<br>Y/N | Special<br>Instructions | CQ Label   |
|------------|------------------------|---|---|---------|----------------------------------|-----------------|-------------------------|--|
|            |                        |   | Yes, I reviewed my online Social Security Statement (located in your mySocialSecurity account).  No   | В       |                                  |                 |                         |  |
| LIV0073005 | A                      | Did you have difficulty navigating between your online Social Security Statement and the Retirement Estimator?  |   | C       | Radio button, one-up vertical    | Y               | Skip Logic Group        | Difficulty<br>Navigating<br>Between RE<br>and Statemen |
| LIV0073006 | С                      | Please describe the difficulty you had navigating between your online Social Security Statement and the Retirement Estimator.   | NO  |         | Text area, no char limit         | N               | Skip Logic Group        | OE_Difficulty Navigating Between RE and Statemen       |
| LIV0073008 | В                      | Do you plan to review your online Social<br>Security Statement next?  | Yes<br>No   |         | Radio button, one-up vertical    | Y               | Skip Logic Group        | Plan to Review<br>SS Statement                         |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?   | Yes<br>No   | F       | Radio button, one-up vertical    | Y               | Skip Logic Group        | Accomplish<br>Goal                                     |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?   | NO  |         | Text area, no char limit         | N               | Skip Logic Group        | OE_Did not accomplish                                  |
| STE0057596 |                        | Do you believe the retirement estimate(s)<br>provided to you was/were based on your entire<br>Social Security earnings record?  | Yes   | G       | Radio button, one-up<br>vertical | Y               | Skip Logic Group        | RE Based on<br>Earnings                                |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   | NU  | G       | Text area, no char limit         | N               | Skip Logic Group        | OE_Not based<br>on earnings                            |
| BJL2267    |                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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  I had difficulty because the links did not take me where I expected  I had difficulty because I experienced technical difficulties (error messages, broken links, etc.)  I had a navigation difficulty not listed above: | A       | Checkbox, one-up vertical        | Y               | Skip Logic Group        | Navigation<br>Experience                               |
| BJL2268    | А                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  | That a navigation difficulty not instead above.   |         | Text area, no char limit         | N               | Skip Logic Group        | Other Difficulty                                       |
| MAD0043083 |                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement?-(Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A       | Checkbox, one up vertical        | ¥               | Skip-Logie<br>Group     | Other<br>Resources                                     |
| MAD0043084 | <b>A</b>               | Please describe what other resources you used to help-prepare for your retirement application   | and the second second   |         | Text area, no char limit         | N               |                         | OPS Other<br>Resources                                 |
|            |                        | Have you used any other SSA resources for your retirement planning? (Please select all that apply)  | Your Online Social Security Statement in the <i>my</i> Social Security pages Social Security's Online Retirement Planner Other Social Security Calculators offered on ssa.gov   |         | Checkbox, one-up vertical        | Y               | Skip Logic<br>Group     | Other<br>Resources                                     |

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| QID                | A  | Question Text  Please describe what other resources you used to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement preparations? | (limited to 50 characters) Frequently Asked Questions (FAQ) on ssa.gov Other resources on the SSA website Lused resources outside of ssa.gov I did not use any resources to prepare at this time  Nothing, the Retirement Estimator provided what I needed | Skip to | Type (select from list)  Text area, no char limit | Y/N<br>N | Mutually Exclusive Skip Logic Group | CQ Label OPS Other              |
|--------------------|----|--|--|---------|---|----------|-------------------------------------|---------------------------------|
| <del>\JL2270</del> |    | to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement  | Other resources on the SSA website I used resources outside of ssa.gov I did not use any resources to prepare at this time   |         | Text area, no char limit                          | N        | Exclusive<br>Skip Logic             |                                 |
| JL2270             |    | to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement  | l used resources outside of ssa.gov<br>I did not use any resources to prepare at this time   |         | Text area, no char limit                          | N        | Exclusive<br>Skip Logic             |                                 |
| JL2270             |    | to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement  | I did not use any resources to prepare at this time  |         | Text area, no char limit                          | N        | Exclusive<br>Skip Logic             |                                 |
| <del>JL2270</del>  |    | to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement  |  |         | Text area, no char limit                          | N        | Exclusive<br>Skip Logic             |                                 |
| HJL2270            |    | to help prepare/plan for your retirement:  What do you plan to do next on the Social Security website to continue your pre-retirement  | Nothing, the Retirement Estimator provided what I needed   |         | Text area, no char limit                          | N        | Skip Logic<br>Group                 |                                 |
| JL2270             |    | Security website to continue your pre-retirement   | Nothing, the Retirement Estimator provided what I needed   |         |   |          |                                     | Resource                        |
|                    |    |  |  |         | Radio button, one-up<br>vertical                  | ¥        |                                     | <del>Do Next</del>              |
|                    |    |  | 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   |         |   |          |                                     |                                 |
|                    |    |  | <del>Don't Know</del>  |         |   |          |                                     |                                 |
| 1AD0043085         | •  | Diagon describe what you plan to do nout to  | Other  | A       | Tout area no aboutimit                            | N        |                                     | OPS Do No                       |
| 1AD0043088         | A  | Please describe what you plan to do next to continue your pre-retirement preparation   |  |         | <del>Text area, no char limit</del>               | 14       |                                     | OPS DO N                        |
|                    |    | After visiting the Retirement Estimator today,   |  |         | Radio button, one-up                              | Υ        | Skip Logic Group                    | Do Next Y                       |
|                    |    | what do you plan to do next?   | Nothing, the Retirement Estimator provided what I needed   |         | vertical  |          |                                     |                                 |
|                    |    |  | Try the Retirement Estimator again (at a later time)   |         |   |          |                                     |                                 |
|                    |    |  | I am ready to file for Social Security Retirement Benefits   |         |   |          |                                     |                                 |
|                    |    |  | Browse the SSA website I will call Social Security's 1-800 number  |         |   |          |                                     |                                 |
|                    |    |  |  |         |   |          |                                     |                                 |
|                    |    |  | I will visit my local Social Security Office I do not know what I will do next at this time  |         |   |          |                                     |                                 |
| TE0061399          |    | Have you registered for a my Social Security   |  |         | Radio button, one-up                              | Y        | Skip Logic                          | Have myS                        |
|                    |    | account?   | Yes  |         | vertical  |          |                                     | Account                         |
| TE0061400          | Α  | What is the main reason you have not   | No   | Α       | Radio button, one-up                              | Y        | Skip Logic                          | Why Not Ha                      |
| 120001400          |    | registered for a <i>my</i> Social Security account?  | Ham currently trying to register for a my Social Security account. I plan to register for a my Social Security account today   |         | vertical  | '        | Skip Logic                          | mySSA<br>Account                |
|                    |    |  | I plan to register for a <i>my</i> Social Security account in the near future  |         |   |          |                                     |                                 |
|                    |    |  | I tried to register for a ${\it my}$ Social Security account, but was unsuccessful.  |         |   |          |                                     |                                 |
|                    |    |  | I am not sure why I need a <i>my</i> Social Security account   |         |   |          |                                     |                                 |
|                    |    |  | I do not want a <i>my</i> Social Security account.   |         |   |          |                                     |                                 |
|                    |    |  | I am unaware of what a my Social Security account is.  |         |   |          |                                     |                                 |
|                    |    |  | Other (please specify): Other, please specify  | AA      |   |          |                                     |                                 |
| TE0061424          | AA | Please tell us why you have not registered for a my Social Security account.   |  |         | Text field, no char limit                         | N        | Skip Logic                          | OPS_Why<br>Have mySt<br>Account |
| JL2273             |    | What is your age?  | <del>Under 30</del>  |         | Drop down, select one                             | N        |                                     | Age                             |
|                    |    | · -  | 30 to 39   |         |   |          |                                     |                                 |
|                    |    |  | <del>40 to 49</del>  |         |   |          |                                     |                                 |
|                    |    |  | <del>50 to 54</del>  |         |   |          |                                     |                                 |
|                    |    |  | <del>55 to 59</del>  |         |   |          |                                     |                                 |
|                    |    |  | <del>60 to 61</del>  |         |   |          |                                     |                                 |
|                    |    |  | <del>62 to 63</del>  |         |   |          |                                     |                                 |
|                    |    |  | <del>64 to 65</del>  |         |   |          |                                     |                                 |
|                    |    |  | 66 and over Prefer not to answer   |         |   |          |                                     |                                 |

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|------------|------------------------|---|--|-------------|-------------------------------|--------------------|-----------------|--|-----------------------------------|
|            |                        |   | SSA Retirement Estimator v4 CUSTOM QUE   | STION L     | IST                           |                    |                 |  |                                   |
| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)   | Skip to     | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions                                | CQ Label                          |
|            |                        | Please tell us how and from where you connected with SSA during your visit today?         | Desktop computer/laptop from my home  Desktop computer/laptop from a friend or relative's home Desktop computer/laptop from my place of employment Public computer workstation in a library Public computer workstation in some other agency/social organization (e.g., social services, Motor Vehicle Administration, housing agency, hospital, etc.) Public computer workstation made available at my local Social Security office SSA Express klosk located in a public space or governmental office Other (please specify) | A<br>B<br>C | Radio button, one-up vertical | Single             | Y               | Skip Logic Group<br>Randomize  Anchor Answer<br>Choice | How Connected with SSA            |
|            | А                      | Did you connect through a unique Social Security icon featured on the computer's desktop? | Yes<br>No  | AA          | Radio button, one-up vertical | Single             | Υ               | Skip Logic Group                                       | Use SSA Icon                      |
|            | AA                     | How did you link to the SSA website?  |  |             | Text area, no char limit      | Open               | N               | Skip Logic Group                                       | OE_How Linked to<br>SSA (library) |
|            | В                      | Please describe the location.   |  |             | Text area, no char limit      | Open               | N               | Skip Logic Group                                       | OE_Location of Kiosk              |
|            | С                      | Please tell us how and from where you connected with SSA during your visit today?         |  |             | Text area, no char limit      | Open               | N               | Skip Logic Group                                       | OPS_How<br>Connected with<br>SSA  |
| BJL2254    |                        |   | 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 Social media (e.g., Facebook, Twitter, blog, etc.) Other, please specify  | C2          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group                                       | Learned about RE                  |
| BJL2255    | С                      | Please specify how you first learned about the Retirement Estimator.                      |  |             | Text field, <100 char         |                    | N               | Skip Logic Group                                       | Other learned about               |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement Estimator                       |  |             | Text field, <100 char         |                    | N               | Skip Logic Group                                       | OE Website                        |
| STE0050207 |                        | How often do you use the Retirement Estimator?  | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day  |             | Radio button, one-up vertical | Single             | Ÿ               |  | Frequency                         |
| BJL2263    |                        | When do you expect to file for retirement benefits?                                       | Dealy more than once a day Within 12 months 1 to 3 years More than 3 but less than 6 years   |             | Radio button, one-up vertical | Single             | Y               |  | Expect to File                    |

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|            |                        |   | SSA Retirement Estimator v4 CUSTOM QUE  | ESTION LI | ST                            |                    |                 |                         |   |
|------------|------------------------|---|---|-----------|-------------------------------|--------------------|-----------------|-------------------------|---|
| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to   | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label  |
|            |                        |   | 6 years or more   |           |                               |                    |                 |                         |   |
| BJL2264    |                        | How do you plan to file for retirement benefits?  | Don't Know  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   |
| LIV0073004 |                        |   | Yes, I reviewed my paper Social Security Statement.  Yes, I reviewed my online Social Security Statement (located in your my Social Security account).  No  | A<br>B    | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Review SS<br>Statement                                  |
| LIV0073005 | A                      | Did you have difficulty navigating between your online<br>Social Security Statement and the Retirement Estimator?               | Yes<br>No   | С         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Difficulty<br>Navigating<br>Between RE and<br>Statement |
| LIV0073006 | С                      | Please describe the difficulty you had navigating between your online Social Security Statement and the Retirement Estimator.   |   |           | Text area, no char limit      |                    | N               | Skip Logic Group        | OE_Difficulty Navigating Between RE and                 |
| LIV0073008 | В                      | Do you plan to review your online Social Security<br>Statement next?  | Yes<br>No   |           | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Plan to Review SS<br>Statement                          |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                                 | Yes   | F         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal   |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?   |   |           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish                                   |
| STE0057596 |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?        | Yes   | G         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings                                 |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record? |   |           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings                                |
| BJL2267    |                        |   | I had no difficulty navigating/browsing to the Retirement Estimator I had difficulty finding the links to the Retirement Estimator I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | A         | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience                                |
| BJL2268    | А                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred              |   |           | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty  |
| MAD0043083 |                        |   | Social Security's Online Retirement Planner<br>SSA Home Page  |           | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources   |

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|------------|------------------------|--|---|-----------|-------------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
|            |                        |  | SSA Retirement Estimator v4 CUSTOM QU   | JESTION L | IST                           |                    |                 |                         |                                      |
| QID        | Skip<br>Logic<br>Label |  | Answer Choices (limited to 50 characters)  The Online Social Security Statement in the my Social Security section  Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare | Skip to   | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application            | I du not use any resources to prepare   |           | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources               |
| BJL2270    |                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations? | Nothing, the Retirement Estimator provided what I needed  |           | Radio button, one-up vertical | Single             | Y               |                         | Do Next                              |
|            |                        |  | 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  |           |                               |                    |                 |                         |                                      |
|            |                        |  | Other   | A         |                               |                    |                 |                         |                                      |
| MAD0043085 | Α                      | Please describe what you plan to do next to continue your pre-retirement preparation                     |   |           | Text area, no char limit      |                    | N               |                         | OPS Do Next                          |
| STE0061399 |                        | Have you registered for a <i>my</i> Social Security account?   | Yes   |           | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account                |
|            |                        |  | No  | Α         |                               |                    |                 |                         |                                      |
| STE0061400 | Α                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?              | I am unaware of what a my Social Security account is.   |           | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account           |
|            |                        |  | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.  |           |                               |                    |                 |                         |                                      |
|            |                        |  | I am currently trying to register for a <i>my</i> Social Security account.  |           |                               |                    |                 |                         |                                      |
|            |                        |  | I do not want a <i>my</i> Social Security account.  Other (please specify):   | - ^ ^     |                               |                    |                 |                         |                                      |
| STE0061424 | AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account.                      | Purier (prease specify).  | AA        | Text field, no char limit     | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
| BJL2273    |                        |  | Under 30 30 to 39 40 to 49 50 to 54 55 to 59 60 to 61 62 to 63 64 to 65 66 and over Prefer not to answer  |           | Drop down, select one         | Single             | N               |                         | Age                                  |

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|            |                        |   | SSA Retirement Estimator v4 CUSTOM QUE   | STION L  | IST                           |                    |                 |                         |   |
|------------|------------------------|---|--|----------|-------------------------------|--------------------|-----------------|-------------------------|---|
| QID        | Skip<br>Logic<br>Label | Ouestion Text   | Answer Choices<br>(limited to 50 characters)   | Skip to  | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CO Label  |
| BJL2254    |                        | How did you first learn about the Retirement Estimator?   | Search engine  | Citap to | Type (eereet inem neg         | Single             | Y               | Skip Logic Group        | Learned about RE  |
| BJLZZ34    |                        | How did you linst learn about the Retirement Estimator?   | 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 Social media (e.g., Facebook, Twitter, blog, etc.) Other, please specify | C2       | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Leanied about RE  |
| BJL2255    | С                      | Please specify how you first learned about the Retirement   |  | - C      |                               |                    |                 | Skip Logic Group        | Other learned   |
|            |                        | Estimator.  |  |          | Text field, <100 char         |                    | N               |                         | about   |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement Estimator   |  |          | Text field, <100 char         |                    | N               | Skip Logic Group        | OE_Website  |
| STE0050207 |                        | How often do you use the Retirement Estimator?  | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day  |          | Radio button, one-up vertical | Single             | Y               |                         | Frequency   |
| BJL2263    |                        | When do you expect to file for retirement benefits?   | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know   |          | Radio button, one-up vertical | Single             | Y               |                         | Expect to File  |
| BJL2264    |                        | 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   |
|            |                        | Did you review your Social Security Statement before using the Retirement Estimator?  | Yes, I reviewed my paper Social Security Statement.  Yes, I reviewed my online Social Security Statement (located in your my Social Security account).  No   | A<br>B   | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Review SS<br>Statement                                  |
|            | A                      | Did you have difficulty navigating between your online<br>Social Security Statement and the Retirement Estimator?             | Yes  | С        | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Difficulty<br>Navigating<br>Between RE and<br>Statement |
|            | С                      | Please describe the difficulty you had navigating between your online Social Security Statement and the Retirement Estimator. |  |          | Text area, no char limit      |                    | N               | Skip Logic Group        | OE_Difficulty Navigating Between RE and                 |
|            | В                      | Do you plan to review your online Social Security Statement next?   | Yes  |          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Plan to Review SS<br>Statement                          |
|            |                        |   | INU  |          |                               |                    |                 |                         |   |

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Date: 10/6/2010

### SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label **Answer Choices** Single or Required Special (limited to 50 characters) Y/N OID **Question Text** Skip to Type (select from list) Multi Instructions CO Label BJL2265 Did the Retirement Estimator provide you with all the Radio button, one-up vertical Single Skip Logic Group Accomplish Goal benefit estimates you were seeking today? BJL2266 What other benefit estimates were you trying to obtain? Text area, no char limit Single Skip Logic Group OE Did not accomplish STE0057596 Do you believe the retirement estimate(s) provided to you Yes Radio button, one-up vertical Single Skip Logic Group RE Based on was/were based on your entire Social Security earnings Earnings record? G Nο STE0057597 Please explain why you think that the retirement Text area, no char limit Single Skip Logic Group OE Not based on estimate(s) was/were not based on your entire Social earnings Security earnings record? BJL2267 How would you describe your navigation experience on Checkbox, one-up vertical Multi Skip Logic Group Navigation the SSA site today prior to arriving at the Retirement I had no difficulty navigating/browsing to the Retirement Estimator Experience Estimator? (Please select all that apply) I had difficulty finding the links to the Retirement Estimator had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: **BJL2268** Please describe your navigation difficulty and identify Text area, no char limit Ν Skip Logic Group Other Difficulty where on the Social Security website this problem occurred MAD0043083 Prior to visiting the Retirement Estimator, have you used Social Security's Online Retirement Planner Checkbox, one-up vertical Multi Skip Logic Group Other Resources any of the following resources to prepare for your SSA Home Page application for retirement? (Please select all that apply) The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website Α did not use any resources to prepare MAD0043084 Please describe what other resources you used to help Text area, no char limit Ν OPS Other prepare for your retirement application Resources BJL2270 What do you plan to do next on the Social Security Nothing, the Retirement Estimator provided what I needed Radio button, one-up vertical Single Do Next website to continue your pre-retirement preparations? 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

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|                   |                        |  | SSA Retirement Estimator v4 CUSTOM QU  | JESTION L | IST  |                    |                      |                         |                                      |
|-------------------|------------------------|--|--|-----------|--|--------------------|----------------------|-------------------------|--------------------------------------|
| QID<br>MAD0043085 | Skip<br>Logic<br>Label | Question Text Please describe what you plan to do next to continue your pre-retirement preparation | Answer Choices<br>(limited to 50 characters)   | Skip to   | Type (select from list) Text area, no char limit | Single or<br>Multi | Required<br>Y/N<br>N | Special<br>Instructions | CQ Label<br>OPS Do Next              |
| STE0061399        |                        | Have you registered for a <i>my</i> Social Security account?                                       | Yes  |           | Radio button, one-up vertical                    | Single             | Y                    | Skip Logic              | Have mySSA<br>Account                |
| STE0061400        | A                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?        | No I am unaware of what a <i>my</i> Social Security account is.  | A         | Radio button, one-up vertical                    | Single             | Y                    | Skip Logic              | Why Not Have mySSA Account           |
|                   |                        |  | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.   |           |  |                    |                      |                         | ,                                    |
|                   |                        |  | I am currently trying to register for a <i>my</i> Social Security account.  I do not want a <i>my</i> Social Security account. |           |  |                    |                      |                         |                                      |
|                   |                        |  | Other (please specify):  | AA        |  |                    |                      |                         |                                      |
| STE0061424        | AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account.                | Other (piease specify).  | AA        | Text field, no char limit                        | Single             | N                    | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
| BJL2273           |                        | What is your <b>age</b> ?  | Under 30 30 to 39 40 to 49 50 to 54 55 to 59 60 to 61 62 to 63 64 to 65 66 and over Prefer not to answer                       |           | Drop down, select one                            | Single             | N                    |                         | Age                                  |

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|            |                        |  | SSA Retirement Estimator v4 CUSTOM  | QUESTION L | IST                           |                    |                 |                         |                         |
|------------|------------------------|--|---|------------|-------------------------------|--------------------|-----------------|-------------------------|-------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to    | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                |
| BJL2254    |                        |  | Search engine   | Chap to    | Type (celeet ileiii ilet)     | Single             |                 | Skip Logic Group        | Learned about RE        |
| BJL2254    |                        | How did you first learn about the Retirement Estimator?  | 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 | C2         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE        |
|            |                        |  | Social media (e.g., Facebook, Twitter, blog, etc.)  |            |                               |                    |                 |                         |                         |
| BJL2255    | С                      | Please specify how you first learned about the Retirement Estimator.   | Other, please specify   | С          | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about     |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement  |   |            | Text lield, <100 char         |                    | N               | Skip Logic Group        | about                   |
| 3120030200 | 62                     | Estimator  |   |            | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website              |
| STE0050207 |                        | How often do you use the Retirement Estimator?   | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day   |            | Radio button, one-up vertical | Single             | Y               |                         | Frequency               |
| BJL2263    |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know  |            | Radio button, one-up vertical | Single             | Y               |                         | Expect to File          |
| BJL2264    |                        | 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             |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                          | Yes   |            | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal         |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?  |   |            | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish   |
| STE0057596 |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record? | Yes   | G          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings |

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## SSA Retirement Estimator v4 CUSTOM QUESTION LIST

|            |                        |  | SSA Retirement Estimator v4 CUSTOM QU  | ESTIONL | 131                           |                    |                 |                         |                                      |
|------------|------------------------|--|--|---------|-------------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)   | Skip to | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social  |  |         | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on<br>earnings          |
|            |                        | estimate(s) was/were not based on your entire social Security earnings record?   |  |         |                               |                    |                 |                         | earnings                             |
| BJL2267    |                        | How would you describe your navigation experience on<br>the SSA site today <b>prior</b> to arriving at the Retirement<br>Estimator? (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       |         | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience             |
|            |                        |  | I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error |         |                               |                    |                 |                         |                                      |
|            |                        |  | messages, broken links, etc.) I had a navigation difficulty not listed above:  | A       |                               |                    |                 |                         |                                      |
| BJL2268    | A                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred   | That a navigation uniculty not listed above.   |         | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty                     |
| MAD0043083 |                        | Prior to visiting the Retirement Estimator, have you used  | Social Security's Online Retirement Planner  |         | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources                      |
|            |                        | any of the following resources to prepare for your application for retirement? (Please select all that apply)  | SSA Home Page  |         |                               |                    |                 |                         |                                      |
|            |                        | application for retirement? (Flease select all that apply)   | The Online Social Security Statement in the my Social Security section   |         |                               |                    |                 |                         |                                      |
|            |                        |  | Frequently Asked Questions (FAQ) Instructional video on the online application page  | 4       |                               |                    |                 |                         |                                      |
|            |                        |  | Other resource on the SSA website  | A       |                               |                    |                 |                         |                                      |
|            |                        |  | I did not use any resources to prepare   | 1 ~     |                               |                    |                 |                         |                                      |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application  |  |         | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources               |
| BJL2270    |                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?   | Nothing, the Retirement Estimator provided what I needed   |         | Radio button, one-up vertical | Single             | Y               |                         | Do Next                              |
|            |                        |  | 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   |         |                               |                    |                 |                         |                                      |
|            |                        |  | Other  | Α       |                               |                    |                 |                         |                                      |
| MAD0043085 | А                      | Please describe what you plan to do next to continue your pre-retirement preparation   |  |         | Text area, no char limit      |                    | N               |                         | OPS Do Next                          |
| STE0061399 |                        | Have you registered for a <i>my</i> Social Security account?   | Yes  |         | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account                |
| STE0061400 |                        | N/hat is the main was an up to the main was a second of  | No   | A       | Dadia huttan ara maratia t    | Circula            |                 | Chin Lonic              | M/han N/ - t 11 - a                  |
| S1E0061400 | A                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?  | I am unaware of what a my Social Security account is.  |         | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account           |
|            |                        |  | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.   |         |                               |                    |                 |                         |                                      |
|            |                        |  | I am currently trying to register for a <i>my</i> Social Security account.  I do not want a <i>my</i> Social Security account.           |         |                               |                    |                 |                         |                                      |
|            |                        |  | Other (please specify):  | AA      |                               |                    |                 |                         |                                      |
| STE0061424 | AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account.  |  |         | Text field, no char limit     | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
| BJL2273    |                        | What is your age?  | <del>Under 25</del>  |         | Drop down, select one         | Single             | N               |                         |                                      |

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pink: ADDITION

blue + -->: REWORDING

Date: 10/6/2010

## SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label Answer Choices (limited to 50 characters) Single or Multi Required Y/N Special Instructions Skip to QID **Question Text** Type (select from list) CQ Label 25 to 54 <del>55 to 59</del> <del>60 to 61</del> 62 to 63 64 to 65 66 and over Prefer not to answer

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pink: ADDITION

| Date: | 10/ | 6/2010 |
|-------|-----|--------|
| Daic. | TO  | 012010 |

|            |                        |  | SSA Retirement Estimator v4 CUSTOM  | QUESTION L | IST                           |                    |                 |                         |                         |
|------------|------------------------|--|---|------------|-------------------------------|--------------------|-----------------|-------------------------|-------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to    | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                |
| BJL2254    |                        |  | Search engine   | Chap to    | Type (celeet ileiii ilet)     | Single             |                 | Skip Logic Group        | Learned about RE        |
| BJL2254    |                        | How did you first learn about the Retirement Estimator?  | 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 | C2         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE        |
|            |                        |  | Social media (e.g., Facebook, Twitter, blog, etc.)  |            |                               |                    |                 |                         |                         |
| BJL2255    | С                      | Please specify how you first learned about the Retirement Estimator.   | Other, please specify   | С          | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about     |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement  |   |            | Text lield, <100 char         |                    | N               | Skip Logic Group        | about                   |
| 3120030200 | 62                     | Estimator  |   |            | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website              |
| STE0050207 |                        | How often do you use the Retirement Estimator?   | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day   |            | Radio button, one-up vertical | Single             | Y               |                         | Frequency               |
| BJL2263    |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know  |            | Radio button, one-up vertical | Single             | Y               |                         | Expect to File          |
| BJL2264    |                        | 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             |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                          | Yes   |            | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal         |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?  |   |            | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish   |
| STE0057596 |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record? | Yes   | G          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings |

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pink: ADDITION

| SSA Retirement Estimator v4 CUSTOM ( | QUESTION LIST |
|--------------------------------------|---------------|
|--------------------------------------|---------------|

|            |                        |  | SSA Retirement Estimator v4 CUSTOM QUI  | ESTION L | 31                            |                    |                 |                         |                                      |
|------------|------------------------|--|---|----------|-------------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
| QID        | Skip<br>Logic<br>Label | <b>Question Text</b>   | Answer Choices<br>(limited to 50 characters)  | Skip to  | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?                              |   |          | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings             |
| BJL2267    |                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: |          | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience             |
| BJL2268    | А                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred   |   |          | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty                     |
| MAD0043083 |                        | any of the following resources to prepare for your application for retirement? (Please select all that apply)  | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A        | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources                      |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application  |   |          | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources               |
| BJL2270    |                        | 11   | Nothing, the Retirement Estimator provided what I needed  |          | Radio button, one-up vertical | Single             | Y               |                         | Do Next                              |
|            |                        |  | 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  |          |                               |                    |                 |                         |                                      |
|            |                        |  | Other   | A        |                               |                    |                 |                         |                                      |
| MAD0043085 | A                      | Please describe what you plan to do next to continue<br>your pre-retirement preparation  |   |          | Text area, no char limit      |                    | N               |                         | OPS Do Next                          |
| STE0061399 |                        | Have you registered for a <i>my</i> Social Security account?   | Yes<br>No   | A        | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account                |
| STE0061400 | А                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?  | I am unaware of what a my Social Security account is.   |          | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account           |
|            |                        |  | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.  I am currently trying to register for a <i>my</i> Social Security account.  |          |                               |                    |                 |                         |                                      |
|            |                        |  | I do not want a my Social Security account.   |          |                               |                    |                 |                         |                                      |
| CTE0061404 |                        | Diagon tall up why you have not registered for a re-   | Other (please specify):   | AA       | Tout field, as abouting!      | Cinala             | A.I             | Ckin Logic              | ODC Why Nat                          |
| STE0061424 | AA                     | Please tell us why you have not registered for a my Social Security account.   |   |          | Text field, no char limit     | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
| BJL2273    |                        | What is your <b>age</b> ?  | Under 25<br><del>26 to 50</del>   | -        | Drop down, select one         | Single             | N               |                         | Age                                  |

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pink: ADDITION

blue + -->: REWORDING

Date: 10/6/2010

# SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label Answer Choices (limited to 50 characters) Single or Multi Required Y/N Special Instructions Skip to QID **Question Text** Type (select from list) CQ Label 51 to 55 56 to 60 67 and over 25 to 54 66 and over Prefer not to answer

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pink: ADDITION

| Date: | 10/ | 6/2010 |
|-------|-----|--------|
| Daic. | TO  | 012010 |

|            |                        |  | SSA Retirement Estimator v4 CUSTOM  | QUESTION L | IST                           |                    |                 |                         |                         |
|------------|------------------------|--|---|------------|-------------------------------|--------------------|-----------------|-------------------------|-------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to    | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                |
| BJL2254    |                        |  | Search engine   | Chap to    | Type (celeet ileiii ilet)     | Single             |                 | Skip Logic Group        | Learned about RE        |
| BJL2254    |                        | How did you first learn about the Retirement Estimator?  | 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 | C2         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE        |
|            |                        |  | Social media (e.g., Facebook, Twitter, blog, etc.)  |            |                               |                    |                 |                         |                         |
| BJL2255    | С                      | Please specify how you first learned about the Retirement Estimator.   | Other, please specify   | С          | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about     |
| STE0050206 | C2                     | Please specify the website that led you to the Retirement  |   |            | Text lield, <100 char         |                    | N               | Skip Logic Group        | about                   |
| 3120030200 | 62                     | Estimator  |   |            | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website              |
| STE0050207 |                        | How often do you use the Retirement Estimator?   | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day   |            | Radio button, one-up vertical | Single             | Y               |                         | Frequency               |
| BJL2263    |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know  |            | Radio button, one-up vertical | Single             | Y               |                         | Expect to File          |
| BJL2264    |                        | 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             |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                          | Yes   |            | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal         |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?  |   |            | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish   |
| STE0057596 |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record? | Yes   | G          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings |

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| SSA Retirement Estimator v4 CUSTOM QUESTION | LIST |
|---|------|
|---|------|

|            |                        |   | SSA Retirement Estimator V4 COSTOM QUI  | ESTION L | 31                            |                    |                 |                         |                                      |
|------------|------------------------|---|---|----------|-------------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to  | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   |   |          | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings             |
| BJL2267    |                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | A        | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience             |
| BJL2268    | A                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  |   |          | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty                     |
| MAD0043083 |                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement? (Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A        | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources                      |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application   |   |          | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources               |
| BJL2270    |                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  | Nothing, the Retirement Estimator provided what I needed  |          | Radio button, one-up vertical | Single             | Y               |                         | Do Next                              |
|            |                        |   | 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  |          |                               |                    |                 |                         |                                      |
|            |                        |   | Other   | Α        |                               |                    |                 |                         |                                      |
| MAD0043085 | Α                      | Please describe what you plan to do next to continue your pre-retirement preparation  |   |          | Text area, no char limit      |                    | N               |                         | OPS Do Next                          |
|            |                        | Have you registered for a my Social Security account?   | Yes<br>No.  | A        | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account                |
|            | Α                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?   | I am unaware of what a <i>my</i> Social Security account is.  |          | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account           |
|            |                        |   | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.  I am currently trying to register for a <i>my</i> Social Security account.  |          |                               |                    |                 |                         |                                      |
|            |                        |   | I do not want a my Social Security account.   |          |                               |                    |                 |                         |                                      |
|            |                        |   | Other (please specify):   | AA       |                               |                    |                 |                         |                                      |
|            | AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account.   |   |          | Text field, no char limit     | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
| BJL2273    |                        | What is your <b>age</b> ?   | Under 25<br>26 to 50  | -        | Drop down, select one         | Single             | N               |                         | Age                                  |

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pink: ADDITION

Date: 10/6/2010

|     | SSA Retirement Estimator v4 CUSTOM QUESTION LIST |               |   |         |                         |                    |                 |                         |          |  |
|-----|--|---------------|---|---------|-------------------------|--------------------|-----------------|-------------------------|----------|--|
| QID | Skip<br>Logic<br>Label                           | Question Text | Answer Choices<br>(limited to 50 characters)          | Skip to | Type (select from list) | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label |  |
|     |  |               | 51 to 55<br>56 to 60<br>61<br>62                      |         |                         |                    |                 |                         |          |  |
|     |  |               | 64<br>65<br>66<br>67 and over<br>Prefer not to answer |         |                         |                    |                 |                         |          |  |

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| Date:      | 10/6/201               | .u   | blue +>: REWORDING  |            |  |                    |                 |                         |                         |
|------------|------------------------|--|---|------------|--|--------------------|-----------------|-------------------------|-------------------------|
|            |                        |  | SSA Retirement Estimator v4 CUSTOM  | QUESTION L | IST  |                    |                 |                         |                         |
| QID        | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to    | Type (select from list)                      | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                |
| BJL2254    |                        | ` `  | 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  Social media (e.g., Facebook, Twitter, blog, etc.) | C2         | Radio button, one-up vertical                | Single             |                 | Skip Logic Group        | Learned about RE        |
| BJL2255    | С                      | Please specify how you first learned about the Retirement  | Other, please specify   | С          |  |                    |                 | Skip Logic Group        | Other learned           |
| STE0050206 | C2                     | Estimator.  Please specify the website that led you to the Retirement Estimator  |   |            | Text field, <100 char  Text field, <100 char |                    | N<br>N          | Skip Logic Group        | about  OE Website       |
| STE0050207 |                        | How often do you use the Retirement Estimator?   | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day   |            | Radio button, one-up vertical                | Single             | Y               |                         | Frequency               |
| BJL2263    |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know  |            | Radio button, one-up vertical                | Single             | Y               |                         | Expect to File          |
| BJL2264    |                        | 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             |
| BJL2265    |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                          | Yes   | F          | Radio button, one-up vertical                | Single             | Y               | Skip Logic Group        | Accomplish Goal         |
| BJL2266    | F                      | What other benefit estimates were you trying to obtain?  |   |            | Text area, no char limit                     | Single             | N               | Skip Logic Group        | OE_Did not accomplish   |
| STE0057596 |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record? | Yes   |            | Radio button, one-up vertical                | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings |

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|            |                        |   | SSA Retirement Estimator v4 CUSTOM QU   | ESTION L | IST                           |                    |                 |                         |                          |
|------------|------------------------|---|---|----------|-------------------------------|--------------------|-----------------|-------------------------|--------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to  | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                 |
| STE0057597 | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   |   |          | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings |
| BJL2267    |                        | How would you describe your navigation experience on<br>the SSA site today <b>prior</b> to arriving at the Retirement<br>Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: |          | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience |
| BJL2268    | A                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  | That a rangation amount not noted above.  |          | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty         |
| MAD0043083 |                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement? (Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A        | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources          |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application   | and not use any resources to prepare  |          | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources   |
| BJL2270    |                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  | Nothing, the Retirement Estimator provided what I needed  |          | Radio button, one-up vertical | Single             | Y               |                         | Do Next                  |
|            |                        |   | 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  |          |                               |                    |                 |                         |                          |
|            |                        |   | Other   | A        |                               |                    |                 |                         |                          |
| MAD0043085 | А                      | Please describe what you plan to do next to continue your pre-retirement preparation  |   |          | Text area, no char limit      |                    | N               |                         | OPS Do Next              |
| BJL2273    |                        | What is your <b>age</b> ?   | Under 25 26 to 50 51 to 55 56 to 60 61 62 63 64 65 66 67 and over Prefer not to answer  |          | Drop down, select one         | Single             | N               |                         | Age                      |

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| Date:      | 10/6/201 | U  | blue +>. REWORDING   |              |                               |           |          |                  |                         |
|------------|----------|--|--|--------------|-------------------------------|-----------|----------|------------------|-------------------------|
|            |          |  | SSA Retirement Estimator v4 CUSTON   | M QUESTION L | IST                           |           |          |                  |                         |
|            | Skip     |  |  |              |                               |           |          |                  |                         |
|            | Logic    |  | Answer Choices   |              |                               | Single or | Required | Special          |                         |
| QID        | Label    | Question Text  | (limited to 50 characters)   | Skip to      | Type (select from list)       | Multi     | Y/N      | Instructions     | CQ Label                |
| BJL2254    |          | How did you first learn about the Retirement Estimator?  | Search engine  Linked from another website  From an SSA representative   | C2           | Radio button, one-up vertical | Single    | Y        | Skip Logic Group | Learned about RE        |
|            |          |  | 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   | c            |                               |           |          |                  |                         |
| BJL2255    | С        | Please specify how you first learned about the Retiremen Estimator.  |  |              | Text field, <100 char         |           | N        | Skip Logic Group | Other learned about     |
| STE0050206 | C2       | Please specify the website that led you to the Retirement Estimator  |  |              | Text field, <100 char         |           | N        | Skip Logic Group | OE_Website              |
| STE0050207 |          | How often do you use the Retirement Estimator?   | This was the first time Every few months or less often Monthly Weekly  |              | Radio button, one-up vertical | Single    | Y        |                  | Frequency               |
|            |          |  | Several times a week Daily/more than once a day  |              |                               |           |          |                  |                         |
| BJL2263    |          | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know   |              | Radio button, one-up vertical | Single    | Y        |                  | Expect to File          |
| BJL2264    |          | 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             |
| BJL2265    |          | Did you accomplish your primary purpose in using the<br>Retirement Estimator?—Did the Retirement Estimator<br>provide you with all the benefit estimates you were<br>seeking today?      | Yes  | F            | Radio button, one-up vertical | Single    | Y        | Skip Logic Group | Accomplish Goal         |
| BJL2266    | 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. What other benefit estimates were you trying to obtain? | Still Trying   | F            | Text area, no char limit      | Single    | N        | Skip Logic Group | OE_Did not accomplish   |
|            |          | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?   | Yes  |              | Radio button, one-up vertical | Single    | Y        | Skip Logic Group | RE Based on<br>Earnings |

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|            |                        |   | SSA Retirement Estimator v4 CUSTOM QUE  | ESTION L | IST                           |                              |                      |   |                          |
|------------|------------------------|---|---|----------|-------------------------------|------------------------------|----------------------|---|--------------------------|
| QID        | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to  | Type (select from list)       | Single or<br>Multi<br>Single | Required<br>Y/N<br>N | Special<br>Instructions<br>Skip Logic Group | CQ Label OE Not based on |
|            | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   |   |          | Text area, no char limit      | Sirigle                      | N                    | Skip Logic Group                            | earnings                 |
| BJL2267    |                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | A        | Checkbox, one-up vertical     | Multi                        | Y                    | Skip Logic Group                            | Navigation<br>Experience |
| BJL2268    | A                      | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  |   |          | Text area, no char limit      |                              | N                    | Skip Logic Group                            | Other Difficulty         |
| MAD0043083 |                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement? (Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A        | Checkbox, one-up vertical     | Multi                        | Y                    | Skip Logic Group                            | Other Resources          |
| MAD0043084 | Α                      | Please describe what other resources you used to help prepare for your retirement application   | . data not doe any reconstruct to properly  |          | Text area, no char limit      |                              | N                    |   | OPS Other<br>Resources   |
| BJL2270    |                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  | Nothing, the Retirement Estimator provided what I needed  |          | Radio button, one-up vertical | Single                       | Y                    |   | Do Next                  |
|            |                        |   | 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  |          |                               |                              |                      |   |                          |
|            |                        |   | Other   | Α        |                               |                              |                      |   |                          |
| MAD0043085 | A                      | Please describe what you plan to do next to continue your pre-retirement preparation  |   |          | Text area, no char limit      |                              | N                    |   | OPS Do Next              |
| BJL2273    |                        | What is your <b>age</b> ?   | Under 25 26 to 50 51 to 55 56 to 60 61 62 63 64 65 66 67 and over Prefer not to answer  |          | Drop down, select one         | Single                       | N                    |   | Age                      |

Date:

MAD0043083

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Prior to visiting the Retirement Estimator, have you used Social Security's Online Retirement Planner

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#### SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label **Answer Choices** Single or Required Special **Question Text** (limited to 50 characters) Y/N QID Skip to Type (select from list) Multi Instructions CQ Label BJL2254 How did you first learn about the Retirement Estimator? Search engine Single Learned about RE Radio button, one-up vertical Linked from another website C2 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 BJL2255 С Other learned about Please specify how you first learned kip Logic Group Other learned about the Retirement Estimator. Text field, <100 char Ν about How often do you use the Retirement Estimator? is was the first time Radio button, one-up vertical Single Frequency veral times a week aily/more than once a day BJL2263 When do you expect to file for retirement benefits? Within 12 months Radio button, one-up vertical Single Expect to File 1 to 3 years More than 3 but less than 6 years More than 6 years 6 years or more Don't Know BJL2264 How do you plan to file for retirement benefits? I prefer to file my retirement application online How to File Radio button, one-up vertical Single By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed Don't Know BJL2265 Radio button, one-up vertical Did you accomplish your primary purpose in using the Single Skip Logic Group Accomplish Goal Yes Still Trying BJL2266 Text area. no char limit OE Did not If you did not accomplish your primary purpose in using Sinale Skip Logic Group the Retirement Estimator, please tell us why you were not accomplish able to do so. **BJL2267** How would you describe your navigation experience on Multi Navigation Checkbox, one-up vertical Skip Logic Group the SSA site today **prior** to arriving at the Retirement Experience I had no difficulty navigating/browsing to the Retirement Estimator Estimator? (Please select all that apply) I had difficulty finding the links to the Retirement Estimator I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: BJL2268 Please describe your navigation difficulty and identify Text area, no char limit Other Difficulty Skip Logic Group where on the Social Security website this problem

Checkbox, one-up vertical

Multi

Skip Logic Group Other Resources

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Prefer not to answer

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### SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label Single or Multi Required Y/N **Answer Choices** Special QID (limited to 50 characters) Skip to Type (select from list) Instructions CQ Label **Question Text** any of the following resources to prepare for your SSA Home Page application for retirement? (Please select all that apply) The Online Social Security Statement in the my Social Security Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website Please describe what other resources you used to help MAD0043084 Text area, no char limit OPS Other Resources prepare for your retirement application BJL2270 Nothing, the Retirement Estimator provided what I needed Do Next What do you plan to do next on the Social Security Single Radio button, one-up vertical website to continue your pre-retirement preparations? 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 Other MAD0043085 OPS Do Next Please describe what you plan to do next to continue Text area, no char limit Ν your pre-retirement preparation BJL2273 What is your age? Under 25 26 to 50 Drop down, select one Sinale N Age 51 to 55 56 to 60 61 62 63 64 65

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|                   |               |   | SSA Retirement Estimator v4 CUSTOM QUESTI                                | ON LIST |                                |           |          |                      |                 |
|-------------------|---------------|---|--|---------|--------------------------------|-----------|----------|----------------------|-----------------|
|                   |               |   |  |         |                                |           |          |                      |                 |
|                   | Skip<br>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        |
| JL2254            |               | How did you first learn about the Retirement Estimator?                     | Search engine  |         | Radio button, one-up vertical  | Single    | Y        | OPS Group            | Learned about R |
|                   |               |   | 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  | _       |                                |           |          |                      |                 |
| JL2255            | С             | Other learned about   | Other, please specify  | С       |                                |           |          | OPS Group            | Other learned   |
| JLZZJJ            | `             | Other learned about   |  |         | Text field, <100 char          |           | N        | Or 3 Group           | about           |
| JL2256            |               | Have you ever sought advice on retirement/financial                         | Yes  | Đ       | Drop down, select one          | Single    | ¥        | Skip Logic Group     | Sought Advice   |
|                   |               | planning or saving strategies?  | Ne   |         |                                |           |          |                      |                 |
| IL2257            | Đ             | From what source have you sought advice on                                  | Family/Friend  | 1       | Checkbox, one-up vertical      | Multi     | ¥        | Skip Logic Group     | Advice Source   |
|                   |               | retirement/financial planning or saving strategies.                         | Financial professional   | -       |                                |           |          |                      |                 |
|                   |               |   | Internet Other   | +       |                                |           |          |                      |                 |
| JL2258            |               | Which statement best describes how you completed the Retirement Estimator?  | I completed it for myself without assistance from anyone else            |         | Radio button, one-up vertical  | Single    | ¥        |                      | Assistance      |
|                   |               | retirement Estimator?   | 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  |         |                                |           |          |                      |                 |
| JL2259            |               | Did the Retirement Estimator help you decide at what age to claim benefits? |  | - :     | Radio button, one-up vertical  | Single    | ¥        | Skip Logic Group     | Help Decision   |
| JL2260            | A             | Please tell us why the Retirement Estimator did not help you                | Ne   | A       | Text area, no char limit       |           | N        | Skip Logic Group     | OE Didn't help  |
| JEEEOO            |               | decide at what age to claim benefits.                                       |  |         | Text area, no ona mme          |           |          | Skip Logic Group     | decide age to   |
| <del>JL2261</del> | -             | At what age do you plan to file for benefits?                               | <del>62</del>  |         | Drop down, select one          | Single    | ¥        | Skip Logic Group     | Age to File     |
|                   |               |   | 63   | 1       |                                |           |          |                      |                 |
|                   |               |   | 64   | -       |                                |           |          |                      |                 |
|                   |               |   | 20   | +       |                                |           |          |                      |                 |
|                   |               |   | 67   | 1       |                                |           |          |                      |                 |
|                   |               |   | <del>68</del>  | 1       |                                |           |          |                      |                 |
|                   |               |   | 69   |         |                                |           |          |                      |                 |
|                   |               |   | <del>70</del>  |         |                                |           |          |                      |                 |
|                   |               |   | 71 or older  | -       |                                |           |          |                      |                 |
|                   |               |   | Unsure Other, please specify   | E       |                                |           |          |                      |                 |
| <del>JL2262</del> | E             | Please specify the age at which you intend to file for benefits.            | Other, peace specify   |         | Text field, <100 char          |           | N        | Skip Logic Group     | Other Age       |
| IL2263            |               | When do you expect to file for retirement benefits?                         | Within 12 months   |         | Radio button, one-up vertical  | Single    | Y        |                      | Expect to File  |
|                   |               |   | 1 to 3 years   | ]       |                                |           |          |                      |                 |
|                   |               |   | More than 3 but less than 6 years  |         |                                |           |          |                      |                 |
|                   |               |   | More than 6 years  | 1       |                                |           |          |                      |                 |
| IL2264            | +             | How do you plan to file for retirement benefits?                            | Don't Know I prefer to file my retirement application online             | -       | Radio button, one-up vertical  | Single    | Y        |                      | How to File     |
| JL2204            |               | now do you plan to life for retirement benefits?                            | By telephone interview   | +       | Tradio button, one-up vertical | Sirigie   | '        |                      | How to File     |
|                   |               |   | Face-to-face in my local SSA field office                                | 1       |                                |           |          |                      |                 |
|                   |               |   | Online with telephone or in-person assistance, if needed                 | 1       |                                |           |          |                      |                 |
|                   |               |   | Don't Know   | 1       |                                |           |          |                      |                 |
| JL2265            |               | Did you accomplish your primary purpose in using the                        | Yes  |         | Radio button, one-up vertical  | Single    | Y        | Skip Logic Group     | Accomplish Goa  |
|                   |               |   | No   | F       |                                |           |          |                      |                 |
|                   |               |   | Still Trying   | 1 -     |                                |           |          |                      |                 |

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|         |                        |   | SSA Retirement Estimator v4 CUSTOM QUESTION   |         |                               |                    |                 |                      |                          |
|---------|------------------------|---|---|---------|-------------------------------|--------------------|-----------------|----------------------|--------------------------|
| QID     | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special Instructions | CQ Label                 |
| BJL2266 | F                      | If you did not accomplish your primary purpose in using the<br>Retirement Estimator, please tell us why you were not able to  |   |         | Text area, no char limit      | Single             | N               | Skip Logic Group     | OE_Did not accomplish    |
|         |                        | do so.  |   |         |                               |                    |                 |                      | docompilori              |
| 3JL2267 |                        | SSA site today <b>prior</b> to arriving at the Retirement Estimator? (Please select all that apply)   | I had no difficulty navigating/browsing to the Retirement Estimator I had difficulty linding the links to the Retirement Estimator> I had difficulty because the links often-did not take me where I expected> I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | A       | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group     | Navigation<br>Experience |
| 3JL2268 | A                      | Other navigation difficulty> Please describe your navigation difficulty and identify where on the Social Security website this problem occurred   |   |         | Text area, no char limit      |                    | N               | Skip Logic Group     | Other Difficulty         |
| JL2269  |                        | Have you ever used the SSA Retirement Planner?  | Yes   |         | Radio button, one-up vertical | Single             | ¥               |                      | RE Planner               |
|         |                        |   | No  |         |                               |                    |                 |                      |                          |
|         |                        | Prior to visiting the Retirement Estimator, have you used any   | Don't know what that is Social Security's Online Retirement Planner   |         | Checkbox, one-up vertical     | Multi              | V               | Skip Logic Group     | Other Resources          |
|         |                        | of the following resources to prepare for your application for  | SSA Home Page   |         | Checkbox, One-up vertical     | iviuiti            | ı               | Skip Logic Group     | Other Resource           |
|         |                        | retirement? (Please select all that apply)  | The Online Social Security Statement in the my Social Security section  |         |                               |                    |                 |                      |                          |
|         |                        |   | Frequently Asked Questions (FAQ)  |         |                               |                    |                 |                      |                          |
|         |                        |   | Instructional video on the online application page  |         |                               |                    |                 |                      |                          |
|         |                        |   | Other resource on the SSA website   | Α       |                               |                    |                 |                      | 000                      |
|         | Α                      | Please describe what other resources you used to help prepare for your retirement application   |   |         | Text area, no char limit      |                    | N               |                      | OPS Other<br>Resources   |
| 3JL2270 |                        | What do you plan to do next in regard to getting answers<br>about your estimated retirement benefits?> What do you<br>plan to do next on the Social Security website to continue<br>your pre-retirement preparations? | Nothing, the Retirement Estimator provided what I needed  |         | Radio button, one-up vertical | Single             | Y               |                      | Do Next                  |
|         |                        |   | 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  |         |                               |                    |                 |                      |                          |
|         |                        |   | Other   | Α       |                               |                    |                 |                      |                          |
|         | A                      | Please describe what you plan to do next to continue your<br>pre-retirement preparation   |   |         | Text area, no char limit      |                    | N               |                      | OPS Do Next              |
| 3JL2271 |                        | What is your preferred language for conducting business with  | English   |         | Radio button, one-up vertical | Single             | ¥               | OPS Group            | Preferred langua         |
|         |                        | What is your preferred language for conducting business with the Social Security Administration?  | Spanish Spanish   |         |                               |                    |                 | · ·                  |                          |
|         |                        |   | Other, please specify   | A       |                               |                    |                 |                      |                          |
| 3JL2272 | A                      | Other preferred language  |   |         | Text field, <100 char         |                    | N               | OPS Group            | Other learned about      |
| JL2273  |                        | What is your age?   | Under 18  |         | Drop down, select one         | Single             | N               |                      | Age                      |
|         |                        |   | <del>18-20</del>  |         |                               |                    |                 |                      |                          |
|         |                        |   | 2 <del>1-30</del>   | İ       |                               |                    |                 |                      |                          |
|         |                        |   | <del>31-40</del>  |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>41-50</del>  |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>51-55</del>  |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>56</del><br><del>57</del>  |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>58</del>   |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>59</del>   |         |                               |                    |                 |                      |                          |
|         |                        |   | <del>60</del>   |         |                               |                    |                 |                      |                          |
|         |                        |   | Under 25  |         |                               |                    |                 |                      |                          |
|         |                        |   | 26 to 50  | -       |                               |                    |                 |                      |                          |
|         |                        |   | 51 to 55<br>56 to 60  | -       |                               |                    |                 |                      |                          |
|         |                        |   | 61  | 1       |                               |                    |                 |                      |                          |
|         |                        |   | 62<br>63  | 1       |                               |                    |                 |                      |                          |
|         | 1                      |   | 63  | 1       |                               |                    |                 |                      |                          |
|         | 1                      |   | 100   |         |                               |                    |                 |                      |                          |
|         |                        |   | 64  |         |                               |                    |                 |                      |                          |
|         |                        |   | 65<br>66 and over   |         |                               |                    |                 |                      |                          |

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|--|--|-----------|-------|----------------------|---|---------|--|--------------------|-----------------|----------------------|----------|
| BA3234  When do you line?  When  | None-dayana kac2   | QID       | Logic | <b>Ouestion Text</b> | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)                  | Single or<br>Multi | Required<br>Y/N | Special Instructions | CO Label |
| Advanced days and such of the control of the contro | All Address of the control of the co |           |       | •                    | 67 or older   |         | 7, |                    |                 | ,                    |          |
| Personal Accounts (Center of Controls of Center of Controls of Center of Controls of Center of Controls of Center of | February  February  February  Construction   | D 11 227/ |       | Where do you live?   |   |         | Dron down select one                     | Single             | N               | Skin Logic Group     | Location |
| - Pohnston Atell   |  |           | Label | Where do you live?   | (limited to 50 characters) 67-or-oilder Prefer not to answer Alabama Alaska Arizana Arkansas California Colorade Connecticut Delaware District of Columbia Florida Georgia Hawaii (daho Illinois Indiana Iowa Kansas Kentucky Louisiana Maryland Massachusetts Michigan Minnesota Mississippi Mississippi Mississippi Missouri Montana New-Jaresy New-York North-Carolina North-Dakota Orlino Delayaria Rhode Island South-Dakota Chile Oklahoma Oregon Pennsylvania Rhode Island South-Dakota Tennessee Fexas Utah Vermont Virginia Wassington West Virginia Wissensin Wyoming American-Gamaa North-Dakota Chile Oklahoma Oregon Pennsylvania Rhode Island South-Dakota Tennessee Fexas Utah Vermont Virginia Wassington West Virginia Wissensin Wyoming American-Gamaa Gueam North-Dakota Chale Us Yirginia Wissensin Wyoming American-Gamaa Gueam North-Mariana Islands Puerto Rice Us Virgin Islands Balor New-Dark Balor Northe-Dakota Chale Gueam North-Dakota Chale Gueam North-Mariana Islands Puerto Rice Us Virgin Islands Balor New-Dark | Skip to |  |                    |                 |                      |          |

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|                    |                        |   | SSA Retirement Estimator v4 CUSTOM QUESTIO  | ON LIST |                                  |                    |                 |                                      |                 |
|--------------------|------------------------|---|---|---------|----------------------------------|--------------------|-----------------|--------------------------------------|-----------------|
| QID                | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)                                      | Skip to | Type (select from list)          | Single or<br>Multi | Required<br>Y/N | Special Instructions                 | CQ Label        |
|                    |                        |   | Midway Atoll<br>Navassa Island<br>Palmyra Atoll<br>Serranilla Bank<br>Wake Island |         |                                  |                    |                 |                                      |                 |
| BJL2275            | _                      |   | Other - Please specify  | G       | Text field, <100 char            |                    | NI.             | Chin Logio Croup                     | Other Location  |
| BJL2276            |                        | Please specify where you live. What is the highest level of education you have completed? | No high galact  |         | Drop down, select one            | Single             |                 | Skip Logic Group<br>Skip Logic Group | Education       |
| <del>DJLZZ70</del> |                        |   | Some high school<br>  High school diploma or equivalent                           |         | <del>Drop down, select one</del> | Single             | 14              | <del>Skip Logic Group</del>          | Education       |
|                    |                        |   | 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   | X       |                                  |                    |                 |                                      |                 |
| BJL2277            | ×                      | Please specify the highest level of education you have completed.                         |   |         | Text field, <100 char            |                    | N               | Skip Logic Group                     | Other Education |

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Date: 10/6/2010

|     | SSA Retirement Estimator v4 CUSTOM QUESTION LIST |               |  |         |                         |                    |  |  |  |  |  |
|-----|--|---------------|--|---------|-------------------------|--------------------|--|--|--|--|--|
|     | Obia   |               |  |         |                         |                    |  |  |  |  |  |
| QID | Skip<br>Logic<br>Label                           | Question Text | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Single or<br>Multi |  |  |  |  |  |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

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|          |                        |  | SSA Retirement Estimator v3 CUSTOM QUESTIO                               | ON LIST      |  |                    |                 |                         |                              |
|----------|------------------------|--|--|--------------|--|--------------------|-----------------|-------------------------|------------------------------|
| QID      | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)                             | Skip to      | Type (select from list)                      | Single or<br>Multi | Required<br>Y/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 RE             |
|          |                        |  | 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  | _            |  |                    |                 |                         |                              |
| EDO0E040 |                        | Others In a war and a live and   | Other, please specify  | С            |  |                    |                 | ODG Green               |                              |
| EDO05316 | С                      | Other learned about  |  |              | Toyt field <100 char                         |                    | NI NI           | OPS Group               | Other learned                |
| EDO05317 |                        | Have you ever sought advice on retirement/financial  | Yes  | D            | Text field, <100 char  Drop down, select one | Single             | N<br>Y          | Skip Logic Group        | about<br>Sought Advice       |
| LD003317 |                        | planning or saving strategies?   | No   |              | Drop down, Select one                        | Sirigle            | '               | Skip Ługic Gruup        | Sought Advice                |
| EDO05318 | D                      | From what <b>source</b> have you sought advice on  | Family/Friend  |              | Checkbox, one-up vertical                    | Multi              | Υ               | Skip Logic Group        | Advice Source                |
|          | _                      | retirement/financial planning or saving strategies.  | Financial professional   |              |  |                    |                 |                         |                              |
|          |                        |  | 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                   |
|          |                        | Retirement Estimator?  | 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  |              |  |                    |                 |                         |                              |
| EDO05320 |                        | Did the Retirement Estimator help you decide at what age to  |  |              | Radio button, one-up vertical                | Single             | Υ               | Skip Logic Group        | Help Decision                |
|          |                        | claim benefits?  |  |              |  |                    |                 |                         |                              |
|          |                        |  | No   | $\bigcirc$ A |  | Cna                | anging to a sk  | ip logic questions      |                              |
|          | 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 help decide age to |
| EDO05321 |                        | At what <b>age do you plan</b> to file for benefits?   | 62   |              | Drop down, select one                        | Single             | Υ               | Skip Logic Group        | Age to File                  |
|          |                        |  | 63   |              |  |                    |                 | Change to Skip Logic so |                              |
|          |                        |  | 64   |              |  |                    |                 | that it can be a drop   |                              |
|          |                        |  | 65   |              |  |                    |                 | down question.          |                              |
|          |                        |  | 66   |              |  |                    |                 |                         |                              |
|          |                        |  | 67   |              |  |                    |                 |                         |                              |
|          |                        |  | 68   |              |  |                    |                 |                         |                              |
|          |                        |  | 69   |              |  |                    |                 |                         |                              |
|          |                        |  | 71 or older  |              |  |                    |                 |                         |                              |
|          |                        |  | Unsure   |              |  |                    |                 |                         |                              |
|          |                        |  | Other, please specify  | E            |  |                    |                 |                         |                              |
| 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 apport to file for reference the refere  | Műthis 12 months   |              | Dadia huttan ara un matical                  | Circula            | Y               |                         | Evenet to Elle               |
| EDU05323 |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years  |              | Radio button, one-up vertical                | Single             | Y               |                         | Expect to File               |
|          |                        |  | More than 3 but less than 6 years  |              |  | 1                  |                 |                         |                              |
|          |                        |  | More than 6 years  |              |  | 1                  |                 |                         |                              |
|          |                        |  | Don't Know   |              |  |                    | 1               |                         |                              |
| EDO05324 |                        | How do you plan to file for retirement benefits?   | I prefer to file my retirement application online                        |              | Radio button, one-up vertical                | Single             | Υ               |                         | How to File                  |
|          |                        |  | By telephone interview   |              |  |                    |                 |                         | ,                            |
|          |                        |  | Face-to-face in my local SSA field office                                |              |  | 1                  |                 |                         |                              |
|          |                        |  | Online with telephone or in-person assistance, if needed                 |              |  | 1                  |                 |                         |                              |
|          |                        |  | Don't Know   |              |  |                    |                 |                         |                              |
| EDO05325 |                        | Did you accomplish your primary purpose in using the   | Yes  |              | Radio button, one-up vertical                | Single             | Y               |                         | Accomplish Goal              |

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blue + -->: REWORDING

SSA Retirement Estimator v3 CUSTOM QUESTION LIST

|          |               |  | <u> </u>  |          |                               |           |          |                         |                  |
|----------|---------------|--|---|----------|-------------------------------|-----------|----------|-------------------------|------------------|
|          | Skip<br>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         |
| EDO05326 | F             | If you did not a second link you will not a second link you will not be second link yo | Still Trying  | F        | Total control of the Control  | Cin ole   | N        |                         | OE Did not       |
| ED005326 | _ F           | If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able t   |   |          | Text area, no char limit      | Single    | IN .     |                         | accomplish       |
|          |               | do so.   |   |          |                               |           |          |                         | docomplian       |
|          |               | How would you describe your navigation experience on the   | I had no difficulty navigating/browsing to the Retirement Estimator       |          | Radio button, one-up vertical | Multi     | Y        | OPS Group               | Navigation       |
|          |               | SSA site today <b>prior</b> to arriving at the Retirement Estimator?   | I had difficulty finding the links to the Retirement Estimator            |          |                               |           |          | ·                       | Experience       |
|          |               | (Please select all that apply)   | Links often did not take me where I expected                              |          |                               |           |          |                         |                  |
|          |               | please note the bolding of the word 'prior'  | I experienced technical difficulties (error messages, broken links, etc.) |          |                               |           |          |                         |                  |
|          |               | P P P P P P P P P P P P P P P P P P P  | I had a navigation difficulty not listed above:                           | Α        |                               |           |          |                         |                  |
|          | Α             | Other navigation difficulty  |   |          | Text field, <100 char         |           | N        | OPS Group               | Other Difficulty |
| EDO05327 |               | Have you ever used the SSA Retirement Planner?   | Yes   | _        | Radio button, one-up vertical | Single    | Y        |                         | RE Planner       |
|          |               |  | No<br>Don't know what that is   | _        |                               |           |          |                         |                  |
| 0005328  |               | What do you plan to do novt in regard to getting answers   | Nothing, the Retirement Estimator provided what I needed                  |          | Radio button, one-up vertical | Single    | Y        |                         | Do Next          |
| J-003328 |               | What do you plan to do next in regard to getting answers   | Call Social Security's 800 number   | $\dashv$ | radio button, one-up vertical | Sirigle   | l r      |                         | Do Next          |
|          |               |  | Call my local Social Security office                                      | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | Visit my local Social Security office                                     | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | Try finding the answers on the Social Security website                    | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | Try the Retirement Estimator again  | $\neg$   |                               |           |          |                         |                  |
|          |               |  | Don't Know  |          |                               |           |          |                         |                  |
| EDO06581 |               | What is your preferred language for conducting business wit  | h English   |          | Radio button, one-up vertical | Single    | Y        | OPS Group               | Preferred langua |
|          |               | the Social Security Administration?  | Spanish   |          |                               |           |          |                         |                  |
|          |               |  | Other, please specify   | A        |                               |           |          |                         |                  |
| EDO06582 | Α             | Other preferred language   |   |          | L                             |           |          | OPS Group               | Other learned    |
|          |               | Lun  | 11 1 40   |          | Text field, <100 char         | 0: 1      | N        |                         | about            |
| O05329   |               | What is your <b>age</b> ?  | Under 18  |          | Drop down, select one         | Single    | N        |                         | Age              |
|          |               |  | 18-20   | _        |                               |           |          |                         |                  |
|          |               |  | 21-30<br>31-40  | _        |                               |           |          |                         |                  |
|          |               |  | 41-50   | _        |                               |           |          |                         |                  |
|          |               |  | 51-55   | -        |                               |           |          |                         |                  |
|          |               |  |   |          |                               |           |          |                         |                  |
|          |               |  | 56<br>57  | _        |                               |           |          |                         |                  |
|          |               |  | 58  |          |                               |           |          |                         |                  |
|          |               |  | 59  |          |                               |           |          |                         |                  |
|          |               |  | 60  |          |                               |           |          |                         |                  |
|          |               |  | 61  |          |                               |           |          |                         |                  |
|          |               |  | 62<br>63  |          |                               |           |          |                         |                  |
|          |               |  | 63  | _        |                               |           |          |                         |                  |
|          |               |  | 64<br>65  | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | 66  | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | 67 or older   | $\dashv$ |                               |           |          |                         |                  |
|          |               |  | Prefer not to answer  | $\dashv$ |                               |           |          |                         |                  |
| O05330   |               | 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  |          |                               |           |          |                         |                  |
|          |               |  | Connecticut   | _        |                               |           |          |                         |                  |
|          |               |  | Delaware District of Columbia   |          |                               |           |          |                         |                  |
|          |               |  | Florida   | -        |                               |           |          |                         |                  |
|          |               |  | Georgia   |          |                               |           |          |                         |                  |
|          |               |  | Hawaii  |          |                               |           |          |                         |                  |
|          |               |  | Idaho   |          |                               |           |          |                         |                  |
|          |               |  | Illinois  |          |                               |           |          |                         |                  |
|          |               |  | Indiana   |          |                               |           |          |                         |                  |
|          |               |  | Iowa  |          |                               |           |          |                         |                  |
|          |               |  | Kansas  |          |                               |           |          |                         |                  |
|          |               |  | Kentucky  |          |                               |           |          |                         |                  |
|          |               |  | Louisiana   |          |                               |           |          |                         |                  |
|          |               |  | Maine   |          |                               |           |          |                         |                  |

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|          |       |   | SSA Retirement Estimator v3 CUSTOM QUESTIC | N 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        |
|          |       |   | Maryland                                   |         |                         |           |          |                         |                 |
|          |       |   | Massachusetts                              |         |                         |           |          |                         |                 |
|          |       |   | Michigan<br>Minnesota                      |         |                         |           |          |                         |                 |
|          |       |   | Mississippi                                |         |                         |           |          |                         |                 |
|          |       |   | Mississippi<br>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<br>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 <b>highest level of education</b> 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.  |  |         |                         |           |          |                         |                 |

Social Security Administration SSA Retirement Estimator v3

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MID: JU89h10NUtR9V44MIk9ldA==

pink: ADDITION

Date: 10/6/2010

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

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

Social Security Administration
SSA Retirement Estimator v3

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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<br>Y/N | Special Instructions |
|-----------------|----------------------|

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|          |                        |   | SSA Retirement Estimator v3 CUSTOM QUESTION   | ON LIST |                                 |                    |                 |  |                     |
|----------|------------------------|---|---|---------|---------------------------------|--------------------|-----------------|--|---------------------|
| QID      | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)         | Single or<br>Multi | Required<br>Y/N | Special Instructions   | CO Label            |
| ED005315 |                        | How did you first learn about the Retirement Estimator?   | Search engine   |         | Radio button, one-up vertical   | Single             |                 | OPS Group  | Learned about RE    |
| ED003315 |                        | 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 | C       | Radio Duttori, Orie-up Vertical | Sirigie            | , i             | OPS Group  | Learned about RE    |
| EDO05316 | С                      | Other learned about   | Other, prease speeny  |         | Text field, <100 char           |                    | N               | OPS Group  | Other learned about |
| EDO05317 |                        | Have you ever <b>sought advice</b> on retirement/financial planning or saving strategies?             | Yes<br>No   | D       | Drop down, select one           | Single             |                 | Skip Logic Group   | Sought Advice       |
| EDO05318 | D                      | From what <b>source</b> 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<br>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 some  | -       | Radio button, one-up vertical   | Single             | Y               |  | Assistance          |
| EDO05320 |                        | Did the Retirement Estimator <b>help you decide</b> at what age to claim benefits?                    | Yes<br>No   |         | Radio button, one-up vertical   | Single             | Y               |  | Help Decision       |
| EDO05321 |                        | At what <b>age do you plan</b> to file for benefits?  | 62<br>63<br>64<br>65<br>66<br>67<br>68<br>69<br>70<br>71 or older<br>Unsure<br>Other, please specify  | E       | Drop down, select one           | Single             |                 | Skip Logic Group<br>Change to Skip Logic so<br>that it can be a drop<br>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  Don't Know  |         | Radio button, one-up vertical   | Single             | Y               |  | How to File         |
| EDO05325 |                        | Did you accomplish your primary purpose in using the  | Yes<br>No<br>Still Trying   | F       | Radio button, one-up vertical   | Single             | Y               |  | Accomplish Goal     |

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blue + -->: REWORDING

## SSA Retirement Estimator v3 CUSTOM QUESTION LIST

|          |                        |  | 00/11/04/10/10/10/10/10/10/10/10/10/10/10/10/10/  | JN LIST |   |                    |                 |  |                       |
|----------|------------------------|--|---|---------|---|--------------------|-----------------|--|-----------------------|
| QID      | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)                     | Single or<br>Multi | Required<br>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. |   |         | Text area, no char limit                    | Single             | N               |  | OE_Did not accomplish |
| EDO05327 |                        | Have you ever used the SSA Retirement Planner?   | Yes<br>No<br>Don't know what that is  |         | Radio button, one-up vertical               | Single             | Y               |  | RE Planner            |
| 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  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?                                 |   | A       | Radio button, one-up vertical               | Single             | Y               | OPS Group  | Preferred langua      |
| EDO06582 | Α                      | Other preferred language   | Caller, process opcomy  |         |   |                    |                 | OPS Group  | Other learned         |
| EDO05329 |                        | What is your <b>age</b> ?  | Under 18<br>18-20<br>21-30<br>31-40   |         | Text field, <100 char Drop down, select one | Single             | N<br>N          |  | about<br>Age          |
|          |                        |  | 41-50<br>51-55<br>56<br>57  |         |   |                    |                 |  |                       |
|          |                        |  | 59<br>60<br>61<br>62<br>63  |         |   |                    |                 |  |                       |
|          |                        |  | 64<br>65<br>66<br>67 or older   |         |   |                    |                 |  |                       |
| EDO05330 |                        | Milane da veu live?  | Prefer not to answer  |         | Dran dayin calast and                       | Cinale             | NI              | Ckin Logio Croup   | Location              |
| EDO05330 |                        | Where do you live?   | Alabama<br>Alaska<br>Arizona<br>Arkansas<br>California  |         | Drop down, select one                       | Single             | N               | Skip Logic Group<br>Change to Skip Logic so<br>that it can be a drop<br>down question. | Location              |
|          |                        |  | Colorado Connecticut Delaware District of Columbia  |         |   |                    |                 |  |                       |
|          |                        |  | Florida<br>Georgia<br>Hawaii<br>Idaho<br>Illiinois  |         |   |                    |                 |  |                       |
|          |                        |  | ilindiana<br>Iowa<br>Kansas<br>Kentucky   |         |   |                    |                 |  |                       |
|          |                        |  | Louisiana<br>Maine<br>Maryland<br>Massachusetts   |         |   |                    |                 |  |                       |
|          |                        |  | Michigan<br>Minnesota<br>Mississippi<br>Missouri  |         |   |                    |                 |  |                       |
|          |                        |  | Montana   | 1       |   |                    |                 |  |                       |

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|   |                        |   | SSA Retirement Estimator v3 CUSTOM QUESTIO                | ON LIST |                         |                    |                 |                         |                 |
|---|------------------------|---|---|---------|-------------------------|--------------------|-----------------|-------------------------|-----------------|
| QID                                     | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)              | Skip to | Type (select from list) | Single or<br>Multi | Required<br>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<br>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<br>DO05332                      |                        | What is the <b>highest level of education</b> 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 |

Social Security Administration SSA Retirement Estimator v3

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pink: ADDITION

Date: 10/6/2010

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

| Required<br>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<br>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<br>Y/N | Special Instructions |
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|          |                        |   | SSA Retirement Estimator v3 CUSTOM QUESTIO   | ON LIST |                               |                    |                 |  |                        |
|----------|------------------------|---|--|---------|-------------------------------|--------------------|-----------------|--|------------------------|
| QID      | Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)   | Skip to | Type (select from list)       | Single or<br>Multi | Required<br>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<br>SSA publication<br>From my Annual Social Security Statement<br>Newspaper, magazine or other media  |         |                               |                    |                 |  |                        |
|          |                        |   | My employer or Human Resources department<br>My financial advisor<br>Word of mouth   |         |                               |                    |                 |  |                        |
|          |                        |   | Other, please specify  | С       |                               |                    |                 |  |                        |
| EDO05316 | С                      | Other learned about   |  |         | Text field, <100 char         |                    | N               | OPS Group  | Other learned<br>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 <b>source</b> have you sought advice on retirement/financial planning or saving strategies. | No<br>Family/Friend<br>Financial professional  |         | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group   | Advice Source          |
|          |                        |   | Internet Other   |         |                               |                    |                 |  |                        |
| EDO05319 |                        | Which statement best describes how you completed the<br>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 <b>help you decide</b> at what age to claim benefits?  |  |         | Radio button, one-up vertical | Single             | Y               |  | Help Decision          |
| EDO05321 |                        | At what <b>age do you plan</b> 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<br>Change to Skip Logic so<br>that it can be a drop<br>down question. | Age to File            |
| ED005000 |                        | Discount of the same that the file for her file   | Other, please specify  | E       | Total field at 00 above       |                    | N.              | Chin Lania Caran   | Other Are              |
| 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<br>No<br>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<br>Logic<br>Label | <b>Question Text</b>   | Answer Choices<br>(limited to 50 characters)  | Skip to |  | Single or<br>Multi | Required<br>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<br>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             | Υ               |                         | 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   |         | Than's battern, one up vertical              | Oigio              |                 | or o ordap              |                     |
|          |                        |  | Other, please specify   | Α       |  |                    |                 |                         |                     |
| EDO06582 | Α                      | Other preferred language   |   |         | T 1511 400 1                                 |                    |                 | OPS Group               | Other learned       |
| EDO05329 |                        | What is your <b>age</b> ?  | Under 18  |         | Text field, <100 char  Drop down, select one | Single             | N<br>N          |                         | <u>about</u><br>Age |
| LD003329 |                        | your age:  | 18-20   |         | Drop down, select one                        | Jingle             | i N             |                         | Age                 |
|          |                        | 21-30  |   |         |  |                    |                 |                         |                     |
|          |                        |  | 31-40   |         |  |                    |                 |                         |                     |
|          |                        |  | 41-50   |         |  |                    |                 |                         |                     |
|          |                        |  | 51-55   |         |  |                    |                 |                         |                     |
|          |                        |  | 56<br>57  |         |  |                    |                 |                         |                     |
|          |                        |  | 58  |         |  |                    |                 |                         |                     |
|          |                        |  | 59  |         |  |                    |                 |                         |                     |
|          |                        |  | 60  |         |  |                    |                 |                         |                     |
|          |                        |  | 61<br>62  |         |  |                    |                 |                         |                     |
|          |                        |  | 63  |         |  |                    |                 |                         |                     |
|          |                        |  | 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<br>Colorado  |         |  |                    |                 |                         |                     |
|          |                        |  | Connecticut   |         |  |                    |                 |                         |                     |
|          |                        |  | Delaware  |         |  |                    |                 |                         |                     |
|          |                        |  | District of Columbia  |         |  |                    |                 |                         |                     |
|          |                        |  | Florida   |         |  |                    |                 |                         |                     |
|          |                        |  | Georgia<br>Hawaii   |         |  |                    |                 |                         |                     |
|          |                        |  | Idaho   |         |  |                    |                 |                         |                     |
|          |                        |  | Illinois  |         |  |                    |                 |                         |                     |
|          |                        |  | Indiana   |         |  |                    |                 |                         |                     |
|          |                        |  | Iowa<br>Kansas  |         |  |                    |                 |                         |                     |
|          |                        |  | Kentucky  |         |  |                    |                 |                         |                     |
|          |                        |  | Louisiana   |         |  |                    |                 |                         |                     |
|          |                        |  | Maine   |         |  |                    |                 |                         |                     |
|          |                        |  | Maryland  |         |  |                    |                 |                         |                     |
|          |                        |  | Massachusetts Michigan  |         |  |                    |                 |                         |                     |
|          |                        |  | Minnesota   |         |  |                    |                 |                         |                     |
|          |                        |  | Mississippi   |         |  |                    |                 |                         |                     |
|          |                        |  | Missouri  |         |  |                    |                 |                         |                     |
|          |                        |  | Montana   |         |  |                    |                 |                         |                     |
|          |                        |  | Nebraska<br>Nebraska  |         |  |                    |                 |                         |                     |
|          |                        |  | Nevada<br>New Hampshire   |         |  |                    |                 |                         |                     |
|          |                        |  | ivew nampanie   |         |  |                    |                 |                         |                     |

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| QID Label Question Text (limited to 50 characters) Skip to Type (select from list) Multi    New Jersey   New Mexico   New York   North Carolina   North Dakota   Ohio   Oklahoma   Oregon   Pennsylvania   Rhode Island   South Carolina   South Carolina   South Dakota   Texas   Utah   Vermont   Virginia   Washington   West Virginia   Wisconsin   Wyoming   Words   Word | Required Special Instructions CQ Label |
|--|--|
| 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   |  |
| New York North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wyoming   |  |
| North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| North Dakota Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Ohio Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| Oklahoma Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Oregon Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| Pennsylvania Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Rhode Island South Carolina South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| South Dakota Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| Tennessee Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Texas Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Utah Vermont Virginia Washington West Virginia Wisconsin Wyoming   |  |
| Vermont Virginia Washington West Virginia Wisconsin Wyoming  |  |
| Virginia Washington West Virginia Wisconsin Wyoming  |  |
| Washington West Virginia Wisconsin Wyoming   |  |
| West Virginia Wisconsin Wyoming  |  |
| Wisconsin Wyoming  |  |
| Wyoming  |  |
|  |  |
|  |  |
| American Samoa Samoa   |  |
| Guam   |  |
| Northern Mariana Islands  Puerto Rico  |  |
| Puerio Fruc<br>US Virgin Islands   |  |
| Bajo Nuevo Bank  |  |
| Bajo view Baink Baker Island   |  |
| Howland Island   |  |
| Jarvis Island  |  |
| Johnston Atoll   |  |
| Kingman Reef   |  |
| Midway Atoli   |  |
| Navassa Island   |  |
| Palmyra Atoli  |  |
| 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                  |
| Some college, but no degree  | down question.                         |
| Associate's degree   |  |
| Bachelor's degree  |  |
| Master's degree  |  |
| Professional degree (MD, JD, etc)  |  |
| Doctorate degree (PhD) Perfor net transport  |  |
| Prefer not to answer Other, please specify X   |  |
| ED065333 X Please specify the highest level of education you have Text field, <100 char  | N Skip Logic Group Other Education     |
| rease specify the highest level of education you have completed.   | Skip Logic Group Other Education       |

Social Security Administration
SSA Retirement Estimator v3
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pink: ADDITION

MID: JU89N10NUTR9V44MIK9IGA= Date: 3/1/2008

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

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

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pink: ADDITION
blue + -->: REWORDING

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

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

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| QID<br>ED005312 | Skip<br>Logic<br>Label | Question Text<br>What is your preferred speaking language?  | Answer Choices (limited to 50 characters)  English Spanish Other, please specify  | Skip to | Type (select from list)                      | Single or<br>Multi<br>Single | Required<br>Y/N<br>¥ | Special Instructions<br>Skip Logic Group   | CQ Label<br>Pref. Language |
|-----------------|------------------------|---|---|---------|--|------------------------------|----------------------|--|----------------------------|
| EDO05313        | В                      | What other language do you speak?   | L.  | + -     | Text field. <100 char                        |                              | N                    | Skip Logic Group   | Other Lang.                |
| ED005313        | A                      | What other SSA internet service would you like to see in<br>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 R            |
| EDO05316        | С                      | Other learned about   |   |         |  |                              |                      | OPS Group  | Other learned              |
| EDO05317        |                        | Have you ever <b>sought advice</b> on retirement/financial planning or saving strategies?   | Yes   | D       | Text field, <100 char  Drop down, select one | Single                       | N<br>Y               | Skip Logic Group   | about<br>Sought Advice     |
| EDO05318        | D                      | planning or saving stategies? From what <b>source</b> have you sought advice on retirement/financial planning or saving strategies. | No 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 <b>help you decide</b> at what age to claim benefits?  | Yes   |         | Radio button, one-up vertical                | Single                       | Y                    |  | Help Decision              |
| EDO05321        |                        | At what <b>age do you plan</b> to file for benefits?  | No 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<br>Change to Skip Logic so<br>that it can be a drop<br>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?  | 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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Nebraska

## SSA Retirement Estimator v3 CUSTOM QUESTION LIST Logic Label Single or Multi Required Y/N **Answer Choices** QID Skip to **Question Text** (limited to 50 characters) Type (select from list) Special Instructions CQ Label Don't Know EDO05325 Did you accomplish your primary purpose in using the Retirement Estimator? Radio button, one-up vertical Single Accomplish Goal Still Trying EDO05326 If you did not accomplish your primary purpose in using the Retirement Estimator, please tell us why you were not able to OE\_Did not Text area, no char limit Single N accomplish EDO05327 Have you ever used the SSA Retirement Planner? Radio button, one-up vertical RE Planner Single Yes 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 Do Next about your estimated retirement? 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 EDO05329 What is your age? Under 18 Drop down, select one Single N Age 18-20 21-30 31-40 41-50 51-55 67 or older Prefer not to answer EDO05330 Where do you live? Alabama Drop down, select one Single Skip Logic Group Location Alaska Change to Skip Logic so Arizona that it can be a drop down question. Arkansas 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 QUESTI    | ON LIST |                         |                    |                 |                         |                 |
|---------|------------------------|--|--|---------|-------------------------|--------------------|-----------------|-------------------------|-----------------|
| QID     | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Single or<br>Multi | Required<br>Y/N | Special Instructions    | CQ Label        |
|         |                        |  | Nevada                                       |         |                         |                    |                 |                         |                 |
|         |                        |  | New Hampshire                                |         |                         |                    |                 |                         |                 |
|         |                        |  | New Jersey                                   |         |                         |                    |                 |                         |                 |
|         |                        |  | New Mexico                                   |         |                         |                    |                 |                         |                 |
|         |                        |  | New York                                     |         |                         |                    |                 |                         |                 |
|         |                        |  | North Carolina                               | -       |                         |                    |                 |                         |                 |
|         |                        |  | North Dakota                                 |         |                         |                    |                 |                         |                 |
|         |                        |  | Ohio<br>Oklahoma                             |         |                         |                    |                 |                         |                 |
|         |                        |  | Oregon                                       | -       |                         |                    |                 |                         |                 |
|         |                        |  | Pennsylvania Pennsylvania                    | -       |                         |                    |                 |                         |                 |
|         |                        |  | Rhode Island                                 | 1       |                         |                    |                 |                         |                 |
|         |                        |  | 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<br>Baker Island              | -       |                         |                    |                 |                         |                 |
|         |                        |  | Howland Island                               | -       |                         |                    |                 |                         |                 |
|         |                        |  | Jarvis Island                                | -       |                         |                    |                 |                         |                 |
|         |                        |  | Johnston Atoll                               | -       |                         |                    |                 |                         |                 |
|         |                        |  | Kingman Reef                                 | 1       |                         |                    |                 |                         |                 |
|         |                        |  | Midway Atoll                                 | -       |                         |                    |                 |                         |                 |
|         |                        |  | Navassa Island                               | 1       |                         |                    |                 |                         |                 |
|         |                        |  | Palmyra Atoll                                |         |                         |                    |                 |                         |                 |
|         |                        |  | Serranilla Bank                              | 1       |                         |                    |                 |                         |                 |
|         |                        |  | Wake Island                                  | 1       |                         |                    |                 |                         |                 |
|         |                        |  | Other - Please specify                       | G       |                         |                    |                 |                         |                 |
| 005331  | G                      | Please specify where you live.                             |  |         | Text field, <100 char   |                    | N               | Skip Logic Group        | Other Location  |
| 005332  |                        | 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   |                 |
|         |                        |  | 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                         |         |                         |                    |                 |                         |                 |
| DO05333 | х                      | Please specify the highest level of education you have     | Other, please specify                        | Х       | Text field, <100 char   |                    | N               | Skip Logic Group        | Other Educati   |
|         |                        |  |  |         |                         |                    | I N             | ISKID I ODIC GROUD      | Uther Education |

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Date: 3/1/2008

|            |                |   | SSA Retirement Estimator v3 CUSTOM QUESTIC | ON LIST |                               |                    |
|------------|----------------|---|--|---------|-------------------------------|--------------------|
|            | Skip           |   | Answer Choices                             |         |                               | Single or          |
| QID        | Logic<br>Label | Question Text                             | (limited to 50 characters)                 | Skip to | Type (select from list)       | Single or<br>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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pink: Addition

Date: 3/1/2008

|            | SSA Retirement Estimator v3 CUSTOM QUESTION LIST |  |   |         |                               |                    |  |  |  |  |
|------------|--|--|---|---------|-------------------------------|--------------------|--|--|--|--|
|            |  |  |   |         |                               |                    |  |  |  |  |
|            | Skip   |  |   |         |                               |                    |  |  |  |  |
| QID        | Logic<br>Label                                   | Question Text                                | Answer Choices (limited to 50 characters) | Skip to | Type (select from list)       | Single or<br>Multi |  |  |  |  |
| SPED005312 |  | ¿Cuál es su preferencia de idioma al hablar? | Inglés                                    |         | Radio button, one-up vertical | Single             |  |  |  |  |

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

EDO05324

How do you plan to file for retirement benefits?

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Don't Know

By telephone interview

I prefer to file my retirement application online

Face-to-face in my local SSA field office
Online with telephone or in-person assistance, if needed

SSA Retirement Estimator v3 CUSTOM QUESTION LIST Skip Logic **Answer Choices** Single or Required Label **Question Text** (limited to 50 characters) Skip to Type (select from list) Multi ÝΝ Special Instructions CQ Label EDO05312 What is your preferred speaking language? English Radio button, one-up vertical Single Skip Logic Group Pref. Language Spanish Other, please specify В Text field. <100 char EDO05313 What other language do you speak? Skip Logic Group Other Lang. What other SSA internet service would you like to see in Multi Skip Logic Group EDO05314 File a Claim Checkbox, one-up vertical SSA Services Spanish? (check all that apply) File an Appeal Apply for Medicare Subsidy Business Services Online EDO05315 OPS Group How did you first learn about the Retirement Estimator? Radio button, one-up vertical Learned about RE Search engine Single 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 С Other, please specify EDO05316 С Other learned about OPS Group Other learned Text field, <100 char about EDO05317 Have you ever sought advice on retirement/financial Yes Drop down, select one Single Skip Logic Group Sought Advice planning or saving strategies? EDO05318 From what source have you sought advice on Family/Friend Checkbox, one-up vertical Skip Logic Group Advice Source retirement/financial planning or saving strategies. Financial professional Internet EDO05319 Which statement best describes how you completed the completed it for myself without assistance from anyone else Radio button, one-up vertical Single Assistance Retirement Estimator? I completed it for myself with assistance from a friend or family member completed it for myself with assistance from a professional Other EDO05320 Did the Retirement Estimator help you decide at what age to Yes Radio button, one-up vertical Help Decision Single claim benefits? EDO05321 At what age do you plan to file for benefits? Drop down, select one Single Age to File Change to Skip Logic so that it can be a drop down question. 71 or older Other, please specify EDO05322 Please specify the age at which you intend to file for benefits. Text field, <100 char N Skip Logic Group Other Age EDO05323 Within 12 months When do you expect to file for retirement benefits? Radio button, one-up vertical Expect to File Single 1 to 3 years More than 3 but less than 6 years More than 6 years

Radio button, one-up vertical

Single

How to File

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|          |                        |  | SSA Retirement Estimator v3 CUSTOM QUESTION   | ON LIST |                                 |                    |                 |   |                         |
|----------|------------------------|--|---|---------|---------------------------------|--------------------|-----------------|---|-------------------------|
| QID      | Skip<br>Logic<br>Label | <b>Question Text</b>   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)         | Single or<br>Multi | Required<br>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<br>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 <b>do next</b> in regards to getting answers   | Don't know what that is<br>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 <b>age</b> ?  | Under 18<br>18-20   | -       | Drop down, select one           | Single             | N               |   | Age                     |
|          |                        |  | 21-30   |         |                                 |                    |                 |   |                         |
|          |                        |  | 31-40   |         |                                 |                    |                 |   |                         |
|          |                        |  | 41-50   |         |                                 |                    |                 |   |                         |
|          |                        |  | 51-55   |         |                                 |                    |                 |   |                         |
|          |                        |  | 56<br>57  |         |                                 |                    |                 |   |                         |
|          |                        |  | 58  |         |                                 |                    |                 |   |                         |
|          |                        |  | 59  | 1       |                                 |                    |                 |   |                         |
|          |                        |  | 60  |         |                                 |                    |                 |   |                         |
|          |                        |  | 61  |         |                                 |                    |                 |   |                         |
|          |                        |  | 62  |         |                                 |                    |                 |   |                         |
|          |                        |  | 63<br>64  | -       |                                 |                    |                 |   |                         |
|          |                        |  | 65  | -       |                                 |                    |                 |   |                         |
|          |                        |  | 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<br>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  | 1       |                                 |                    |                 |   |                         |
|          |                        |  | Idaho   |         |                                 |                    |                 |   |                         |
|          |                        |  | Illinois  |         |                                 |                    |                 |   |                         |
|          |                        |  | Indiana   | -       |                                 |                    |                 |   |                         |
|          |                        |  | lowa<br>Kansas  | 1       |                                 |                    |                 |   |                         |
|          |                        |  | Kentucky  | 1       |                                 |                    |                 |   |                         |
|          |                        |  | Louisiana   |         |                                 |                    |                 |   |                         |
|          |                        |  | Maine   |         |                                 |                    |                 |   |                         |
|          |                        |  | Maryland  |         |                                 |                    |                 |   |                         |
|          |                        |  | Massachusetts   | -       |                                 |                    |                 |   |                         |
|          |                        |  | Michigan<br>Minnesota   | -       |                                 |                    |                 |   |                         |
|          |                        |  | Mississippi   |         |                                 |                    |                 |   |                         |
|          |                        |  |   |         |                                 |                    |                 |   |                         |
|          |                        |  | Missouri  |         |                                 |                    |                 |   |                         |
|          |                        |  | Missouri Montana Nebraska   |         |                                 |                    |                 |   |                         |

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|          |                        |  | SSA Retirement Estimator v3 CUSTOM QUESTIC   | N LIST  |                          |                    |                 |                                      |                 |
|----------|------------------------|--|--|---------|--------------------------|--------------------|-----------------|--------------------------------------|-----------------|
| QID      | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list)  | Single or<br>Multi | Required<br>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<br>North Carolina                   |         |                          |                    |                 |                                      |                 |
|          |                        |  | North Dakota                                 |         |                          |                    |                 |                                      |                 |
|          |                        |  | Ohio   |         |                          |                    |                 |                                      |                 |
|          |                        |  | Oklahoma                                     |         |                          |                    |                 |                                      |                 |
|          |                        |  | Oregon                                       |         |                          |                    |                 |                                      |                 |
|          |                        |  | Pennsylvania                                 |         |                          |                    |                 |                                      |                 |
|          |                        |  | Rhode Island                                 |         |                          |                    |                 |                                      |                 |
|          |                        |  | South Carolina                               |         |                          |                    |                 |                                      |                 |
|          |                        |  | South Dakota                                 |         |                          |                    |                 |                                      |                 |
|          |                        |  | Tennessee                                    |         |                          |                    |                 |                                      |                 |
|          |                        |  | Texas  |         |                          |                    |                 |                                      |                 |
|          |                        |  | Utah   |         |                          |                    |                 |                                      |                 |
|          |                        |  | Vermont                                      |         |                          |                    |                 |                                      |                 |
|          |                        |  | Virginia                                     |         |                          |                    |                 |                                      |                 |
|          |                        |  | Washington<br>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<br>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 |

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Date: 3/1/2008

| SSA Retirement Estimator v3 CUSTOM QUESTION LIST |               |   |                            |         |                               |           |  |  |
|--|---------------|---|----------------------------|---------|-------------------------------|-----------|--|--|
|  |               |   |                            |         |                               |           |  |  |
|  | Skip<br>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    |  |  |

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

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Date: 3/1/2008

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|            |                        |  | SSA Retirement Estimator v                   | 3 CUSTOM QUESTION LIST |                               |                    |
|------------|------------------------|--|--|------------------------|-------------------------------|--------------------|
| QID        | Skip<br>Logic<br>Label | Ouestion Text                                | Answer Choices<br>(limited to 50 characters) | Skip to                | Type (select from list)       | Single or<br>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     |

blue + -->: REWORDING

pink: ADDITION

|                        |   | SSA Retirement Estimator v4 CUS  | TOM QUEST | TION LIST                     |                    |                 |                         |                       |
|------------------------|---|--|-----------|-------------------------------|--------------------|-----------------|-------------------------|-----------------------|
| Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)   | Skip to   | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label              |
|                        | 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 | C2        | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE      |
| С                      | Please specify how you first learned about the Retirement Estimator.                            |  |           | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about   |
| C2                     | Please specify the website that led you to the Retirement Estimator                             |  |           | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website            |
|                        | How often do you use the Retirement Estimator?  | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day  |           | Radio button, one-up vertical | Single             | Y               |                         | Frequency             |
|                        | When do you expect to file for retirement benefits?   | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know   |           | Radio button, one-up vertical | Single             | Y               |                         | Expect to File        |
|                        | 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           |
|                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today? | Yes  |           | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal       |
| F                      | What other benefit estimates were you trying to obtain?   |  |           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish |

|                        |   | SSA Retirement Estimator v4 CUSTC   | M QUEST     | TION LIST                     |                    |                 |                         |                            |
|------------------------|---|---|-------------|-------------------------------|--------------------|-----------------|-------------------------|----------------------------|
| Skip<br>Logic<br>Label | Ouestion Text   | Answer Choices<br>(limited to 50 characters)  | Skip to     | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                   |
|                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?  | , , ,   | Omp to      | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings    |
|                        | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   | No  | G           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings   |
|                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | -<br>-<br>- | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience   |
|                        | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  | That a navigation difficulty not isseed above.  |             | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty           |
|                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement? (Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A           | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources            |
|                        | Please describe what other resources you used to help prepare for your retirement application   | rua not use any resources to prepare  |             | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources     |
|                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  | Nothing, the Retirement Estimator provided what I needed  |             | Radio button, one-up vertical | Single             | Y               |                         | Do Next                    |
|                        |   | 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   |             |                               |                    |                 |                         |                            |
|                        |   | Other   | Α           |                               |                    |                 |                         |                            |
|                        | Please describe what you plan to do next to continue your pre-retirement preparation  |   |             | Text area, no char limit      |                    | N               |                         | OPS Do Next                |
|                        | Have you registered for a <i>my</i> Social Security account?  | Yes   |             | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account      |
| A                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?   | No I am unaware of what a <i>my</i> Social Security account is.   | A           | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account |
|                        |   | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.  |             |                               |                    |                 |                         |                            |

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pink: ADDITION

blue + -->: REWORDING

10/6/2010

|                        |   | SSA Retirement Estimator v4 CUSTO   | M QUEST | ION LIST                  |                    |                 |                         |                                      |
|------------------------|---|---|---------|---------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
| Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)   | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
|                        | ·   | I am currently trying to register for a <i>my</i> Social Security account.  | ·       | ,                         |                    |                 |                         | ·                                    |
|                        |   |   |         |                           |                    |                 |                         |                                      |
|                        |   | I do not want a <i>my</i> Social Security account.  Other (please specify):   | AA      |                           |                    |                 |                         |                                      |
| AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account. | Other (please specify).   | AA      | Text field, no char limit | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
|                        | What is your <b>age</b> ?   | Under 25 Under 30 30 to 39 40 to 49 50 to 54 55 to 59 60 to 61 62 to 63 64 to 65 25 to 54 55 to 59 60 to 61 62 to 63 64 to 65 65 to 60 66 to 61 62 to 63 64 to 65 |         | Drop down, select one     | Single             | N               |                         | Age                                  |

blue + -->: REWORDING

pink: ADDITION

|                        |   | SSA Retirement Estimator v4 CUST   | FOM QUEST | TION LIST                     |                    |                 |                         |                       |
|------------------------|---|--|-----------|-------------------------------|--------------------|-----------------|-------------------------|-----------------------|
| Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)   | Skip to   | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label              |
|                        | 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 | C2        | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE      |
| С                      | Please specify how you first learned about the Retirement Estimator.                            |  |           | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about   |
| C2                     | Please specify the website that led you to the Retirement Estimator                             |  |           | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website            |
|                        | How often do you use the Retirement Estimator?  | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day  |           | Radio button, one-up vertical | Single             | Y               |                         | Frequency             |
|                        | When do you expect to file for retirement benefits?   | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know   |           | Radio button, one-up vertical | Single             | Y               |                         | Expect to File        |
|                        | 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           |
|                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today? | Yes  |           | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal       |
| F                      | What other benefit estimates were you trying to obtain?   |  |           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish |

|                        |   | SSA Retirement Estimator v4 CUSTO   | M QUEST     | TION LIST                     |                    |                 |                         |                            |
|------------------------|---|---|-------------|-------------------------------|--------------------|-----------------|-------------------------|----------------------------|
| Skip<br>Logic<br>Label | Ouestion Text   | Answer Choices<br>(limited to 50 characters)  | Skip to     | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                   |
|                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record?  | · ' '   | Cmp to      | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings    |
|                        | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?   | No  | G           | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Not based on earnings   |
|                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | -<br>-<br>A | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience   |
|                        | Please describe your navigation difficulty and identify where on the Social Security website this problem occurred  | That a navigation uniculty not used above.  |             | Text area, no char limit      |                    | N               | Skip Logic Group        | Other Difficulty           |
|                        | Prior to visiting the Retirement Estimator, have you used any of the following resources to prepare for your application for retirement? (Please select all that apply) | Social Security's Online Retirement Planner SSA Home Page The Online Social Security Statement in the my Social Security section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare   | A           | Checkbox, one-up vertical     | Multi              | Y               | Skip Logic Group        | Other Resources            |
|                        | Please describe what other resources you used to help prepare for your retirement application   | rua not use any resources to prepare  |             | Text area, no char limit      |                    | N               |                         | OPS Other<br>Resources     |
|                        | What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  | Nothing, the Retirement Estimator provided what I needed  |             | Radio button, one-up vertical | Single             | Y               |                         | Do Next                    |
|                        |   | 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   |             |                               |                    |                 |                         |                            |
|                        |   | Other   | Α           |                               |                    |                 |                         |                            |
|                        | Please describe what you plan to do next to continue your pre-retirement preparation  |   |             | Text area, no char limit      |                    | N               |                         | OPS Do Next                |
|                        | Have you registered for a <i>my</i> Social Security account?  | Yes   |             | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Have mySSA<br>Account      |
| A                      | What is the <u>main reason</u> you have not registered for a<br>my Social Security account?   | No I am unaware of what a <i>my</i> Social Security account is.   | A           | Radio button, one-up vertical | Single             | Y               | Skip Logic              | Why Not Have mySSA Account |
|                        |   | I tried to register for a <i>my</i> Social Security account, but was unsuccessful.  |             |                               |                    |                 |                         |                            |

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pink: ADDITION 10/6/2010

|                        |   | SSA Retirement Estimator v4 CUSTO   | M QUEST | TION LIST                 |                    |                 |                         |                                      |
|------------------------|---|---|---------|---------------------------|--------------------|-----------------|-------------------------|--------------------------------------|
| Skip<br>Logic<br>Label | Question Text   | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)   | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                             |
|                        |   | I am currently trying to register for a my Social Security account.   |         |                           |                    |                 |                         |                                      |
|                        |   | I do not want a <i>my</i> Social Security account.  |         |                           |                    |                 |                         |                                      |
|                        |   | Other (please specify):   | AA      |                           |                    |                 |                         |                                      |
| AA                     | Please tell us why you have not registered for a <i>my</i> Social Security account. |   |         | Text field, no char limit | Single             | N               | Skip Logic              | OPS_Why Not<br>Have mySSA<br>Account |
|                        | What is your <b>age</b> ?   | Under 25 26 to 50 51 to 55 56 to 60 61 62 63 64 65 66 67 and over 25 to 54 55 to 59 60 to 61 62 to 63 64 to 65 66 and over Prefer not to answer |         | Drop down, select one     | Single             | N               |                         | Age                                  |

Social Security Administration
SSA Retirement Estimator v4
MID: dwYM9t9olVlhBdRVhFxhlw4C
Date: 10/6/2010

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| Date: | 10/6/201               | U  | blue +>: REWORDING   |            |                               |                    |                 |                         |                         |
|-------|------------------------|--|--|------------|-------------------------------|--------------------|-----------------|-------------------------|-------------------------|
|       |                        |  | SSA Retirement Estimator v4 CUSTOM   | QUESTION L | IST                           |                    |                 |                         |                         |
| QID   | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)   | Skip to    | Type (select from list)       | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                |
|       |                        |  | 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 | C2         | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Learned about RE        |
|       | С                      | Please specify how you first learned about the Retirement Estimator.   |  |            | Text field, <100 char         |                    | N               | Skip Logic Group        | Other learned about     |
|       | C2                     | Please specify the website that led you to the Retirement Estimator  |  |            | Text field, <100 char         |                    | N               | Skip Logic Group        | OE Website              |
|       |                        | ·  | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day  |            | Radio button, one-up vertical | Single             | Y               |                         | Frequency               |
|       |                        | When do you expect to file for retirement benefits?  | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know   |            | Radio button, one-up vertical | Single             | Y               |                         | Expect to File          |
|       |                        |  | 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             |
|       |                        | Did the Retirement Estimator provide you with all the benefit estimates you were seeking today?                          | Yes  | F          | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | Accomplish Goal         |
|       | F                      | What other benefit estimates were you trying to obtain?  |  |            | Text area, no char limit      | Single             | N               | Skip Logic Group        | OE_Did not accomplish   |
|       |                        | Do you believe the retirement estimate(s) provided to you was/were based on your entire Social Security earnings record? | Yes  |            | Radio button, one-up vertical | Single             | Y               | Skip Logic Group        | RE Based on<br>Earnings |

Social Security Administration
SSA Retirement Estimator v4
MID: dwYM9t9olVlhBdRVhFxhlw4C
Date: 10/6/2010

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| SSA Retirement Estimator v4 CUSTOM ( | QUESTION LIST |
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| estimate(s) washere not based on your entire Social Security commings record?  A Please describe your revigation experience on the Social Security washers to expect at their capit.  Indid difficulty because the links do not also make the links do not also not so do not not so local to links also make the links do not also not so local lin |     |       |  |   |         |                               |        |   |                     |                       |
|--|-----|-------|--|---|---------|-------------------------------|--------|---|---------------------|-----------------------|
| Peace exactile your recipitation of filling to a ferrite recipitation of filling to a | OID | Logic | Question Text  |   | Skip to | Type (select from list)       |        |   |                     | CO Label              |
| Security earnings record?    Now would you describe your newtgeston experience on Part Process select all that apply)   Now process select all that apply   Now proc | ¥.5 |       |  | (miniou to oo onaraotoro)   | Ciap to |                               |        |   |                     | OE_Not based of       |
| bits SSA districtory (Process period and final apply)  In add difficulty because the links, etc.)  In add difficulty because the links of discrete interior  In add discrete interior of discrete |     |       | estimate(s) was/were not based on your entire Social   |   |         |                               |        |   |                     |                       |
| Peece describe our negation difficulty and identify because I experienced broken difficulties (error negation difficulty and identify before on the Social Security whose the product of the following resources to prepare for your application for element (Pienes elect all that apply whose reports to prepare for your application for element (Pienes elect all that apply the following resources to prepare for your application for element (Pienes elect all that apply produced in the produced of the following resources to prepare for your application for element (Pienes elect all that apply produced in the produced of the following resources to prepare for your preference of the produced of the pro   |     |       | the SSA site today <b>prior</b> to arriving at the Retirement  |   |         | Checkbox, one-up vertical     | Multi  | Y | Skip Logic Group    |                       |
| Research describe, your navigation, officulty and identify process on the Social Security verballs this problem of the Social Security verballs this problem.  A Peace describe, your navigation, officulty and identify processor on the Social Security verballs this problem.  A Peace of each pure navigation, officulty and identify problem.  Processor of the Social Security verballs this problem.  SSA Home Page.  SSA Home Page.  The Online Social Security Statement in the my Social Security security.  Foregraph 65 your processor of the Social Security verballs to your plan to do next on the Social Security website for center preparations?  A Peace describe what you plan to do next on continue your pre-retirement preparations?  Only Social Security website for center preparations?  A Peace describe what you plan to do next to continue your pre-retirement preparations?  Only Social Security website for center preparations?  Only Social Security website for center preparations?  Only International preparations?  Only Social Security website for center preparations?  The Reterment Estimator again for the center preparation for the cent |     |       |  | I had difficulty because the links did not take me where I expected |         |                               |        |   |                     |                       |
| A Please describe your navigation difficulty and identify where on the Social Security with the problem of the Country of the Politicul Action for retirement? (Please select all that apply)  Find the property of the Politicul Action for retirement? (Please select all that apply)  Find provided with a publication for retirement? (Please select all that apply)  Find provided with a publication for retirement? (Please select all that apply)  Find provided with a publication for retirement? (Please select all that apply)  Find provided with a publication for retirement? (Please select all that apply)  Find provided with a publication for retirement provided with a publication page (The Country Scholarse (FAC))  Find provided with a publication page (The Country Scholarse (FAC))  Find provided with a publication page (The Country Scholarse (FAC))  Find provided with a publication page (The Country Scholarse (FAC))  Find provided with a publication page (The Country Scholarse (FAC))  Find provided with a publication provided with a needed with a publication page (The Country Scholarse (FAC))  Find provided with a publication provided with a needed with a needed with a publication provided with a needed with |     |       |  | messages, broken links, etc.)                                       |         |                               |        |   |                     |                       |
| where on the Social Security website this problem occurred  Prior to valing the Reterment Estimator, have you used any of the following resources to priors for your retrement? (Researce solver at that apply)  SSA Home Page The Chine Social Security Statement in the my Social Security Prior to valing the Reterment Estimator provided what in redded  A Please describe what other resources you used to help prepare for your retrement application What do you plan to do next on the Social Security statement in resources to prepare  What do you plan to do next on the Social Security website to continue your pre-retrement preparations?  Call Social Security is flore may be continued by the social Security website to continue your pre-retrement preparations?  Call Social Security strongers on the Social Security website  Try this retrement Estimator again Don't Know  A Please describe what you plan to do next on the Social Security strongers on the Social Security website Try this retrement preparation  Other  A Please describe what you plan to do next on the social Security strongers on the Social Security website Try this retrement preparation  Other  A Please describe what you plan to do next to continue Journ pre-element preparation  Other  A Please describe what you plan to do next to continue Social Security account?  Visit my local Social Security website Try the Retirement Estimator again Don't Know A Please feel it as why you have not registered for a my Social Security account.  A Mats the main reason you have not registered for a my Social Security account.  A Please this is the main reason you have not registered for a my Social Security account.  A Please feel it as why you have not registered for a my Social Security account.  A Please feel it as why you have not registered for a my Social Security account.  A Please feel it as why you have not registered for a my Social Security account.  A Please feel it as why you have not registered for a my Social Security account.  A Please feel it as why you have not |     |       | Discount of the second of the second idea of the   | I had a navigation difficulty not listed above:                     | Α       | Total and a state Back        |        |   | Obia Lauria Ossassa | Other Different       |
| any of the following resources to prepare for your application for reterement? (Please select all that apply) The Online Social Security Statement in the my Social Security Security Security The Online Social Security Statement in the my Social Security Security Security The Online Social Security Statement in the my Social Security Security Security The Online Social Security Statement in the my Social Security Security Security Statement in the my Social Security Security Security Statement in the my Social Security Statement in the my Social Security Statement Security Security Statement Security Statement Security Security Statement Security Security Statement Security Security Statement Security Security Statement Security Secu |     | A     | where on the Social Security website this problem  |   |         | l ext area, no char limit     |        | N | Skip Logic Group    | Other Difficulty      |
| application for retirement? (Please select all that apply) Fine Online Social Security Statement in the my Social Security Section Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website I did not use any resources to prepare I did not use any social Security account? I did not use any social Security account. I did not use any social Security acc |     |       | Prior to visiting the Retirement Estimator, have you used  |   |         | Checkbox, one-up vertical     | Multi  | Y | Skip Logic Group    | Other Resource        |
| Fequenty Asked Questions (FAQ) Instructional video on the critine application page Other resource vyou used to help prepare for your retirement application What of you plan to do next on the Social Security website to continue your pre-retirement preparations?  Nothing, the Retirement Estimator provided what I needed  Nothing, the Retirement Estimator provided what I needed  Radio button, one-up vertical  Radio button, one-up vertical  Single  Y  Do Next  Orber (and your pre-retirement preparations)  Call Social Security s800 number Call my local Social Security office Infry finding the answers on the Social Security verbsite Try the Retirement Estimator again Don't Know  Please describe what you plan to do next to continue your pre-retirement preparation  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Please describe what you plan to do next to continue your pre-retirement preparation  A  Radio button, one-up vertical  Single  Y  Skip Logic Why Not Haw my Social Security account?  Test area, no char limit  N  OPS Do Nex  Preserved A  Radio button, one-up vertical  Single  Y  Skip Logic Why Not Haw my Social Security account?  Test letd, no char limit  Single  N  Skip Logic OPS Why Not Haw my Social Security account.  A  Please tell us why you have not registered for a my Social Security account.  A  Please tell us why you have not registered for a my Social Security account.  A  Please tell us why you have not registered for a my Social Security account.  A  Please tell us why you have not registered for a my Social Security account |     |       | lapplication for retirement? (Please select all that apply)  |   |         |                               |        |   |                     |                       |
| Instructional video on the online application page Other resource on the SSA website A Please describe what other resources you used to help prepare for your retirement application What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  Nothing, the Retirement Estimator provided what I needed  Call Social Security 800 number Call my local Social Security office Visit my local Social Security office Tyry the Retirement Estimator again Other  A Please describe what you plan to do next to continue your pre-retirement preparation  Nothing, the Retirement Estimator provided what I needed  Radio button, one-up vertical Single Y Do Next  Do Next  Single Y Do Next  Original Security website Tyry the Retirement Estimator gain Don't Know Other A Please describe what you plan to do next to continue your pre-retirement preparation  N OPS Do Next  OPS Do Next  A What is the main reason you have not registered for a my Social Security account?  No A What is the main reason you have not registered for a my Social Security account?  No A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security procount.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Security account.  A Please tell us wity you have not registered for a my Social Securi |     |       | трения ( 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1   |   |         |                               |        |   |                     |                       |
| Other resource on the SSA website Idd not use any resources to prepare Inding the Retirement Estimator provided what I needed Inding the Retirement Estimator provided what I needed Inding the Retirement preparations?  Call Social Security 800 number Call my local Social Security office Inding the answers on the Social Security website Inding the answers on the Social Security account   Indication of the Social Security account on the Social Security account on the Social Security account.  Indication of the Social Security account on the Social Security account.  Indication of the Social Security account.   |     |       |  |   |         |                               |        |   |                     |                       |
| Figure 2   Figure 2   Figure 3   Figure 3   Figure 4   Figure 3   Figure 4    |     |       |  |   | -       |                               |        |   |                     |                       |
| A Please describe what other resources you used to help prepare for or your retirement application  What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  Call Social Security 800 number Call my local Social Security office Viet my local Social Security office Viet my local Social Security office Try the Retirement Estimator provided what I needed  Call social Security office Viet my local Social Security office Viet my local Social Security office Try the Retirement Estimator again  Don't Know  Other  A Please describe what you plan to do next to continue your pre-retirement preparation  A Please describe what you plan to do next to continue your pre-retirement preparation  A What is the main reason you have not registered for a my Social Security account?  A What is the main reason you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  A Please fell us why you have not registered for a my Social Security account.  |     |       |  |   | - A     |                               |        |   |                     |                       |
| What do you plan to do next on the Social Security website to continue your pre-retirement preparations?  Call Social Security 800 number Call my local Social Security office Ty finding the answers on the Social Security website Ty finding the answers on the Social Security website Ty the Retirement Estimator again Onth Know  A Please describe what you plan to do next to continue your pre-retirement preparation  A What is the main reason you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security in the registered for a my Social Security in the registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A A Please tell us why you have not registered for a my Social Security account.  A Text field, no char limit Single N Skip Logic OPS_Why N Have mySSA Account.  A Please tell us why you have not registered for a my Social Security account.   |     | Α     | Please describe what other resources you used to help  | I did not use any resources to prepare                              |         | Text area, no char limit      |        | N |                     | OPS Other             |
| website to continue your pre-retirement preparations?  Call Social Security office  Call my local Social Security office  Visit my local Social Security office  Try finding the answers on the Social Security website  Try the Retirement Estinator again  Other  A Please describe what you plan to do next to continue your pre-retirement preparation  A Please feel us why you have not registered for a my Social Security account.  I am unaware of what a my Social Security account.  I tied to register for a my Social Security account.  I do not want a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  I do not want a my Social Security account.  Other (Desce specify):  A Text field, no char limit Single N Skip Logic OPS_Why No Have most registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  Other (Desce specify):  A Text field, no char limit Single N Skip Logic OPS_Why No Have my SSA Account.  A Please tell us why you have not registered for a my Social Security account.  Other (Desce specify):  A Text field, no char limit Single N Skip Logic OPS_Why No Have my SSA Account.  A Text field, no char limit Single N Skip Logic OPS_Why No Have my SSA Account.  A Please tell us why you have not registered for a my Social Security account.   |     |       |  |   |         |                               |        |   |                     |                       |
| Call my local Social Security office Visit my local Social Security website Try finding the answers on the Social Security website Try the Retirement Estinator again Don't Know Don't Know A Please describe what you plan to do next to continue your pre-retirement preparation No A What is the main reason you have not registered for a my Social Security account; I tied to register for a my Social Security account, but was unsuccessful.  AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Please tell us why you have not registered for a my Social Security account. AA Pleas |     |       |  | Nothing, the Retrement Estimator provided what i needed             |         | Radio button, one-up vertical | Single | Y |                     | Do Next               |
| Visit my local Social Security office   Try finding the answers on the Social Security website   Try finding the answers on the Social Security website   Try the Retirement Estimator again   Don't Know   A      |     |       |  |   |         |                               |        |   |                     |                       |
| Try finding the answers on the Social Security website Try the Retirement Estimator again Don't Know Other A Please describe what you plan to do next to continue your pre-retirement preparation  A Please describe what you plan to do next to continue your pre-retirement preparation  Text area, no char limit N OPS Do Nex  Radio button, one-up vertical Single Y Skip Logic Have mySSA Account  No A Radio button, one-up vertical Single Y Skip Logic Why Not Have mySSA Account  No Interest or a my Social Security account?  Interest or egister for a my Social Security account, but was unsuccessful.  In am currently trying to register for a my Social Security account.  I do not want a my Social Se |     |       |  |   |         |                               |        |   |                     |                       |
| Try the Retirement Estimator again Don't Know Other A Please describe what you plan to do next to continue your pre-retirement preparation  Text area, no char limit N OPS Do Nex Padio button, one-up vertical A What is the main reason you have not registered for a my Social Security account? It field to register for a my Social Security account.  It field to register for a my Social Security account.  I do not want a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Text field, no char limit Single N Skip Logic OPS Why Not Have my SSA Account AA ACCOUNT ACCOUNT AA ACCOUNT ACCOUNT AA ACCOUNT ACCOUNT AA ACCOUNT AA ACCOUNT ACCOUNT AA ACCOUNT ACCOUNT AA ACCOUNT ACCOUNT AA ACCOUNT ACCOUN |     |       |  |   |         |                               |        |   |                     |                       |
| Don't Know Other  A Please describe what you plan to do next to continue your pre-retirement preparation  Have you registered for a my Social Security account?  A What is the main reason you have not registered for a my Social Security account?  I tried to register for a my Social Security account, but was unsuccessful.  I am currently trying to register for a my Social Security account.  I do not want a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  A Please tell us why you have not registered for a my Social Security account.  |     |       |  |   |         |                               |        |   |                     |                       |
| A Please describe what you plan to do next to continue your pre-retirement preparation    Radio button, one-up vertical   Single   Y   Skip Logic   Have mySSA Account   |     |       |  |   |         |                               |        |   |                     |                       |
| No   No   No   No   No   No   No   No  |     |       |  | Other   | Α       |                               |        |   |                     |                       |
| Have you registered for a my Social Security account?  A What is the main reason you have not registered for a my Social Security account?  I am unaware of what a my Social Security account is.  I tried to register for a my Social Security account.  I am currently trying to register for a my Social Security account.  I do not want a my Social Security account.  I do not want a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.  AA Please tell us why you have not registered for a my Social Security account.   |     | A     |  |   |         | Text area, no char limit      |        | N |                     | OPS Do Next           |
| A What is the main reason you have not registered for a my Social Security account?  I am unaware of what a my Social Security account is.  I tried to register for a my Social Security account, but was unsuccessful.  I am currently trying to register for a my Social Security account.  I do not want a my Social Security account.  Other (please specify):  AA  Please tell us why you have not registered for a my Social Security account.  AA  Please tell us why you have not registered for a my Social Security account.  Text field, no char limit Single N Skip Logic OPS_Why Not Have mySSA Account.  OPS_Why Not Have mySSA Account.   |     |       | Have you registered for a <i>my</i> Social Security account?   | Yes   |         | Radio button, one-up vertical | Single | Υ | Skip Logic          | Have mySSA<br>Account |
| my Social Security account?  I tried to register for a my Social Security account, but was unsuccessful.  I am currently trying to register for a my Social Security account.  I do not want a my Social Security account.  Other (please specify):  AA  Please tell us why you have not registered for a my Social Security account.  Text field, no char limit Single N Skip Logic OPS_Why No Have mySSA Account.  OPS_Why No Have mySSA Account.  |     |       | Marking the control of the control o | No  | Α       | Dediction and account of      | O'mele |   | Objectively         | Marie Alexada         |
| unsuccessful.  I am currently trying to register for a my Social Security account.  I do not want a my Social Security account.  Other (please specify):  AA  Please tell us why you have not registered for a my Social Security account.  Text field, no char limit Single N Skip Logic OPS_Why No Have mysSA Account.  OPS_Why No Have mysSA Account.   |     | A     |  |   |         | Radio button, one-up vertical | Single | Y | Skip Logic          | mySSA Accour          |
| I do not want a my Social Security account.  Other (please specify):  AA  Please tell us why you have not registered for a my Social Security account.  AA  Please tell us why you have not registered for a my Social Security account.  Text field, no char limit Single N Skip Logic OPS_Why Not Have mySSA Account.  |     |       |  | unsuccessful.   |         |                               |        |   |                     |                       |
| AA Please tell us why you have not registered for a my Social Security account.  Other (please specify):  AA Text field, no char limit Single N Skip Logic OPS_Why No Have mySSA Account Account No.   |     |       |  |   |         |                               |        |   |                     |                       |
| AA Please tell us why you have not registered for a my Social Security account.  Text field, no char limit Single N Skip Logic OPS_Why No Have mySSA Account   |     |       |  | other (nlease specify):   | ΔΔ.     |                               |        |   |                     |                       |
| What is your age? Under 25 Drop down, select one Single N Age  |     | AA    | Please tell us why you have not registered for a my<br>Social Security account.  | очно-цивов эрсину.  | AA      | Text field, no char limit     | Single | N | Skip Logic          | Have mySSA            |
|  |     |       | What is your age?  | Under 25  |         | Drop down, select one         | Single | N |                     | Age                   |

Social Security Administration SSA Retirement Estimator v4 MID: dwYM9t9olVlhBdRVhFxhlw4C

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

pink: ADDITION

Date: 10/6/2010

|     | SSA Retirement Estimator v4 CUSTOM QUESTION LIST |               |   |         |                         |                    |                 |                         |          |  |  |
|-----|--|---------------|---|---------|-------------------------|--------------------|-----------------|-------------------------|----------|--|--|
| QID | Skip<br>Logic<br>Label                           | Question Text | Answer Choices<br>(limited to 50 characters)          | Skip to | Type (select from list) | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label |  |  |
|     |  |               | 51 to 55<br>56 to 60<br>61<br>62                      |         |                         |                    |                 |                         |          |  |  |
|     |  |               | 64<br>65<br>66<br>67 and over<br>Prefer not to answer |         |                         |                    |                 |                         |          |  |  |

Social Security Administration
SSA Retirement Estimator v4
MID: dwYM9t9olVlhBdRVhFxhlw4C
Date: 10/6/2010

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

pink: ADDITION

| SSA Retirement Estimator v4 CUSTOM QUESTION LIST | SSA Retirement Estimator v4 COSTOM QUESTION LIST |
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|     |                        |   | SSA Retirement Estimator V4 COSTOM Qu   | 220110112 |                               |                              |                 |   |                          |
|-----|------------------------|---|---|-----------|-------------------------------|------------------------------|-----------------|---|--------------------------|
| QID | Skip<br>Logic<br>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)       | Single or<br>Multi<br>Single | Required<br>Y/N | Special<br>Instructions<br>Skip Logic Group | CQ Label                 |
|     |                        |   | 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 | C2        | Radio button, one-up vertical | Single                       | Y               | Skip Logic Group                            | Learned about RE         |
|     |                        | Please specify how you first learned about the Retirement Estimator.  |   |           | Text field, <100 char         |                              | N               | Skip Logic Group                            | Other learned about      |
|     | C2                     | Please specify the website that led you to the Retirement<br>Estimator  |   |           | Text field, <100 char         |                              | N               | Skip Logic Group                            | OE Website               |
|     |                        |   | This was the first time Every few months or less often Monthly Weekly Several times a week Daily/more than once a day   |           | Radio button, one-up vertical | Single                       | Y               |   | Frequency                |
|     |                        | When do you expect to file for retirement benefits?   | Within 12 months 1 to 3 years More than 3 but less than 6 years 6 years or more Don't Know  |           | Radio button, one-up vertical | Single                       | Y               |   | Expect to File           |
|     |                        |   | 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              |
|     |                        | Did you accomplish your primary purpose in using the<br>Retirement Estimator? Did the Retirement Estimator<br>provide you with all the benefit estimates you were<br>seeking today?               | Yes  No Still Trying  | F<br>F    | Radio button, one-up vertical | Single                       | Y               | Skip Logic Group                            | Accomplish Goal          |
|     | F                      | If you did not accomplish your primary purpose in using<br>the Retirement Estimator, please tell us why you were not<br>able to do so. What other benefit estimates were you<br>trying to obtain? |   |           | Text area, no char limit      | Single                       | N               | Skip Logic Group                            | OE_Did not<br>accomplish |
|     |                        | Do you believe the retirement estimate(s) provided to you<br>was/were based on your entire Social Security earnings<br>record?  | Yes   | G         | Radio button, one-up vertical | Single                       | Y               | Skip Logic Group                            | RE Based on<br>Earnings  |

Social Security Administration SSA Retirement Estimator v4 MID: dwYM9t9olVlhBdRVhFxhlw4C Date: 10/6/2010

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|-------|------------------------|--|---|---------|---------------------------|--------------------|-----------------|-------------------------|-----------------------------|
|       |                        |  | SSA Retirement Estimator v4 CUSTOM QUE  | STION L | IST                       |                    |                 |                         |                             |
| QID   | Skip<br>Logic<br>Label | Question Text  | Answer Choices<br>(limited to 50 characters)  | Skip to | Type (select from list)   | Single or<br>Multi | Required<br>Y/N | Special<br>Instructions | CQ Label                    |
|       | G                      | Please explain why you think that the retirement estimate(s) was/were not based on your entire Social Security earnings record?                              |   |         | Text area, no char limit  | Single             | N               | Skip Logic Group        | OE_Not based on<br>earnings |
|       |                        | How would you describe your navigation experience on the SSA site today <b>prior</b> to arriving at the Retirement Estimator? (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 I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: | A       | Checkbox, one-up vertical | Multi              | Y               | Skip Logic Group        | Navigation<br>Experience    |
|       | А                      | Please describe your navigation difficulty and identify where on the Social Security website this problem  |   |         | Text area, no char limit  |                    | N               | Skip Logic Group        | Other Difficulty            |

Social Security Administration SSA Retirement Estimator v4 MID: dwYM9t9olVlhBdRVhFxhlw4C 10/6/2010

Date:

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nk: ADDITION

Prior to visiting the Retirement Estimator, have you used Social Security's Online Retirement Planner

blue + -->: REWORDING

## SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label **Answer Choices** Single or Required Special **Question Text** (limited to 50 characters) Y/N QID Skip to Type (select from list) Multi Instructions CQ Label BJL2254 How did you first learn about the Retirement Estimator? Search engine Single Learned about RE Radio button, one-up vertical Linked from another website C2 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 BJL2255 С Other learned about Please specify how you first learned kip Logic Group Other learned about the Retirement Estimator. Text field, <100 char Ν about How often do you use the Retirement Estimator? is was the first time Radio button, one-up vertical Single Frequency veral times a week aily/more than once a day BJL2263 When do you expect to file for retirement benefits? Within 12 months Radio button, one-up vertical Single Expect to File 1 to 3 years More than 3 but less than 6 years More than 6 years 6 years or more Don't Know BJL2264 How do you plan to file for retirement benefits? I prefer to file my retirement application online How to File Radio button, one-up vertical Single By telephone interview Face-to-face in my local SSA field office Online with telephone or in-person assistance, if needed Don't Know BJL2265 Radio button, one-up vertical Did you accomplish your primary purpose in using the Single Skip Logic Group Accomplish Goal Yes Still Trying BJL2266 Text area. no char limit OE Did not If you did not accomplish your primary purpose in using Sinale Skip Logic Group the Retirement Estimator, please tell us why you were not accomplish able to do so. **BJL2267** How would you describe your navigation experience on Multi Navigation Checkbox, one-up vertical Skip Logic Group the SSA site today **prior** to arriving at the Retirement Experience I had no difficulty navigating/browsing to the Retirement Estimator Estimator? (Please select all that apply) I had difficulty finding the links to the Retirement Estimator I had difficulty because the links did not take me where I expected I had difficulty because I experienced technical difficulties (error messages, broken links, etc.) I had a navigation difficulty not listed above: BJL2268 Please describe your navigation difficulty and identify Text area, no char limit Other Difficulty Skip Logic Group where on the Social Security website this problem

Checkbox, one-up vertical

Multi

Skip Logic Group Other Resources

Social Security Administration
SSA Retirement Estimator v4
MID: dwYM9t9olVIhBdRVhFxhlw4C
Date: 10/6/2010

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pink: ADDITION

67 and over
Prefer not to answer

blue + -->: REWORDING

## SSA Retirement Estimator v4 CUSTOM QUESTION LIST Skip Logic Label Single or Multi Required Y/N **Answer Choices** Special QID (limited to 50 characters) Skip to Type (select from list) Instructions CQ Label **Question Text** any of the following resources to prepare for your SSA Home Page application for retirement? (Please select all that apply) The Online Social Security Statement in the my Social Security Frequently Asked Questions (FAQ) Instructional video on the online application page Other resource on the SSA website Please describe what other resources you used to help MAD0043084 Text area, no char limit OPS Other Resources prepare for your retirement application BJL2270 Nothing, the Retirement Estimator provided what I needed Do Next What do you plan to do next on the Social Security Single Radio button, one-up vertical website to continue your pre-retirement preparations? 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 Other MAD0043085 OPS Do Next Please describe what you plan to do next to continue Text area, no char limit Ν your pre-retirement preparation BJL2273 What is your age? Under 25 26 to 50 Drop down, select one Sinale N Age 51 to 55 56 to 60 61 62 63 64 65

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MID: p00ldwE4ssR1MA9UUtZ5Ng4C

pink: Addition

Date: 10/6/2010

|     |                        |               | SSA Retirement Estimator v4 CUSTOM QUESTIC   | ON LIST |                         |                    |  |
|-----|------------------------|---------------|--|---------|-------------------------|--------------------|--|
|     | Obia                   |               |  |         |                         |                    |  |
| QID | Skip<br>Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Single or<br>Multi |  |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

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|     |                |               | SSA Retirement Estimator v4 CUSTOM QUESTION  | LIST    |                         |
|-----|----------------|---------------|--|---------|-------------------------|
|     | Skip           |               |  |         |                         |
| QID | Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) |

| Single or<br>Multi | Required<br>Y/N | Special Instructions |
|--------------------|-----------------|----------------------|

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|------------------------|---------------|--|---------|-------------------------|--------------------|-----------------|
|                        |               | SSA Retirement Estimator v4 CUSTOM QUESTION LIST   |         |                         |                    |                 |
| Skip<br>Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters)   | Skip to | Type (select from list) | Single or<br>Multi | Required<br>Y/N |



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|------------------------|---------------|--|---------|-------------------------|--------------------|-----------------|
|                        |               | SSA Retirement Estimator v4 CUSTOM QUESTION LIST   |         |                         |                    |                 |
| Skip<br>Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters)   | Skip to | Type (select from list) | Single or<br>Multi | Required<br>Y/N |



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pink: Addition

Date: 10/6/2010

|     |                        |               | SSA Retirement Estimator v4 CUSTOM QUESTIC   | ON LIST |                         |                    |  |
|-----|------------------------|---------------|--|---------|-------------------------|--------------------|--|
|     | Obia                   |               |  |         |                         |                    |  |
| QID | Skip<br>Logic<br>Label | Question Text | Answer Choices<br>(limited to 50 characters) | Skip to | Type (select from list) | Single or<br>Multi |  |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

Social Security Administration SSA Retirement Estimator v4 MID: p00ldwE4ssR1MA9UUtZ5Ng4C

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|     |               |               | SSA Retirement Estimator v4 CUSTOM QUESTION | ON LIST |                         |           |   |
|-----|---------------|---------------|---|---------|-------------------------|-----------|---|
|     | Skip<br>Logic |               | Answer Choices                              |         |                         | Single or |   |
| QID | Label         | Question Text | (limited to 50 characters)                  | Skip to | Type (select from list) | Multi     | i |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

Social Security Administration SSA Retirement Estimator v4 MID: p00ldwE4ssR1MA9UUtZ5Ng4C

Date: 10/6/2010

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|     |               |               | SSA Retirement Estimator v4 CUSTOM QUESTION | ON LIST |                         |           |   |
|-----|---------------|---------------|---|---------|-------------------------|-----------|---|
|     | Skip<br>Logic |               | Answer Choices                              |         |                         | Single or |   |
| QID | Label         | Question Text | (limited to 50 characters)                  | Skip to | Type (select from list) | Multi     | i |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

Social Security Administration SSA Retirement Estimator v4 MID: p00ldwE4ssR1MA9UUtZ5Ng4C

Date: 10/6/2010

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pink: ADDITION

| SSA Retirement Estimator v4 CUSTOM QUESTION LIST |               |               |                            |         |                         |           |   |  |
|--|---------------|---------------|----------------------------|---------|-------------------------|-----------|---|--|
|  | Skip<br>Logic |               | Answer Choices             |         |                         | Single or |   |  |
| QID  | Label         | Question Text | (limited to 50 characters) | Skip to | Type (select from list) | Multi     | i |  |

| Required<br>Y/N | Special Instructions |
|-----------------|----------------------|

Social Security Administration
SSA Retirement Estimator v3
MID: AshNI5IMspIFJJMYA9c9JA==
Date: 10/6/2010

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|                  |               |   | SSA Retirement Estimator v3 CUSTOM QUESTI  | ON LIST |                               |           |          |                         |  |
|------------------|---------------|---|--|---------|-------------------------------|-----------|----------|-------------------------|--|
|                  | Skip<br>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                            |
|                  |               |   |  |         | Text field, <100 char         | 0: 1      | N        | 01: 1 : 0               | about                                    |
| EDO05317         |               | Have you ever sought advice on retirement/financial   | Yes  | D       | Drop down, select one         | Single    | Y        | Skip Logic Group        | Sought Advice                            |
| ED00F040         |               | planning or saving strategies?  | No<br>Family/Exiand  |         | Chaelthou and war atiant      | No. de:   | V        | Chin Logio Carrer       | Advise Com                               |
| EDO05318         | D             | From what <b>source</b> have you sought advice on retirement/financial planning or saving strategies. | Family/Friend  | +       | Checkbox, one-up vertical     | Multi     | Y        | Skip Logic Group        | Advice Source                            |
|                  |               | letirement/inaricial planning of saving strategies.   | Financial professional   | +       |                               |           |          |                         |  |
|                  |               |   | 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                               |
| ED003319         |               | Retirement Estimator?   |  |         | Radio button, one-up vertical | Sirigie   | 1        |                         | Assistance                               |
|                  |               | Total Smith Estimated :   | 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 <b>help you decide</b> at what age to claim benefits?                    |  |         | Radio button, one-up vertical | Single    | Y        | Skip Logic Group        | Help Decision                            |
|                  |               |   | No   | A       |                               |           |          |                         |  |
| CQLiv001008<br>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 help<br>decide age to<br>claim |
| EDO05321         |               | At what age do you plan to file for benefits?   | 62   |         | Drop down, select one         | Single    | Υ        | Skip Logic Group        | Age to File                              |
|                  |               |   | 63   |         |                               | _         |          | Change to Skip Logic so |  |
|                  |               |   | 64   |         |                               |           |          | that it can be a drop   |  |
|                  |               |   | 65   |         |                               |           |          | down question.          |  |
|                  |               |   | 66   |         |                               |           |          |                         |  |
|                  |               |   | 67   |         |                               |           |          |                         |  |
|                  |               |   | 68   |         |                               |           |          |                         |  |
|                  |               |   | 69   |         |                               |           |          |                         |  |
|                  |               |   | 70   |         |                               |           |          |                         |  |
|                  |               |   | 71 or older  |         |                               |           |          |                         |  |
|                  |               |   | Unsure   | _       |                               |           |          |                         |  |
|                  |               |   | Other, please specify  | E       | 7 15 11 100 1                 |           |          | 01: 1 : 0               | 0.1                                      |
| 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  | F       | Radio button, one-up vertical | Single    | T .      |                         | Accomplish Go                            |
|                  |               |   | No   |         |                               |           |          |                         |  |

Social Security Administration
SSA Retirement Estimator v3
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blue + -->: REWORDING

## SSA Retirement Estimator v3 CUSTOM QUESTION LIST

|              | Skip<br>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                 |
| <b>4</b>     |               | <b>4</b>  | 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 <b>prior</b> to arriving at the Retirement Estimator? |  |         | Checkbox, one-up vertical               | Multi     | Υ        | OPS Group               | Navigation<br>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       |   |           |          |                         |                          |
|              |               |   | 56<br>57   | -       |   |           |          |                         |                          |
|              |               |   | 58   | +       |   |           |          |                         |                          |
|              |               |   | 59   | 1       |   |           |          |                         |                          |
|              |               |   | 60   | 1       |   |           |          |                         |                          |
|              |               |   | 61   |         |   |           |          |                         |                          |
|              |               |   | 62   |         |   |           |          |                         |                          |
|              |               |   | 63   | 1       |   |           |          |                         |                          |
|              |               |   | 64   | 4       |   |           |          |                         |                          |
|              |               |   | 65<br>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   |         |   |           |          |                         |                          |
|              |               |   | Colorado Connecticut   | -       |   |           |          |                         |                          |
|              |               |   | Delaware   |         |   |           |          |                         |                          |
|              |               |   | District of Columbia   | 1       |   |           |          |                         |                          |
|              |               |   | Florida  |         |   |           |          |                         |                          |
|              |               |   | Georgia  |         |   |           |          |                         |                          |
|              |               |   | Hawaii   |         |   |           |          |                         |                          |
|              |               |   | Idaho  |         |   |           |          |                         |                          |
|              |               |   | Illinois   |         |   |           |          |                         |                          |
|              |               |   | Indiana  |         |   |           |          |                         |                          |
|              |               |   | lowa<br>Kansas   | 1       |   |           |          |                         |                          |
|              |               |   | Kentucky   |         |   |           |          |                         |                          |
|              |               |   |  | _       |   |           |          |                         |                          |

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|          | SSA Retirement Estimator v3 CUSTOM QUESTION LIST |   |  |         |                         |           |          |   |                 |
|----------|--|---|--|---------|-------------------------|-----------|----------|---|-----------------|
|          |  |   |  |         |                         |           |          |   |                 |
|          |  |   |  |         |                         |           |          |   |                 |
|          | Skip<br>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<br>Maine                                 |         |                         |           |          |   |                 |
|          |  |   | Maryland   |         |                         |           |          |   |                 |
|          |  |   | Massachusetts                                      |         |                         |           |          |   |                 |
|          |  |   | Michigan   |         |                         |           |          |   |                 |
|          |  |   | Minnesota  |         |                         |           |          |   |                 |
|          |  |   | Mississippi<br>Missouri                            |         |                         |           |          |   |                 |
|          |  |   | Montana  |         |                         |           |          |   |                 |
|          |  |   | Nebraska   |         |                         |           |          |   |                 |
|          |  |   | Nevada   |         |                         |           |          |   |                 |
|          |  |   | New Hampshire<br>New Jersey                        |         |                         |           |          |   |                 |
|          |  |   | New Mexico   |         |                         |           |          |   |                 |
|          |  |   | New York   |         |                         |           |          |   |                 |
|          |  |   | North Carolina                                     |         |                         |           |          |   |                 |
|          |  |   | North Dakota                                       |         |                         |           |          |   |                 |
|          |  |   | Ohio<br>Oklahoma                                   |         |                         |           |          |   |                 |
|          |  |   | Oregon   |         |                         |           |          |   |                 |
|          |  |   | Pennsylvania                                       |         |                         |           |          |   |                 |
|          |  |   | Rhode Island<br>South Carolina                     |         |                         |           |          |   |                 |
|          |  |   | South Carolina<br>South Dakota                     |         |                         |           |          |   |                 |
|          |  |   | Tennessee  |         |                         |           |          |   |                 |
|          |  |   | Texas  |         |                         |           |          |   |                 |
|          |  |   | Utah   |         |                         |           |          |   |                 |
|          |  |   | Vermont<br>Virginia                                |         |                         |           |          |   |                 |
|          |  |   | Washington   |         |                         |           |          |   |                 |
|          |  |   | West Virginia                                      |         |                         |           |          |   |                 |
|          |  |   | Wisconsin  |         |                         |           |          |   |                 |
|          |  |   | Wyoming American Samoa                             |         |                         |           |          |   |                 |
|          |  |   | Guam   |         |                         |           |          |   |                 |
|          |  |   | Northern Mariana Islands                           |         |                         |           |          |   |                 |
|          |  |   | Puerto Rico  |         |                         |           |          |   |                 |
|          |  |   | US Virgin Islands<br>Bajo Nuevo Bank               |         |                         |           |          |   |                 |
|          |  |   | Baker Island                                       |         |                         |           |          |   |                 |
|          |  |   | Howland Island                                     |         |                         |           |          |   |                 |
|          |  |   | Jarvis Island                                      |         |                         |           |          |   |                 |
|          |  |   | Johnston Atoll<br>Kingman Reef                     |         |                         |           |          |   |                 |
|          |  |   | Midway Atoll                                       |         |                         |           |          |   |                 |
|          |  |   | Navassa Island                                     |         |                         |           |          |   |                 |
|          |  |   | Palmyra Atoli                                      |         |                         |           |          |   |                 |
|          |  |   | Serranilla Bank<br>Wake Island                     |         |                         |           |          |   |                 |
|          |  |   | Other - Please specify                             | G       |                         |           |          |   |                 |
|          | G  | Please specify where you live.                                    |  |         | Text field, <100 char   |           | N        | Skip Logic Group                              | Other Location  |
| EDO05332 |  | What is the <b>highest level of education</b> you have completed? | No high school                                     |         | Drop down, select one   | Single    | N        | Skip Logic Group                              | Education       |
|          |  |   | Some high school High school diploma or equivalent |         |                         |           |          | Change to Skip Logic so 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 completed. |  |         | Text field, <100 char   |           | N        | Skip Logic Group                              | Other Education |
|          |  | completed.  |  |         |                         |           |          |   |                 |

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Date: 10/6/2010

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

| Required<br>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<br>Y/N | Special Instructions |
|-----------------|----------------------|