**Looking Ahead: How Should Social Security Serve You?**

|  |  |  |  |
| --- | --- | --- | --- |
| **BEFORE YOU START:** | | | |
| **Do you currently receive, or have you applied for Social Security benefits of any kind in the last 5 years?** | | | |
| **Mark 🗷 one answer.** | | | |
| 🞏 | **Yes 🡪** | **STOP!** | You do not need to complete this survey. Please leave the rest of the survey blank and return it in the enclosed envelope with only this box marked. Thank you for your time. |
| 🞏 | **No 🡪** | **CONTINUE READING.** | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ABOUT OUR SURVEY** | | | | |
| **To prepare for the future, Social Security needs your help! This survey asks about planning to file for retirement benefits, your expectations for good service, your preference for contacting Social Security, and what kinds of services you think we should have available. The survey should take about 15 minutes to finish.** | | | | |
| * Answer all questions as directed. You may be told to skip over some questions. When that happens, you will see an arrow with a note telling you what question to answer next: | | | | |
| Example: | 🞏 Yes | |
|  | **🗷** No 🡺 **SKIP to Question 1.** | |
| **INSTRUCTIONS FOR MARKING YOUR ANSWERS** | | | | |
| * Use a pen with blue or black ink or a number 2 pencil. | | | * Make no stray marks. | |
| * Do not use a pen with ink that soaks through the paper. | | | * Keep all entries within the appropriate boxes. | |
| **GETTING READY FOR RETIREMENT** | | | | |

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

|  |  |
| --- | --- |
| **Mark 🗷 one answer.** | |
| 🞏 | It came in the mail from Social Security |
| 🞏 | I used *my* Social Securityaccount to get one on Social Security’s website  🡺 **SKIP to Question 3.** |
| 🞏 | It came in the mail from Social Security and I used my Social Security account to get one on Social Security’s website🡺 **SKIP to Question 3.** |
| 🞏 | I did not get a Social Security Statement |

1. Are you aware that you can access your Social Security Statement by setting up a *my* Social Securityaccount?

|  |  |
| --- | --- |
| **Mark 🗷 one answer.** | |
| 🞏 | Yes |
| 🞏 | No |

🡺 **SKIP to Question 5.**

1. Did you use your *my* Social Securityaccount to access your Social Security Statement online after receiving an annual reminder from Social Security?

|  |  |
| --- | --- |
| **Mark** 🗷 **one answer.** | |
| 🞏 | Yes |
| 🞏 | No |

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mark 🗷 one answer.** | **Very**  **Useful** | **Somewhat Useful** | **Not Very Useful** | **Not at All Useful** |
| I found the Social Security Statement … | **🞏** | **🞏** | **🞏** | **🞏** |

1. Social Security has a tool on its website that *my* Social Securityaccount holders can use to find out how much their monthly retirement benefit will be called the *my* Social SecurityRetirement Calculator (my RC) Have you ever used the online Retirement Calculator?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷** **one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | 🡺 **SKIP to Question 7.** |

1. How would you rate the usefulness of the *my* Social Security Retirement Calculator on Social Security’s website?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mark** 🗷 **one answer.** | **Very**  **Useful** | **Somewhat Useful** | **Not Very Useful** | **Not at All Useful** |
| I found the *my* Social SecurityRetirement Calculator to be… | **🞏** | **🞏** | **🞏** | **🞏** |

1. Besides the Social Security Statement or *my* Social Security Retirement Calculator, have you ever gotten any other information about Social Security retirement benefits?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | 🡺 **SKIP to Question 9.** |

1. Where did you get that information?

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

|  |
| --- |
| **YOUR RETIREMENT PLANS** |

1. Please indicate your current employment status below.

|  |  |
| --- | --- |
| **Mark 🗷 one answer.** | |
| 🞏 | Full time employment |
| 🞏 | Part time employment |
| 🞏 | Temporarily laid off work |
| 🞏 | Unemployed, looking for work |
| 🞏 | Volunteer work |
| 🞏 | Not working (Retired) |

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

| **Mark 🗷 one answer.** | **Before Age 62** | **62 – 65** | **66 – 67** | **At 68 or older** | **No current plans to stop working** | **I am not sure** |
| --- | --- | --- | --- | --- | --- | --- |
| I plan to stop (or I stopped) working…. | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **At Age 62** | **Between 62**  **and your Full Retirement Age** | **At your Full**  **Retirement Age**  **66 or 67** | **Between your Full Retirement Age and Age 70** | **At Age 70**  **or Older** |
| **🞎** | **🞎** | **🞎** | **🞎** | **🞎** |
| Maximum reduction in monthly benefit | Some reduction in monthly benefit | Full unreduced monthly benefit | Some increase in monthly benefit | Maximum increase in monthly benefit |
| \*For more information about these options go to <http://www.socialsecurity.gov/retire2/applying1.htm>. | | | | |
| **YOUR PREFERENCES FOR CONTACTING SOCIAL SECURITY IN THE FUTURE** | | | | |

For questions 12 through 15, please **mark 🗷** to indicate how you would like to contact Social Security in the future.

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

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

| To replace a lost Social Security card, I would prefer to… |
| --- |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| To correct my Social Security earnings record, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

1. How would you prefer to contact Social Security to get information?

|  |
| --- |
| To get information from Social Security, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

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

|  |
| --- |
| To complete an application for benefits, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| To schedule an appointment to speak with someone about my application, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| To check on my application while it’s being processed, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

1. For services related to the Social Security benefits you may receive in the future, such as changing your address or getting a statement of the total benefits you received in the last year, how would you prefer to contact Social Security?

|  |
| --- |
| To change information on my Social Security records, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| To get information from my Social Security records, I would prefer to… |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Speak on the telephone**  **with an SSA employee** | **Visit a Local Office** | **Use the Website** | **Have a Video Appointment** | **Use a Mobile Application (App)** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| YOUR PREFERENCES FOR SOCIAL SECURITY’S TELEPHONE SERVICE |

1. Although it may not have been your preferred contact method in questions 12 through 15, do you think you would **ever** call Social Security for your service needs in the future?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 18.** |

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

| **A reasonable time for me to wait:** | **Less than 1 minute** | **1 to 3 minutes** | **4 to 5 minutes** | **6 to 10 minutes** | **11 to 20 minutes** | **More than 20 minutes** |
| --- | --- | --- | --- | --- | --- | --- |
| To speak to **an employee on the phone** is … | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
|  |  |  |  |  |  |  |
| **A reasonable time for me to wait:** | **Less than 1 hour** | **More than 1 hour but same day** | **Next day** | **2 to 3 days** | **More than 3 days** | **A week or more** |
| For an employee to **call me**  **back** when I leave a phone message is … | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| YOUR PREFERENCES FOR SOCIAL SECURITY’S IN-OFFICE SERVICE |

1. Although it may not have been your preferred contact method in questions 12 through 15, do you think you would **ever** visit a Social Security office for your service needs in the future?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 20.** |

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

| **A reasonable time for me to wait:** | **Same day** | **Next day** | **About 2‑3 days** | **About 1 week** | **About 2 weeks** | **More than 2 weeks** |
| --- | --- | --- | --- | --- | --- | --- |
| To **get an appointment** in a local office is … | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

| **A reasonable time for me to wait:** | **Less than 5 minutes** | **5 to 10 minutes** | **11 to 20 minutes** | **21 to 30 minutes** | **31 to 45 minutes** | **More than 45 minutes** |
| --- | --- | --- | --- | --- | --- | --- |
| To be seen in an office **without** an appointment is … | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
| To be seen in an office **with** an appointment is … | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| **YOUR PREFERENCES FOR CONTACTING SOCIAL SECURITY VIA WEBSITE** |

1. Although it may not have been your preferred contact method in questions 12 through 15, do you think you would **ever** use the website to contact Social Security for your service needs in the future?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 22.** |

1. For the following action, please **mark 🗷** the box that best describes the amount of time you think is **reasonable** to wait.

| **A reasonable time for me to wait:** | **Less than 1 hour** | **More than 1 hour but same day** | **Next day** | **2 to 3 days** | **More than 3 days** | **A week or more** |
| --- | --- | --- | --- | --- | --- | --- |
| To **get a response** when I ask  a question via email or secure message is… | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

|  |
| --- |
| YOUR EXPERIENCE USING THE INTERNET AND ONLINE SERVICES |

1. Do you currently use the Internet?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 33.** |

1. What device do you most frequently use to conduct business online? Do you use:

|  |  |
| --- | --- |
| **Mark 🗷 one answer.** | |
| 🞏 | A desktop or laptop computer |
| 🞏 | A smartphone |
| 🞏 | A tablet |

1. When conducting business online, which do you prefer?

|  |  |
| --- | --- |
| **Mark 🗷 one answer.** | |
| 🞏 | A website |
| 🞏 | A downloadable application (app) |
| 🞏 | I do not have a preference |

1. How frequently do you conduct your personal business?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Mark 🗷 one answer for each** | **Always** | **Often** | **Occasionally** | **Rarely** | **Never** |
| Online | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
| By telephone | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
| By mail | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
| In person | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |
| Using video | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

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

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 29.** |

1. Have you ever used your *my* Social Security account?

|  |  |  |
| --- | --- | --- |
| **Mark 🗷 one answer.** | | |
| 🞏 | Yes |  |
| 🞏 | No | **🡺 SKIP to Question 30.** |

1. What have you used your *my* Social Security account for?

|  |  |
| --- | --- |
| **Mark 🗷 all answers that apply.** | |
| 🞏 | To view estimates of my future benefits |
| 🞏 | To verify my earnings |
| 🞏 | To view the estimated Social Security and Medicare taxes I have paid |
| 🞏 | To request a replacement Social Security card |
| 🞏 | To get a letter to show that I do **not** receive any benefit payments |
|  | **🡺 SKIP to Question 30.** |

1. Why haven’t you created your *my* Social Security account?

|  |  |
| --- | --- |
| **Mark 🗷 all answers that apply.** | |
| 🞏 | I do not like to provide or receive information online |
| 🞏 | The registration too hard |
| 🞏 | I tried but was not able to complete registration for technical reasons |
| 🞏 | I do not know enough about it |
| 🞏 | The current online services do not fit my needs |
| 🞏 | I do not have a computer or internet access |
| 🞏 | I don’t trust SSA’s security |
| 🞏 | I don’t have a reason to make an account at this time |
| 🞏 | Some Other Reason (please describe)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

1. Social Security also offers online services on its website. How likely would you be to use one of Social Security’s online services?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mark 🗷 one answer.** | **Very**  **Likely** | **Somewhat Likely** | **Not Very Likely** | **Not at All Likely** |
| For me, using one of Social Security’s online services is… | 🞏 | 🞏 | 🞏 | 🞏 |

1. What is the **main** reason why you **might be** **likely** to use Social Security’s online services?

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

1. What is the **main** reason why you **might not be likely** to use Social Security’s online services?

|  |  |
| --- | --- |
| **Mark 🗷 ONLY one answer.** | |
| 🞏 | Easier to understand things explained by a person |
| 🞏 | Can get questions answered right away by a person |
| 🞏 | Concerned about security and/or privacy of my information |
| 🞏 | Some other reason you might not use it **Please explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| 🞏 | Can’t think of any reason why I wouldn’t use it |

1. Are you more or less likely to use service options like phone, internet, or video since the global pandemic in 2020?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Mark 🗷 one answer.** | | | | |
| **Much more likely** | **More likely** | **Unchanged** | **Less likely** | **Much less likely** |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 |

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

|  |  |
| --- | --- |
| Social Security Survey | |
| *[Contractor Return Address]* | |
| **PRIVACY ACT STATEMENT**  The Social Security Administration is authorized to collect the information for this survey under Executive Order 12862, “Setting Customer Service Standards.” Your response to these questions is strictly voluntary. The information you provide will be used to help us improve the service that we give you. Your response will not be disclosed to any other government or private agency.  **OMB Control No:** 0960-0526  **Expiration Date:** | **PAPERWORK REDUCTION ACT STATEMENT**  This information collection meets the requirements of 44 U.S.C. § 3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 15 minutes to read the instructions, gather the facts and answer the questions. You may send comments on our time estimate above to:  Social Security Administration, 6401 Security Blvd., Baltimore, MD 21235-6401.  *Send only comments relating to our time estimate to this address, not the completed form.* |