

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 Security** account 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

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

Mark one answer.

Yes

No

→ **SKIP to Question 5.**

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

Mark one answer.

- Yes
- No

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

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

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

Mark one answer.

- Yes
- No → **SKIP to Question 7.**

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

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

7. 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.**

8. 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
- Somewhere else **Please explain:** _____

YOUR RETIREMENT PLANS

9. 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)

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

Mark <input checked="" type="checkbox"/> one answer.	Before Age 62	62 – 65	66 – 67	At 68 or older	No current plans to stop working	I am not sure
I plan to stop (or I stopped) working....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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

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

YOUR PREFERENCES FOR CONTACTING SOCIAL SECURITY IN THE FUTURE

For questions 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.**

12. 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To schedule an appointment to speak with someone about my application, I would prefer to...				
Speak on the telephone with an SSA employee	Visit a Local Office	Use the Website	Have a Video Appointment	Use a Mobile Application (App)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To check on my application while it's being processed, I would prefer to...				
Speak on the telephone with an SSA employee	Visit a Local Office	Use the Website	Have a Video Appointment	Use a Mobile Application (App)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. 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 <u>change</u> 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To <u>get</u> information from my Social Security records, I would prefer 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S TELEPHONE SERVICE

16. 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.

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

A reasonable time for me to wait:	Less than 1 minute	1 to 3 minutes	4 to 5 minutes	6 to 10 minutes	11 to 20 minutes	More than 20 minutes
To speak to an employee on the phone is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A reasonable time for me to wait:	Less than 1 hour	More than 1 hour but same day	Next day	2 to 3 days	More than 3 days	A week or more
For an employee to call me back when I leave a phone message is ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR PREFERENCES FOR SOCIAL SECURITY'S IN-OFFICE SERVICE

18. 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.

19. 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 ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

YOUR PREFERENCES FOR CONTACTING SOCIAL SECURITY VIA WEBSITE

20. 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.

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

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

YOUR EXPERIENCE USING THE INTERNET AND ONLINE SERVICES

22. Do you currently use the Internet?

Mark one answer.

- Yes
 No → **SKIP** to Question 33.

23. 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

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

Mark one answer.

- A website
 A downloadable application (app)
 I do not have a preference

25. How frequently do you conduct your personal business?

Mark <input checked="" type="checkbox"/> one answer for each	Always	Often	Occasionally	Rarely	Never
Online	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Using video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Mark one answer.

- Yes
- No → **SKIP to Question 29.**

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

Mark one answer.

- Yes
- No → **SKIP to Question 30.**

28. 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.**

29. 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)_____

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

Mark <input checked="" type="checkbox"/> one answer.	Very Likely	Somewhat Likely	Not Very Likely	Not at All Likely
For me, using one of Social Security's online services is...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. 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

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

33. 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

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e 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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.