

Social Security Statement Focus Groups Eligibility Questionnaire

Thank you for looking at this opportunity! The Social Security Administration (SSA) and Ipsos invite you to participate in an interview at a research facility in [IF 'State' = 'Illinois' INSERT 'Chicago' OR IF 'State' = 'North Carolina' INSERT 'Charlotte' OR IF 'State' = 'California' INSERT 'Los Angeles' OR If 'State' = 'Arkansas' INSERT 'Little Rock'] as part of a study regarding how the public uses the online Social Security *Statement* and which new features they like to see in the online *Statement* in the future.

We are conducting focus groups with all members of the public that have an active *my* Social Security account and have accessed this account online. The focus group will consist of 8-10 participants and will last approximately an hour and a half.

Participation in this research is voluntary, you may stop participating at any time, and you do not have to answer every question. Your name will not appear in any reports from the findings. Your interview and survey questions will remain private and confidential.

Recognizing the value of your time, we are offering an honorarium of \$150 if you participate in this research. Please answer the questions below to determine if you are eligible to participate in the focus group.

Eligibility Questions

1) **[Do not ask question, RECORD ONLY]** Moderator to record sex of the respondent.

- Male
- Female

2) What is your age?

[SINGLE PUNCH]

- 24 years of age and under **[if chosen, STOP SURVEY, all else proceed to Q2]**
- 25 – 34 years of age
- 35 – 44 years of age
- 45 – 54 years of age
- 55 – 64 years of age
- 65 years of age and over
- Decline to answer

3) Do you live in or near **[IF 'State' = 'Illinois' INSERT 'Chicago' OR IF 'State' = 'North Carolina' INSERT 'Charlotte' OR IF 'State' = California INSERT 'Los Angeles' OR If 'State' = 'Arkansas' INSERT 'Little Rock']?**

[SINGLE PUNCH]

- Yes
- No **[STOP SURVEY]**

CITY MARKER

[IF 'State' = 'Illinois' AND Q3=Yes, CITY MARKER= 'Chicago'

IF 'State' = 'North Carolina' AND Q3=Yes, CITY MARKER= 'Charlotte'

IF 'State' = California AND Q3=Yes, CITY MARKER= 'Los Angeles'

If 'State' = 'Arkansas' AND Q3=Yes, CITY MARKER= 'Little Rock']

4) Do you live in **[INSERT CITY MARKER VALUE]** itself or in the surrounding area?

[SINGLE PUNCH]

- City **[IF CITY MARKER = = 'Chicago' OR 'Los Angeles', SKIP to Q6; all else STOP SURVEY]**
- Surrounding area **[IF CITY MARKER = 'Chicago' OR 'Los Angeles' STOP SURVEY. IF CITY MARKER = 'Charlotte' OR 'Little Rock' Continue to Q5]**
- I do not live in **[INSERT CITY MARKER] [STOP SURVEY]**

5) You indicated living in the surrounding area of **[INSERT CITY MARKER]**. Would you consider the area you live to be suburban or rural?

[SINGLE PUNCH]

- Suburban [IF CITY MARKER = 'Charlotte' continue to Q6, all else STOP SURVEY]
- Rural [IF Q3 = 'Little Rock' continue to Q6, all else STOP SURVEY]
- Other, please specify [STOP SURVEY]

6) Are you familiar with the term *Social Security Statement*?

[SINGLE PUNCH]

- Yes [SKIP to Q8]
- No [proceed to Q7]

7) Have you ever received a statement in the mail or accessed a statement online that had the following information?

[SINGLE PUNCH]

- Your estimated benefits which would tell you what you would receive if you claimed Social Security at age 62, full retirement age or age 70
 - Yes [proceed to Q8]
 - No [proceed to b]
 - Your earnings record
 - Yes [proceed to Q8]
 - No [proceed to c]
 - Applying for benefits
 - Yes [proceed to Q8]
 - No [proceed to d]
 - Receiving benefits while you work
 - Yes [proceed to Q8]
 - No [proceed to e]
 - Retirement age considerations
 - Yes [proceed to Q8]
 - No [proceed to f]
 - Information on financial planning
 - Yes [proceed to Q8]
 - No [STOP Survey]
- 8) Based on your previous answer, we believe you have either received a Social Security *Statement* in the mail or accessed it on line through your *my* Social Security Account. In the

following section, we will ask you about your experience with the Social Security *Statement* and if you have accessed this statement online. [\[proceed to Q9\]](#)

9) Have you created an online *my* Social Security account?

[SINGLE PUNCH]

- Yes [\[proceed to Q10\]](#)
- No [\[STOP Survey\]](#)
- Don't know [\[STOP Survey\]](#)

10) Have you accessed your Social Security *Statement* online?

[SINGLE PUNCH]

- Yes [\[proceed to Q11\]](#)
- No [\[STOP Survey\]](#)
- Don't know [\[STOP Survey\]](#)

11) Thinking back over the last five years, how often have you accessed your Social Security *Statement*?

[SINGLE PUNCH]

- At least once per month
- At least once per year
- At least once over the last 5 years
- I have an account, but I have never used it [\[STOP Survey, all else proceed to Q12\]](#)

12) Recall the last time you accessed your Social Security *Statement* online. What was your primary reason for accessing your statement?

[SINGLE PUNCH]

- Verify your earnings (Check my Earnings Record)
- Check your estimated future benefits
- View the estimated Social Security and Medicare taxes you've paid
- Understand how benefits are calculated
- Get information about financial or retirement planning
- Learn more about the Social Security program
- Other: _____

13) Recall the last time you accessed your Social Security *Statement* online. How did you access your statement? Did you:

[SINGLE PUNCH]

- View the *Statement* online within the *my* Social Security account.
- Download and print out the *Statement* from the *my* Social Security account to view it in hard copy.

- View the paper *Statement* that you had received from the Social Security Administration by mail.
- Other, please specify:

14) What is your preferred way to receive the Social Security *Statement* from SSA?

[SINGLE PUNCH]

- I prefer to get my *Statement* online within the *my* Social Security account.
- I prefer to download and print out my *Statement* from the *my* Social Security account to view it in hard copy.
- I prefer to receive the paper *Statement* in the mail.
- I have no preference.

15) Are you currently receiving Social Security benefits?

[SINGLE PUNCH]

- Yes
- No
-

16) Is anyone else in your household currently receiving any Social Security benefits?

[SINGLE PUNCH]

- Yes
- No
- Don't know

17) What is the highest level of education you have completed?

[SINGLE PUNCH]

- Less than high school
- High school graduate
- Some college
- Trade/technical/vocational training
- College grad
- Postgraduate work/degree

18) What is your marital status?

[SINGLE PUNCH]

- Divorced
- Separated
- Widowed

- Currently married
- Single/Never married

19) What is your employment status? Please choose all that apply

[MULTI PUNCH]

- Employed full-time
- Employed part-time
- Retired
- Other, please specify
- Not currently employed **[Choose one] [Skip to Q21, all else proceed to Q20]**

20) Are you self-employed?

- Yes, please specify _____
- No

21) What is your race?

[SINGLE PUNCH]

- White
- Black
- Asian
- American Indian or Alaska Native
- Native Hawaiian or other Pacific Islander
- Some Other Race, please specify: _____

22) Are you of Hispanic, Latino, or Spanish origin, such as Mexican, Puerto Rican, Cuban, or other Spanish background?

[SINGLE PUNCH]

- Yes
- No
- Don't know

Contact Information

Based on the information you provided, you are eligible to participate in our focus group. The questions below will ask you about your interest and availability for participation.

23) Please indicate below if you are willing and able to travel to [IF 'State' = 'Illinois' INSERT 'XXX' OR IF 'State' = ' North Carolina' INSERT 'XXX' OR IF 'State' = California INSERT 'XXX' OR If 'State' = 'Arkansas' INSERT 'XXX'] on [IF 'State' = ['Illinois']

INSERT 'XXX' OR IF 'State' = 'North Carolina' INSERT 'XXX' OR IF 'State' = California INSERT 'XXX' OR IF 'State' = 'Arkansas' INSERT 'XXX'].

[SINGLE PUNCH]

- Yes **[Proceed to Q21]**
- No **[STOP Survey]**
- Not sure **[STOP Survey]**

24) Currently, we have focus groups scheduled in **[IF 'State' = 'Illinois' INSERT 'XXX' OR IF 'State' = 'North Carolina' INSERT 'XXX' OR IF 'State' = California INSERT 'XXX' OR If 'State' = 'Arkansas' INSERT 'XXX']** on **[IF 'State' = ['Illinois'] INSERT 'XXX' OR IF 'State' = 'North Carolina' INSERT 'XXX' OR IF 'State' = California INSERT 'XXX' OR IF 'State' = 'Arkansas' INSERT 'XXX']** at 7:00PM – 8:30PM. Will you be able to participate at this date and time?

[SINGLE PUNCH]

- Yes **[Proceed to Q22]**
- No **[STOP Survey]**
- Don't know **[STOP Survey]**

25) In order for us to schedule you for an interview, we will need to contact you with information on how to participate.

Please provide your full name: _____

Please provide your email address: _____

Please provide your phone number: _____

Thank You!

Thank you for completing this questionnaire! If you are chosen to participate in a focus group, we will contact you to confirm a time slot. Please be sure to check the email you provided in the survey regularly until you hear from us! If you have any questions, please email **XXX** at xxx@xxx.com or call at **XXX-XXX-XXX**.