

**Common Services for Borrowers  
Customer Satisfaction**

**2007 Annual Direct Loan School Customer  
Satisfaction Survey**

**Web Survey Requirements**

# 1. Annual Direct Loan School Customer Satisfaction Survey Web Survey Requirements

The School survey is designed to gauge the satisfaction of Direct Loan school financial aid administrators (FAAs) with the CSB project.

## 1.1 General System Requirements

The following are general system requirements.

- 1.1.1 Responses shall be gathered in a web survey.
- 1.1.2 The link for the web survey shall be emailed to each School's FAA targeted individual and provided to Training Technologies, Inc. (TTI) so that the School's FAA targeted individuals may access the website and take the survey.
- 1.1.3 A reminder notice for the web survey containing the link shall be emailed to each School's FAA targeted individuals and provided to Training Technologies, Inc. (TTI) so that the targeted individuals may access the website and take the survey.
- 1.1.4 The system shall count each user's response on the survey only once.
- 1.1.5 The system shall allow the user to retake the survey but the old survey shall be overwritten.
- 1.1.6 The system shall be 508 compliant.
- 1.1.7 The web page shall have the same look as the FSA survey.
- 1.1.8 The web pages shall have the FSA "Start Here, Go Further" logo, which will be provided by ACS.



## **1.2 Email Contents**

TTI shall send email to the survey targeted individuals.

### **1.2.1 FSA Publicity Email**

The following verbiage shall be provided in an email to the survey targeted individuals.

The U.S Department of Education, Federal Student Aid (FSA) is soliciting feedback from Financial Aid Administrators (FAAs) who contact the Direct Loan Servicing Center, School Services Group. We are asking FAAs to rate the level and quality of service that the Direct Loan Servicing Center, School Services Group, provides. The results of this survey will be used to measure the effectiveness of current services as well as to identify areas that may need improvement.

In a few days, you will receive an email from [insert company name], an independent survey company with a link to the survey. Please help us by completing the survey at your earliest convenience. The survey takes only a few minutes to complete. Please be assured that your responses are completely confidential. We appreciate the time you take to participate in our survey.

Thank you!  
U.S. Department of Education  
Federal Student Aid

### 1.2.2 Initial Email

The initial email will contain the following language:

We are asking you to participate in a customer satisfaction survey. The U.S Department of Education, Federal Student Aid (FSA) is soliciting feedback from Financial Aid Administrators (FAAs) who contact the Direct Loan Servicing Center, School Services Group. Your responses are completely confidential.

We appreciate the time you take to participate in this survey.

Each link in each email is specific to your response. If you forward your email link to others and they take the survey, each survey entry will be overwritten and invalidated. Please do not share your email link with anyone else.

Please click on the following link to participate in this survey. <<link>>

Thank you!  
U.S. Department of Education  
Federal Student Aid

If you have problems accessing the survey website, please download either Internet Explorer 6 or Netscape 6 or higher. For issues relating to the survey please contact us at support@traintech.com. This address should not be used to obtain information about your direct student loan.

### 1.2.3 Reminder Email Notice

The following verbiage shall be provided in an email to the survey targeted individuals one week subsequent to the first email.

#### REMINDER!!!

We sent you a request on [***Date***] asking you to participate in a customer satisfaction survey. The U.S Department of Education, Federal Student Aid (FSA) is soliciting feedback from Financial Aid Administrators (FAAs) who contact the Direct Loan Servicing Center, School Services Group. Your responses are completely confidential.

We appreciate the time you take to participate in this survey. If you have already completed the survey, thank you.

Please click on the following link to participate in this survey. <<link>>

Thank you!  
U.S. Department of Education  
Federal Student Aid

If you have problems accessing the survey website, please download either Internet Explorer 6 or Netscape 6 or higher. For issues relating to the survey please contact us at <[support@traintech.com](mailto:support@traintech.com)> This address should not be used to obtain information about your ~~direct student loan~~

### 1.2.4 Undelivered Email

TTI shall capture and provide to ACS a list of all addresses of undelivered email.

## **1.3 Web Survey Introduction Screen**

### **1.3.1 Introduction**

The first page of the web survey shall have an introduction page that contains the following language.

#### **Direct Loan Servicing Center, School Services Group Customer Satisfaction Survey for School Financial Aid Administrators**

We are soliciting feedback from all Financial Aid Administrators (FAAs) at all schools that participated in Direct Loan School Servicing. We are asking FAAs to rate the level and quality of service that the Direct Loan Servicing Center, School Services Group, provides. Your comments are important to us to identify areas that may need improvement in order to continually provide you with quality service.

Drawing upon your experiences over the last year, please evaluate your experiences specifically relating to the Direct Loan Servicing Center, School Services Group, and those mechanisms used to manage your Direct Loan students such as the Direct Loan school website and associated reports.

### 1.3.2 Choice of Survey

The following choices of surveys will be available.

#### Direct Loan Servicing Center, School Services Group Customer Satisfaction Survey for School Financial Aid Administrators

I interact with the Direct Loan Servicing Center, School Services Group, in the following ways:  
(choose all that apply)

- Phone
- Email
- Website (dl.ed.gov/schools)

#### Survey Rating Scale

You will be evaluating on a scale from 1 to 5 where:

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

**1.1.1.1** The user shall have the option of choosing any or all of the survey choices.

**1.1.1.2** If user does not choose any survey, a warning icon shall appear telling the user to answer the missed questions.

**1.1.1.3** The questions shall display in the warning icon with their associated number.

**1.1.1.4** When a survey is selected, the user shall be forced to answer all questions within that survey.

**1.1.1.5** The user shall not be able to move forward until all questions are answered.

### 1.3.3 Response ratings

The following response ratings shall appear on each survey page.

Extremely Satisfied	5
Very Satisfied	4
Satisfied	3
Neither Satisfied nor Dissatisfied	2
Dissatisfied	1
Not Applicable	Blank Space

**1.3.4 Not applicable shall be input into the database as a blank space and not “0”.**

## 1.4 Survey Functions

The following sections identify the survey functions

- 1.4.1 The survey questions for calling, emailing, and website usage accrue to the incentive.
- 1.4.2 The questions regarding the reactions of the students to the Direct Loan website and Direct Loan Servicing Center DO NOT accrue to the incentive.



### 1.1.1.6 Phone - Introduction

The following language shall appear at the top of the questions.

#### Survey for Calling the Direct Loan Servicing Center, School Services Group

In rating the following qualities, think about your experience in calling our Direct Loan Servicing Center, School Services Group, in the past year and rate your level of satisfaction with the response you received.

#### Survey Rating Scale

You will be evaluating on a scale from 1 to 5 **where:**

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.1.1.7 Phone – Questions

	How satisfied/dissatisfied were you:
<b>1.1</b>	With the timeliness of the response to your call?
<b>1.2</b>	With the knowledge of the School Services Representative?
<b>1.3</b>	That the School Services Representative handled the issue in one call?
<b>1.4</b>	With the follow-up promised during your call?
<b>1.5</b>	With your overall experience calling the Direct Loan Servicing Center, School Services Group?

### 1.1.1.8 Email – Introduction

The following language shall appear at the top of the questions.

#### Survey for Emailing the Direct Loan Servicing Center, School Services Group

If in the past year you corresponded with the Direct Loan Servicing Center, School Services Group, via email, rate your level of satisfaction with the response received.

You will be evaluating on a scale from 1 to 5 **where:**

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.1.1.9 Email – Questions

	How satisfied/dissatisfied were you:
2.1	With the length of time it took to get a response to your request?
2.2	That the response provided accurate information that resolved the issue?
2.3	With the follow-up promised during your email?
2.4	With your overall experience emailing the Direct Loan Servicing Center, School Services Group?

### 1.1.1.10 Website – Introduction

The following language shall appear at the top of the questions.

**Survey for the Direct Loan Servicing Online School Site**

In rating the following qualities, please think about your experience in the past year using the Direct Loan Servicing Online School Site ([dl.ed.gov/schools](http://dl.ed.gov/schools)) for matters relating to existing loans and generating reports.

**Survey Rating Scale**

You will be evaluating on a scale from 1 to 5 **where:**

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.1.1.11 Website – Questions

	How satisfied/dissatisfied were you:
3.1	With the availability of the website?
3.2	With the ease of use of the website?
3.3	With the information presented on the website?
3.4	With the “Help” function of the website?
3.5	With your overall experience using the Direct Loan Servicing Online School Site?

## 1.5 Overall Satisfaction Question

The overall satisfaction question is presented to everyone and is a required question. This question accrues to incentive.

### Overall Experience

In rating the following qualities, please think about your overall experience in the past year with the Direct Loan Servicing Center, School Services Group.

### Survey Rating Scale

You will be evaluating on a scale from 1 to 5 **where:**

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.5.1 Question

	How Satisfied or Dissatisfied were you:
	With the overall performance of the Direct Loan Servicing Center, School Services Group?

## 1.6 Direct Loan Servicing Borrower Website Questions

The questions about the Direct Loan Servicing Borrower Website are optional questions. They shall be provided to everyone. They DO NOT accrue to incentive.

### 1.6.1 Introduction

The following language shall appear at the top of the questions.

#### Survey for the Direct Loan Servicing Borrower Website

We are interested in overall feedback you may have received from your students regarding the services offered on the Direct Loan Servicing Borrower Website.

#### Survey Rating Scale

You will be evaluating on a scale from 1 to 5 **where:**

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.6.2 Direct Loan Servicing Borrower Website Questions

	How satisfied/dissatisfied were your <b>students</b> :
<b>4.1</b>	With the availability of the Direct Loan Servicing Borrower Website?
<b>4.2</b>	With the ease of use of the Direct Loan Servicing Borrower Website?
<b>4.3</b>	With the information presented on the Direct Loan Servicing Borrower Website?
<b>4.4</b>	With their overall experience using the Direct Loan Servicing Borrower Website?

## 1.7 Direct Loan Servicing Center Questions

The questions about the Direct Loan Servicing Center are optional questions. They shall be provided to everyone. They DO NOT accrue to incentive.

### 1.7.1 Introduction

The following language shall appear at the top of the questions.

#### Survey for the Direct Loan Servicing Center

We are also interested in overall feedback you may have received from your students regarding their experience with the Direct Loan Servicing Center.

#### Survey Rating Scale

You will be evaluating on a scale from 0 to 5 where:

<b>Extremely Satisfied</b>	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither Satisfied nor Dissatisfied</b>	<b>Dissatisfied</b>
Means 5	Means 4	Means 3	Means 2	Means 1

Note: Not Applicable will not be displayed in the box above, but the functionality will be provided for selection in the survey.

### 1.7.2 Direct Loan Servicing Center Questions

	How satisfied/dissatisfied were your <b>students</b> :
<b>5.1</b>	With the timeliness of the response to their call?
<b>5.2</b>	With the knowledge of the Customer Service Representative (CSR)?
<b>5.3</b>	That the CSR handled the issue in one call?
<b>5.4</b>	With the follow-up promised during their call?
<b>5.5</b>	With their overall experience calling the Direct Loan Servicing Center?

## 1.8 Program Specific Questions

The following are the Program Specific Questions. These are six open-ended information requests or questions presented for the recipient to answer with comments and text responses.

<b><u>Graduate-PLUS (G-PLUS)</u></b>
1. Please describe your experience with the G-PLUS program during the last year.
[text response]
2. Please provide any recommendations you have to enhance the G-PLUS program.
[text response]
<b><u>Late Stage Delinquency Accounts (LSDA)</u></b>
1. Please describe the activities your institution performs to manage and minimize Late Stage Delinquent accounts.
[text response]
2. Please provide any recommendations you have for enhancing the LSDA process for next year.
[text response]
<b><u>Entrance/Exit Counseling</u></b>
1. What issues or questions have you or your students had regarding Entrance and/or Exit Counseling activities this past year?
[text response]
2. Please provide any recommendations you have for improving the Entrance/Exit Counseling process.
[text response]

The following are the requirements for the comments.

- 1.8.1 The comments shall appear in a text box with the ability to gather an unlimited amount of data.
- 1.8.2 The user shall have the option of entering comments; they are not required.
- 1.8.3 Comments do not accrue to the incentive.

## 1.9 Comments

The following are the requirements for the comments.

- 1.9.1 The comments shall appear in a text box with the ability to gather an unlimited amount of data.
- 1.9.2 The user shall have the option of entering comments; they are not required.
- 1.9.3 Comments do not accrue to the incentive.

The comments text shall be:

For any qualities that you rated "Dissatisfied" or "1", please provide any comments that will help us improve the rating in the space below:
[text response]
Please provide any other comments for improvement, especially about areas not addressed in the survey questions, in the space below:
[text response]
Please provide any compliments you have about our services or staff in the space below:
[text response]

## 1.10 Submitting and Exiting

- 1.10.1 There shall be a submit Button that allows users to submit the survey.
- 1.10.2 Once submitted, web page shall appear that informs the user that the survey has been received.
- 1.10.3 There shall be the following language on the final screen:

“Thank you for taking the Direct Loan Servicing Center survey. Your assistance will help us better serve you. Please be assured that all responses are confidential.”

## 1.11 Reporting

TTI shall provide standard reports for the School survey.



### 1.11.1 Incentive/Disincentive Report

1.1.1.12 See Report format in Appendix A

### 1.11.2 Overall

1.1.1.13 See Report format in Appendix A

### 1.11.3 Comments Report

The comments shall be sorted by

1. Dissatisfied or “1” rated response comments
2. Improvement comments
3. Compliment comments
4. See Report format Appendix A

#### 1.11.4 Raw data

It is of utmost importance that the names of the respondents be protected. Confidentiality and impartiality are very important attributes of this survey. To that end, at the end of the survey period, a “dump” of the raw data in a comma delimited flat file/Excel spreadsheet format in “read only” mode shall be delivered to FSA and ACS simultaneously. Once the survey ends, there will be a conference call between FSA, ACS, and TTI to ensure that all of the requirements for data transmission are being met.

The data file should contain for both testing and production a Global Unique Identifier that masks the email addresses of the respondents. This is to be used strictly for purposes of data analysis and to ensure that we can map back to a row in the database should the reports become corrupted.

The data file will also contain a legend that maps the raw question ID in the data to the actual question. See example below:

Area	Unique Question ID	Text of Question
BO	ID_Q2_S1_8	How satisfied/dissatisfied were you with the CSB counterpart's ability to understand the issue?
BO	ID_Q3_S1_9	How satisfied/dissatisfied were you with the CSB counterpart's ability to escalate the issue if required to obtain a solution?
BO	ID_Q4_S1_10	How satisfied/dissatisfied were you with the timeframe in which the CSB counterpart took to address the issue?
BO	ID_Q5_S1_11	How satisfied/dissatisfied were you with the ability of the CSB counterpart to interpret requirements according to schedule?
BO	ID_Q6_S1_12	How satisfied/dissatisfied were you with the level of urgency that the CSB counterpart places on (or associates with) the issue?

BO	ID_Q7_S1_13	How satisfied/dissatisfied were you with the ability of the CSB counterpart to coordinate resources to resolve problems?
BO	ID_Q8_S1_14	How satisfied/dissatisfied were you with the quality of the service provided by the CSB counterpart?

### 1.11.5 End of Survey

After the survey is removed from the field, a page will be presented to the user who enters. The following language will be displayed:

Thank you for your interest in the Direct Loan Servicing Center, School Services Group, survey. The survey period has ended. Please plan to participate in next year's survey.

Thank you!  
U.S. Department of Education  
Federal Student Aid

### 1.11.6 Survey Information Email Link

The following are the requirements for the survey information email link.

**1.1.1.14** There shall be an email link in the initial email that allows the user to contact the survey administrator.

**1.1.1.15** There shall be an email link in the reminder emails that provides a way to contact the survey administrator.

**1.1.1.16** Message shall read, "If you have problems accessing the survey website, please download either Internet Explorer 6 or Netscape 6 or higher. For issues relating to the survey please contact us at [[TTI](#) email address]. This address should not be used to obtain information about direct student loans."

**1.1.1.17** All emails shall be forwarded to [Jim.Melear@acs-inc.com](mailto:Jim.Melear@acs-inc.com).

Appendix A – Report Formats

Incentive/Disincentive Report

Overall Report

Comments Report