



U.S. Department of Education 2010 Additional Servicers Customer Survey School Personnel

(Items in **BOLD** are interviewer instructions, and are not intended to be read to the customer)
(Items marked *i.e.* or *e.g.* should only be read if respondent needs clarification)

Introduction (Do not read)

INTRO1. Hello, this is _____ calling from [data vendor] on behalf of the United States Department of Education. May I please speak to **(name from list, refer to ACS as “the Direct Loan Servicing Center”)** ? (If necessary: **We’re conducting a voluntary customer satisfaction survey and are trying to contact financial aid professionals who work with the Direct Loan or previously with the Federal Family Education Loan Program.**)

- 1 **(Named person is on the phone, continue at INTRO4)**
- 2 **(Named person is available, proceed at INTRO3. when respondent comes to phone)**
- 3 **(Named person is unavailable, schedule callback)**
- 4 **(Named person is no longer this number, use INTRO2.)**
- 5 Refused/Hung Up

INTRO2. Is there another number at which I could reach him/her? (If necessary: **We’re conducting a customer satisfaction survey and are trying to contact financial aid professionals who work with Department of Education Loan Programs.**)

- 1 **(Will provide new number)** >> Thank you and have a good day. (Contact new number)
- 2 **(Refused to provide new number)** >> Thank you and have a good day!

INTRO3. **(When respondent comes to phone)**
Hello, this is [interviewer name] calling from [data vendor] on behalf of the United States Department of Education. **(Continue)**



INTRO4. The Department of Education is conducting this survey with financial aid professionals to measure satisfaction with **[servicer from list]** in their servicing of Direct and previously disbursed FFEL loans purchased by the Department. For this survey we are interested in speaking with financial aid professionals who work with **[servicer]** on matters relating to their servicing of these Department-owned loans. Does your work involve **[servicer's]** servicing of your students' loans owned by the Department?

- 1. Yes **(go to Intro5)**
- 2. No **(go to Intro6)**
- 3. Don't know

INTRO5. This interview will take less than 10 minutes. Your comments will remain strictly confidential. Is now a good time for us to speak? **(If necessary: this survey is authorized by Office of Management and Budget Control No. XXXX-XXXX).**

- 1 Yes **(Skip to background questions)**
- 2 No **(When would be a more convenient time for you to complete this study?)**

INTRO6. Is there someone else in your office I could speak to specifically regarding their experiences with **[servicer]** servicing of the loans owned by the Department? **(capture name/number if yes; else thank and terminate).**

Background Questions (Do not read)

To begin I'd like to ask you a few questions about your role and experiences with loan servicing administration.

BACK1 What is your current job title? **(listen and code per below, confirm)**

- 1 Financial Aid Director
- 2 Associate Director of Financial Aid
- 3 Assistant Director of Financial Aid
- 4 Loan Specialist
- 5 Counselor
- 6 Other (specify)

BACK2 How long have you been in your current position? **(listen and code per below)**

- 1 Less than 1 year
- 2 1 year to less than 5 years
- 3 5 years or more
- 4 Refused

BACK3 Have you worked with [servicer] prior to September 1, 2009?

- 1 Yes
- 2 No **(skip to BACK4)**

BACK3.1 Did you work with them on lending issues, servicing issues, or other areas prior to September 1, 2009? **(select all that apply)**

- 1 Lending
- 2 Servicing
- 3 Other

BACK3.2 How long had you worked with them on these issues prior to September 2009?

September, 2010



- 1 Less than 1 month
- 2 1 month to less than 3 months
- 3 3 months to less than 6 months
- 4 6 months to 1 year
- 5 More than 1 year

BACK4 Do you work with loan servicers other than **[servicer]**?

- 1 Yes
- 2 No **(skip to BACK5)**
- 3 Don't know **(skip to BACK5)**

BACK4.1 How many other servicers do you work with? **(capture number)**

BACK5 How frequently do you interact with **[servicer]** on loan servicing issues in your work? **(listen and code per below, clarify if needed)**

- 1 Daily
- 2 Less than daily but at least once per week
- 3 Less than once per week but at least once per month
- 4 Less than once per month but several times per year
- 5 Only a few times per year or less

Now I'd like to ask you a series of questions about various aspects of your interactions with **[servicer]**. As we go through these questions, please consider your experiences with **[servicer]** *only* with regard to the *servicing* of Department of Education *owned loans beginning September 1, 2009* ; please set aside any thoughts about **[servicer]** except those concerning their servicing of these loans.

Customer Service **(Do not read)**

CSERV1 When was the last time you contacted (e.g., called, emailed, etc.) **[servicer]** about a servicing issue? **(listen and code per below)**

- 1 I have never contacted **[servicer]** **(skip to next section)**
- 2 Less than 1 month ago
- 3 One month to less than 3 months ago
- 4 Three months to less than 6 months ago **(skip to next section – will remove this skip in 3/2010)**
- 5 Six months to less than 1 year ago **(skip to next section – will remove this skip in 6/2010)**
- 6 More than one year ago **(skip to next section)**
- 8 Don't Know **(skip to next section)**
- 9 Refused **(skip to next section)**

CSERV2 How did you contact them about this most recent issue? **(listen, code all that apply)**

- 1 Phone call
- 2 Email
- 3 Fax
- 4 Other **(specify)**

Please think about your experiences contacting **[servicer]**. On a scale from 1 to 10 where 1 is "poor" and 10 is "excellent", please rate **[servicer]** on:

CSERV3 Providing clear points of contact for inquiries

CSERV4 Responsiveness to your inquiries



- CSERV5 Their effectiveness in resolving issues
- CSERV6 The courtesy of their staff
- CSERV7 Their staff's knowledge
- CSERV8 Their follow-through to issue resolution

Web Site (Do not read)

WEBSCR Does [servicer] provide a website for you to access information about their processes or other general loan servicing information?

- 1 Yes
- 2 No **(skip to next section)**
- 3 Don't know **(skip to next section)**

WEBSL Does [servicer]'s website provide access to student/loan-level data?

- 1 Yes
- 2 No
- 3 Don't know

WEB1. When was the last time you accessed [servicer]'s website? **(listen and code per below)**

- 1 I have never accessed the web page **(skip to next section)**
- 2 Less than 1 month ago
- 3 One month to less than 3 months ago
- 4 Three months to less than 6 months ago **(skip to next section – will remove this skip in 3/2010)**
- 5 Six months to less than 1 year ago **(skip to next section – will remove this skip in 6/2010)**
- 6 More than one year ago **(skip to next section)**
- 7 Don't Know **(skip to next section)**
- 8 Refused **(skip to next section)**

Think about the web site they provide. On a scale from 1 to 10, where “1” means “poor” and “10” means “excellent”, how would you rate the...

- WEB2. Ease of logging into the site
- WEB3. Clarity of the web site organization
- WEB4. Ease of navigating the web site
- WEB5. Accuracy of information provided on the web site
- WEB6. Your ability to find the information you needed on the site
- WEB7. Usefulness of the tools on the web site

WEB8. **(IF ANY WEB2 – WEB7 < 7) What could [servicer] do to improve their website? (capture open end)**

Information/Communications (Do not read)

INFOTYPE Please think about any information you receive from [servicer] regarding loan servicing. What mode of communication does [servicer] use to communicate this information to you? **(listen and code all that apply)**

- 1 Phone
- 2 Email
- 3 Mail
- 4 Text message



5 Online chat

Now please think about any communications or information you receive from **[servicer]** regarding loan servicing. On the same 1 to 10 scale please rate the information you receive on:

- INFO1 Usefulness
- INFO2 Clarity
- INFO3 Convenience of the format
- INFO4 Timeliness

Systems/Tools (Do not read)

Think about the systems or tools you use in your Federal loan work with **[servicer]**. On a scale from 1 to 10, where “1” means “poor” and “10” means “excellent”, how would you rate their systems on...

- SYS1 Reliability (i.e., the percentage of the time “up and running”)
- SYS2 Ease of submitting information
- SYS3 Ease of retrieving information you need
- SYS4 Clarity of instructions/documentation
- SYS5 Flexibility
- SYS6 Your level of comfort using the system/tools
- SYS7 Reporting capabilities

- SYS8 Have you had any formal training from **[servicer]** on how to use their systems and tools for loan servicing?
 - 1 Yes
 - 2 No **(skip to next section)**

- SYS9 What kind of training did you receive? **(listen and code per below)**
 - 1 In-person seminar/group training session
 - 2 One-on-one training with **[servicer]** representative
 - 3 Internet-based self-guided training
 - 4 Webinar or facilitated on-line training (e.g., via WebEx, GoToMeeting, etc.)
 - 5 Videotape or DVD
 - 6 Other **(specify)**

- SYS10 On the 1 to 10 scale, please rate the usefulness of the training you received.

- SYS11 **(IF ANY SYS1-SYS7, SYS10 <7)** What could **[servicer]** do to improve their systems, tools or training? **(capture open end)**

Working Relationship (Do not read)

Now please think more generally about **[servicer]**'s performance with respect to loan servicing. On the 1 to 10 scale, please rate **[servicer]** on:

- RELA1 Their responsiveness to the needs of financial aid professionals such as yourself
- RELA2 The service and support they provide to students with loans in servicing
- RELA3 Their receptiveness to input and suggestions for improvements
- RELA4 Providing innovative tools and approaches to servicing loans



ACSI Benchmark Questions (Do not read)

Now please think about your interactions with **[servicer]** regarding servicing of Loans owned by the Department *only*.

ACSI1. Using a 10-point scale on which "1" means "very dissatisfied" and 10 means "very satisfied", how satisfied are you with your experiences with **[servicer]**?

ACSI2. Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has **[servicer]** fallen short of or exceeded your expectations?

ACSI3. Imagine what an ideal interaction with an organization servicing loans would be like for you. How well do you think your interactions with **[servicer]** compare with that ideal? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

Outcome Measures (Do not read)

COMP1. In the past three months, have you complained to **[servicer]** about any aspect of their servicing of Department-owned loans?

- 1 Yes
- 2 No
- 8 Don't know
- 9 Refused

COMP2. **(IF COMP1=1)** What was the nature of your complaint? **(capture open end)**

COMP3. Was the issue resolved to your satisfaction? **(IF COMP1=1)**

- 1 Yes
- 2 No
- 9 Resolution still pending

COMP4. In the past three months, have you complained to the U.S. Department of Education about any aspect of **[servicer]**'s performance servicing loans?

- 1 Yes
- 2 No
- 8 Don't know
- 9 Refused

COMP5. **(IF COMP4 =1)** What was the nature of your complaint? **(capture open end)**

COMP6. Was the complaint resolved to your satisfaction? **(IF COMP4=1)**

- 1 Yes
- 2 No
- 9 Resolution still pending

Closing (Do not read)

CLOSE1. In your own words, what could **[servicer]** do to improve their processes or practices for servicing loans? **(enter verbatim response)**

That's all the questions I have for you. Thank you for your time, and have a good day.



Paperwork Burden Statement

According to the Paperwork reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this voluntary information collection is 1845-0045. The time required to complete this information collection is estimated to average 10 minutes per response, including the time to review instructions, search existing data resources, gather the data needed and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to:** U.S. Department of Education, Washington, D.C. 20202-4537. **If you have comments or concerns regarding the status of your individual submission of this form, write directly to:** U.S. Department of Education, Federal Student Aid Division, 400 Maryland Avenue, S.W., UCP Room 42G3, Washington D.C. 20202-2800.