U.S. Department of Education
2010 Additional Servicers Customer Survey
FSA and Partners Personnel

(Items in BOLD are programming instructions. Batteries of scaled items to be rotated unless otherwise noted with exception of ACSI benchmark questions. "Don't know" option will be allowed on all items except for ACSI benchmark questions)

NOTE: ITEMS TO BE CAPTURED FROM SAMPLE LIST
- **FSA – Business Operations vs. Technical Areas**
- **FSA/Partner role/department**
- **Job Title**
- **Organization**

Introduction **(Do not display)**

This survey is on behalf of the United States Department of Education Office of Federal Student Aid and is part of an initiative we have undertaken to improve satisfaction with the services provided by ACS and the additional Title IV servicers we engaged to service the FFEL loans purchased by the Department of Education in 2009.

This survey is voluntary and will be conducted on a quarterly basis. In each quarter we will be asking you to provide feedback on one of the servicers in the program. For this quarter's survey, we'd like you to rate your interactions and evaluations of the personnel, systems and processes of [servicer] *only with regard to the management/servicing* **of the loans owned by the Department since September 1, 2009. The survey will take less than 7 minutes. This is a voluntary survey is authorized by the U.S. Office of Management and Budget Control No. 1845-0045. There are no assurances of confidentiality.**

Background Questions **(Do not display)**

We'll begin with a few questions about your role and experiences with loan servicing administration.

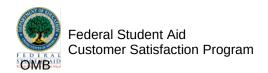BACK1   How long have you been in your current position?
   1   Less than 1 year
   2   1 year to less than 5 years
   3   5 years or more

BACK2   How long have you interacted with **[servicer]** in your day-to-day work on any aspect of Title IV lending or loan servicing?
   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

BACK3   How frequently do you interact with **[servicer]** specifically on *loan servicing* issues in your work?

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> 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

Statement on Survey Frame of Reference (Do not display)

(Display following on its own webpage)

Following are a series of questions about various aspects of your interactions with and evaluations of **[servicer]**. As you go through these questions, please consider your experiences with **[servicer]** only with regard to the servicing of loans owned by the Department of Education, either Direct loans or FFEL loans purchased by the Department of Education f since September 1, 2009. Please set aside any other dealings, past or present, you may have with **[servicer].**

Systems/Tools (Do not display)

SYS1   In your work with **[servicer]** involving their servicing of ED-owned loans, do you interface directly with their data systems (e.g., via Internet-based or other electronic systems)?
   1   Yes
   2   No **(skip to next section)**

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 use
SYS3   Clarity of instructions/documentation
SYS4   Flexibility (i.e., ability to accommodate changes in requirements)
SYS5   Being up-do-date (e.g., incorporating updates driven by legislative requirements)

Work Product (Do not display)

PROD1   Do you receive any routine work product, report or other **[servicer]** generated deliverables associated with their servicing of ED owned loans, including such things as data transfers and summaries of their database information?
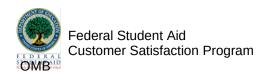   1   Yes
   2   No **(skip to next section)**

On the same 1 to 10 scale please rate **[servicer]** on:

PROD2   Timeliness
PROD3   Completeness
PROD4   Accuracy
PROD5   Consistency in meeting requirements
PROD6   Correction of errors
PROD7   Ability to accommodate changes in systems or requirements
   PROD8 (IF ANY PROD2-PROD7 < 7) How could **[servicer]** improve their work products?
      (capture open end)

Information/Communications (Do not display)

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Please think about any other occasional communications, information or updates you or your team receive from **[servicer]** regarding their servicing of the ED-owned loans. On a scale from 1 to 10 where 1 is "poor" and 10 is "excellent", please rate the information you receive on:

INFO1   Usefulness
INFO2   Clarity
INFO3   Convenience of the format
INFO4   Timeliness

INFO5   **(IF ANY INFO1-INFO4 <7)** How could **[servicer]** improve their communications to you? **(capture open end)**

Direct Interactions with Servicer Staff **(Do not display)**

DI1   When was the last time you contacted **[servicer]** about a servicing issue for the ED-owned loans (e.g., called on phone, emailed, etc.)?

1   I have never directly 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)**

DI2 How did you contact them about the last issue you wanted to raise with them? Choose all that apply.

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

DI3   What was the nature of the issue you contacted them about? **(capture open end)**

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:

DI4 Providing clear points of contact for inquiries
DI5 Responsiveness to your inquiries
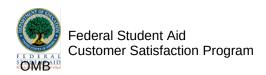DI6 Their effectiveness in resolving issues
DI7 The courtesy of their staff
DI8 Their staff's knowledge
DI9 Their follow-through to issue resolution

DI10   **(IF ANY DI4-DI9 <7)** How could **[servicer]** better support FSA, schools and borrowers in resolving issues that arise with servicing the ED-purchased FFEL loans? **(capture open-end)**

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Working Relationship with FSA **(Do not display)**

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

RELA1   Their receptiveness to input and suggestions for improvements
RELA2   Providing innovative tools and approaches to servicing FFEL loans
RELA3   Productivity of meetings
RELA4   Partnering with you to overcome challenges
RELA5   Their responsiveness to urgent/extraordinary requests

RELOPN   **(If any of RELA1-RELA5 rated less than 7)** What specifically could **[servicer]** improve to develop a better working relationship with FSA in your view?

ACSI Benchmark Questions **(Do not display)**

Now please think about your interactions with **[servicer]** regarding servicing of ED-owned loans *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 Federal Family Education 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 display)**

COMP1 In the past three months, have you had to escalate or formally address a complaint about any aspect of **[servicer]**'s performance servicing ED-owned loans?
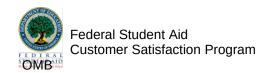
1   Yes
2   No **(skip to Closing)**

COMP2   What was the nature of the complaint? **(capture open end)**

Closing **(Do not display)**

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

This completes our survey. Thank you for your time, and have a good day.

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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 7 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.

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