

**Company Portal Interaction Survey
Questionnaire Structure**

	Survey Script/Survey Item	Response Choices	Generic Clearance Mapping
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	<p>This survey is about your company's interactions with the Consumer Financial Protection Bureau (CFPB) Portal, beginning on or about [Date].</p> <p>This survey focuses exclusively on operations. Our intent is to better understand your company's experience with the operations and functionality of the CFPB Portal. We are not soliciting responses about the content of any CFPB complaint or the CFPB complaint model at this time.</p>		
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To what extent do you agree with the following statements regarding your company's experience with the CFPB Portal?			
1	The CFPB boarding process was efficient.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	119.2 Referral, Company Portal, Accessibility; 125.2 Feedback, Referral, Company Portal, Ease of Use; 132.2 Referral, Company Portal, Setting up account (Generic Clearance Inventory, Feedback tab)
2	The CFPB credentialing process was straightforward.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	119.2 Referral, Company Portal, Accessibility; 125.2 Feedback, Referral, Company Portal, Ease of Use; 132.2 Referral, Company Portal, Setting up account (Generic Clearance Inventory, Feedback tab)
3	The process of setting up CFPB Portal users is efficient.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	119.2 Referral, Company Portal, Accessibility; 125.2 Feedback, Referral, Company Portal, Ease of Use; 132.2 Referral, Company Portal, Setting up account (Generic Clearance Inventory, Feedback tab)
4	Managing credentials for CFPB Portal users is easy.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	119.2 Referral, Company Portal, Accessibility; 125.2 Feedback, Referral, Company Portal, Ease of Use; 132.2 Referral, Company Portal, Setting up account (Generic Clearance Inventory, Feedback tab)
5	Navigating to resources on the CFPB Portal is easy.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	119.2 Referral, Company Portal, Accessibility; 125.2 Feedback, Referral, Company Portal, Ease of Use (Generic Clearance Inventory, Feedback tab)
6	My company receives sufficient CFPB Portal training.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	120.2 Referral, Company Portal, Appropriateness of resource materials provided to users(Generic Clearance Inventory, Feedback tab)
7	What do you think is the most effective way for receiving CFPB Portal training? (Select one)	Live in person (seminar) Webinar On-demand video FAQs	120.2 Referral, Company Portal, Appropriateness of resource materials provided to users; 126.2 Referral, Company Portal, Knowledge, preparedness, professionalism in training users (Generic Clearance Inventory, Feedback tab)

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Portal access and resources	8 Do your company's portal users use the CFPB Portal manual?	Yes No Don't know	120.2 Referral, Company Portal, Appropriateness of resource materials provided to users(Generic Clearance Inventory, Feedback tab)
	9 [If yes to Q8] To what extent do you agree that the manual is useful?	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	120.2 Referral, Company Portal, Appropriateness of resource materials provided to users(Generic Clearance Inventory, Feedback tab)
	To what extent do you agree with the following statements regarding your company's experience with the CFPB Portal?		
	10 The definitions of Closing and Administrative response categories are clear.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	122.2 Referral, Company Portal, Clarity of instructions (Generic Clearance Inventory, Feedback tab)
	11 The Daily Digest effectively notifies my company when action is needed on a CFPB complaint.	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	120.2 Referral, Company Portal, Appropriateness of resource materials provided to users(Generic Clearance Inventory, Feedback tab)
	12 By which method would your company prefer to receive notifications about CFPB complaints? (Select all that apply)	Email Portal notifications Direct data transfer Automated voice message	120.2 Referral, Company Portal, Overall Service (Generic Clearance Inventory, Feedback tab)
	13 How often does your company experience technical issues with the CFPB Portal? (Select one)	Never Rarely Somewhat often Often Routinely	123.2 Referral, Company Portal, Company Portal technical support (Generic Clearance Inventory, Feedback tab)
	14 [If Somewhat often, Often, or Routinely to Q13] What technical issues has your company experienced most frequently on the CFPB Portal? Issues related to: (Select all that apply)	Logging in Resetting a password User management (adding/removing users, changing user access) Submitting a response Error message(s) Closing/attaching document(s) Other	123.2 Referral, Company Portal, Company Portal technical support (Generic Clearance Inventory, Feedback tab)
	To what extent do you agree with the following statement regarding your company's experience with the CFPB Portal?		
	15 My company receives sufficient support related to CFPB Portal issues (i.e., technical or process issues).	1 Strongly disagree 2 Disagree 3 Neither agree nor disagree 4 Agree 5 Strongly agree 0 (Don't know/Does not apply)	123.2 Referral, Company Portal, Company Portal technical support (Generic Clearance Inventory, Feedback tab)

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Level of effort/burden	16	Does your company use a separate system from the CFPB Portal to track actions in response to individual CFPB complaints?	Yes No Don't know	133.2 Referral, Company Portal, Upload/download; 125.2 Referral, Company Portal, Ease of Use; 130.2 Referral, Company Portal, Report generation (Generic Clearance Inventory, Feedback tab)
	17	[If yes to Q16] How does your company move data from CFPB systems into your separate system?	Manual re-entry Automated process Other Does not apply	133.2 Referral, Company Portal, Upload/download; 125.2 Referral, Company Portal, Ease of Use (Generic Clearance Inventory, Feedback tab)
Organization and governance	18	How many employees in your company handle CFPB complaints on a full-time basis? (Select one)	None 1 to 3 4 to 9 10 to 25 More than 25	126.2 Referral, Company Portal, Knowledge, preparedness, professionalism in training users (Generic Clearance Inventory, Feedback tab)
	19	Does your company have a dedicated CFPB complaint response team?	Yes No Don't know	126.2 Referral, Company Portal, Knowledge, preparedness, professionalism in training users (Generic Clearance Inventory, Feedback tab)
Other	20	Approximately what proportion of total consumer complaints that your company receives are CFPB complaints? (Select one)	1 out of 1 1 out of 50 1 out of 100 1 out of 250 1 out of 500 1 out of 1,000 1 out of 10,000 Don't know	2.2 All Stakeholders, All CFPB Offerings, Transparency (Generic Clearance Inventory, Feedback tab)
	21	How often does your company access data published in the CFPB Consumer Complaint Database? (Select all that apply)	On an ad-hoc basis Daily Weekly Monthly Quarterly Annually Never	2.2 All Stakeholders, All CFPB Offerings, Transparency (Generic Clearance Inventory, Feedback tab)