**NCER-NPSAS Grant Study**

**Connecting Students with Financial Aid (CSFA) 2017: Testing the Effectiveness of FAFSA Interventions on College Outcomes**

**Appendices B and C**

**Survey Materials**

**OMB # 1850-0931 v.2**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**

**revised May 2017**

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**NCER-NPSAS Grant Study**

**Connecting Students with Financial Aid (CSFA) 2017: Testing the Effectiveness of FAFSA Interventions on College Outcomes**

**Appendix B**

**Survey Communication Materials**

**OMB # 1850-0931 v.2**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**

**revised May 2017**

**Data Collection Announcement Letter**

<<date>>

<<name>>

<<addr1>>

<<addr2>>«addr2»

<<city>>, <<st>> <<zip>>

Dear <<fname>>,

I am pleased to inform you that you have been selected to participate in Connecting Students with Financial Aid (CSFA), an important study that has provided students with information about financial aid and seeks to learn more about student experiences with financial aid.

CSFA is asking selected participants to complete a brief survey and is interested in your thoughts. **The CSFA survey will only take 10 minutes to complete, and you will receive $20 as a token of our appreciation.** The survey can even be completed on your mobile device. To make sure your voice is heard, please complete the survey by <<early\_Web\_date>>.

To complete the survey, log on to our secure website at https://surveys.nces.ed.gov/CSFA using the Study ID and password below:

**Study ID** = «caseid»

**Password** = «password»m *(password is case sensitive).*

You represent many students like you who were not selected for CSFA, and your participation is important to the success of the study. If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**

If you have any other questions or concerns about the study, please contact the CSFA Project Director, Jeff Franklin, at 800-XXX-YYYY, [jwf@rti.org](mailto:jwf@rti.org), or the NCES Project Officer, Tracy Hunt-White, at 202-245-ZZZZ, [Tracy.Hunt-White@ed.gov](mailto:Tracy.Hunt-White@ed.gov).

Thank you in advance for making CSFA a success.

Sincerely,

[Insert signatures]

Jeff Franklin Tracy Hunt-White, PhD

Project Director, CSFA NCES Project Officer

RTI International National Center for Education Statistics

U.S. Department of Education

|  |
| --- |
| NCES is authorized to conduct CSFA by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C. §9543) and to collect students’ education records from education agencies or institutions for the purposes of evaluating federally supported education programs under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3)(iii) and 99.35). The data are being collected for NCES by RTI International, a U.S.-based nonprofit research organization. All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151). |

**Data Collection Announcement E-mail**

SUBJ: You are invited to complete the CSFA survey!

Dear <FirstName>,  
  
I am pleased to inform you that you have been selected to participate in Connecting Students with Financial Aid (CSFA), an important study that has provided students with information about financial aid and seeks to learn more about student experiences with financial aid.

CSFA is asking selected participants to complete a brief survey and is interested in your thoughts. **The CSFA survey will only take 10 minutes to complete, and you will receive $20 as a token of our appreciation.** The survey can even be completed on your mobile device. To make sure your voice is heard, please complete the survey by <<early\_Web\_date>>.

To complete the survey on the web, log on to our secure website at https://surveys.nces.ed.gov/CSFA using the Study ID and password below:

**Study ID** = «caseid»

**Password** = «password»m *(password is case sensitive).*

You represent many students like you who were not selected for CSFA, and your participation is important to the success of the study. If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**

If you have any other questions or concerns about the study, please contact the CSFA Project Director, Jeff Franklin, at 800-XXX-YYYY, [jwf@rti.org](mailto:jwf@rti.org), or the NCES Project Officer, Tracy Hunt-White, at 202-245-ZZZZ, [Tracy.Hunt-White@ed.gov](mailto:Tracy.Hunt-White@ed.gov).

Thank you in advance for making CSFA a success.

Sincerely,

[Insert signatures]

Jeff Franklin Tracy Hunt-White, PhD

Project Director, CSFA NCES Project Officer

RTI International National Center for Education Statistics

U.S. Department of Education

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Reminder E-mail 1**

SUBJ: Don’t Forget to Complete Your CSFA Survey!

Dear <FirstName>,

Recently, we contacted you about your selection for the Connecting Students with Financial Aid (CSFA) study. Data collection for CSFA is now underway, and we would like to remind you to complete the survey by <date>.

**If you complete the 10-minute survey, you will receive $20 as a token of our appreciation.** The survey can easily be completed on your mobile device. To access the online survey, just click here to get started or log in on our secure website:

https://surveys.nces.ed.gov/CSFA/  
Study ID: <caseid>

Password: <password>e

The CSFA survey will ask about your knowledge of and experiences with financial aid. Your participation, while voluntary, is important to the success of the study**.** If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**

If you have any questions about the study, please contact me at 1-800-XXX-YYYY or [jwf@rti.org](mailto:jwf@rti.org), or the NCES Project Officer, Tracy Hunt-White, at 202-245-YYYY or [Tracy.Hunt-White@ed.gov](mailto:YYYYYYY@ed.gov).

Thank you for helping to make CSFA a success.

Sincerely,

Jeff Franklin

Project Director, CSFA

RTI International

1-800-XXX-YYYY

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Reminder E-mail 2**

SUBJ: Don’t Forget to Complete Your CSFA Survey!

Dear <FirstName>,

I would like to remind you that your participation in the Connecting Students with Financial Aid (CSFA) study is still needed, and that I hope that you will participate soon.

**If you complete the CSFA survey, you will receive a $20 token of our appreciation. The survey—which can be easily completed on your mobile device—takes only 10 minutes to complete.**

To access the online survey, just click here or log in to our secure website:

[**https://surveys.nces.ed.gov/CSFA/**](https://surveys.nces.ed.gov/CSFA/)

Study ID:  <caseid>

Password: <password>a

If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**  Thank you in advance for your participation in this very important study.

Sincerely,

Jeff Franklin

Project Director, CSFA

RTI International

1-800-XXX-YYYY

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Reminder Postcard 1**

**Fname,**

**Recently we sent you information about completing the U.S. Department of Education’s CSFA survey. This study helps policymakers learn about how financial aid impacts student enrollment in postsecondary education.**

**If you haven’t yet participated, we’d like to remind you that we’re offering $20 as a token of our appreciation for completing the 10-minute survey, which you can easily complete on your mobile device!**

**To complete your survey online, log into the study website at**

**Or call (800) XXX-YYYY to complete your survey by phone.**

**Connecting Students with Financial Aid (CSFA) Study**

**Thank you for your participation!**



The Connecting Students with Financial Aid study is a follow-up survey of individuals who were enrolled in postsecondary education during the 2015-16 academic year. For more information about the study, visit http://nces.ed.gov/surveys/npsas/grant/

**https://surveys.nces.ed.gov/CSFA**

**Study ID: <<12345678>>**

**Password: <<P@s$w0rd>>n**

**Reminder E-mail 3**

SUBJ: Don’t Delay - Complete Your CSFA Survey Today!

Dear <FirstName>,

Data collection for the Connecting Students with Financial Aid study continues, and it won’t be a success without your participation! The survey takes **only 10 minutes and** can easily be completed on your mobile device.When you complete your survey**, you will receive a $20 token of our appreciation.**

To access the online survey on our secure website, click here or log in:

[**https://surveys.nces.ed.gov/CSFA/**](https://surveys.nces.ed.gov/CSFA/)

Study ID:  <caseid>

Password: <password>b

If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**  Thank you in advance for your participation in this very important study.

Sincerely,

Jeff Franklin

Project Director, CSFA

RTI International

1-800-XXX-YYYY

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Reminder E-mail 4**

SUBJ: The CSFA Survey Needs YOUR Participation!

Dear <FirstName>,

Don’t forget to complete the Connecting Students with Financial Aid study and receive a $30 token of appreciation—payable by PayPal or check. The survey takes 10 minutes and can be completed online or over the phone. You can even complete it on your mobile device!

It’s easy to participate in CSFA on our secure website. Just click here to get started right away!

[**https://surveys.nces.ed.gov/CSFA/**](https://surveys.nces.ed.gov/CSFA/)

Study ID:  <caseid>

Password: <password>c

If you have questions, problems completing your survey online, or prefer to complete the survey over the telephone, simply call our **Help Desk** at **1-800-XXX-YYYY**

Thanks!

Jeff Franklin

Project Director, CSFA

RTI International

1-800-XXX-YYYY

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Reminder Postcard 2**



**There’s truly no substitute for your responses. That’s why you will receive a $20 token of appreciation for completing the CSFA survey.**

**Just a reminder—**

**we still need you to complete the CSFA survey.**

The Connecting Students with Financial Aid study is a follow-up survey of individuals who were enrolled in postsecondary education during the 2015-16 academic year. For more information about the study, visit http://nces.ed.gov/surveys/npsas/grant/

**The survey takes about 10 minutes, and can even be completed on your mobile device!**

**«fname»,**

**We value your participation in CSFA —**

**Log on to https://surveys.nces.ed.gov/CSFA/ with your Study ID and password.**

**Study ID: «caseID» Password: «password»p**

**Or call (800) XXX-YYYY if you have questions, need assistance, or would like to complete the survey over the phone.**

**Reminder E-mail 5**

SUBJ: It’s Your Last Chance to Receive $20!

The CSFA survey is easy to complete and takes only about 10 minutes. You can even complete it on your mobile device!

<FirstName>  
  
Tomorrow is the last day to complete your CSFA survey and we can’t replace you with anyone else! I want to remind you that **the study ends at midnight on <<date>>** and if you finish the survey by then, we’ll send you a $20 token of appreciation!

To get started, [click here](https://surveys.nces.ed.gov/bps/startresume.aspx?d=UUI4L1BNUWZTemFVSDNzMWlHMVUwcW0ydjBuUlFDTlEwcUpaYXVkSG5pYjNHdnVKOUYyQlFzeElJREdDajBiTXUvZXFTWmhldDZJQXZvdnI0dzNucVE9PQ2&p=g)!

<https://surveys.nces.ed.gov/csfa/>

Study ID: [caseid]  
Password: [pswd]g

Please call the **Help Desk at 1-800-XXX-YYYY** if you have any questions or problems completing your survey.

Thank you!

Jeff Franklin

Project Director, CSFA

RTI International

1-800-XXX-YYYY

OMB Control Number: 1850-0931

Learn more about our confidentiality procedures at https://URL

**Thank You/Incentive Letter**

(Applies only to SMs who opt to receive their incentive via check.)

<<date>>

<<name>>

<<addr1>>

<<addr2>>«addr2»

<<city>>, <<st>> <<zip>>

Dear «fname» «lname»:

On behalf of the Connecting Students with Financial Aid (CSFA) study  and the National Center for Education Statistics (NCES), which is part of the U.S. Department of Education, we would like to thank you. Your participation in CSFA is very important in helping to ensure the success of our study about student experiences with financial aid.

Enclosed you will find a check for $20 as a token of our appreciation.

If you have any questions, please do not hesitate to contact us at 1-800-XXX-YYYY.

Sincerely,

Jeff Franklin Tracy Hunt-White, PhD

CSFA Project Director Project Officer

RTI International National Center for Education Statistics

**Data Collection Website Text**

**HOME PAGE:**

**Welcome to the Connecting Students with Financial Aid (CSFA) study!**

GET STARTED!

Study ID

Password:

□ Show me what I’ve typed

LOG IN

Need your Study ID number or password? (hyperlink)

NCES is authorized to conduct CSFA by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C. §9543) and to collect students’ education records from education agencies or institutions for the purposes of evaluating federally supported education programs under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3)(iii) and 99.35). The data are being collected for NCES by RTI International, a U.S.-based nonprofit research organization. All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this voluntary information collection is 1850-0931. The time required to complete this information collection is estimated to average approximately 10 minutes per response, including the time to review instructions, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate, suggestions for improving this survey, or any comments or concerns regarding the status of your individual submission of this survey, please write directly to: The Connecting Students with Financial Aid study, National Center for Education Statistics, Potomac Center Plaza, 550 12th St, SW, Room 4004, Washington, DC 20202.

**CONTACT US**

If you need assistance accessing the web survey or wish to complete the survey by phone, contact the CSFA Help Desk.

**Telephone**

Phone: 877-XXX-XXXX

**Email**

csfa@rti.org

**CSFA Staff**

CSFA project staff are available to respond to your questions Monday through Friday between 9:00 a.m. and 5:00 p.m. ET.

**CSFA Staff**

|  |  |
| --- | --- |
| RTI Project Director | Jeff Franklin |
|  | [jwf@rti.org](mailto:jwf@rti.org) |
|  | 919-485-2614 |
| NCES Project Officer | Tracy Hunt-White |
|  | [Tracy.Hunt-White@ed.gov](mailto:Tracy.Hunt-White@ed.gov) |
|  | 202-245-6507 |

**WHAT TO EXPECT**

**How can I complete the CSFA survey?**

You may complete the CSFA survey on the Web – simply Log in from the home page by entering your study ID number and password, which are provided in the CSFA letter or e-mail you received. You can even complete it on your mobile device. If you need assistance accessing the survey on the website, or if you want to complete the survey by telephone, contact the CSFA Help Desk by calling 877-XXX-XXXX or sending an e-mail to csfa@rti.org.

**How long will the survey take?**

For most people, we expect the survey will take about 10 minutes, depending on your answers. You do not have to complete the survey in one session. You can get started and, if you choose, you can easily log out and resume at a later time.

**Do I have to participate?**

Participation in this study is voluntary; however, your involvement is very important to the success of this study. CSFA is an important study that has provided students with information about financial aid and seeks to learn more about student experiences with financial aid. By participating, you have the opportunity to help policymakers, researchers, and others better understand the experiences of students like you. You may recall being contacted about or participating in the National Postsecondary Student Aid Study (NPSAS) last year. We need your participation again for this study to be a success!

**Can I refuse to answer a question?**

You may refuse to answer any question at any time. If you choose not to answer or are unable to answer a particular question, you may still continue with the rest of the survey.

**How do I know your website is secure?**

The CSFA website is protected by Secure Sockets Layer (SSL, 128-bit encryption) technology. Your survey responses are collected over a secure server and connection also protected by SSL.

**Should I use a particular web browser to take the web survey?**

The survey needs to use a browser that supports HTML5 and JavaScript. The latest versions of Firefox, Chrome, and Safari will work, as will Internet Explorer 9 and later. If you are having any trouble completing the survey, please call our Help Desk at 877-XXX-XXXX and we will be happy to assist you.

**CONFIDENTIALITY**

The National Center for Education Statistics (NCES) is required to follow strict procedures to protect personal information in the collection, reporting, and publication of data. All of the information you provide may be used only for statistical purposes and may not be disclosed, or used, in identifiable form for any other purpose except as required by law (20 U.S.C. §9573 and 6 U.S.C. §151).

Data security procedures for CSFA are reviewed and approved by NCES data security staff. Your answers are secured behind firewalls and are encrypted during internet transmission using Secure Sockets Layer (SSL) protocol. All data entry modules are password protected and require the user to log in before accessing confidential data.

Congress has authorized the National Center for Education Statistics (NCES) of the U.S. Department of Education’s Institute of Education Sciences to collect data about the costs of postsecondary education because policymakers at all levels need reliable and current national data in order to make decisions about postsecondary education.

NCES is authorized to conduct the Connecting Students with Financial Aid study by the Education Sciences Reform Act of 2002 (ESRA 2002, 20 U.S.C. § 9543), and to collect students’ education records from educational agencies or institutions for the purposes of evaluating federally supported education programs under the Family Educational Rights and Privacy Act (FERPA, 34 CFR §§ 99.31(a)(3) and 99.35).

The study has been approved by the U.S. Office of Management and Budget (OMB). The valid OMB control number for this information collection is 1850-0931. The expiration date is xx\xx\2020.

**ABOUT CSFA**

The **Connecting Students with Financial Aid (CSFA)** is a study of approximately 16,000 students randomly selected from across the U.S. to find out more about their thoughts and experiences with student financial aid.

Study participants were first surveyed in 2016 as part of the National Postsecondary Student Aid Study (NPSAS).

CSFA is conducted by the National Center for Education Statistics (NCES), in the U.S. Department of Education’s Institute for Education Sciences, with data collection being carried out under contract by RTI International\*, a nonprofit research organization based in North Carolina.

\*RTI International is a registered trademark and a trade name of Research Triangle Institute.

To learn more about CSFA, visit [NCES’s CSFA website](https://nces.ed.gov/surveys/npsas/grant/csfa/).

**NCER-NPSAS Grant Study**

**Connecting Students with Financial Aid (CSFA) 2017: Testing the Effectiveness of FAFSA Interventions on College Outcomes**

**Appendix C**

**Survey Instrument**

**OMB # 1850-0931 v.2**

Submitted by  
National Center for Education Statistics  
U.S. Department of Education

**October 2016**

**revised May 2017**

**CSFA Student Survey**

This appendix provides the item wording for the Connecting Students with Financial Aid (CSFA) student survey. Many changes were made to the original OMB submission approved on January 19, 2017 (OMB# 1850-0931 v.1) in preparation for the cognitive testing conducted in April 2017 (OMB# 1850-0803 v.191). These changes were caused by a combination of further researcher review, financial aid policy changes, and suggested improvements from NCES and OMB. The original survey submission contained several items that were dense in content and had to be divided into several questions for clarity and improved quality of collected data. This resulted in an overall increase in the number of questions.

In addition, items were added to capture data during the unique timing of the survey. Specifically, items were added to examine the first year of respondent experience with the early availability of the Free Application for Federal Student Aid (FAFSA) and the use of Prior-Prior Year tax data. Also, during the OMB review of the cognitive interview package, several questions were modified for improved understanding and clarity, and others were generated to expand data collected on topics such as student loans. Lastly, questions regarding respondent use of the Internal Revenue Service’s Data Retrieval Tool (DRT) in the FAFSA were added to the survey given the unexpected loss of the DRT in FAFSA in the middle of the 2017-18 FAFSA application season and during the CSFA informational letter intervention phase.

After the cognitive testing was concluded, further revisions were made to the survey based on the cognitive testing outcomes (Appendix F) and suggestions from RTI International, the data collection contractor, regarding survey design, survey programming, and data collection projections. The combined revisions are reflected in the finalized survey instrument provided in this appendix and are designed to reduce respondent burden, increase participation rate, and improve the quality and clarity of collected data.

Table 1 summarizes content revisions to the CSFA survey as compared to the CSFA survey that was approved for April 2017 cognitive testing (OMB# 1850-0803 v.191). The majority of the CSFA questions remained unchanged in language and/or formatting, but may have been renumbered to identify each question individually rather than as a sub-question of a single item. Other questions remain unchanged, but have been reorganized within the survey for better flow and respondent experience. Some questions have been modified to contain language that is clearer for respondents and/or that better captures the intention of the inquiry. Lastly, one question has been omitted because it was found to be redundant, and one question was created by separating a portion of the previously joint question (Q65). Lastly, items about how to provide the promised incentive have been added.

# Table 1. Summary of Changes to CSFA Student Survey

**Renumbered (Renum) – Renumbered since cognitive testing - no change in relative question placement within survey**

**Reorganized (Reorg) – Change in placement since cognitive testing   
Revised (Rev) – Change in language (question or response options) or Change in question format** **since cognitive testing**

**Removed – Item removed since cognitive testing**

**Added – Item added since cognitive testing**

| **Item #** | **Item Name** | **Change** | **Rationale** |
| --- | --- | --- | --- |
| Consent | Consent statement review | Rev | Removed PRA statement since it appears on log in web page. |
| Q1 | Submit 2017-18 FAFSA | Renum  Rev | Previous Q2/Q2b  Shortened answer option to “yes”, “no”, and added option “not sure” |
| Q2 | FAFSA Submission History | Renum | Previous Q4 |
| Q3 | FAFSA Awareness | Reorg  Rev | Previous Q7  Language revision in response options necessary to include previously nested options – No, Yes and have completed before, Yes and have not ever completed |
| Q4 | Non-FAFSA application | Renum  Reorg  Rev | Previous Q3  Separated from multiple question item  Removed display logic nested under initial “yes” answer to list out three Yes options and one “No” option. Cognitive Interviews suggested that respondents answer more accurately when the options provided examples of “non-governmental” financial aid application they may have completed. Removed “other” custom entry option. |
| Q5 | FAFSA Each Year | Rev | Included “FAFSA” abbreviation followed by the definition (question of awareness has already been asked, so we’ll use FAFSA for the remainder of the instrument where applicable. |
| Q6 | Early FAFSA awareness | Rev | Language revision: “FAFSA” in place of “government financial form” (see item Q5); “was available to students to apply starting October 1, 2016” |
| Q7 | Early FAFSA source | Renum  Rev | Previous nested Q6b  Language revision: “FAFSA” in place of “financial aid form”; Combined Friend and Family Member options into “Friend or Family Member” |
| Q8 | No 2017-18 FAFSA | Rev | Previous 8a  Language revision “file the FAFSA” in place of “apply for financial aid” in question text; In Response options - cognitive interview feedback indicated a benefit to including “I did not need financial aid to pay for college expense this year” to be inclusive of that desired response option. Removed “Other” text entry option to improve the accuracy of responses. |
| Q9 | Not FAFSA eligible | Renum  Rev | Previous nested Q8b  Ask if indicated by answer to Q8  Language revision necessary when separated from prior host question: “Why do you believe you do not qualify for financial aid? Options from original Q8b separated to make the item more efficient and logical for respondents. All options represented in the original Q8b are found in items Q9 and Q10. |
| Q10 | No Fin Aid Need | Renum  Rev | Previous nested Q8b;  Ask if indicated by answer to Q8  Language revision necessary when separated from prior host question: “Why did you not need financial aid this year?” Options from original Q8b separated to make the item more efficient and logical for respondents. Added response options (due to cog interview feedback): “I have funds in a college savings account to cover expenses”; “I received scholarships or grants from other (non-government sources”; “I have graduated and am no longer enrolled” |
| Q11 | FAFSA Learning | Renum  Rev | Previous Q9  In Question text: used “of completing the FAFSA to apply” in place of “applying for”. In Response Options; condensed options, added “private counselor” to “financial advisor” option, made “I did not receive help from someone else” as the final option that, if selected, will disable possible selection of other options. |
| Q12 | FAFSA Assistance | Renum  Rev | Previous Q10  In Question text: to improve clarity for respondents - used “when you last completed the FAFSA” in place of “to complete your financial aid forms (i.e. the FAFSA) the last time you did so?” In response options: condensed options, added “private counselor” to “ financial advisor” option, made “I do not know how to apply for financial aid the final option that, if selected, will disable possible selection of other options. |
| Q13 | Financial Info Dependent | Reorg | Remains number Q13, but appears in a different order than in previous version (improved logic of answering if respondent has EVER applied for aid rather than only if they applied for 2017-18) |
| Header | IRS DRT DOWN Statement | Rev | Clarified statement – used “FAFSA” where applicable and IRS “DRT” abbreviation after establishing meaning. Also changed statement to reflect the permanent loss of DRT after March 2017 (original stated “not available for several weeks”) |
| Q14 | IRS DRT Down Impact | Renum  Reorg  Rev | Previous Q11a  Q14 asked of all students (DRT loss may have created an obstacle that prevented a respondent from filing 17-18)  Separation into individual items required revision of text for logic and clarity.  Added “Did the IRS DRT removal affect…”; used “FAFSA” in place of “financial aid forms” |
| Q15 | FAFSA Format | Renum  Reorg | Nested within previous Q12a  Question and response options from original 12a separated for enhanced clarity, efficiency, and logic for respondents and data collection. All options represented in the original 12a are found in items Q15, Q16, Q27, Q28, Q29. |
| Q16 | FAFSA Paper | Renum  Reorg  Rev | Nested within previous Q12a  Question and response options from original 12a separated for enhanced clarity, efficiency, and logic for respondents and data collection. All options represented in the original 12a are found in items Q15, Q16, Q27, Q28, Q29.  Dropped “other” text entry option from responses. |
| Q17 | IRS DRT Use | Renum | Previous Q12b |
| Q18 | IRS DRT Awareness | Renum | Previous Q12c |
| Q19 | IRS DRT Timing | Renum  Reorg  Rev | Previous Q11b  Separated from Q14 to follow display logic for 17-18 filers  Separation into individual items required revision of text for logic and clarity.  Added “Did the IRS DRT removal affect…”; used “FAFSA” in place of “financial aid forms” and “forms” in question and answer where applicable. |
| Q20 | IRS DRT Method | Reorg  Rev | Previous Q11c  Separated from Q14 to follow display logic for 17-18 filers  Separation into individual items required revision of text for logic and clarity.  Added “Did the IRS DRT removal affect…”; used “FAFSA” in place of “financial aid forms” and “forms” in question and answer where applicable. |
| Q21 | Fin Aid Steps | Renum | Previous Q14a |
| Q22 | Fin Aid Comp Myself | Renum | Previous Q14b |
| Q23 | Fin Aid Comp W Help | Renum  Rev | Previous Q14c  Transposed word order for improved clarity of statement |
| Q24 | Fin Aid Award Letter | Renum | Previous Q14d |
| Q25 | Fin Aid School Office | Renum | Previous Q14e |
| Q26 | Fin Aid Questions | Renum | Previous Q14f |
| Q27 | FAFSA Error | Renum  Rev  Reorg | Previous Q12a  Cog interview feedback suggested improving language and formatting as a True/False inquiry may improve validity of response. Transposed word order for clarity.  Question and response options from original 12a separated for enhanced clarity, efficiency, and logic for respondents and data collection. All options represented in the original 12a are found in items Q15, Q16, Q27, Q28, Q29  Order in final version adjusted to chronologically follow other FAFSA completion questions |
| Q28 | FAFSA Verification | Renum  Rev  Reorg | Previous Q12a  Cog interview feedback suggested improving language and formatting as a True/False inquiry may improve validity of response. Dropped “also” from statement.  Question and response options from original 12a separated for enhanced clarity, efficiency, and logic for respondents and data collection. All options represented in the original 12a are found in items Q15, Q16, Q27, Q28, Q29  Order in final version adjusted to chronologically follow other FAFSA completion questions |
| Q29 | School Fin Aid Form | Renum  Rev  Reorg | Previous Q12a  Cog interview feedback suggested improving language and formatting as a True/False inquiry may improve validity of response.  Question and response options from original 12a separated for enhanced clarity, efficiency, and logic for respondents and data collection. All options represented in the original 12a are found in items Q15, Q16, Q27, Q28, Q29  Order in final version adjusted to chronologically follow other FAFSA completion questions |
| Q30 | PPY | ReNum | Previous Q15 |
| Q31 | PPY Addt Paperwork | ReNum | Previous Q16 |
| Q32 | Credit Fall 2017 | Renum  Rev | Previous Q17  Created consistency with options provided in other credit-load questions |
| Q33 | Credit Comparison | Renum | Previous Q18 |
| Q34 | Fin Aid Course Load | Renum  Rev | Previous Q19  Cog interview feedback indicated statement is confusing. Rearranged the word order for clarity. Added response option “Does Not Apply To Me” |
| Q35 | Fin Aid Course Aware | Renum | Previous Q20 |
| Q36 | Not Full Time | Renum  Rev | Previous Q21  Add clarifier “attending less than full time” after “fewer than 12 credits”, added option for “I completed my degree/graduated” after cognitive interviews. Replaced response option “Other” with text entry with “None of the Above” without manual text entry. |
| Q37 | Credits (PT) Next Term | Renum | Previous Q22 |
| Q38 | Why Full Time | Renum  Rev | Previous Q23  Added “ I am required to enroll full-time due to a scholarship I am receiving or program I am a part of. Replaced response option “Other” with text entry with “None of the Above” without manual text entry. |
| Q39 | Credits (FT) Next Term | Renum | Previous Q24 |
| Q40 | Attending Due to Fin Aid Offer | Renum  Rev | Previous Q25a  Cognitive Interview Outcome: Language found to be confusing – reworded and shortened. |
| Q41 | Attending 1st Choice | Renum  Rev | Previous Q25b  Cognitive Interview Outcome: Language found to be confusing – reworded and shortened. |
| Q42 | Fin Aid Award Enrollment | Renum  Rev | Previous Q25c  Cognitive Interview Outcome: Language found to be confusing – reworded and shortened. |
| Q43 | Limit Credits - Debt | Renum  Rev  Reorg | Previous Q31f  Changed ”I take in college” to “I’m taking”  Moved to existing section regarding financial aid affecting decision making about enrollment intensity |
| Q44 | Stopped out - Debt | Renum  Reorg | Previous Q31g  Moved to existing section regarding financial aid affecting decision making about enrollment intensity |
| Q45 | Student Loan Self | Renum  Rev | Previous Q26a  added “ever” to question |
| Q46 | Student Loan Family | Renum  Rev | Previous Q26b  Added “ever” and “your” to question |
| Q47 | Loan Decision Yes | Renum  Reorg  Rev | Previous Q28  Moved to before Q48 to improve survey logic and respondent experience  Removed “other” option from responses – reworded “I did not receive help from anyone else” |
| Q48 | Type of Student Loans | Renum  Rev | Previous Q27  Added “ever”, “your” and “expenses” to question. Added two options after cognitive interview feedback: a) Loan from my college and b) Credit Card Loan |
| Q49 | Loans to Attend | Renum  Reorg | Previous Q25d  Moved to the beginning of this block of statements to improve survey progression and respondent experience |
| Q50 | College Helped Loan Decision | Renum  Reorg | Previous Q 29a (Not in original – added during passback recommendations)- Changed placement to improve survey progression and respondent experience |
| Q51 | Repayment Plan | Renum | Previous Q31a |
| Q52 | Ability to Pay – Orig | Renum  Rev | Previous Q31b  Removed “originally”; simplification |
| Q53 | Interest Rate Awareness | Renum  Reorg  Rev | Previous Q29b (Not in original - added during passback recommendations)  Changed placement to improve survey progression (topic) and respondent experience  Removed “personal” |
| Q54 | Interest rate comfort | Renum | Previous Q31d (Not in original – added during passback recommendations) |
| Q55 | Monthly Payment Awareness | Renum  Reorg  Rev | Previous Q29c  Changed placement to improve survey progression (topic) and respondent experience  Removed “personal” |
| Q56 | Ability to Pay – Now | Renum | Previous Q31c (Not in original – added during passback recommendations) |
| Q57 | Repayment Started | Renum  Reorg | Previous Q30 (Not in original – added during passback recommendations)  Changed placement to improve survey progression (topic) and respondent experience |
| Q58 | Loan Decision No | Renum  Rev | Previous Q32  Cognitive interviews found this question confusing, especially if they didn’t need a loan – there was no “decision” to make. Reworded the question to provide additional context and added the response option: “I had enough money to pay for college“ |
| Q59 | Repay Loan | Renum | Previous Q33a |
| Q60 | Interest Rate | Renum | Previous Q33b (Not in original – added during passback recommendations)- |
| Q61 | Other Debt | Renum | Previous Q33c |
| Q62 | Loan Option | Renum | Previous Q33d |
| Q63 | Fin Aid avoid Loans | Renum | Previous Q33e |
| Q64 | Trouble getting loan | Renum  Rev | Previous Q33f  Question shortened to only asking if respondent experienced trouble getting a loan, not if they were ultimately unable to get one. |
| Q65 | Unable to get Loan | Added | Previous Q33f  Added to separate out from Previous Q 33f – this item was confusing because there were multiple outcomes for respondents during cognitive testing. |
| Q66 | Select Method | Added | Incentive Delivery Question |
| Q67 | Paypal Email Entry | Added | Incentive Delivery Question |
| Q68 | Paypal Phone Entry | Added | Incentive Delivery Question |
| Q69 | Check Mailing Entry | Added | Incentive Delivery Question |
| Q70 | Check Email Entry | Added | Incentive Delivery Question |

Item Omitted since previous version

|  |  |  |  |
| --- | --- | --- | --- |
| Q 31e | Repay Loans | Removed | Previous Q31e; feedback suggested question was redundant (similar to current Q56 |

**Follow-up Survey – Survey Instrument**

**<<ALL STUDENTS – CONSENT>>**

You are being contacted because you agreed to participate in an external research project when you responded to the 2015-16 National Postsecondary Student Aid Study (NPSAS:16). For more information go to: <http://nces.ed.gov/surveys/npsas/grant/>.

* Yes, Continue on the Survey
* NO

**<<ALL STUDENTS>>**

|  |  |
| --- | --- |
| Q1: Did you apply for **federal or state financial aid** to help you with college expenses for the current (2017-18) school year? | * Yes * No |
| Q2: Prior to 2017-18, have you ***ever*** applied for state or federal government financial aid to help you with college expenses? | * Yes * No * Not Sure |
| Q3: Do you know what the FAFSA is? | * No, I am not sure what the FAFSA is * Yes, I know what the FAFSA is and have completed it before * Yes, I know what the FAFSA is, but have not ever completed it before |
| Q4: Did you apply for financial aid from anyone else (a non-governmental source) to help you with college expenses for the current (2017-18) school year? (Check all that apply) | * No, I did not apply for financial aid from a non-governmental source * Yes, I applied for financial aid using the CSS/Financial Aid Profile * Yes, I applied for financial aid using an application from my school * Yes, I applied for financial aid using an application from another organization |
| Q5: Are you aware that to get state or federal government financial aid, you must complete the FAFSA (Free Application for Federal Student Aid) each year? | * Yes * No |

Block Header: Last year, the FAFSA was available to students to begin the financial aid application process starting October 1, 2016 – three months earlier than usual

|  |  |
| --- | --- |
| Q6: Were you aware that the 2017-18 FAFSA was made available earlier than usual? | * Yes * No |
| **DISPLAY LOGIC: IF Q6=Yes**  Q7: How did you find out about the early availability of the 2017-18 FAFSA? | * Communication (e.g., letter, email, flyer) from my college * Communication (e.g., letter, email, flyer) from the government (e.g., U.S. Department of Education) * Media (print or electronic) or Social Media * Friend or Family Member |

**<<DISPLAY LOGIC: IF Q1 = “NO…” (*DID NOT APPLY FOR FEDERAL AND/OR STATE GOVERNMENT AID FOR THE CURRENT 2017-18 YEAR)* >>**

|  |  |  |
| --- | --- | --- |
| Q8: Why did you **not** file the FAFSA for 2017-18? (Check All that Apply) | | * I don’t think I qualify for financial aid * I did not need financial aid to pay for college expenses this year * I think it is too much of a hassle to apply for financial aid because I am not eligible for much money * I did not realize that I had to submit a financial aid application each year * It was too late to apply for financial aid when I decided to do so |
| << If Q8 = I don’t think I qualify for financial aid>>  Q9. Why do you believe you don’t qualify for financial aid | * I’ve applied for financial aid before, but did not receive any money * My family income is too high to qualify for financial aid * I don’t have good enough grades to get financial aid * I am not enrolled full time * I’m not a US citizen |
| <<If Q8 = I did not need financial aid to pay for college expenses this year>>  Q10: Why did you not need financial aid this year? | * I have funds in a college savings account to cover expenses * I received scholarships or grants from other (non-government) sources * I decided not to enroll this year * I have graduated and am no longer enrolled |

## <<DISPLAY LOGIC: IF Q1 = YES or Q2 = YES (*A STUDENT HAS EVER APPLIED FOR FEDERAL AND/OR STATE GOVERNMENT AID )*>>

## Block Header: We’re interested in your experiences with applying for Financial Aid.

|  |  |
| --- | --- |
| Q11: How did you learn about the process of completing the FAFSA to apply for government financial aid?  *Check all that apply*. | * Friend or Relative * Communication or mailing from my school * Community Organization * Online website * Private counselor or financial advisor * I do not know how to apply for financial aid |
| Q12: Did you receive assistance from another person when you last completed the FAFSA? If yes, please indicate from whom. *Check all that apply.* | * Relative or Friend * My college’s financial aid or other staff * Community Organization * Live counselor via phone or online * Private counselor or financial advisor * I did not receive help from someone else |
| Q13: Do you rely on a parent, guardian, or other party to provide financial information in order to complete your FAFSA? | * Yes * No |

## <<ALL STUDENTS>>

## Block Header: When completing the FAFSA , students have had the option of using the IRS Data Retrieval Tool (DRT) to help them.  The IRS DRT allows you to electronically transfer your federal tax return information from the U.S. Treasury to your FAFSA. Last March, during the aid application season, the IRS DRT became unavailable .

|  |  |
| --- | --- |
| Q14: Did the IRS DRT removal affect *whether* you completed your 2017-18 FAFSA? | * Yes, it did affect whether I chose to complete the FAFSA * No, it did not affect whether I chose to complete FAFSA |

**<<DISPLAY LOGIC: *IF Q1 = “YES…” (DID file the 2017-18 FAFSA)* >>**

|  |  |  |
| --- | --- | --- |
| Q15: Please tell us how you submitted your 2017-18 FAFSA. | | * I submitted the FAFSA online * I submitted the paper FAFSA |
| <<DISPLAY LOGIC: IF Q15 = Paper FAFSA>>  Q16: Why did you choose to submit the FAFSA on paper?  *Check all that apply*. | * I did not know there are other options for submitting the FAFSA * I tried to submit the FAFSA online but had difficulty * I did not have good online access to be able to complete the FAFSA online * The paper version seemed easier than other options |
| <<DISPLAY LOGIC: IF Q15 = FAFSA Online>>  Q17: Did you use the IRS Data Retrieval Tool to complete your FAFSA? | * Yes * No * Not Sure |
| Q18: Please indicate the statements that apply to you regarding the IRS DRT. *Check all that apply*. | | * I am not familiar with the IRS DRT * I found the IRS DRT to be easy to use * The IRS DRT system was not available when I tried to use it * I wanted to use the IRS DRT but I had difficulty doing so * I was not eligible to use the IRS DRT because of my (or my family’s) tax return or filing status |
| Q19: Did the IRS DRT removal affect *when* you completed your 2017-18 FAFSA? | | * Yes, I delayed submitting the FAFSA due to unavailability of the IRS DRT * No, it did not affect the timing of when I submitted the FAFSA |
| Q20: Did the IRS DRT removal affect howyou completed your 2017-18 FAFSA? | | * No, I submitted the FAFSA the same way as I originally intended * Yes, I decided to submit the FAFSA by a different means because of the unavailability of the IRS DRT |

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| --- | --- | --- | --- | --- | --- |
| We’re also interested to know your opinions about the financial aid process for the 2017-18 academic year. *Please select one response to each statement.* | | | | | |
| Q21: I clearly understood the steps to get financial aid for college this year. | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q22: I was able to complete the FAFSA **by myself** easily | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q23: I was able to complete the FAFSA easily with the help of other family members (e.g., parents), | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q24: My financial aid award letter was easy to understand | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q25: My school’s financial aid office was available to help me understand my financial aid offer | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q26: I know where to go if I have questions about my financial aid forms | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |

|  |  |  |
| --- | --- | --- |
| Q27: After I submitted the FAFSA, I was asked to fix an error or problem with my application | * True | * False |
| Q28: I was asked to submit more information for “Verification” | * True | * False |
| Q29: My school required me to complete another form to apply for financial aid | * True | * False |

|  |  |
| --- | --- |
| Q30: For the 2017-18 FAFSA, you could use your family information from tax year 2015. Did this make completing the form easier, harder, or not change the difficulty of the process? | * Easier * Harder * Did not change the difficulty of the process |
| Q31: Did you need to submit additional paperwork or seek a special consideration due to a change in circumstance from the 2015 tax filing year to the 2017-18 FAFSA filing season? | * Yes * No * Not Sure |

## <<ALL STUDENTS>>

|  |  |  |
| --- | --- | --- |
| Q32: How many credits are you taking this term (Fall 2017)? Select one  *If you are unsure about the number of credits, assume each course is usually 3 credits.* | * No credits (I am not enrolled this term) * Less than 6 credits * 6 to 8 credits (approximately two courses) * 9 to 11 credits (approximately 3 courses) * 12 to 14 credits (full-time; approximately 4 courses;) * 15 credits or more (full-time; approximately 4-6 courses) | |
| Q33: Are you taking more, fewer, or the same credits as the last time you enrolled in college courses? | * Increased – I’m taking more credits (or courses) this term * Decreased – I’m taking fewer credits this term * No change – I’m taking the same number of credits | |
| Q34: If your financial aid offer, not including loans, had been doubled, would you have taken more credits or courses? | * Yes * No * Does Not Apply to me |
| Q35: Did you know that the amount of financial aid you may be eligible for increases when you are enrolled for more credits? | * Yes * No |

***<<DISPLAY LOGIC: IF Q32 is less than 12 credits/full-time >>***

|  |  |
| --- | --- |
| Q36: Why are you taking fewer than 12 credits/attending less than full time this term?  *Check all that apply*. | * I completed my degree/graduated * I do not need additional courses for my degree * The courses I need to take are not being offered or did not have space for me (i.e., limited enrollment) * I have other work or personal commitments * I cannot afford to pay for more courses * None of the above |
| Q37: How many credits do you plan to take the next term? Select one.  *If you are unsure about the number of credits, assume each course is usually 3 credits.* | * No credits (do not plan to enroll) * Less than 6 credits * 6 to 8 credits (approximately two courses) * 9 to 11 credits (approximately 3 courses) * 12 to 14 credits (full-time; approximately 4 courses) * 15 credits or more (full-time; approximately 4-6 courses) |

**<< DISPLAY LOGIC: IF Q32 = *CURRENTLY ENROLLED THIS TERM AND TAKING 12 CREDITS OR MORE* >>**

|  |  |
| --- | --- |
| Q38: What made you decide to take 12 or more credits this term? *Check all that apply*. | * I need the courses to complete my degree. * I received enough financial aid to make full-time enrollment possible. * I am trying to complete my degree as quickly as possible. * I am required to enroll full-time due to a scholarship I am receiving or a program I am a part of * None of the above |
| Q39: How many credits do you plan to take the next term? Select one.  *If you are unsure about the number of credits, assume each course is usually 3 credits.* | * No credits (do not plan to enroll) * Less than 6 credits * 6 to 8 credits (approximately two courses) * 9 to 11 credits (approximately 3 courses) * 12 to 14 credits (full-time; approximately 4 courses) * 15 credits or more (full-time; approximately 4-6 courses) |

**<<ALL STUDENTS>>**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| We’re also interested to know how financial aid affects your decisions about college. *Please select one response to each statement.* | | | | | |
| Q40: I’m attending my current school because of the financial aid package I was offered | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q41: I was not offered enough financial aid to make attending my 1st-choice school affordable | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q42: After I learned about my financial aid award, I decided to take more college credits than I was originally planning | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q43: I am limiting the number of credits I’m taking because I want to minimize my student debt | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q44: I have stopped taking college classes because of my student loan debt | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |

|  |  |
| --- | --- |
| Q45: Have you ever personally taken out a loan to pay for college? | * Yes * No |
| Q46: Has a family member ever taken out a loan to help you pay for your college? | * Yes * No * Not Sure |

**If 45 and 46 are both “No”, Respondent will skip to Q 58**

**<<DISPLAY LOGIC: If Q45 = YES (STUDENT TOOK OUT A LOAN)>>**

|  |  |
| --- | --- |
| Q47: How did you decide to personally take out a loan?  *Check all that apply* | * Talked to my Parents or Other Relative * Talked to a Friend * Talked to my college’s financial aid staff * Got help from a Community Organization * Used an online resource to consider my options * I did not receive help from anyone else |

**<<DISPLAY LOGIC: Answer Q50 – Q If Q45 = YES (STUDENT TOOK OUT A LOAN) OR Q46 = YES (FAMILY MEMBER TOOK OUT LOAN FOR COLLEGE)>>**

|  |  |
| --- | --- |
| Q48: What kinds of loans have you or family members ever taken out to pay for your college expenses?  *Check all that apply* | * Federal Student Loan (Stafford Loan, Direct Loan, etc.) * Federal Parent PLUS Loan * Loan from a Bank * Loan from a relative or friend * Not Sure * Loan from my college * Credit Card Loan |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| We’re interested to know what you think about your student loans. **Please select one response to each statement.** | | | | | |
| Q49: I am only able to attend college by taking out loans | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q50: My college helped me determine the right amount of loans I needed to take | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q51: When I took out my loans, I understood what the repayment plan would be | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q52: When I took out my loans, I was confident that I would be able to repay them | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q53: I have a good understanding of what interest rate I am being charged on my student loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q54: I am comfortable with the interest rate being charged on my student loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q55: I have a good understanding of what my monthly payment will be after college for my student loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q56: **Currently**, I am confident that I will be able to repay my student loans | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |

|  |  |
| --- | --- |
| Q57: Have you already made any payments toward your student loans? | * Yes * No |

**<<SKIP LOGIC: IF Q45 = NO (*IF THE STUDENT DID NOT TAKE OUT A LOAN ) and Q46 = NO* >>**

|  |  |
| --- | --- |
| Q58: If you or your family have not taken out a loan for your college expenses, how did you make the decision? (Check all that apply) | * Talked to my Parents or Other Relative * Talked to a Friend * Talked to my college’s financial aid staff * Got advice from a Community Organization * Used an online or print resource to consider my options * I had enough money to pay for college * I did not need help from someone else to decide |

**<< ALL STUDENTS>>**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| We’re interested in your opinions about college student loans. *Please select one response to each statement.* | | | | | |
| Q59: I worry about being able to repay a loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q60: I worry about the interest rate being too high. | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q61: I have other debt I am managing (e.g., credits cards, car loan, mortgage) | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q62: I found it confusing to understand my student loan options | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q63: I received enough financial aid to be able to avoid taking out loans | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q64: I had trouble trying to get a student loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |
| Q65: I was unable to get a student loan | *Strongly Disagree* | *Disagree* | *Neither Agree or Disagree* | *Agree* | *Strongly Agree* |

**<< ALL STUDENTS>>**

|  |  |  |
| --- | --- | --- |
| Q66: To show our appreciation for completing the survey today, we would like to send you $20, payable by PayPal or check. Please indicate your preferred payment type | | * PayPal. The $20 transfer will be sent via email within the next few hours * Check. Please allow up to 4 weeks for processing and delivery of the $20 check * No, thanks. Decline the incentive. |
| << IF select “PayPal”>>  Q67: Please provide the email address to which you would like the PayPal payment sent. | * FIRST – type in your email address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Then - click: (PayPal button) |
| <<If select PayPal, they are routed to Phone>>  Q68: Please provide your phone number in case there is a problem with your PayPal payment | * Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| <<If select CHECK>>  Q69: Please provide the address to which you would like the $20 check mailed (Allow 4 weeks for delivery) | First Name, Last Name, Address, ZIP, City, State |
| Q70: Please provide your email address | Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |