



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?

- 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

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