



Agency Priority Goal (APG) Action Plan

Federal Student Aid Customer Service

APG Goal Leader: Mark Brown, Chief Operating Officer, Federal Student Aid

APG Deputy Goal Leader: Chris Greene, Deputy Chief Operating Officer, Federal Student Aid

Overview

Goal Statement

Impact Statement

Leverage the Next Generation Financial Services Environment (Next Gen FSA) to improve and personalize customers' experience with Federal Student Aid (FSA).

Achievement Statement

By September 30, 2021, FSA will transform its relationship with prospective and current customers through deployment of significant components of the Next Gen FSA that result in a personalized experience:

- The number of individuals submitting a Free Application for Federal Student Aid® (FAFSA®) through a mobile device will increase to 2.6 million.
- The overall customer satisfaction level throughout the student aid life cycle, as measured by the FSA Customer Satisfaction score,* will increase.

Challenge

- To provide enhanced access to real-time financial aid information through a mobile-first, mobile complete environment, allowing customers to make informed decisions and access quality customer service.

Opportunity

- Modernizing and improving customers' overall experience through continuous development and increased availability of the Department's first mobile platform, the myStudentAid app. In addition, the redesigned StudentAid.gov website is the first step in delivering on the promise of providing customers with a single, digital front door. This will give prospective and current customers a one-stop shop for getting information about applying for and managing their federal student aid.

*The Federal Student Aid Customer Satisfaction Score is an annual composite metric that measures the overall customer satisfaction level throughout the student aid life cycle for *Free Application for Federal Student Aid*® (FAFSA®) applicants (mobile and FAFSA.gov), Title IV aid recipients in school, and borrowers in repayment. The score is based on the American Customer Satisfaction Index surveys.

Leadership & Implementation Team

Mark Brown, Chief Operating Officer,
Federal Student Aid

Chris Greene,
Deputy Chief Operating Officer,
Student Experience and Aid Delivery
Federal Student Aid

Goal Structure & Strategies

The goal is a two-year Agency Priority Goal (APG) covering FY 2020 and FY 2021.

To achieve the goal the Department will improve customers' experience throughout the entire student aid life cycle by continuing to modernize capabilities for the *Free Application for Federal Student Aid* (FAFSA®) and the servicing and repayment of student loans. [Next Generation Financial Services Environment \(Next Gen\)](#) is the Department's transition to the digital future of Federal Student Aid (FSA), and aims to shift FSA to be a more customer-centric organization. FSA will build products and services that meet customers' expectations. This strategy is predominately used in private industry and now several government agencies, including FSA, are following this customer-centric model.

The APG is aligned with the progress of Next Gen FSA and will be measured by the following customer-centric metrics in FY 2020:

- Number of customers submitting the FAFSA via a mobile platform – either through the *myStudentAid mobile app* or mobile-optimized FAFSA.gov
- The overall customer satisfaction level throughout the student aid life cycle, as measured by the American Customer Satisfaction Index (ACSI)
- Number of customers checking loan balances via the *myStudentAid mobile app*
- Number of users adopting a virtual assistant that will answer questions about federal student aid
- Number of visits (sessions) to the redesigned StudentAid.gov website.

Summary of Progress – FY 2020 Quarter 1 & 2

- On February 23, FSA released three new features (Aid Summary, Loan Simulator, and Make a Payment Pilot), which provide personalized information and tools that help customers make more informed decisions and manage their loans.
 - The new Aid Summary displays details for each loan and grant received. Users can monitor repayment progress, receive alerts about their accounts, and keep track of remaining eligibility for Direct Loans and Pell Grants. Borrowers seeking Public Service Loan Forgiveness (PSLF) can track the number of qualifying payments made. With Aid Summary, users no longer have to log in to the *National Student Loan Data System* (NSLDS[®]) website for any of this information.
 - *Loan Simulator* replaces the *Repayment Estimator*. With *Loan Simulator*, borrowers can select a repayment goal, such as paying off loans as quickly as possible or paying the lowest amount per month. The tool also offers a simulation that shows repayment options if borrowers are struggling to make payments on loans or anticipate a financial burden in the future. There will be updates to *Loan Simulator* throughout 2020. The next update will show what repayment options would look like if additional loans were borrowed for school.
 - The Make a Payment feature provides FSA with a proof-of-concept for ultimately transitioning all borrowers with federally held loans onto a single servicing platform, and it allows borrowers to make payments through FSA's StudentAid.gov website. The pilot provides the option for five to seven million borrowers, with Direct Loans in repayment assigned to Great Lakes and Nelnet, to make a standard monthly payment on their loans through StudentAid.gov. Once fully implemented, this feature will improve customer options to repay their loans.

Summary of Progress – FY 2020, continued

- On December 21, FSA launched the AidanSM Virtual Assistant as part of the Next Gen effort to improve the way customers – including students, parents, borrowers, schools, and partners – interact with and manage the programs administered by FSA. Aidan is a virtual assistant that uses advanced technology—artificial intelligence and natural language processing—to answer the most common questions on federal student aid.
- In response to the CARES Act, signed by the President on March 27, 2020, FSA will provide relief to student loan borrowers during the COVID-19 national emergency. Federal student loan borrowers are automatically placed in an administrative forbearance, which allows them to temporarily stop making monthly payments. This suspension of payments will last until Sept. 30, 2020, but borrowers can still make payments if they choose.
- Staffing for FSA’s federal loan servicer call centers continued to be a challenge, particularly in the month of March due to COVID-19 as the servicers worked to make their staff available to work remotely while also responding to increased call volumes associated with the implementation of the CARES Act and provisional changes to loan servicing based on the legislation. FSA continues to provide technical assistance to servicers to assist with improving this standard.

Key Milestones

Each implementation phase links to a key milestone toward achieving this APG.

Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Comments
Launch the 2020–21 FAFSA® Form and myStudentAid Mobile App.	12/31/19	Met		Chris Greene	
The number of customers submitting FAFSA Forms through a mobile platform – the myStudentAid App -- or FAFSA.gov. is 2.4M.	9/30/20	On track	Decrease in submissions due to COVID-19	Chris Greene	
Utilize FY 2019 performance data on the number of customers checking loan balances via the myStudentAid mobile app to set aggressive targets for FY 2020.	12/31/19	Met	Increased from Quarter 1	Chris Greene	
The number of customers checking loan balances via the myStudentAid mobile app is 70K.	9/30/20	On track	Increased from Quarter 1	Chris Greene	
Introduce a virtual assistant that can answer questions about federal student aid.	12/31/19	Met		Chris Greene	
The number of users to adopt the virtual assistant through StudentAid.gov is 25,000.	9/30/20	Met	Exceeded target for FY 2020	Chris Greene	
Launch the Next Gen FSA implementation with the consolidation of multiple websites into a single, digital front door: StudentAid.gov.	12/31/19	Met	Three new improvements added in February	Chris Greene	
The number of visits (sessions) to the redesigned StudentAid.gov site goal is 190M.	9/30/20	On track	Visits increased	Chris Greene	

Key Milestones, continued

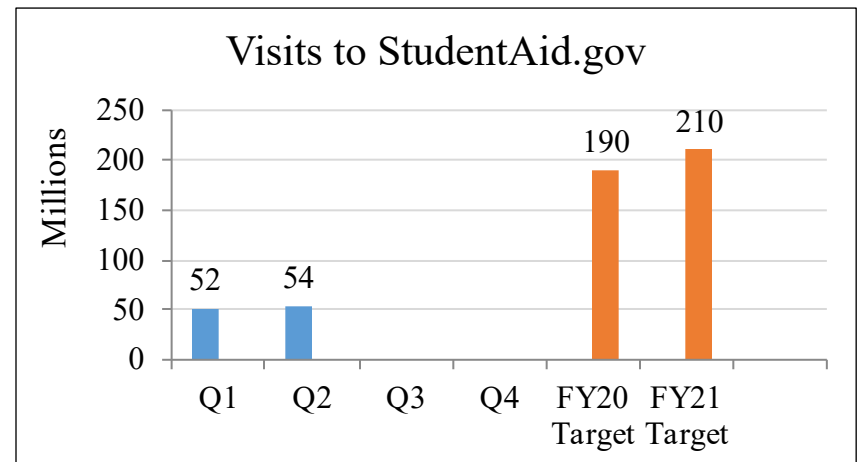
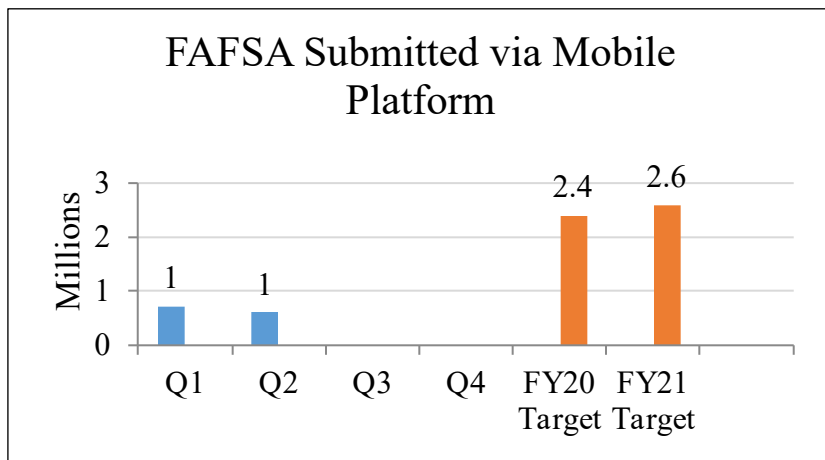
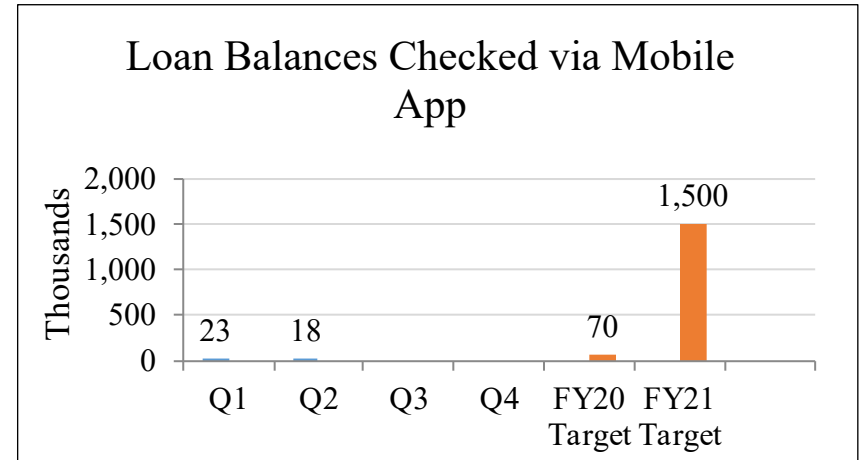
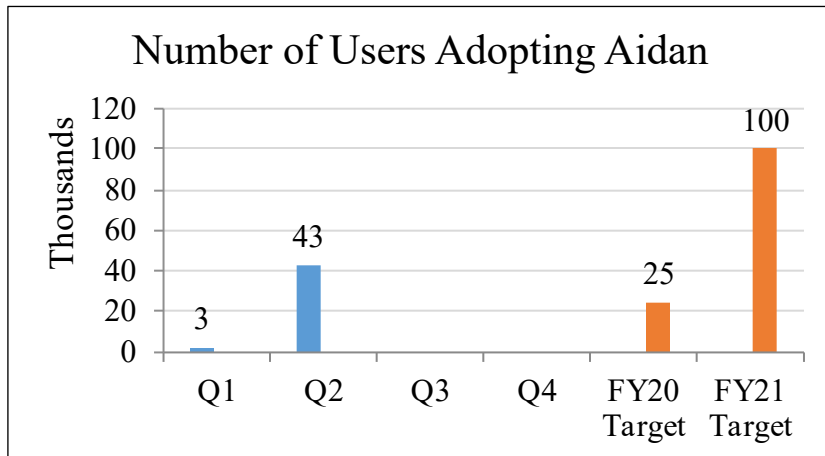
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Solidify the methodology for the way the FSA customer satisfaction score is assessed for the American Customer Satisfaction Index Surveys.	12/31/19	Met		Chris Greene	
Improve processes for customer interactions while applying for, receiving, and repaying federal student aid, as illustrated by achieving a score of 74 in the American Customer Satisfaction Index Surveys.	9/30/21			Chris Greene	Data is available only annually.
The number of customers submitting a FAFSA Forms through a mobile platform – the myStudentAid App -- or FAFSA.gov. is 2.6M.	9/30/21	On track		Chris Greene	
The number of customers checking loan balances via the myStudentAid mobile app is 1.5M.	9/30/21	On track		Chris Greene	
The number of users to adopt the virtual assistant through StudentAid.gov is 100,000.	9/30/21	On track		Chris Greene	
The number of visits (sessions) to the redesigned StudentAid.gov site is 210M.	9/30/21	On track		Chris Greene	

*The APG addresses the lack of quality and efficient loan information available to students and borrowers which impacts their ability to make informed financial decisions.

Key Indicators

FSA aims to improve and personalize prospective and current customers' experience through accessing information and federal student aid. The charts below show targets for FY 2020 and FY 2021 and actuals by quarter.



Data Accuracy and Reliability

- Data are collected from Apple's App Store, Google Play, and FSA's online platform analytics.
- For the number of downloads of the app, the FSA team generates a monthly report directly from Apple's App Store and Google Play. The data are reported as a cumulative number for all three months within the quarter.
- The data will be reviewed by FSA leadership prior to being released as part of the Department's strategic reporting.

Additional Information

Contributing Programs

Organizations:

- Federal Student Aid

Program Activities:

- Monitoring by Federal Student Aid

Stakeholder / Congressional Consultations

The Department conducted congressional consultation as part of the development of its *U.S. Department of Education's Strategic Plan for Fiscal Years 2018-22*, the FY 2018-2019 Agency Priority Goals (APGs), and the FY 2020-2021 APGs.