



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 Q3

- As of July 2020 , the consolidated StudentAid.gov website has received over 130 million visits since it was launched in December 2019 and is at 82.8 percent of its target goal for FY 2020. There are two releases planned over the next several months which will include the launch of an enhanced myStudentAid mobile app and improvements to Public Service Loan Forgiveness and borrower defense.
- Key updates to the website during quarter 3 include release of the Annual Student Loan Acknowledgement, enhancements to the Loan Simulator, and the addition of an employer database to the Public Service Loan Forgiveness Help Tool. Also during quarter 3, StudentAid.gov integrated the Federal Student Aid Feedback System.
- The Annual Student Loan Acknowledgement was launched in April and had more than 400,000 between April and July 2020. This tool is intended for borrowers to know what they owe before they take out more loans.
- The Loan Simulator had over 1.9 million users in the first five months after it was launched. The Department iteratively released new functionality that allows a user to simulate repayment scenarios for complex situations. In the fall the Department will add the ability to simulate what happens when a student borrows more, as well as what happens if they make early payments on their loans.

Summary of Progress – FY 2020 Q3

- The Public Service Loan Forgiveness Help Tool had 1.3 million users since December. The tool now has an employer database with more than 1.5 million employers in it to help borrowers know if their employment makes them potentially eligible or ineligible for the program.
- Federal Student Aid also launched the Aidan Virtual Assistant, which can answer questions for a pilot group of 50 percent of customers who are logged in on StudentAid.gov. Aidan uses advanced technology – artificial intelligence and natural language processing – to assist with common financial aid questions and tasks, such as “how much do I owe” and “who is my loan servicer?” Since being launched in September 2019, Aidan has had over 300,000 users who have exchanged over 800,000 messages.
- The enhanced tools and increased customer engagement demonstrate the positive impact of Federal Student Aid’s investments in technology to improve the customer experience. Federal Student Aid anticipates it will be reflective in the American Customer Satisfaction Index survey results at the end of the fiscal year period.

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	Completed		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	In-Progress	Over 1.9 M FAFSAs were submitted via a mobile platform through the end of Q3.	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	Completed		Chris Greene	
The number of customers checking loan balances via the myStudentAid mobile app is 70K.	9/30/20	In-Progress	Over 62,000 customers have checked their loan balances through Q3.	Chris Greene	
Introduce a virtual assistant that can answer questions about federal student aid.	12/31/19	Completed		Chris Greene	
The number of users to adopt the virtual assistant through StudentAid.gov is 25,000.	9/30/20	Completed	The FY 2020 target has been significantly exceeded.	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	Completed		Chris Greene	
The number of visits (sessions) to the redesigned StudentAid.gov site goal is 190M.	9/30/20	In-Progress	157 M visits (sessions) through Q3.	Chris Greene	

Key Milestones, continued

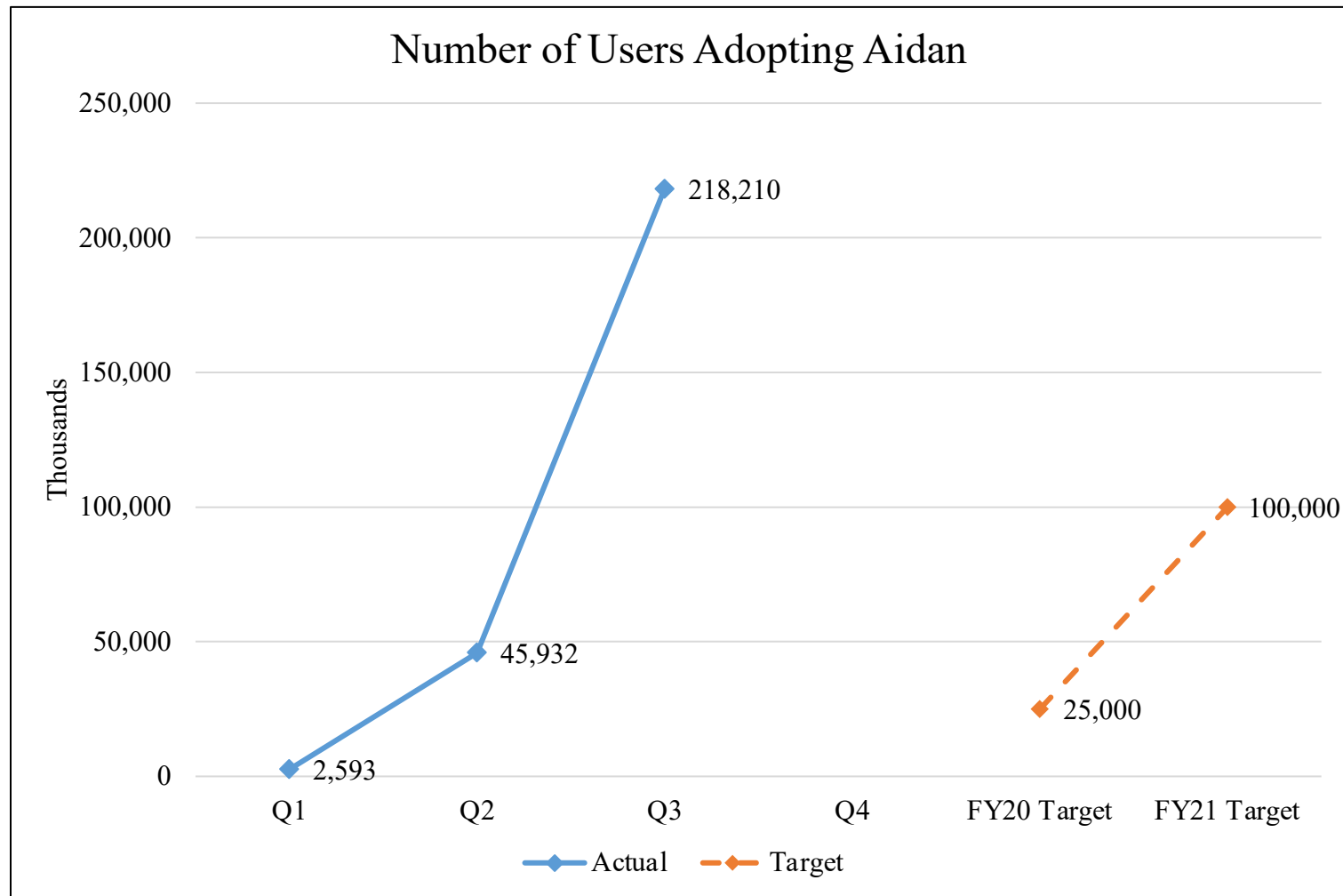
Each implementation phase links to a key milestone toward achieving this APG.

Milestone Summary					
Key Milestone	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Comments
Solidify the methodology for the way the FSA customer satisfaction score is assessed for the American Customer Satisfaction Index Surveys.	12/31/19	Completed		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	In-Progress	2.6 million FAFSAs filed through mobile platform.	Chris Greene	
The number of customers checking loan balances via the myStudentAid mobile app is 1.5M.	9/30/21	In-Progress	1.5 million customers checked loan balances via myStudentAid mobile app.	Chris Greene	
The number of users to adopt the virtual assistant through StudentAid.gov is 100,000.	9/30/21	In-Progress	Over 218,000 customers have used Aidan through FY2020 Q3.	Chris Greene	
The number of visits (sessions) to the redesigned StudentAid.gov site is 210M.	9/30/21	In-Progress	210 million visits (sessions) to studentaid.gov.	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.

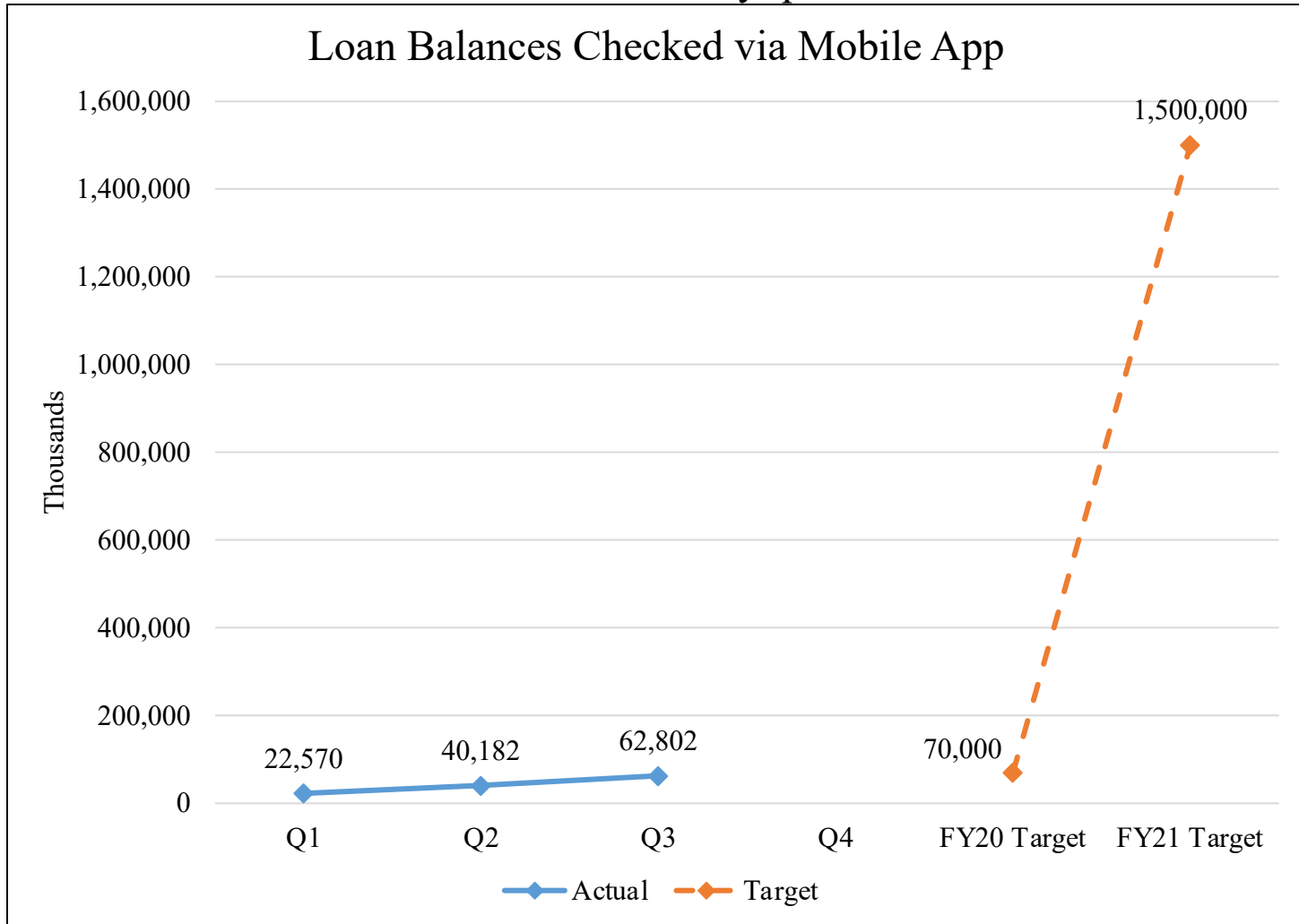
Key Indicators

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



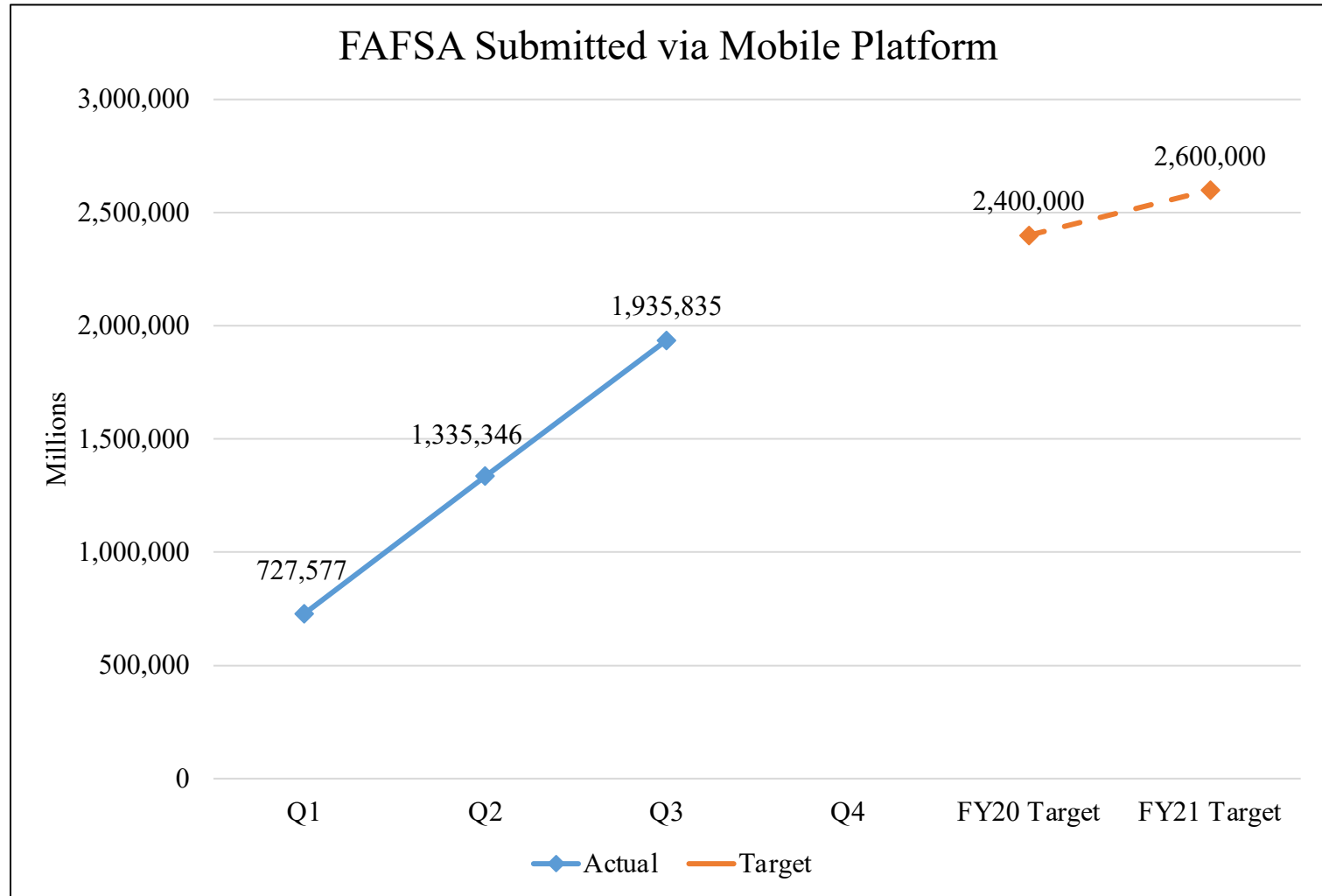
Key Indicators

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



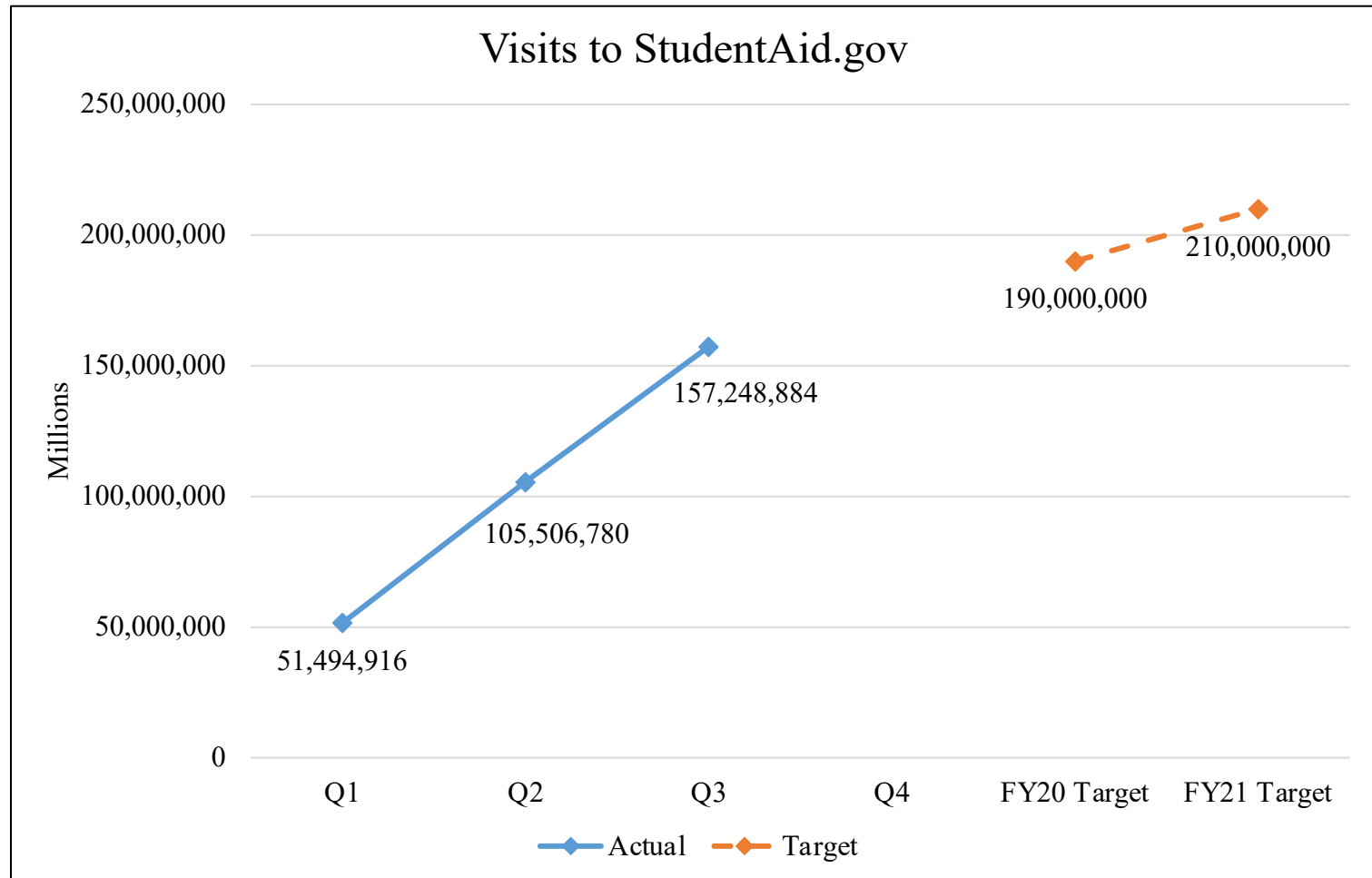
Key Indicators

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



Key Indicators

FSA aims to improve and personalize prospective and current customers' experience through accessing information and federal student aid. The chart below shows targets for FY 2020 and FY 2021 and cumulative 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.