



## Agency Priority Goal (APG) Action Plan

# Improve Borrowers' Access to Quality Customer Service

**APG Goal Leader:** Chris Greene, Chief Customer Experience Officer, Federal Student Aid

**APG Deputy Goal Leader:** Robert King, Assistant Secretary, Office of Postsecondary Education

# Overview

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## Goal Statement\*

- By September 30, 2019, the Office of Federal Student Aid (FSA) will advance the adoption of the Next Generation Financial Services Environment, enabling over 1.8 million customers to submit their Free Application for Federal Student Aid (FAFSA) through the FSA mobile platform and 30,000 customers to use the mobile platform to check on their loan balances.

## 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 with access to quality customer service.

## Opportunity

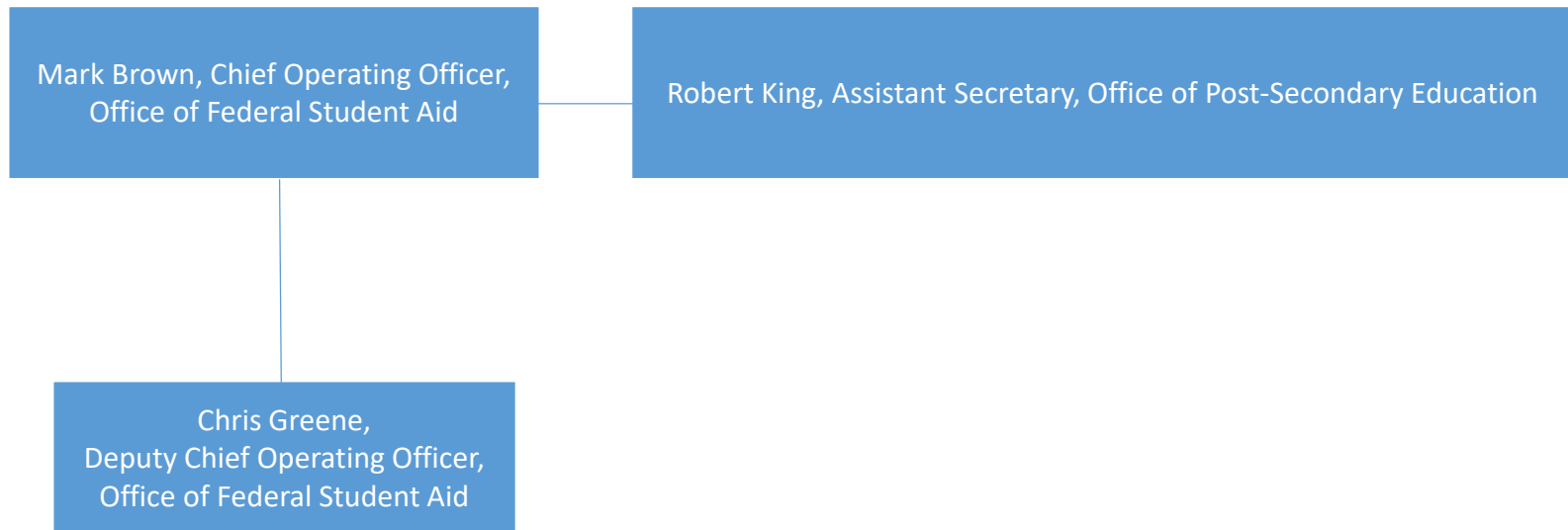
- Modernizing and improving customers' overall experience by developing and making available the Department's first mobile platform, *myStudentAid*. Through the mobile platform, students and parents can fill out and submit a FAFSA, view their federal student loan history, compare information about schools and link to other services.

\*APG changed at the start of Quarter 1 of FY 2019 with the Department's transition to a new paradigm of student loan processing.

# Leadership

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Visual representation of the goal team governance structure:



# Goal Structure & Strategies

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The Department will improve customers' experience throughout the entire student aid life cycle by first modernizing capabilities related to the FAFSA and the servicing and repayment of customer loans. With the Department's transition to a new paradigm of student loan processing, [Next Generation Financial Services Environment \(Next Gen\)](#), the Department revised this APG to monitor the following metrics in FY 2019:

- Number of downloads of the *myStudentAid mobile app*;
- Number of customers checking loan balances via the *myStudentAid mobile app*;
- Number of customers submitting the FAFSA via a mobile platform – either through the *myStudentAid mobile app* or mobile-optimized FAFSA.gov; and
- Number of visits (sessions) to the redesigned StudentAid.gov site.

# Summary of Progress – FY 2019 Q4

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- In October 2018, FSA launched its first *myStudentAid* mobile app which allows its customers, students and parents, to complete and submit the Free Application for Federal Student Aid (FAFSA®) form on a mobile phone. FSA customers continued to download the *myStudentAid* app from both Apple App Store (iOS) and Google Play (Android). The *myFAFSA* component—which is used to complete the FAFSA form—is the app’s featured function. The app provides guidance on how to complete the FAFSA questions, making the overall process more engaging and user-friendly. Continued awareness of the mobile app contributed to the increase in the number of downloads for FSA to exceed its goal.
- In October 2018, FSA launched its first *myStudentAid* mobile app which allows its customers to check their loan balances, similar to the banking industry. Increases in the number of downloads of the app reflect increased usage. This metric exceeded its goal.
- In addition to submitting a FAFSA form via the *myStudentAid* app, students and parents can submit a FAFSA form on a mobile device through [fafsa.gov](https://fafsa.gov). The [FAFSA.gov](https://fafsa.gov) site was redesigned so that the form pages fit the screen size and shape of any device, including desktop or laptop computers and mobile devices such as smartphones or tablets. This metric exceeded its goal.
- The October 2018 migration of the FAFSA home page to [StudentAid.gov](https://StudentAid.gov) continued to drive a large number of customers to the website, resulting in the increase in the number of sessions on the site. This metric exceeded its goal.
- In July 2019, FSA released *myStudentAid* version 2.2 that includes the *myChecklist* feature which provides users with guidance regarding student aid next steps and enabled push notifications that will send messages directly to users.

# Summary of Progress – FY 2018 through FY 2019

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- During FY 2018 through FY 2019, FSA made significant strides toward the development, implementation, and ongoing improvement of Next Gen.
- In 2018, FSA released the Department's first app, *myStudentAid*. Customers continue to download the *myStudentAid* app from both the Apple App Store (iOS) and Google Play (Android). The *myFAFSA* component—which is used to complete the FAFSA form—is the app's featured function. The app provides guidance on how to complete the FAFSA questions, making the overall process more engaging and user-friendly.
- The Department also redesigned the [fafsa.gov](https://fafsa.gov) website to allow better usability.

## Next Steps

- FSA will continue to conduct outreach activities, and monitor adoption, related to the *myStudentAid* app and mobile FAFSA submission/completion rates.
- FSA will release updates to the *myStudentAid* app which will enhance the user experience inclusive of a personalized dashboard, financial aid summary and borrower tools.
- In FY 2020, FSA plans to introduce a Virtual Assistant that can help answer more than 800 questions about federal student aid. This new Virtual Assistant will become a key service touchpoint, enabling customer self-service and reducing the need for customers to call FSA contact centers.

## The Department achieved this APG.

- By September 30, 2019, FSA proposed to advance the adoption of Next Gen, enabling over 1.8 million customers to submit their FAFSA through the FSA mobile platform and 30,000 customers to use the mobile platform to check their loan balances. The Department surpassed these targets – more than 2.2 million customers submitted their FAFSA through the platform and 65,718 customers used the platform to check loan balances.

# Key Milestones

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

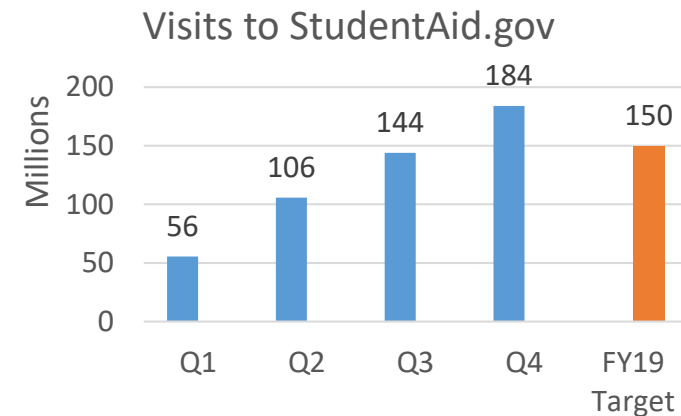
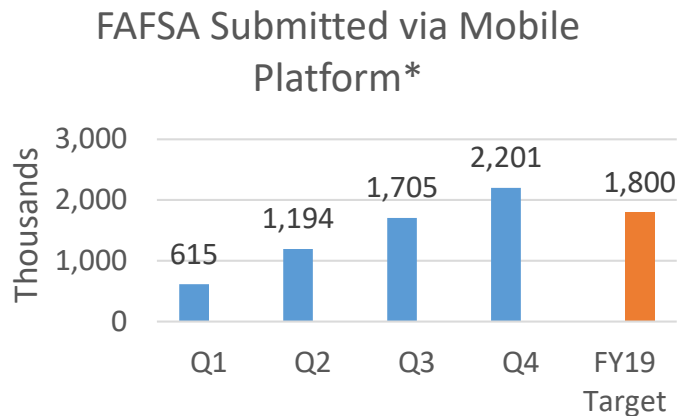
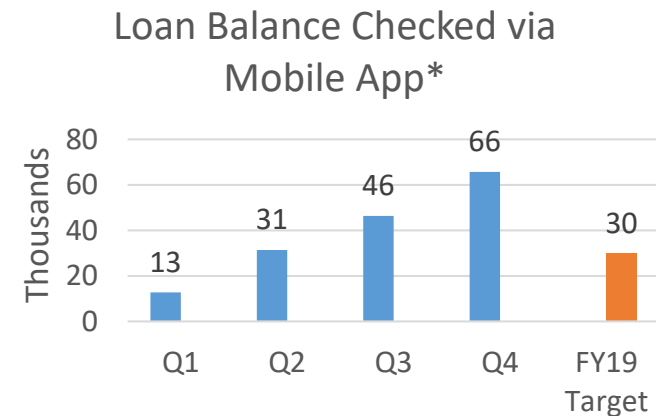
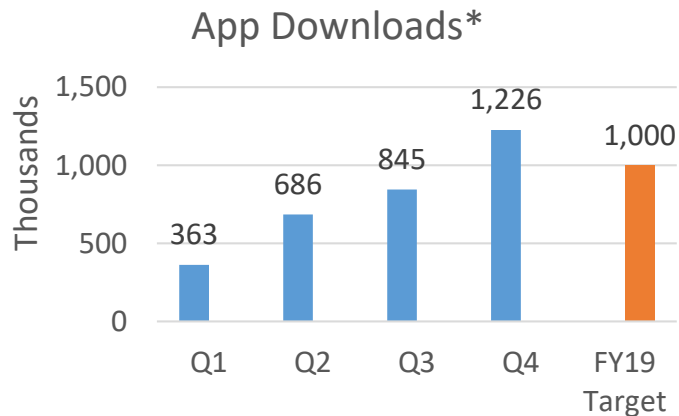
Milestone Summary					
Key Milestone	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Comments
In FY 2018 Q4, FSA proposed a change to the agency performance goal (APG) and associated metrics as an improved indicator for Next Gen FSA. Metrics were inclusive of myStudentAid mobile app downloads, the number of FAFSAs submitted and loan balances checked via the mobile platform, and the number of visits to StudentAid.gov	9/30/18	Met		Chris Greene	*
In FY 2019 Q1, the Department approved FSA's proposed change to the APG and provided feedback on associated metrics	12/31/18	Met		Chris Greene	*
In FY2019 Q1 FSA baselined metrics and forecast annual target goals which incorporated Departmental recommendations	12/31/18	Met		Chris Greene	*
Track, monitor, and report the myStudentAid mobile app downloads, the number of FAFSAs submitted and loan balances checked via the mobile platform, and the number of visits to StudentAid.gov	12/31/18	Met	See Slide 7	Chris Greene	**
Track, monitor, and report the <i>myStudentAid</i> mobile app downloads, the number of FAFSAs submitted and loan balances checked via the mobile platform, and the number of visits to StudentAid.gov	3/31/19	Met	See Slide 7	Chris Greene	**
Track, monitor, and report the <i>myStudentAid</i> mobile app downloads, the number of FAFSAs submitted and loan balances checked via the mobile platform, and the number of visits to StudentAid.gov	6/30/19	Met	See Slide 7	Chris Greene	
Track, monitor, and report the <i>myStudentAid</i> mobile app downloads, the number of FAFSAs submitted and loan balances checked via the mobile platform, and the number of visits to StudentAid.gov	9/30/19	Met	See Slide 7	Chris Greene	

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

\*\* Development and customer adoption of the *myStudentAid* mobile app and utilization of StudentAid.gov as vehicles of customer engagement, as envisioned by the Next Gen FSA will occur over a graduated cycle. Milestone status is listed as "Met" when all APG metrics are on target to meet the annual goal.

# Key Indicators

FSA aims to increase the use of *myStudentAid* mobile to access information and apply for federal student aid. The charts below shows FY 2019 culminative actuals.



\**myStudentAid* mobile app released in August 2018. No baselines available for these new metrics and targets are calculated to reflect best estimate.



# Data Accuracy and Reliability

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Data are collected from Apple's App Store, Google Play and FSA's online platform analytics.

For number of downloads of the app, the FSA team generates a monthly report directly from Apple's App Store and Google Play. The data is 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

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## **Contributing Programs**

Organizations:

- Office of Federal Student Aid

Program Activities:

- Monitoring by the Office of Federal Student Aid