



Question 3F-G

Question 3F-G	F				G		
Surveyed Call Centers	Long Distance Vendor	Network Messages Provided by Carrier	Routing Rules Implemented by Carrier	Carrier Provided Information (ANI, DNIS)	Vendor and PBX Model	Automated Call Dial-up (ACD) Group	Queuing & Routing Methods
<i>Direct Loan Servicing Center</i>	MCI Worldcom	NONE	Percent Call Routing	DNIS	Lucent G3R	Calls are routed using expected wait time for skill groups b/w two offices	Expected wait time
<i>Direct Loan Consolidation Center</i>	AT&T migration to MCI scheduled for 7/22/00	Initial welcome message and 3 menu prompts. Also emergency messaging provided at carrier level	Network call allocator split between Louisville & Montgomery call centers Also network allocator for application request boxes	DNIS	Lucent G3R version 6.3	<ul style="list-style-type: none"> Agents are set up in SplitSkills within the CMS system Skill sets are Exam Entry, Customer Service, and Application Status 	<ul style="list-style-type: none"> Combination of tools including the switch, conversant, and CMS Each of three skill sets (Exam Entry, Customer Service, Application Status) have dedicated 800 numbers which provide borrower access Application status skill set receives calls from carrier
<i>Federal Student Aid Information Center (FSAIC)</i>	MCI	NONE	NONE	DNIS	Lucent G3R	<ul style="list-style-type: none"> ACD1-Iowa City, Iowa 58 agents ACD2-Lawrence, Kansas 244 agents 	<ul style="list-style-type: none"> Best service routing between sites Expert Agent Distribution to most idle agent by skill level Option to proceed in English or Spanish then either confirm that the application has been processed or to request duplicate SAR or to identify holder of existing student
<i>Debt Collection Service Information Center (DCSIC)</i>	MCI	NONE	NONE	DNIS	Lucent G3R	<ul style="list-style-type: none"> ADC1-Iowa City 54 agents ACD2-Lawrence 16 agents 	<ul style="list-style-type: none"> Best service routing between sites Expert Agent Distribution to most idle agent by skill level



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<i>Ombudsman</i>	MCI	NONE	NONE	DNIS	Lucent G3R	<ul style="list-style-type: none"> ACD1-Iowa City, Iowa 10 agents ACD2-Lawrence, KS 6 agents 	<ul style="list-style-type: none"> Best Service Routing between sites Expert Agent Distribution to most idle agent by skill level An option is given to leave voice mail if the call is queued
<i>Central Processing System (CPS) Customer Service Center</i>	MCI	NONE	NONE	DNIS	Lucent G3R	<ul style="list-style-type: none"> ACD1-Iowa City, Iowa ACD2-Lawrence, KS 	Utilize expert agent distribution to most idle agent by skill level
<i>Direct Loan Origination Center - School Relations</i>	MCI Worldcom	NONE	Call allocator, in event of emergency calls can be routed to alternate location in Louisville, KY	DNIS	Lucent G3r 6.3	N/A	<ul style="list-style-type: none"> Calls are routed depending on G-code for School Relations which callers enter after the language prompt For applicant services, SSN entered routes the call
<i>National Student Loan Data System (NSLDS) Customer Service Center</i>	MCI Worldcom FTS 2001	NONE	NONE	DNIS	Nortel Meridian Option 11-C	3 ACD groups for NSLDS	Each caller given 3 choices during initial greeting: <ul style="list-style-type: none"> Go to web assistance queue Go into Spanish queue R Remain on line for general queue (If wait for first two queues is longer than 3 minutes, then callers transferred to general queue)



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<i>Pell Grant Hotline</i>	N/A	N/A	N/A	N/A	ROLM (Siemens)	One group of 7 agents	Menu driven option to leave message or wait for agent with 24x7 message service
<i>Title IV WAN (TIV WAN) Customer Service Center</i>	MCI	NONE	Skill Level	DNIS	Lucent G3R	<ul style="list-style-type: none"> • ACD1-Iowa City, Iowa 16 agents • ACD2-Lawrence,KS 4 agents 	<ul style="list-style-type: none"> • Best Service Routing between sites • Expert agent distribution to most idle agent by skill level
<i>Customer Support Call Center</i>	N/A	N/A	N/A	N/A	G-3	One "general" group with 27 agents	Calls are routed to available call agents in ready status or callers are given option of leaving a message



Question 3H-K

Questions 3H-K	H		I	J	K
Surveyed Call Centers	Outbound Dialing		Network Operation System	Service Level Reporting	Source of Data for Service Level Report
	Predictive Dialer	Agent Follow up questions			
Direct Loan Servicing Center	EIS System 7000	Loan Counseling for Debt Collection	Novell 4X Windows NT 4X	Statistic reports by site and departments on a Daily, Weekly, Monthly, and Quarterly basis	<ul style="list-style-type: none"> • PBX for inbound 800 numbers and manual inbound calls • EIS System 700 for predictive dialing
Direct Loan Consolidation Center	NO	<ul style="list-style-type: none"> • Yes, for collecting information from borrower to complete his application • Callbacks by CSR supervisor for quality control when borrower requests 	LANs are Microsoft NT 4.0 with an Ethernet backbone	<ul style="list-style-type: none"> • Call center statistics including # of calls handled, abandoned over 3 minutes • Spanish calls handled and calls handled by VRU • Reported daily & bi-monthly 	Call Management System (CMS)
Federal Student Aid Information Center (FSAIC)	NO	<ul style="list-style-type: none"> • Yes, only supervisors make outbound calls, only handful per month • They are made when info is not available at time of inbound call or if corrected info needs to be given 	<ul style="list-style-type: none"> • MS Windows NT 4.0. Workstations are configured with Windows NT • All locations are configured the same and are connected via a Wide Area Network 	<ul style="list-style-type: none"> • Daily statistics showing calls offered, calls answered, calls abandoned in menu, calls abandoned in queue, calls blocked, calls answered as a percent of calls offered, avg. speed of answer provided weekly • QC report and Highlights report monthly 	Lucent Call Management System
Debt Collection Service Information Center (DCSIC)	NO	<ul style="list-style-type: none"> • Only supervisors make outbound calls, and they are small in number • Only made if wrong info was given out in the original call or if there is a problem with a credit card payment 	<ul style="list-style-type: none"> • MS Windows NT 4.0. Workstations are configured with Windows NT • All locations are configured the same and are connected via a Wide Area Network 	<ul style="list-style-type: none"> • Daily statistics showing calls offered, calls answered, calls answered as a percent of calls offered, avg. speed of answer reported weekly • QC report and highlights reported monthly 	Lucent Call Management System



Question 3H-K

Questions 3H-K	H		I	J	K
Surveyed Call Centers	Outbound Dialing		Network Operation System	Service Level Reporting	Source of Data for Service Level Report
	Predictive Dialer	Agent Follow up questions			
<i>FAFSA on the Web Customer Service Center</i>	NO	All outbound calls are followed-up to previous calls	Microsoft NT 4.0 Network with Microsoft NT workstations	Report number of calls received and answered with an average speed of answer	Lucent Center Vu Call Management System
<i>Ombudsman</i>	NO	<ul style="list-style-type: none"> • Caseworkers make follow-up calls without the use of a dialer • Caseworkers contact ED agencies, leaders, lenders, loan services, etc., to follow up on each case and keep the client apprised of the status of the case 	<ul style="list-style-type: none"> • MS Windows NT 4.0. Workstations are configured with Windows NT • All locations are configured the same and are connected via a Wide Area Network 	<ul style="list-style-type: none"> • Once a week daily statistics showing calls answered live in less than 60 seconds, calls answered by voicemail in less than 60 seconds, calls answered live in greeted than 60 seconds, and calls answered by voicemail in greeted than 60 seconds • QC report and Highlights reported monthly 	Lucent Call Management System, manual logs
<i>Central Processing System (CPS) Customer Service Center</i>	NO	Outbound calls are used to follow-up on a previous call	Microsoft NT 4.0 Network with Microsoft NT workstations	Report volume, number of calls to voicemail, and the average speed of answer	Lucent Center Vu Call Management System
<i>Direct Loan Origination Center – School Relations</i>	NO	CSRs make calls to schools and borrowers in order to follow-up on or close issues from previous contacts	Microsoft NT 4.0	<ul style="list-style-type: none"> • Call and processing volumes are reported on daily basis to DOE during morning production meetings • Additional detailed reporting is performed for call center statistics, production statistics, warehouse inventory, and school issue tracking during bi-weekly process review 	CMS



Question 3H-K

Questions 3H-K	H		I	J	K
Surveyed Call Centers	Outbound Dialing		Network Operation System	Service Level Reporting	Source of Data for Service Level Report
	Predictive Dialer	Agent Follow up questions			
National Student Loan Data System (NSLDS) Customer Service Center	NO	<ul style="list-style-type: none"> Agents make outbound calls to provide answers to difficult questions that required research, also make calls to data providers when submissions aren't received on time or if there is a problem with the submission Each email inquiry receives a phone call to ensure response requisition was received 	Windows NT	N/A	Meridian Max
Pell Grant Hotline	They have this capability but generally do a conference call and verify there has been a resolution to the call.	NO	www.pellgrantsonline.ed.gov	6 CSR and one supervisor	N/A
Title IV WAN (TIV WAN) Customer Service Center	NO	Outbound calls are made to facilitate research on advanced issues, to return voicemail, to help trouble shoot modem errors when the computer doesn't have a dedicated line, and to do calling campaigns as designated by the DOE	MS Windows NT 4.0 at all sites	Provide percent of calls to voicemail to the DOE through weekly and monthly reports	Lucent Call Management System
Customer Support Call Center	NO	NO	Telequent	Yes MIS	Service
Lender or Guaranty Agency Default Rates	N/A	N/A	N/A	N/A	N/A



Question 3L-N

Questions 3L-N	L		M		N	
Surveyed Call Centers	Application Used by CSR		CSR's Desktop		Computer Telephone Integration (CTI)	
	Dumb Terminal	PC Based	Legacy / Other	Desktop Software	Screen pop-ups enabled	Technology Used
Direct Loan Servicing Center	<ul style="list-style-type: none"> Application used is ACMS D Terminal configuration is VT 320 	<ul style="list-style-type: none"> Application used is ACMS PC configuration is P120 to P600 	<ul style="list-style-type: none"> ACMS used to query database Maintained by ACS and AFSA 	<ul style="list-style-type: none"> VT Emulation Maintained by ACS and AFSA 	NO	NO
Direct Loan Consolidation Center	N/A	Application used is LOS Powerbuilder which accesses HP-UX database	NO	<ul style="list-style-type: none"> Loan origination subsystem used to track/provide updates/status info to borrowers Loaded in each individual workstation. 	<ul style="list-style-type: none"> Montgomery- YES Louisville-- NO 	Vendor is Cautherin Computer Systems
Federal Student Aid Information Center (FSAIC)	Some agents still use dumb terminals, but by 8/2000 they will all be transitioned to PCs	CPS mainframe database and NSLDS database accessed through PC-based configuration	N/A	<ul style="list-style-type: none"> IBM 3270 is supported internally It is used to access the CPS and NSLDS databases Internet Explorer is used by some information specialists to access NSLDS database 	NO	NONE
Debt Collection Service Information Center (DCSIC)	Within a month all dumb terminals remaining will be transitioned to PCs	FEEL database accessed through PC based configuration	IBM 3270 emulation software package used to access the FEEL database	N/A	NO	N/A



Question 3L-N

Questions 3L-N	L		M		N	
Surveyed Call Centers	Application Used by CSR		CSR's Desktop		Computer Telephone Integration (CTI)	
	Dumb Terminal	PC Based	Legacy / Other	Desktop Software	Screen pop-ups enabled	Technology Used
<i>FAFSA on the Web Customer Service Center</i>	NONE	All PC operators use PCs loaded with: <ul style="list-style-type: none"> • Microsoft Outlook • IBM 3270 software • Microsoft Explorer • Netscape Navigator 	N/A	All PC operators use PCs loaded with: <ul style="list-style-type: none"> • Microsoft Outlook • IBM 3270 software • Microsoft Explorer • Netscape Navigator 	NONE	N/A
<i>Ombudsman</i>	N/A	Currently use PCs to access Ed Ombudsman case-tracking systems	N/A	<ul style="list-style-type: none"> • Information specialists use an IBM 3270 emulation software package. It is used to access the FEEL and NSLDS databases • Internet Explorer is used to access the NSLDS database and the Ombudsman case-tracking system 	NO	NONE
<i>Central Processing System (CPS) Customer Service Center</i>	N/A	NT-based machines	N/A	<ul style="list-style-type: none"> • Microsoft Office Pro used for email • MSAccess for database work • IBM 3270 used to allow operators to access data on the CPS database at the virtual data center • Netscape Navigator and Microsoft Explorer used to assist users in loading software • Peregrine, used for Customer Relationship Management • EDE software, software they create and support. • Supported internally 	NONE	N/A



Question 3L-N

Questions 3L-N	L		M		N	
Surveyed Call Centers	Application Used by CSR		CSR's Desktop		Computer Telephone Integration (CTI)	
	Dumb Terminal	PC Based	Legacy / Other	Desktop Software	Screen pop-ups enabled	Technology Used
Direct Loan Origination Center – School Relations	N/A	LOS Powerbuilder application which accesses HP-UX database	N/A	<ul style="list-style-type: none"> Microsoft office suite used for normal business functions Access database software is distributed in runtime modules used to track various functions and is supported on site Microsoft Outlook used for email Attachmate Extra 32770 emulation for connecting to the EDS CAS system for internal processes and is supported on-site, Microsoft Internet Explorer used to access company intranet and direct loan sites 	YES	IBM Callpath server Version 6.2
National Student Loan Data System (NSLDS) Customer Service Center	N/A	PC Based	<ul style="list-style-type: none"> TSO/ISPF-QMF through Attachmate is used to support query access to database TSO/RACF through Attachmate is used to reset user passwords NSLDS web application and all above applications supported in house 	Windows NT/98 and Microsoft Office 97 Professional	NO	N/A
Pell Grant Hotline	Customized MS ACCESS Database includes common problems and solutions and calls are categorized by subject	Windows 95 running the following: <ul style="list-style-type: none"> MS Office Extra! Emulation software RFMS GUI Windows application 	TIV WAN, RFMS, Internet – to verify records and access information about students and institutions	Windows 95 running the following: <ul style="list-style-type: none"> MS Office Extra! Emulation software RFMS GUI Windows application 	Staff is given 6 weeks of training shadowing and instruction followed by on going instruction in new systems and functions	N/A



Question 3L-N

Questions 3L-N	L		M		N	
Surveyed Call Centers	Application Used by CSR		CSR's Desktop		Computer Telephone Integration (CTI)	
	Dumb Terminal	PC Based	Legacy / Other	Desktop Software	Screen pop-ups enabled	Technology Used
Title IV WAN (TIV WAN) Customer Service Center	N/A	<ul style="list-style-type: none"> Service Center by Peregrine Imagine Internal accounting system Enterprise support system IBM 3270 Microsoft Outlook Internet Explorer/ Netscape 	N/A	<ul style="list-style-type: none"> Service Center by Peregrine to provide history for each customer contact and as a knowledge database Imagine, an imaging system, which provides images of enrollment info, internal accounting system to provide info on billing to customers Enterprise Support system, a web based interface to give just in time mailbox info and to reset network passwords (supported externally by GEIS) Microsoft Outlook used for email and calendar Internet Explorer/Netscape, for web site support All above except Enterprise are supported internally 	NO	N/A
Customer Support Call Center	N/A	Windows 95	<ul style="list-style-type: none"> NSLDS, CPS PEPS FASFA 	Windows 95, standard ED headhunters configuration, Telequent software	NO	N/A
Lender or Guaranty Agency Default Rates	N/A	N/A	N/A	N/A	N/A	N/A



Question 4A-F

Question 4A-F	A	B	C	D	E	F	
Surveyed Call Centers	Warm Handoff	Spanish Language	Services over the Web	Staffing Level	Top 20 Questions	Automated Call Tracking Systems / What Technology	
						Software	Hardware
Direct Loan Servicing Center	<ul style="list-style-type: none"> Only LO After 7/21/00 MCI conversion, plans to implement additional locations 	<ul style="list-style-type: none"> Transferred to Spanish speaking CSR VRU does t have Spanish option but it's not in Spanish 	www.dlserver.ed.gov	<ul style="list-style-type: none"> As of June staffing level of 1,100 Supervisor / CSR ratio is 1/20 	N/A	NONE	NONE
Direct Loan Consolidation Center	<ul style="list-style-type: none"> YES--only Montgomery to Direct Loan Servicing Center After switch from AT&T to MCI Louisville site & Loan Origination site will have this capability 	YES--offered in the conversant. Staffed from 7am-7pm CST to handle Spanish callers	www.loanconsolidation.ed.gov	<ul style="list-style-type: none"> Average normal staffing level is 75-85 CSRs Supervisor/C SR ration is 1/15 During peak time, staff grows by 50-60 CSRs from other departments w/in center 	N/A	LOS system casing feature is primary source for tracking resolution to borrower inquiry	N/A
Federal Student Aid Information Center (FSAIC)	NO	<ul style="list-style-type: none"> YES--first option on menu for incoming calls is to continue in English or Spanish Callers who opt for Spanish are routed to a Spanish queue staffed by bilingual information specialists Option resides on NCS phone switch 	NO	<ul style="list-style-type: none"> Avg. staffing level is 203 information specialists, not including supervisors Supervisor/C SR ratio is 1:15 	N/A	NO--however, all calls for which caller has a file on the CPS database are logged into the CPS database	NONE



Question 4A-F

Question 4A-F	A	B	C	D	E	F	
Surveyed Call Centers	Warm Handoff	Spanish Language	Services over the Web	Staffing Level	Top 20 Questions	Automated Call Tracking Systems / What Technology	
						Software	Hardware
Debt Collection Service Information Center (DCSIC)	NO	Callers who wish to speak Spanish are transferred by the information specialist to a Spanish queue.	NO	<ul style="list-style-type: none"> Avg. staffing level is 76 Supervisor to CSR is 1:10 	N/A	NO--however, all calls for which caller has a file on the FEEL database are logged into the FEEL database	N/A
FAFSA on the Web Customer Service Center	NONE	<ul style="list-style-type: none"> NO--IVRU option is not in Spanish Spanish speaking staff are available, and Spanish speaking callers are manually transferred to them 	<ul style="list-style-type: none"> www.FAFSA.ED.GOV, main page with forms and FAQs www.PIN.ED.GOV, secondary page, with help options 	<ul style="list-style-type: none"> Avg staffing level 5/99-6/00 is 40 reps Ratio of supervisors to staff is 1:12 	N/A	For callers who have a processed record, all customer contacts are logged on the CPS database through the IBM 3270 interface	N/A
Ombudsman	NO--calls are transferred to DCS and 4FEDAID, but the FTSS2001 connection does not allow them to do it warmly	<ul style="list-style-type: none"> Spanish option on message system does not work. Bilingual staff are available in Spanish queue Callers wishing to speak Spanish are transferred manually 	NO	<ul style="list-style-type: none"> Avg. staffing 26 Supervisor to CSR ratio is 1:8 	N/A	ED's casetracking system accessed via the internet	N/A



Question 4A-F

Question 4A-F	A	B	C	D	E	F	
Surveyed Call Centers	Warm Handoff	Spanish Language	Services over the Web	Staffing Level	Top 20 Questions	Automated Call Tracking Systems / What Technology	
						Software	Hardware
Central Processing System (CPS) Customer Service Center	Conference to other call centers and stay on the line, Title IV WAN, Direct Loan Origination, and RFMS (Pell)	NO--option for Spanish on the IVRU, but Spanish speaking callers are transferred to Spanish speaking staff upon request	<ul style="list-style-type: none"> www.ed.gov/offices/OSFAP/sfatech/ Web site for common questions and issues with EDE software 	<ul style="list-style-type: none"> Normal staffing level is 40 representatives Ratio of supervisors to CSR 1:8 	N/A	Service Center software created by Peregrine is used. Each school has an assigned ID and all customer contacts are logged under the ID and can be accessed later if needed	N/A
Direct Loan Origination Center - School Relations	NO--LOC will once transition to MCI is complete	YES--IVRU. There are agents staffed to support this function	https://lo-online.ed.gov	<ul style="list-style-type: none"> Avg call center staffing level 109 Normal supervisor to CSR ration 1:16 	N/A	Lucent Center Vu CMS	N/A
National Student Loan Data System (NSLDS) Customer Service Center	YES—however, prefer to conference in the other agency	YES--option is in incoming message. Two representatives can assist callers in Spanish	www.nslsdfap.ed.gov	<ul style="list-style-type: none"> 16 employees and 1 supervisor 	N/A	INFOMAN used to log all calls received,	N/A



Question 4A-F

Question 4A-F	A	B	C	D	E	F	
Surveyed Call Centers	Warm Handoff	Spanish Language	Services over the Web	Staffing Level	Top 20 Questions	Automated Call Tracking Systems / What Technology	
						Software	Hardware
Pell Grant Hotline	YES--have this capability but we generally do a conference call and verify there has been a resolution to the call.	NO	www.pellgrantsonline.ed.gov	<ul style="list-style-type: none"> 6 CSR and 1 supervisor 	N/A	Customized MS ACCESS Database includes common problems and solutions and calls are categorized by subject.	Windows 95 running MS Office, Extra! Emulation software and RFMS GUI Windows application
Title IV WAN (TIV WAN) Customer Service Center	<ul style="list-style-type: none"> Warm handoffs are performed as a conference call FTS2000 does not support releasing the incoming line 	<ul style="list-style-type: none"> Customer is manually transferred to bilingual agent No IVRU option for Spanish 	NO	<ul style="list-style-type: none"> Yearly avg. is 21 staff members Normal supervisor to CSR ratio is 2:21 	N/A	Service Center by Peregrine does track call content and resolution time to the inquiry	N/A
Customer Support Call Center	Do not drop off line but do provide warm handoffs	Once a customer is speaking to a CSR he can request a Spanish speaking CSR of which there are two	www.ifap.ed.gov	<ul style="list-style-type: none"> Supervisor to CSR ratio is 1:10 	N/A	YES—Lotus Notes is current call tracking system	N/A
Lender or Guaranty Agency Default Rates	NO	NO	YES--hotline directs customers to a website for information about default and the website identifies the hotline	N/A	N/A	NO	NO



Question 4G-I

Question 4G-I	G	H	I	
Surveyed Call Centers	Customer Relationship Management System / Tool	Quality Control Process	Training	
			Technical	Functional
Direct Loan Servicing Center	NONE	Quality Control Coordinators - random	<ul style="list-style-type: none"> On job training for 5 weeks Monthly training and weekly updates 	<ul style="list-style-type: none"> On job training for 5 weeks Monthly training and weekly updates
Direct Loan Consolidation Center	<ul style="list-style-type: none"> Center Vu Supervisor monitors CSR's activity Supervisors can run reports to reflect real time activity and capture historical data 	<ul style="list-style-type: none"> Monitor CSR's w/ a Quality team of experienced CSRs Survey borrowers for feedback Test CSRs to ensure they have comprehensive knowledge base 	<ul style="list-style-type: none"> 2 weeks functional classroom training 1 week of on the job training & a refresher training based on monitored calls and feedback from surveys & test scores Training for all new system releases 	<ul style="list-style-type: none"> 2 weeks functional classroom training 1 week of on the job training & a refresher training based on monitored calls and feedback from surveys & test scores Training for all new system releases
Federal Student Aid Information Center (FSAIC)	NONE	<ul style="list-style-type: none"> Remote monitoring by ED personnel 1% internal call monitoring Random QC monitoring 	<ul style="list-style-type: none"> PC Training CPS database training NSLDS database training 	<ul style="list-style-type: none"> Customer service training Content training for program knowledge



Question 4G-I

Question 4G-I	G	H	I	
Surveyed Call Centers	Customer Relationship Management System / Tool	Quality Control Process	Training	
			Technical	Functional
<i>Debt Collection Service Information Center (DCSIC)</i>	NONE	<ul style="list-style-type: none"> • Remote monitoring by ED personnel • 1% internal call monitoring • Random QC monitoring 	<ul style="list-style-type: none"> • PC training • FEEL database training 	<ul style="list-style-type: none"> • Customer service training • Content training for program knowledge
<i>FAFSA on the Web Customer Service Center</i>	NONE	Live Call Monitoring	One week training for all staff with update training when needed	One week training for all staff with update training when needed
<i>Ombudsman</i>	NONE	<ul style="list-style-type: none"> • Remote monitoring by ED personnel • 1% internal call monitoring • Random QC monitoring • Under PIC II, the FSAIC will have an Independent Quality Assurance Unit to monitor phone calls and will use call recording software 	<ul style="list-style-type: none"> • PC training • ombudsman casetracking system training • FEEL database training • NSLDS database training 	<ul style="list-style-type: none"> • Customer service training • Content training for program knowledge



Question 4G-I

Question 4G-I	G	H	I	
Surveyed Call Centers	Customer Relationship Management System / Tool	Quality Control Process	Training	
			Technical	Functional
Central Processing System (CPS) Customer Service Center	Service center acts as a Customer Relationship Management System by allowing them to store data specific to customer	Live monitoring with feedback sheets	Extensive, at start of employment and throughout the year	Extensive, at start of employment and throughout the year
Direct Loan Origination Center – School Relations	NONE	Remote monitoring (service observe) Desktop monitoring (Control IT)	N/A	<ul style="list-style-type: none"> Classroom and on the job training in customer service Lasts 6-8 weeks depending on program Ongoing education, professional development and new release training throughout the year
National Student Loan Data System (NSLDS) Customer Service Center	NONE	Manager monitors calls and audits 10% of all tickets created each day for accuracy	<ul style="list-style-type: none"> Train for 8-12 weeks before they answer calls Receive continuing education 	<ul style="list-style-type: none"> Train for 8-12 weeks before they answer calls Receive continuing education



Question 4G-I

Question 4G-I Surveyed Call Centers	G Customer Relationship Management System / Tool	H Quality Control Process	I	
			Training	
			Technical	Functional
<i>Pell Grant Hotline</i>	TIV WAN, RFMS, Internet – to verify records and access information about students and institutions	Windows 95 running: <ul style="list-style-type: none"> • MS Office • Extra! Emulation software • RFMS GUI Windows application 	Staff is given 6 weeks of training shadowing and instruction followed by on going instruction in new systems and functions.	N/A
<i>Title IV WAN (TIV WAN) Customer Service Center</i>	<ul style="list-style-type: none"> • Service Center by Peregrine gives history of each customers activity with the customer service staff • Software also has searchable knowledge database to provide consistent and timely answers to customer inquiries 	Remote monitoring of calls	<ul style="list-style-type: none"> • Minimum of three weeks classroom and one-on-one training • Training on SAIG products, software tools needed to answer questions, technical Dial-up networking and remote access service training, telecommunication error resolution training 	<ul style="list-style-type: none"> • Peer to peer listening in to live calls • Training is updated for each rep • Minimum of three weeks classroom and one-on-one training
<i>Customer Support Call Center</i>	N/A	<ul style="list-style-type: none"> • Team leaders sit in with CSRs when they are first employed • Actual calls are not monitored, only entry of Q and A's into LN DB are checked and reviewed 	<ul style="list-style-type: none"> • Agents are sent to appropriate systems training • Teloquent and Lotus Notes 	Informal training on phone courtesy and techniques and information input
<i>Lender or Guaranty Agency Default Rates</i>	N/A	Use ED's voicemail	N/A	Functional training



Question 4J-L

Question 4J-L	J		K		L	
Surveyed Call Centers	Automated means to inform Customer of potential wait time		Call Transfers		Busiest Timeframe	
	Technology solution	Service Provided	Transfer to Centers	Number of Calls Transferred	Day of Week	FY Month
<i>Direct Loan Servicing Center</i>	Algorithms in PBX	IVRU tells callers in queue	Loan Origination and Loan Consolidation	5% of volume (June)	Monday	February
<i>Direct Loan Consolidation Center</i>	NO	NONE	Direct Loan Servicing Center	8,000/month	Monday	June
<i>Federal Student Aid Information Center (FSAIC)</i>	Use a switch announcement	System does not give expected wait time but says all agents are busy please wait	<ul style="list-style-type: none"> • Transfer only a handful of calls to FOTW customer service • Do it only when someone is calling from outside the U.S. and is unable to reach them on toll free line 	Less than 100	Monday	August



Question 4J-L

Question 4J-L	J		K		L	
Surveyed Call Centers	Automated means to inform Customer of potential wait time		Call Transfers		Busiest Timeframe	
	Technology solution	Service Provided	Transfer to Centers	Number of Calls Transferred	Day of Week	FY Month
Debt Collection Service Information Center (DCSIC)	N/A	IVRU informs caller of at least 3 minutes of wait time, but this is not accurate	NO	NONE	Monday	February
FAFSA on the Web Customer Service Center	NO	N/A	Federal Student Aid Information Center Direct Loan Servicing Center	<ul style="list-style-type: none"> • 3800 calls - 10% • 200 calls -<1% 	Monday	March and August
Ombudsman	A switch announcement indicates that all agents are busy and to please wait.	Does not give expected wait time because wait time is usually short	Occasionally transfer calls to 1-800-4-FEDAID and DCS.	Do not keep count of the number	Monday	Not yet established. Phone line has been in service for less than a year



Question 4J-L

Question 4J-L	J		K		L	
Surveyed Call Centers	Automated means to inform Customer of potential wait time		Call Transfers		Busiest Timeframe	
	Technology solution	Service Provided	Transfer to Centers	Number of Calls Transferred	Day of Week	FY Month
<i>Central Processing Center (CPS) Customer Service Center</i>	NO	N/A	<ul style="list-style-type: none"> • Title IV WAN 530 calls, 7% • RFMS 220 calls, 3% • Direct Loan Origination 80 calls 1% 	11%	Tuesday	August and September
<i>Direct Loan Origination Center - School Relations</i>	NO	N/A	N/A	N/A	Monday	August
<i>National Student Loan Data System (NSLDS) Customer Service Center</i>	NO	N/A	N/A	N/A	N/A	N/A



Question 4J-L

Question 4J-L	J		K		L	
Surveyed Call Centers	Automated means to inform Customer of potential wait time		Call Transfers		Busiest Timeframe	
	Technology solution	Service Provided	Transfer to Centers	Number of Calls Transferred	Day of Week	FY Month
<i>Pell Grant Hotline</i>	N/A	N/A	N/A	N/A	Monday	September
<i>Title IV WAN (TIV WAN) Customer Service Center</i>	NO	N/A	<ul style="list-style-type: none"> • CPS 193 per month, 7% • RFMS 18 per month, 1% • NSLDS 41 per month, 2% • DLOC/Servicing 18 per month, 1% 	11% per month	Evenly spread out with Friday being a slight decline	Consistent throughout year with slight decrease Dec-Feb and slight increase in conjunction with FISAP processing in August & September
<i>Customer Support Call Center</i>	YES	Alerts customer that he is number "x" in queue but does not give expected time to hold	PIC	NO	N/A	N/A
<i>Lender or Guaranty Agency Default Rates</i>	NO	NO	N/A	N/A	N/A	October



Aggregate Figures

High level Call Center Information - Survey Question 3B												
Month	Total Calls Received				Total Calls Answered				Total Calls Abandoned			
	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate
Jun-99	1,291,786	42,549		1,334,335	1,266,971	39,160		1,306,131	29,706	2,734		32,440
Jul-99	1,384,082	48,869		1,432,951	1,351,433	46,294		1,397,727	42,522	2,101		44,623
Aug-99	1,533,465	58,899		1,592,364	1,484,316	55,724		1,540,040	54,268	2,674		56,942
Sep-99	1,010,366	57,381		1,067,747	995,772	51,276		1,047,048	17,650	2,762		20,412
Oct-99	877,686	46,734		924,420	870,308	42,029		912,337	10,430	2,212		12,642
Nov-99	916,279	43,503		959,782	906,982	41,190		948,172	16,244	2,194		18,438
Dec-99	982,003	41,414		1,023,417	970,288	38,278		1,008,566	17,267	2,866		20,133
Jan-00	1,558,076	34,310		1,592,386	1,491,506	33,941		1,525,447	148,816	946		149,762
Feb-00	1,721,999	32,263		1,754,262	1,619,972	31,385		1,651,357	209,378	1,064		210,442
Mar-00	1,743,017	35,055		1,778,072	1,646,448	34,076		1,680,524	147,270	1,091		148,361
Apr-00	1,418,892	29,173		1,448,065	1,366,866	27,235		1,394,101	65,144	599		65,743
May-00	1,504,302	31,804		1,536,106	1,448,195	32,441		1,480,636	60,940	816		61,756
Total	<i>15,941,953</i>	<i>501,954</i>	-	16,443,907	<i>15,419,057</i>	<i>473,029</i>	-	15,892,086	<i>819,635</i>	<i>22,059</i>	-	841,694
Average	<i>1,328,496</i>	<i>41,830</i>	-	1,370,326	<i>1,284,921</i>	<i>39,419</i>	-	1,324,341	<i>68,303</i>	<i>1,838</i>	-	70,141
percentage of received									5%	4%		5%

Aggregate Figures



High level Call Center Information - Survey Question 3B												
Month	Average Speed of Answer				Average Talk Time				Average Call Handling Time			
	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate
Jun-99	140	74	-	214	1,041	1,960	-	3,001	1,233	2,770	-	4,003
Jul-99	163	88	-	251	1,015	1,764	-	2,779	1,207	2,662	-	3,869
Aug-99	118	83	-	201	969	1,743	-	2,712	1,138	2,789	-	3,927
Sep-99	101	107	-	208	1,007	1,844	-	2,851	1,181	2,671	-	3,852
Oct-99	66	110	-	176	1,610	1,892	-	3,502	2,082	2,554	-	4,636
Nov-99	96	91	-	187	1,573	1,957	-	3,530	2,041	2,455	-	4,496
Dec-99	115	96	-	211	1,508	1,857	-	3,365	1,961	2,677	-	4,638
Jan-00	213	75	-	288	1,712	1,773	-	3,485	2,132	2,293	-	4,425
Feb-00	281	79	-	360	1,752	1,854	-	3,606	2,305	2,532	-	4,837
Mar-00	193	73	-	266	1,599	1,867	-	3,466	2,175	2,423	-	4,598
Apr-00	138	76	-	214	1,475	1,867	-	3,342	1,853	2,404	-	4,257
May-00	146	76	-	222	1,409	1,625	-	3,034	1,763	2,249	-	4,012
Total	<i>1,771</i>	<i>1,028</i>	-	2,799	<i>16,669</i>	<i>22,003</i>	-	38,672	<i>21,069</i>	<i>30,479</i>	-	51,548
Average	<i>148</i>	<i>86</i>	-	233	<i>1,389</i>	<i>1,834</i>	-	3,223	<i>1,756</i>	<i>2,540</i>	-	4,296



Aggregate Figures

High Level Call Center Information - Survey Question 3B												
Month	Average Speed of Answer				Average Talk Time				Average Call Handling Time			
	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate
Jun-99	18	9		15	3.44	6.03		5.09	3.74	8.42		6.98
Jul-99	22	10		18	3.42	5.08		4.42	3.70	6.48		5.47
Aug-99	24	9		20	3.31	4.94		4.29	3.56	6.04		5.12
Sep-99	13	12		12	3.52	5.26		4.56	3.76	6.43		5.44
Oct-99	9	12		11	3.59	5.04		4.43	3.78	6.09		5.20
Nov-99	13	10		12	3.61	5.07		4.46	3.83	6.06		5.20
Dec-99	15	11		13	3.52	5.05		4.43	3.75	7.24		6.05
Jan-00	33	9		28	3.70	4.44		4.10	3.92	5.04		4.55
Feb-00	53	9		46	3.80	4.63		4.25	4.01	5.58		4.92
Mar-00	44	10		38	3.58	4.97		4.39	3.80	5.79		5.00
Apr-00	27	10		23	3.47	4.66		4.16	3.68	5.15		4.54
May-00	26	10		22	3.33	4.70		4.13	3.53	5.87		4.99
Averages in minutes	<i>25</i>	<i>10</i>	-	22	<i>3.53</i>	<i>4.99</i>	-	4.39	<i>3.75</i>	<i>6.18</i>	-	5.29
					<i>3.50</i>	<i>5.00</i>		<i>4.40</i>				

Aggregate Figures



High level Call Center Information - Survey Question 3D								
Month	Calls Resolved on First Contact				Calls Handled completely by Automation			
	Students	Schools	Inst.	Aggregate	Students	Schools	Inst.	Aggregate
Jun-99	81%	92%		87%	24%	10%		20%
Jul-99	81%	92%		87%	26%	8%		22%
Aug-99	81%	92%		87%	23%	9%		19%
Sep-99	81%	94%		88%	24%	6%		21%
Oct-99	81%	94%		88%	19%	7%		16%
Nov-99	81%	92%		87%	19%	4%		17%
Dec-99	81%	91%		86%	20%	3%		17%
Jan-00	81%	91%		86%	21%	4%		18%
Feb-00	81%	89%		85%	21%	6%		17%
Mar-00	81%	91%		86%	19%	8%		16%
Apr-00	81%	91%		86%	18%	7%		15%
May-00	81%	89%		85%	19%	4%		17%
Averages	81%	91%		86%	21%	6%		18%

Notes:

<p>4 out of 6 provided data</p>	<p>2 out of 7 with data. TIVWAN has data from 2/00</p>	<p>5 out of 6 until Oct '99 when Ombudsman began taking calls</p>	<p>6 out of 7 Pell has data through Dec '99</p>
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Aggregate Figures



Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	9,338,107
Voice Mail	6,519
e-mail	158,372
Facsimile	379,530
Written	977,388
Web "Chat" Session	-
On-line Session	66,965

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	131,689
Voice Mail	6,414
e-mail	102,625
Facsimile	967
Written	196,179
Web "Chat" Session	-
On-line Session	-



Direct Loan Servicing Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	509,705	509,106	5,490	2	241	240
Jul-99	558,714	558,014	10,573	2	240	240
Aug-99	539,199	538,507	5,811	2	237	236
Sep-99	456,813	455,871	3,998	2	244	236
Oct-99	467,823	466,836	4,039	3	246	237
Nov-99	509,433	508,289	8,091	3	248	245
Dec-99	527,248	525,957	6,843	3	246	241
Jan-00	819,993	814,829	87,410	5	261	262
Feb-00	899,376	882,913	123,814	13	260	257
Mar-00	747,196	735,679	62,218	11	263	260
Apr-00	535,235	531,950	16,403	5	261	258
May-00	528,393	526,687	6,539	3	254	249
Total	7,099,128	7,054,638	341,229	5	250	247

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99		36%	64%	100%	
Jul-99		36%	64%	100%	
Aug-99		36%	64%	100%	
Sep-99		34%	66%	100%	
Oct-99		35%	65%	100%	
Nov-99		33%	67%	100%	
Dec-99		31%	69%	100%	
Jan-00		39%	61%	0%	
Feb-00		41%	59%	0%	
Mar-00		37%	63%	100%	
Apr-00		35%	65%	100%	
May-00		34%	66%	100%	
Total	0%	35.71%	64.29%	83%	



Direct Loan Servicing Center

Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	7,099,128
Voice Mail	-
e-mail	55,605
Facsimile	242,770
Written	549,253
Web "Chat" Session	-
On-line Session	-

Technical Information - Outbound correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	-
Web "Chat" Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C	
Direct Loan Servicing Center	%
Account Inquiry	28.7%
Defer/Forbs	27.5%
Payment Inquiries	19.3%
Interest	5.3%
Update Borrower Information	5.2%
Transfer To LOC	5.1%
EDA	3.0%
Repay Options	2.9%
Pay Off	1.9%
General DSL Program Inquiry	1.1%
	100.0%



Direct Loan Consolidation Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	112,408	111,211	1,197	96	211	300
Jul-99	103,364	102,302	1,062	107	209	300
Aug-99	100,115	99,531	584	51	172	241
Sep-99	96,112	95,592	520	55	206	288
Oct-99	99,988	99,834	154	32	195	267
Nov-99	106,592	106,016	576	56	188	257
Dec-99	99,830	99,191	639	71	180	262
Jan-00	124,120	122,545	1,575	108	188	247
Feb-00	120,708	119,578	1,130	97	182	235
Mar-00	128,037	127,016	1,021	57	117	152
Apr-00	108,312	107,735	577	44	130	168
May-00	118,271	117,199	1,072	63	141	181
Total	1,317,857	1,307,750	10,107	70	177	242

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	0.25	30%	70%	99%	180
Jul-99	0.25	34%	66%	99%	180
Aug-99	0.25	13%	87%	99%	180
Sep-99	0.25	25%	75%	99%	180
Oct-99	0.25	26%	74%	100%	180
Nov-99	0.25	24%	76%	99%	180
Dec-99	0.25	21%	79%	99%	180
Jan-00	0.25	23%	77%	99%	180
Feb-00	0.25	25%	75%	99%	180
Mar-00	0.25	22%	78%	99%	180
Apr-00	0.25	16%	84%	99%	180
May-00	0.25	17%	83%	99%	180
Total	25%	23.00%	77.00%	99%	



Direct Loan Consolidation Center

Technical Information - Inbound Correspondence Medium - 3E

Contact Media	Volume Inbound
IVRU	298,052
Voice Mail	45
e-mail	10,474
Facsimile	13,318
Written	124,250
Web "Chat" Session	-
On-line Session	66,965

Technical Information - Outbound Correspondence Medium - 3E

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	14,539
Facsimile	-
Written	-
Web "Chat" Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Direct Loan Consolidation Center	%
Application Status Calls related to Certification	23.0%
Application Status Calls related to Promissory Notes	19.0%
General Program Consolidation Questions	19.0%
Application Status Calls related to Loan Pay-off	18.0%
Application Request	13.0%
Loan holder/School Inquiries	3.0%
Post-Funding Questions	2.0%
Interest Rate Questions	1.0%
Web-site Questions	1.0%
Application Status calls for Applications that have been deactivated	1.0%
	100.0%



Federal Student Aid Information Center

HighLevel Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	547,820	529,527	18,293	18	171	183
Jul-99	601,892	577,006	24,886	27	174	187
Aug-99	753,251	709,939	43,312	39	176	190
Sep-99	357,271	350,006	7,265	14	173	186
Oct-99	229,404	226,471	2,933	8	167	180
Nov-99	234,402	228,304	6,098	19	162	176
Dec-99	269,082	261,225	7,857	23	157	172
Jan-00	467,942	414,229	53,713	72	163	175
Feb-00	500,952	427,298	73,654	130	177	192
Mar-00	669,258	591,232	78,026	89	182	199
Apr-00	603,819	560,992	42,827	49	182	198
May-00	668,464	621,024	47,440	43	172	186
Total	5,903,557	5,497,253	406,304	44	171	185

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	1	23%	77%		
Jul-99	1	26%	74%		
Aug-99	1	30%	70%		
Sep-99	1	28%	72%		
Oct-99	1	20%	80%		
Nov-99	1	22%	78%		
Dec-99	1	22%	78%		
Jan-00	1	23%	77%		
Feb-00	1	20%	80%		
Mar-00	1	23%	77%		
Apr-00	1	25%	75%		
May-00	1	27%	73%		
Total	100%	24.08%	75.92%	0%	



Federal Student Aid Information Center

Technical Information - Inbound Correspondence Medium 3E	
Contact Media	Volume Inbound
IVRU	1,365,399
Voice Mail	-
e-mail	9,867
Facsimile	152
Written	43,587
Web "Chat" Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	8,465
Facsimile	152
Written	33,317
Web "Chat" Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C	
Federal Student Aid Information Center (FSAIC)	%
Help with SAR corrections	25.0%
Change of Institution	15.0%
Application (FAFSA) help	15.0%
Status Check	13.0%
NSLDS Check (Borrower Tracking)	12.0%
Refer to Financial Aid Administrator	6.0%
SAR Duplicate Request	5.0%
Materials Request	5.0%
College Is Possible Campaign	3.0%
Image Look-Up Requests	1.0%
	100.0%



Debt Collection Service Information Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	82,852	79,113	3,739	21	236	308
Jul-99	70,183	66,052	4,131	24	223	289
Aug-99	70,557	67,008	3,549	23	222	289
Sep-99	70,437	64,873	5,564	27	221	293
Oct-99	58,745	55,749	2,996	18	217	281
Nov-99	47,229	46,031	1,198	9	236	301
Dec-99	50,589	49,570	1,019	6	251	310
Jan-00	80,010	78,008	2,002	8	227	281
Feb-00	118,153	113,147	5,006	15	229	281
Mar-00	101,148	98,466	2,682	12	232	289
Apr-00	76,292	73,294	2,998	15	221	274
May-00	79,981	77,284	2,697	12	226	276
Total	906,176	868,595	37,581	16	228	289

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	1	0%	100%		
Jul-99	1	0%	100%		
Aug-99	1	0%	100%		
Sep-99	1	0%	100%		
Oct-99	1	0%	100%		
Nov-99	1	0%	100%		
Dec-99	1	0%	100%		
Jan-00	1	0%	100%		
Feb-00	1	0%	100%		
Mar-00	1	0%	100%		
Apr-00	1	0%	100%		
May-00	1	0%	100%		
Total	100%	0.00%	100%	0%	



Debt Collection Service Information Center

Technical Information - Inbound Correspondence Medium - 3E

Contact Media	Volume Inbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	155,454
Web "Chat"	-
Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	162,862
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Debt Collection Service	%
Account dispute	18.0%
Federal offset	16.0%
Refer to collection agency	14.0%
Accounts set up on billing	13.0%
Not on file	13.0%
Request for N33 (statement of financial status to document hardship)	10.0%
Refer to guaranty agency	5.0%
Request for U25/U26 (paid or settled-in-full letter)	5.0%
Closed school	3.0%
Balance check	3.0%
	100.0%



FAFSA on the Web Customer Service

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	39,001	38,014	987	3	182	202
Jul-99	49,929	48,059	1,870	3	169	191
Aug-99	70,343	69,331	1,012	3	162	182
Sep-99	29,733	29,430	303	3	163	178
Oct-99	21,418	21,134	284	3	141	157
Nov-99	18,410	18,148	262	3	151	162
Dec-99	35,092	34,209	883	3	147	166
Jan-00	65,816	61,725	4,091	3	210	247
Feb-00	82,582	76,828	5,754	3	247	300
Mar-00	97,101	93,784	3,317	3	185	214
Apr-00	94,892	92,561	2,331	3	155	171
May-00	108,843	105,664	3,179	3	154	174
Total	713,160	688,887	24,273	3	172	195

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	0.99	31%	69%		
Jul-99	0.99	33%	67%		
Aug-99	0.99	34%	66%		
Sep-99	0.99	33%	67%		
Oct-99	0.99	36%	64%		
Nov-99	0.99	35%	65%		
Dec-99	0.99	43%	57%		
Jan-00	0.99	38%	62%		
Feb-00	0.99	38%	62%		
Mar-00	0.99	32%	68%		
Apr-00	0.99	34%	66%		
May-00	0.99	37%	63%		
Total	99%	35.33%	65%	0%	



FAFSA on the Web Customer Service

Technical Information - Inbound Correspondence Medium - 3E

Contact Media	Volume Inbound
IVRU	252,000
Voice Mail	-
e-mail	76,800
Facsimile	1,200
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	76,800
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

FAFSA Express/FAFSA Web Products	%
General Financial Aid Questions	25.0%
Questions on Use of the PIN	15.0%
Application Status Check	15.0%
Data Entry Questions	10.0%
Signature Page Questions	10.0%
Internet Browser/ISP Problems	10.0%
Information on Processing Times	5.0%
Correction on the Web Questions	5.0%
Miscellaneous	3.0%
Direct Loan Questions	2.0%

100.0%

Ombudsman



High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99						
Jul-99						
Aug-99						
Sep-99						
Oct-99	308	284	24	2	644	960
Nov-99	213	194	19	6	588	900
Dec-99	162	136	26	9	527	810
Jan-00	195	170	25	17	663	920
Feb-00	228	208	20	23	657	1,040
Mar-00	277	271	6	21	620	1,061
Apr-00	342	334	8	22	526	784
May-00	350	337	13	22	462	697
Total	2,075	1,934	141	10	391	598

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99					
Jul-99					
Aug-99					
Sep-99					
Oct-99		0%	100%	100%	60
Nov-99		0%	100%	100%	60
Dec-99		0%	100%	100%	60
Jan-00		0%	100%	96%	60
Feb-00		0%	100%	91%	60
Mar-00		0%	100%	90%	60
Apr-00		0%	100%	89%	60
May-00		0%	100%	90%	60
Total	0%	0.00%	67%	63%	



Ombudsman

Technical Information - Inbound Correspondence Medium - 3E

Contact Media	Volume Inbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Ombudsman	%
Tax offset or wage garnishment issue	25.0%
Loan amount issues (fees, interest, account history)	15.0%
Customer service issue with the lender	10.0%
Identify holder of loans or lost loans	10.0%
Trouble getting NSLDS updated	10.0%
Disability discharge and closed school issues	10.0%
Consolidation issues	5.0%
Caller received a letter from school, lender, IRS	5.0%
Bankruptcy issues	5.0%
Following up on their case	5.0%
	100.0%



Central Processing System Customer Service Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	7,625	7,058	567	3	520	843
Jul-99	9,009	8,551	458	3	507	787
Aug-99	10,550	9,885	665	3	495	764
Sep-99	12,207	11,531	676	3	472	771
Oct-99	9,314	8,575	739	3	475	783
Nov-99	9,841	8,937	904	3	450	724
Dec-99	10,855	9,287	1,568	3	415	703
Jan-00	6,174	6,019	155	3	440	702
Feb-00	6,428	6,178	250	3	472	747
Mar-00	7,584	7,368	216	3	469	744
Apr-00	5,363	5,280	83	3	463	682
May-00	6,594	6,432	162	3	449	691
Total	101,544	95,101	6,443	3	469	745

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	0.96	5%	95%		
Jul-99	0.96	6%	94%		
Aug-99	0.96	5%	95%		
Sep-99	0.96	4%	96%		
Oct-99	0.96	6%	94%		
Nov-99	0.96	4%	96%		
Dec-99	0.96	4%	96%		
Jan-00	0.96	5%	95%		
Feb-00	0.96	6%	94%		
Mar-00	0.96	5%	95%		
Apr-00	0.96	5%	95%		
May-00	0.96	5%	95%		
Total	96%	5.00%	95%	0%	



Central Processing System Customer Service Center

Technical Information - Inbound Correspondence Medium 3E	
Contact Media	Volume Inbound
IVRU	500
Voice Mail	60
e-mail	100
Facsimile	80
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	100
Facsimile	15
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C	
CPS Customer Service	%
CPS Processing Questions	25.0%
Software Install Questions	20.0%
Pell Processing Questions	20.0%
Direct Loan Questions	10.0%
Return of Title IV Funds Software Questions	10.0%
Database Maintenance	5.0%
Printing/Query Questions	5.0%
FISAP Software Questions	3.0%
Packaging Questions	1.0%
QA Software Questions	1.0%
	100.0%



Direct Loan Origination Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	16,806	16,610	196	8	196	0
Jul-99	23,956	23,695	261	9	194	0
Aug-99	32,136	31,832	304	9	196	0
Sep-99	26,783	26,480	303	11	203	0
Oct-99	22,854	22,617	237	10	196	0
Nov-99	20,311	20,128	183	9	195	0
Dec-99	16,526	16,375	151	8	183	0
Jan-00	17,372	17,821	171	8	163	0
Feb-00	14,480	14,540	165	8	155	0
Mar-00	15,875	15,754	228	10	183	0
Apr-00	14,708	13,193	161	9	174	0
May-00	12,864	14,181	162	9	184	0
Total	234,671	233,226	2,522	9	185	0

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99		0%	100%	100%	8
Jul-99		0%	100%	100%	9
Aug-99		0%	100%	100%	9
Sep-99		0%	100%	100%	11
Oct-99		0%	100%	100%	10
Nov-99		0%	100%	100%	9
Dec-99		0%	100%	100%	8
Jan-00		0%	100%	100%	8
Feb-00		0%	100%	100%	8
Mar-00		0%	100%	100%	10
Apr-00		0%	100%	100%	9
May-00		0%	100%	100%	9
Total	0%	0.00%	100%	100%	



Direct Loan Origination Center

Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	234,671
Voice Mail	-
e-mail	953
Facsimile	43,384
Written	104,829
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C	
Direct Loan Origination Center - School Relations	%
Loan Status	68.0%
Referral Calls	29.0%
Reconciliation	1.0%
Fulfillment	1.0%
Customer Support	1.0%
	100.0%

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	131,689
Voice Mail	-
e-mail	953
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-



NSLDS Customer Service Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	3,802	3,660	142	30	337	813
Jul-99	3,572	3,407	165	43	345	813
Aug-99	3,496	3,318	178	38	322	839
Sep-99	3,534	3,336	198	60	332	779
Oct-99	3,574	3,306	268	64	342	777
Nov-99	3,380	3,128	252	46	397	786
Dec-99	4,056	3,759	297	52	317	922
Jan-00	2,708	2,617	91	31	327	785
Feb-00	2,586	2,487	89	35	342	981
Mar-00	3,304	3,198	106	27	353	837
Apr-00	2,765	2,646	119	31	312	862
May-00	3,476	3,353	123	31	283	780
Total	40,253	38,215	2,028	41	334	831

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99	0.88	0%	100%	100%	
Jul-99	0.88	0%	100%	100%	
Aug-99	0.88	0%	100%	100%	
Sep-99	0.91	0%	100%	100%	
Oct-99	0.91	0%	100%	100%	
Nov-99	0.87	0%	100%	100%	
Dec-99	0.85	0%	100%	100%	
Jan-00	0.86	0%	100%	100%	
Feb-00	0.81	0%	100%	100%	
Mar-00	0.86	0%	100%	100%	
Apr-00	0.87	0%	100%	100%	
May-00	0.86	0%	100%	100%	
Total	87%	0.00%	100%	100%	



**Technical Information -
Inbound Correspondence Medium
- 3E**

Contact Media	Volume Inbound
IVRU	-
Voice Mail	-
e-mail	900
Facsimile	2,040
Written	-
Web "Chat" Session	-
On-line Session	-

**Technical Information -
Outbound Correspondence
Medium - 3E**

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	960
Facsimile	720
Written	-
Web "Chat" Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

National Student Loan Data System	%
Enrollment and security issues	30.0%
NSLDSFAP on the Web	23.0%
SSCR	22.0%
Perkins	8.0%
Data Integrity	5.0%
Guaranty Agency issues	4.0%
Application Software	3.0%
FAT/ISIR	2.0%
QMF and ED users	2.0%
Reference Materials	1.0%
	100.0%



Pell Grant Hotline

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	1,357	1,357	0			
Jul-99	1,730	1,722	8			
Aug-99	2,266	2,260	6			
Sep-99	2,774	0	0			
Oct-99	2,160	0	0			
Nov-99	2,071	2,053	18			
Dec-99	2,206	2,131	75			
Jan-00	1,698	1,589	109			
Feb-00	2,472	2,203	269			
Mar-00	1,995	1,689	306			
Apr-00	1,425	1,363	62			
May-00	1,913	1,870	43			
Total	24,067	18,237	896	0	0	0

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99		1%	99%		
Jul-99		1%	99%		
Aug-99		1%	99%		
Sep-99		1%	99%		
Oct-99		1%	99%		
Nov-99		1%	99%		
Dec-99		1%	99%		
Jan-00		0%	100%		
Feb-00		0%	100%		
Mar-00		0%	100%		
Apr-00		0%	100%		
May-00		0%	100%		
Total	0%	101	0.58%	99%	0%



Pell Grant Hotline

Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	-
Voice Mail	2,283
e-mail	1,516
Facsimile	439
Written	15
Web "Chat" Session	-
On-line Session	-

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	2,283
e-mail	-
Facsimile	-
Written	-
Web "Chat" Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Pell Grant Customer Service	%
RFMS Procedures and Status	30.0%
Student Record Inquiry	20.0%
Authorization Amount Questions	20.0%
Web Page Questions	10.0%
Student/Parent Questions	10.0%
Student Payment Summary (SPS) and Year-to- Date (YTD) requests	10.0%
	100.0%



Title IV WAN Customer Service Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	10,756	8,272	1,765	3	567	1,114
Jul-99	8,485	6,802	1,098	3	462	1,062
Aug-99	8,724	6,702	1,438	3	507	1,186
Sep-99	8,884	6,730	1,509	3	537	1,121
Oct-99	7,037	5,736	940	3	464	994
Nov-99	6,386	5,430	627	3	435	945
Dec-99	6,293	5,248	745	3	488	1,052
Jan-00	4,867	4,404	356	3	427	806
Feb-00	4,307	3,987	259	3	449	804
Mar-00	4,481	4,251	169	3	471	842
Apr-00	3,455	3,296	120	3	462	860
May-00	5,053	4,701	293	3	417	778
Total	78,728	65,559	9,319	3	474	964

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99		11%	89%		
Jul-99		8%	92%		
Aug-99		11%	89%		
Sep-99		3%	97%		
Oct-99		12%	88%		
Nov-99		13%	87%		
Dec-99		13%	87%		
Jan-00		12%	88%		
Feb-00	0.91	12%	88%		
Mar-00	0.9	10%	90%		
Apr-00	0.9	16%	84%		
May-00	0.86	13%	87%		
Total	30%	11.17%	89%	0%	



Title IV WAN Customer Service Center

Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	88,357
Voice Mail	3,756
e-mail	1,200
Facsimile	467
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Technical Information - Outbound correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	3,756
e-mail	-
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C	
Title IV (TIV WAN) Support	%
Needs help with network Password	20.0%
Batch status information	20.0%
Needs help with installing software	15.0%
Needs help with a transmission error	15.0%
Transfer call to other contractor's customer service center (CPS, NSLDS, DLOC, etc.)	15.0%
Enrollment information (how to sign up new people, change enrollment information)	8.0%
Billing information	2.0%
Software/Documentation questions	5.0%
	100.0%



Customer Support Call Center

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99	2,203	2,203	64	30	340	
Jul-99	2,117	2,117	111	30	256	
Aug-99	1,727	1,727	83	30	223	
Sep-99	3,199	3,199	76	30	300	
Oct-99	1,772	1,772	28	30	415	
Nov-99	1,514	1,514	210	30	480	
Dec-99	1,476	1,476	30	30	454	
Jan-00	1,491	1,491	64	30	416	
Feb-00	1,986	1,986	32	30	436	
Mar-00	1,808	1,808	66	30	391	
Apr-00	1,456	1,456	54	30	456	
May-00	1,902	1,902	33	30	292	
Total	22,651	22,651	851	30	372	0

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99		40%	60%	98%	30
Jul-99		30%	70%	94%	30
Aug-99		35%	65%	94%	30
Sep-99		25%	75%	95%	30
Oct-99		20%	80%	96%	30
Nov-99		5%	95%	96%	30
Dec-99		2%	97%	96%	30
Jan-00		4%	96%	96%	30
Feb-00		15%	85%	96%	30
Mar-00		30%	70%	96%	30
Apr-00		22%	78%	98%	30
May-00		5%	95%	95%	30
Total	0%	19.42%	81%	96%	



Customer Support Call Center

Technical Information - Inbound Correspondence Medium - 3E	
Contact Media	Volume Inbound
IVRU	-
Voice Mail	375
e-mail	957
Facsimile	80
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Customer Support Branch	%
General Provisions	33.0%
Other	27.0%
Applicant Systems	13.0%
Pell	9.0%
Campus Base	7.0%
FFELP	7.0%
Direct Loans	3.0%
LEAP	1.0%
	100.0%

Technical Information - Outbound Correspondence Medium - 3E	
Contact Media	Volume Outbound
IVRU	-
Voice Mail	375
e-mail	808
Facsimile	80
Written	-
Web "Chat"	-
Session	-
On-line Session	-



Lender or Guaranty Agency Default Management Division

High Level Call Center Information - Survey Question 3B

Month	Total Calls Received	Total Calls Answered	Total Calls Abandoned	Average Speed of Answer (sec)	Average Talk Time (sec)	Average Call Handling Time (sec)
Jun-99						
Jul-99						
Aug-99						
Sep-99						
Oct-99	23	23	0			
Nov-99	0	0				
Dec-99	2	2				
Jan-00	0	0				
Feb-00	4	4				
Mar-00	8	8				
Apr-00	1	1				
May-00	2	2				
Total	40	40	0	0	0	0

High Level Call Center Information - Survey Question 3D

Month	For Calls Resolved on First Contact (%)	Calls Handled completely by Automation (%)	Calls Handled Completely by CSR (%)	Calls Answered within Service Standards (%)	Calls Answered within Service Standards (sec)
Jun-99					
Jul-99					
Aug-99					
Sep-99					
Oct-99					
Nov-99					
Dec-99					
Jan-00					
Feb-00					
Mar-00					
Apr-00					
May-00					

Total 0% 107 0.00% 0% 0%



Lender or Guaranty Agency Default Management Division

Technical Information - Inbound Correspondence Medium - 3E

Contact Media	Volume Inbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-

Reasons for Calling Call Centers - Survey Question 3C

Lender or Guaranty Agency Default Rates	%
Request for the default guide	90.0%
Address Changes	4.0%
Questions regarding default data	4.0%
Backup data	1.0%
Wrong data	1.0%
	100.0%

Technical Information - Outbound Correspondence Medium - 3E

Contact Media	Volume Outbound
IVRU	-
Voice Mail	-
e-mail	-
Facsimile	-
Written	-
Web "Chat"	-
Session	-
On-line Session	-



Participants and Meetings

Current State Assessment Sub-Team Members:

★ Corwin K. Jennings	Students	Chris Hill	CIO
Frank Kidd	CIO	Don Applegarth	EDS
Chris Ledman	NCS	Marcello Rojtman	Schools
Carol Franklin-Jones	Students	Karen Epps	Students
Kenneth Faison	Students	Shelby Stone	Students
Shirley Wheeler	Students	Michael Kinfu	Modernization Partner

The sub team scheduled meetings once per week and as needed with the following results:

6/06/2000	2:00
6/13/2000	2:00
6/27/2000	2:00
7/11/2000	2:00
7/18/2000	2:00
7/25/2000	2:00
8/01/2000	2:00
8/08/2000	2:00

★ Sub Team Lead