

Questionnaire Management Guidelines

Goals:

- One consolidated document to track all model and CQ changes throughout the life of the project
- Questionnaire always matches the live survey
- Easy and error-free way to submit CQ changes
- All changes tracked and reflected in one document (DOT will help)

Questionnaire Resources:

- 1 [Questionnaire Design and Approval Process](#)
- 2 [Question Grouping Rules](#)
- 3 [OPS vs. Skip Logic Decision for "Other, Please Specify"](#)
- 4 [Model and Custom Question Checks_SRA](#)
- 5 [Model and Custom Question Checks_Team LeadManager](#)
- 6 [Model and Custom Question Checks_DOT](#)
- 7 [Foreign Language Survey Instructions](#)

Welcome and Thank You Text

Directions:

This welcome text is shown at the top of the questionnaire window and the thank you text at the bottom. This is a good place to mention the site/company/agency name so the visitor knows whom they are taking the survey for. Feel free to modify the standard Welcome text shown in the box below.

Welcome Text

Thank you for visiting the **IRS.gov website**. This survey is conducted by ForeSee on behalf of the Internal Revenue Service. Your opinions will help the IRS provide the types of information and services that you need and want.

Your answers to the survey are strictly confidential and will remain anonymous. The IRS receives only compiled data, which does not allow for the identification of any individual. The IRS is committed to protecting your privacy as you take this survey, and whenever you visit the IRS website.

Please do NOT provide any personal identification information such as your Name, Social Security Number, Taxpayer Identification Number, Telephone Number, E-Mail Address, or Street Address in the "comments" sections of this questionnaire. The IRS is NOT able to respond to tax or personal related inquiries that are submitted through this survey.

Thank You Text

Thank you very much for completing this survey. All answers and comments will be used by the IRS to help serve you better.

Examples

Welcome Text Example

The screenshot shows a web browser window with the URL <http://www.foreseeresults.com/survey/display?cid=test&mid=0ltk0Fpkgl00h5w>. The page features the ForeSee logo and the title "Customer Satisfaction Survey". The main text reads: "Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve. Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible. Required questions are denoted by an *". Below this is a question: "1: *Please rate the ability to narrow choices to find the product(s) you are looking for on this site." The response options are a scale from 1 to 10, with "1=Poor" and "Excellent=10" at the ends, and a "Don't Know" option. Each number has a radio button next to it.

Thank You Text Example

The screenshot shows a survey question: "16: What size and style of jeans were you shopping for today?". It has two columns of radio button options. The first column is for size: "1", "3", "5". The second column is for style: "Boot cut", "Low rise", "Flare". Above the question are two dropdown menus for "Football" and "Hockey", both set to "Please Select". Below the question is a yellow callout box with the text: "'web site' has been corrected to now read 'website' in the text to the left". At the bottom of the survey window, there is a "Thank you for taking our survey - and for helping us serve you better." message, a note about not receiving a response, and "Cancel" and "Submit" buttons. The footer includes "Copyright 2010 - all rights reserved" and links for "ForeSee Results", "Privacy Policy", and "Survey Support".

Model Instance Name:

IRS Transcript Survey



MID: 9E9R5NixRMc5h88FsMRV1g==

Partitioned (Y/N)? N

Date: 3/12/12

IRS Transcript Survey

Model questions utilize the ACSI methodology to determine scores and impacts

	MQ Label	CUSTOMER SATISFACTION
	Satisfaction - Overall	Satisfaction What is your overall satisfaction with the transcript ordering process? (1=Very Dissatisfied, 10=Very Satisfied)
	Satisfaction - Expectations	How well does the transcript ordering process meet your expectations ? (1=Falls Short, 10=Exceeds)
	Satisfaction - Ideal	How does the IRS transcript ordering process compare to your idea of an ideal ordering process ? (1=Not Very Close, 10=Very Close)

Model Instance Name:
 IRS Transcript Survey
 MID: 9E9R5NIxRMc5h88FsMRV1g==
 Date: 3/12/12

~~red & strike-through~~: DELETE
underlined & italicized: RE-ORDER
 pink: ADDITION
 blue + -->: REWORDING



IRS Transcript Survey CUSTOM QUESTION LIST

QID	Skip Logic Label	Question Text	AnswerIDs (DOT)	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)
MMW2043		What type of transcript did you order today?	MMW2043A01 MMW2043A02	Tax return Tax account transcript		Radio button, one-up vertical
MMW2044		Why did you order a transcript today?	MMW2044A01 MMW2044A02 MMW2044A03 MMW2044A04 MMW2044A05 MMW2044A06	For my accountant/financial advisor For a lender/financial institution for a mortgage For a government agency For a student loan request For my own records Other		Radio button, one-up vertical
MMW2045		If other, please explain:				Text area, no char limit
MMW2046		How easy was the ordering process?	MMW2046A01 MMW2046A02 MMW2046A03 MMW2046A04 MMW2046A05	Very easy Somewhat easy Somewhat difficult Very difficult I did not order a transcript at this time	A	Radio button, one-up vertical
MMW2047	A	If you did not order a transcript at this time, please explain:				Text area, no char limit
MMW2048		Was the information/explanation about transcripts and how to order them useful ?	MMW2048A01 MMW2048A02 MMW2048A03	Yes No Somewhat	A A	Radio button, one-up vertical
MMW2049	A	If no or somewhat, please explain:				Text area, no char limit
MMW2050		Did you order transcripts before ?	MMW2050A01 MMW2050A02	Yes No	A	Radio button, one-up vertical
MMW2051	A	If yes, how many times have you ordered transcripts before?	MMW2051A01 MMW2051A02 MMW2051A03 MMW2051A04	This is my first time Once or twice Three or more times Don't know/can't remember		Radio button, one-up vertical
MMW2052		How can we further improve this application to better serve your needs in the future?				Text area, no char limit



CQ Label Type			
Single or Multi	Required Y/N	Special Instructions	CQ Label Type
S	Y		
S	Y	Skip Logic Group	Purpose
	N		Other purpose
S	Y	Skip Logic Group	Ordering process
	N		Why not order
S	Y	Skip Logic Group	Useful Info
	N		Not useful info
S	Y	Skip Logic Group	Ordered before
S	Y		Times ordered
	Y		Improve

Holiday 2010 Custom Question Setup

YOU MUST KEEP THE CQ LABELS AS THEY ARE LABELED B

red & strike-through: DELETE
 underlined & italicized: RE-ORDER
 pink: ADDITION
 blue + -->: REWORDING

CUSTOM QUESTION LIST

QID (Group ID)	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	
Generic "spend" intention for benchmarking and to compare to 2008, 2009 and 2010		Do you expect to spend more or less online during the 2010 holiday season compared to 2009?	A lot more			Single	Y	
Spend intention with this retailer		Do you expect to spend more or less online during the 2010 holiday season with retailer.com compared to 2009?	Please use the following guidelines: - DO NOT MODIFY THE WORDING of the ANSWER CHOICES - DO NOT ADD ANSWER CHOICES OR DELETE ANSWER CHOICES - DO NOT CHANGE ORDER OF ANSWER CHOICES, if you would like answer choice order changed, please request randomization - DO NOT change the CQ LABELS - You may change your company name in the question which is highlighted in BLUE					Y
			A little more	R				
			I expect to spend about the same amount as last year					
			A little less	S				
			A lot less	S				
		Not sure						
	R	Why do you expect to spend more online with retailer.com this holiday season? (please select all that apply)	Promotions (\$ or % off offers)		Checkbox, one-up vertical	Multi	Y	
		Quality of merchandise						
		Merchandise selection						
		Good return policy						
		Online product prices						
		Shipping costs						
		Availability of merchandise						
		Better personal economic circumstances this year						
		Other (please specify):	Z					



Special Instructions

Skip Logic Group

Skip Logic Group