

Survey Type	Always On			
Property		UAT:		
Targeting Logic	<i>ex: URL, page path, parameter</i>			
Page / Q. #	Include / Exclude	Survey Text	Required?	Answer Type

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Experience Cloud Field	Notes

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Survey Type	Always On			
Property		UAT:		
Targeting Logic	<i>ex: URL, page path, parameter</i>			
Page / Q. #	Include / Exclude	Survey Text	Required?	Answer Type
1	Include	Please rate your agreement with the following statements about using your online account: This interaction increased my trust in the IRS.	Y	Scale 1-5
2	Include	I am satisfied with the service I received from the online tax account tool.	Y	Scale 1-5
3	Include	The online tax account tool met my needs.	Y	Scale 1-5
4	Include	It was easy to find what I needed.	Y	Scale 1-5
5	Include	It took a reasonable amount of time to do what I needed to do.	Y	Scale 1-5
6	Include	How long have you had an online account with the IRS?	N	Radio Buttons
6.1	Include	How easy or difficult was the sign-up process for an online tax account?	N	Scale 1-5

7	Include	What was the purpose of your visit today? (Select all that apply.)	Y	Checkboxes

Please rate your level of agreement with the following statement. The details of my balance were clear and easy to understand. (Please select "Don't Know" if your balance was not shown.)

7.1	Include		N	Scale 1-5

7.2	Include	Please specify your other reason for visit.	N	Text
7.3	Include	What did you want to accomplish by viewing your notice or letter today?	N	Text
8	Include	If you could change or improve one thing about the online tax account tool, what would it be?	N	Text
9	Include	What did you like best about your experience today?	N	Text

Answer Choices	Condition
1= Strongly Disagree	
Disagree	
Neutral	
Agree	
5 = Strongly Agree	
1= Strongly Disagree	
Disagree	
Neutral	
Agree	
5 = Strongly Agree	
1= Strongly Disagree	
Disagree	
Neutral	
Agree	
5 = Strongly Agree	
1= Strongly Disagree	
Disagree	
Neutral	
Agree	
5 = Strongly Agree	
1= Strongly Disagree	
Disagree	
Neutral	
Agree	
5 = Strongly Agree	
First time user	
Less than 6 months	
More than 6 months, but less than a year	
More than a year	
1 = Very Difficult	If First time user selected for
2	
3	
4	
5 = Very Easy	

View my balance

Make an online payment	
View my payment history or activity	
View my filing history or tax records	
Set up a payment plan	
View or modify details of an existing payment plan	
View notices or letters	
View Economic Impact Payment (stimulus) information	
View advance Child Tax Credit payment information	
View or update personal contact information	
Other (please specify)	

Strongly Disagree

If View my balance selected f

Disagree	
Neutral	
Agree	
Strongly Agree	
Don't Know	

If Other (please specify) sele

If View notices or letters selec

Experience Cloud Field	Notes
	Trust
	Satisfaction
	Service Effectiveness
	Process Ease
	Process Efficiency
6	

or 7	
scted for 7	Free Response
cted for 7	Free Response
	Free Response
	Free Response

Notes

See updated BPP spec here: <https://docs.google.com/spreadsheets/d/1SumhmxFhmuGajNAclpmQqNfQol>

MEDALLIA EXPERIENCE CLOUD

MEC Name	MEC Field ID	MEC Field Type
App ID (Mobile)	e_bp_digital_mobile_app_id_auto	Autoindexed Text
App Version (Mobile)	e_bp_digital_mobile_app_version_	Autoindexed Text
Browser Language	e_bp_digital_language_auto	Autoindexed Text
Browser Name	e_bp_digital_browser_name_auto	Autoindexed Text
Browser Version	e_bp_digital_browser_version_au	Autoindexed Text
City	e_bp_digital_city_auto	Autoindexed Text
ClickTale Session URL	e_bp_digital_clicktale_session_url	Hyperlink
Country	e_bp_digital_country_auto	Autoindexed Text
Country Code	e_bp_digital_country_code_auto	Autoindexed Text
Decibel Insight Session URL	e_bp_digital_decibel_insight_sessio	Hyperlink
Device	e_bp_digital_device_hardware_type	Autoindexed Text
Device ID (Mobile)	e_bp_digital_mobile_device_id_aut	Autoindexed Text
Device Marketing Name	e_bp_digital_device_marketing_na	Autoindexed Text
Device Model	e_bp_digital_device_model_auto	Autoindexed Text
Device Model (Mobile)	e_bp_digital_mobile_device_model	Autoindexed Text
Device Vendor	e_bp_digital_device_vendor_auto	Autoindexed Text
Digital ID	e_bp_digital_unit	Unit
Digital Survey	e_bp_digital_itm_survey_alt	Alternative Set
Form ID	e_bp_digital_form_id_txt	Text
Form Name	e_bp_digital_form_name_txt	Text
Glassbox Session URL	e_bp_digital_glassbox_session_url	Hyperlink
Historical Data Flag	e_bp_historical_data_flag_yn	Enumerated
IP Address	e_bp_digital_ip_address_txt	Text
Is Mobile Device	e_bp_digital_device_is_mobile_yn	Enumerated
Is Mobile Phone	e_bp_digital_device_is_mobile_ph	Enumerated
Is Tablet	e_bp_digital_device_is_tablet_yn	Enumerated
Language Locale	e_bp_digital_language_locale_txt	Text
Operating System	e_bp_digital_device_os_name_au	Autoindexed Text
Origin Type	e_bp_digital_origin_type_auto	Autoindexed Text
OS Type (Mobile)	e_bp_digital_mobile_os_type_auto	Autoindexed Text
OS Version	e_bp_digital_device_os_version_au	Autoindexed Text
OS Version (Mobile)	e_bp_digital_mobile_os_version_at	Autoindexed Text
Record Type - Digital All Digital (MD)	e_bp_record_type_digital_all_yn	Enumerated
Region	e_bp_digital_region_auto	Autoindexed Text
Screen Capture URL	e_bp_digital_screencapture_url	Hyperlink
Screen Resolution	e_bp_digital_device_screen_reso	Autoindexed Text
SDK Version (Mobile)	e_bp_digital_mobile_sdk_version_	Autoindexed Text
SessionCam Session URL	e_bp_digital_sessioncam_session_	Hyperlink
Tealeaf Session URL	e_bp_digital_tealeaf_session_url	Hyperlink
Trigger Type	e_bp_digital_trigger_event_type_au	Autoindexed Text
Unique Record ID	e_bp_digital_response_id_txt	Text
URL Query Parameters	e_bp_digital_url_query_parameters	Text

Usable Screen Resolution	e_bp_digital_device_usable_reso n_resolution_auto	Autoindexed Text
UUID	e_bp_digital_uuid_txt	Text
Respondedate	e_respondedate	Datetime
User Replay Session URL	e_bp_digital_user_replay_session _url	Hyperlink
Full Story Session URL	e_bp_digital_full_story_session_u r	Hyperlink
Quantam Metrics Session URL	e_bp_digital_quantam_metrics_s sion_url	Hyperlink
Website URL	e_bp_digital_website_url	Hyperlink



		4 - Demo
Development Cycle	k_bp_development_cycle_flag_co mbined_alt	5 - Teach 6 - Live

Included in Filter

Yes
Yes
Yes
Yes
Yes
Yes
No
Yes
No
No
Yes
Yes
Yes
Yes
Yes
Yes
Yes

Yes
No
No
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Yes
Yes
Yes
No
No
Yes
No
Yes
Yes
No
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Yes
No

No

Yes

No

No

No

No

No

Yes

No

Status		yyyy-MM-dd		
Summary				
This targeting specifications list the different targeting options for both the Always				
Targeting Option	Targeting Dscription	Always-On	General	
Specific Device Type	Choose any combination of desktop, mobile and tablet.	mobile, and tablet	mobile and tablet	
Include Customers on URLs	intercept survey targeting for.	None	None	
Exclude Customers on URLs	intercept survey targeting.	None	None	
Abandoning Customers	Target customers only as they intend to leave page, desktop only.	N/A	None	
Number of Visits	Choose a specific customer visit number or minimum / maximum number of visits to trigger the intercept survey for (e.g. target only first visit, or only after sufficient usage).	N/A	None	
Percentage of Visits	Target a representing set of the visitors. Choose a percentage of sessions on the website.	N/A	5.00%	
Time in Session	Target customers after a minimum time in the session (multiple pages can be visited).	N/A	300 seconds	
Visit	after sufficient usage).	N/A	None	

Time on Page	target customers only after a minimum time on the page.	N/A	30 seconds
Don't invite a customer that declined a historical invite	feedback in the selected timeframe.	N/A	21 days
Don't invite a customer that provided feedback	already provided feedback in the selected timeframe.	N/A	90 days
Custom Targeting Rules	custom parameters (customer data).		None

s On (Button) strategic	
Behavioral	Key
tablet	Do you want to
None	Required, to
None	Are there any
None	How to focus on seemingly points of failures in flow (abandoning page, straight from usage advice)?
None	Do we want to focus on new or returning customers (average yearly metric of returning visitors required for reference)? What impacts the returning customer metrics?
5.00%	What is the desired volume of digital feedback? What constitutes a significant response sample size?
300 seconds	What defines sufficient usage for customers visiting the website (average metric required for reference)? How to ensure customers are not overly interrupted?
None	What defines

30 seconds	What defines
21 days	Digital specific
90 days	Digital specific
None	Do we have