







| 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?<br>(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                            |                                 |

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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

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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<br>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 |
| <b>Unique Record ID</b>                   | 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<br>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<br>_url             | Hyperlink        |
| Full Story Session URL      | e_bp_digital_full_story_session_u<br>r               | Hyperlink        |
| Quantam Metrics Session URL | e_bp_digital_quantam_metrics_s<br>sion_url           | Hyperlink        |
| Website URL                 | e_bp_digital_website_url                             | Hyperlink        |



|                   |  |                       |
|-------------------|--|-----------------------|
|                   |  | 4 - Demo              |
| Development Cycle | k_bp_development_cycle_flag_co<br>mbined_alt | 5 - Teach<br>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  |
| No  |
| No  |
| No  |
| No  |
| No  |
| No  |
| No  |
| Yes |
| No  |
| Yes |
| Yes |
| Yes |
| No  |
| No  |
| Yes |
| No  |
| Yes |
| Yes |
| No  |
| No  |
| Yes |
| No  |

No

Yes

No

No

No

No

No

Yes

No



|  |   |                    |                    |  |
|--|---|--------------------|--------------------|--|
| Status   |   | yyyy-MM-dd         |                    |  |
| <b>Summary</b>   |   |                    |                    |  |
| This targeting specifications list the different targeting options for both the Always |   |                    |                    |  |
|  |   |                    |                    |  |
| <b>Targeting Option</b>  | <b>Targeting Dscription</b>   | <b>Always-On</b>   | <b>General</b>     |  |
| 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 |  |
|                         |  |
| <b>Behavioral</b>       | <b>Key</b>   |
| 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       |