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

Answer Choices	Condition

Experience Cloud Field	Notes

Survey Type	Always On			
Property		UAT:		
Targeting Logic	*ex: URL, page path, parameter*			
Page / Q. #	**Include / Exclude**	**Survey Text**	**Required?**	**Answer Type**
1	Include	This interaction increased my trust in the IRS.	Y	Scale 1-5
2	Include	account tool.	Y	Scale 1-5
3	Include	needs.	Y	Scale 1-5
4	Include	within the tool.	Y	Scale 1-5
5	Include	time to do what I needed to do.	Y	Scale 1-5
6	Include	user of this tool?	N	Buttons
7	Include	How did you learn about this tax pro account tool?	N	Radio Buttons
7.1	Include	What other way did you learn about this tax pro account tool?	N	Text Area
8	Include	What was your purpose of visit? (select all that apply)	Y	Checkboxes

8.1	Include	Please specify your other reason for visit.	N	Text Area
9	Include	What is your tax professional role? (select all that apply)	N	Checkboxes
9.1	Include	Please specify your tax professional role.	N	Text Area
10	Include	To the best of your knowledge, how many of your clients have existing individual IRS online accounts?	N	Radio Buttons
11	Include	If you could change or improve one thing about this tax pro tool, what would it be?	N	Text Area

Answer Choices	Condition
1 = Strongly Disagree	
2	
3	
4	
5 = Strongly Agree	
1 = Strongly Disagree	
2	
3	
4	
5 = Strongly Agree	
1 = Strongly Disagree	
2	
3	
4	
5 = Strongly Agree	
1 = Strongly Disagree	
2	
3	
4	
5 = Strongly Agree	
1 = Strongly Disagree	
2	
3	
4	
5 = Strongly Agree	
First Time	
Returning	
Google	
Word of mouth	
Professional publication	
IRS.gov	
IRS Nationwide Tax Forums	
Stakeholder Liason	
Other IRS Outreach	
Other	
	if Other selected for 7
Request POA	
Request TIA	
Other	

	if Other selected for 8
Attorney	
CPA	
Enrolled Agent	
Enrolled Actuary	
Enrolled Retirement Plan Agent	
Designee on a Tax Information Authorization (TIA)	
Other	
	If Other selected for 9
None	
Less than half	
About half	
More than half	
All	
Unsure	

Experience Cloud Field	Notes
	Confidence_Trust
	Satisfaction
	Quality
	Ease
	Efficiency
	Returning
	Learn about
	Learn about_other
	Purpose

	Purpose_other
	Role
	Role_other
	Clients with accounts
	Change one thing

Survey Type	Intercept		
Property Targeting Logic	ex: URL, page path, parameter		

Page / Q. #	Include / Exclude	Survey Text	Required?	Answer Type

Answer Choices	Condition	Experience Cloud Field

Notes

	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_aut o	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_sessi	Hyperlink
Device	e_bp_digital_device_hardware_typ e_auto	Autoindexed Text
Device ID (Mobile)	e_bp_digital_mobile_device_id_aut	Autoindexed Text
Device Marketing Name	e_bp_digital_device_marketing_na me_auto	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 one_yn	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_aut o	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_a uto~~	~~Autoindexed Text~~
~~OS Version (Mobile)~~	~~e_bp_digital_mobile_os_version_at~~	~~Autoindexed Text~~
Record Type - Digital All	e_bp_record_type_digital_all_yn	Enumerated
Record Type - Digital Medallia Digital (MD)	e_bp_record_type_digital_md_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_resol ution_auto	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_entity_type_a uto	Autoindexed Text
Unique Record ID	e_bp_digital_response_id_txt	Text
URL Query Parameters	e_bp_digital_url_query_parameter s_txt	Text

Usable Screen Resolution	e_bp_digital_device_usable_scree n_resolution_auto	Autoindexed Text
UUID	e_bp_digital_uuid_txt	Text
Responsedate	e_responsedate	Datetime
User Replay Session URL	e_bp_digital_user_replay_session _url	Hyperlink
Full Story Session URL	e_bp_digital_full_story_session_ur l	Hyperlink
Quantam Metrics Session URL	e_bp_digital_quantam_metrics_se ssion_url	Hyperlink
Website URL	e_bp_digital_website_url	Hyperlink
Development Cycle	k_bp_development_cycle_flag_co mbined_alt	4 - Demo 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
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*			

Summary

This targeting specifications list the different targeting options for both the Always On (Button

Targeting Option	Targeting Dsecription	Always-On	General	Behavioral
Specific Device Type	~~Choose any combination of~~ desktop, mobile and tablet. ~~on your website to include~~	~~mobile, and~~ tablet	~~mobile, and~~ tablet	~~mobile, and~~ tablet
Include Customers on URLs	intercept survey targeting for. ~~from intercept survey~~	None	None	None
Exclude Customers on URLs	targeting.	None	None	None
Abandoning Customers	Target customers only as they intend to leave page, desktop only.	*N/A*	None	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	None
Percentage of Visits	Target a representing set of the visitors. Choose a percentage of sessions on the website.	*N/A*	5.00%	5.00%
Time in Session	Target customers after a minimum time in the session (multiple pages can be visited).	*N/A*	300 seconds	300 seconds
~~Number of Pages Viewed in~~ Visit	~~the first page visited or only~~ after sufficient usage).	*N/A*	None	None

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

) strategic

Key
Do you want to
Required, to
Are there any
How to focus on seemingly points of failures in flow (abandoning page, straight from usage advice)?
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?
What is the desired volume of digital feedback? What constitutes a significant response sample size?
What defines sufficient usage for customers visiting the website (average metric required for reference)? How to ensure customers are not overly interrupted?
What defines

What defines
Digital specific
Digital specific
Do we have