



# Member List Data Submission Guide

Updated: November 14, 2023

## Member List Data Overview

Data submitted in this format are loaded and made available in the WebMD Ignite Growth Platform (IGP) for audience segmentation to support easy inclusion or exclusion of particular groups of people.

## Person Loading

**Fully-Mastered Persons:** Most data are only meaningful if we can connect them with an addressable person. New person records are first evaluated to determine if they have sufficient data to be fully mastered. Fully mastered persons are connected to all activities (e.g., medical encounters, class attendance) that are associated with that same person.

**A fully mastered person requires the record contain First Name, Last Name, Street Address 1, AND Postal Code.**

## File Format Requirements

> Files are to be UTF-8 encoded

> Delimiters: Pipe (|) delimited or Comma (,) with optional double quote (") qualifiers per field.

Any double-quotes ("), backslash (\) or delimiters characters within any field must be escaped with a backslash, whether or not the field is quote enclosed.

Bad Format	Correct Format
John "A"	"John\"A\""
John "A"	John\"A\"
134 "A" St	"134\"A\" St"
134 "A" St	134\"A\" St
Probably a fatfinger\"	"Probably a fatfinger\""
Probably a fatfinger\	Probably a fatfinger\"
"C\O John A"	"C\\O John A"
C\O John A	C\\O John A

> If a backslash (\) precedes an actual delimiter at any place in a supplied file, that file will fail to load. This is to protect against possible data corruption as the fields after will be ambiguous in their relative position and is most easily avoided by always quote-qualifying fields.

> If data in the entire field cannot be provided, leave it blank (no characters in the field).

> First row contains headers. These are case sensitive, so please follow the below header names exactly.

> No page breaks, footers, or data summaries / totals.

## File Naming Conventions

{File Type}\_{YYYYMMDD}

{Source}\_{File Type}\_{YYYYMMDD}

**Examples:**  
 EMPLOYEES\_MEMBERLIST\_20220801  
 MEMBERLIST\_20220801

**Note:** File name can be in either upper or lowercase; file extension is not required.

**File Processing**

**Replacement:** If an existing "List Name" is supplied in a more recent file, the membership for that List Name will be reset and replaced with only the persons supplied in the most recent file. The persons from all previous files will still be available for communications if they qualify for criteria other than their membership to the given List Name.

**File Delivery**

**Standard**

For standard recurring Member Lists, WebMD Ignite recommends building an extract and providing the latest activities via SFTP in the same manner as all other file types.

**Ad Hoc**

For Ad Hoc submission of Member Lists, WebMD Ignite recommends the creation of an internal folder that your marketing team can place Member List files that has automation built to drop files to the appropriate WebMD Ignite SFTP folder.

Where it is not practical or possible for you to provide the file to an internal folder that automatically pushes the respective list to the WebMD Ignite SFTP, please send the list via an encrypted email to your assigned Marketing Engagement Specialist who will then move this to the appropriate client SFTP folder. If you have any questions pertaining to any of the above, please reach out to your Account Manager.

**File Layout Requirements**

File Types Included: Custom Activity

**Required:** Field is required for one or more function (see below)  
 L - Required for record to load. Record will be rejected if missing.  
 M - Required for loading as fully-mastered person. If ANY are missing, the person can't be fully mastered.  
**Standard Values Required:** We remove any record with a value not in the [standard value list](#).

**File Layout 1. Member List**

Column Order	Field	Header Name	Description	Example	Required	Standard Values Required	Impact Statement
1	First Name	first_name	An individual's first name.	Mary	ML		Required for person mastering and personalized communications.
2	Middle Name	middle_name	An individual's middle name. Will frequently include only the first initial of the middle name.	Ann			Important in merging or separating two people in the same household with the same first and last name, i.e. parents and children.
3	Last Name	last_name	An individual's last name, including any hyphenation.	Smith	ML		Required for person mastering and in some communications depending on salutation.
4	Prefix	prefix	The prefix to someone's name when addressing them on a piece of direct mail.	Ms			Important for all communication channels depending on salutation structure.
5	Suffix	suffix	The generational suffix for a person.	Jr			Important for keeping two individuals with the same name in the same family separate and/or confirming two person records should be matched between disparate systems.
6	Street Address 1	street_address_1	The first line of the individual's home address, not including city, state, zip.	1234 Main St.	ML		Required to correctly link individuals at a household/family level both within the same system and between disparate systems.

7	Street Address 2	street_address_2	The second line of the individual's home address, not including city, state, zip.	Apt. F12			Required to correctly link individuals at a household/family level both within the same system and between disparate systems.
8	City	city	The city of an individual's home address.	Madison			Useful to correctly link individuals at a household/family level both within the same system and between disparate systems.
9	State/Province	state_province	Standardized state or province. For US addresses, this should be the standard 2-character abbreviation.	WI			Useful to correctly link individuals at a household/family level both within the same system and between disparate systems.
10	Postal Code	postal_code	The full postal (ZIP for US addresses) code, including ZIP+4 if present.	53717-1234	ML		Required to correctly link individuals at a household/family level both within the same system and between disparate systems.
11	Gender	gender	Indicates the person's gender. Valid entries are M, F and U.	F		Y	Critical for campaign execution and predictive models.
12	Birth Date	birth_date	The person's date of birth. YYYY-MM-DD.	1973-04-23			Useful for person mastering, campaign execution and predictive models.
13	Home Phone Number	home_phone	The home phone number of a person. This should include area code and no dashes.	6088317880			Useful for campaign execution and person mastering.
14	Mobile Phone Number	mobile_phone	A person's cell phone number. This should include area code and no dashes.	6088317880			Useful for campaign execution and person mastering.
15	Primary Email Address	primary_email	A person's primary email address.	Mary@gmail.com			Required for email campaigns. <b>Note:</b> Email addresses that are not of the basic structure of xxx@yyyy (or <string>@<string>) will not be loaded. This is done to prevent invalid email addresses from overwriting valid emails and to reduce failed email deliveries. If the primary email address is blank or invalid, the secondary email address is evaluated and will be loaded as primary (if valid).
16	Secondary Email Address	secondary_email	A person's primary email address.	Mary@gmail.com			Required for email campaigns. <b>Note:</b> Email addresses that are not of the basic structure of xxx@yyyy (or <string>@<string>) will not be loaded. This is done to prevent invalid email addresses from overwriting valid emails and to reduce failed email deliveries. If the primary email address is blank or invalid, the secondary email address is evaluated and will be loaded as primary (if valid).
17	Employer Name	employer_name	A person's employer.	WebMD Ignite			Useful for some campaigns.
18	List Name	list_name	Unique name for the list ( <a href="#">see impact</a> ).	ABC Employees	L		Important for including or excluding specific groups from audiences. <b>Membership of a given List Name will be entirely replaced each time a list with the same name is submitted.</b>

### Standard Data Values

Data Attributes with a 'Y' in the Standard Values Required column must contain one of the corresponding values found here.

Attribute	Value	Value Description
Gender	M	Male
	F	Female
	U	Unknown
	NB	Non-Binary