Call Center Activity Data Submission Guide

Updated: January 3, 2025

Table of contents

Data submission overview

Person Loading

Fully-Mastered Persons: 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 to contain <u>First Name</u>, <u>Last Name</u>, <u>Street Address 1</u>, AND <u>Postal Code</u>.

Unmastered Persons: Person records that don't meet the criteria for fully-mastered are then evaluated to become unmastered persons. Unmastered persons connect only to the activity that generated them but can still be included in audience creation by using the Unmastered Persons Only (enhanced audience) option.

WARNING: As unmastered persons are made actionable with very little data, it is suggested that you safeguard against submitting data that may include persons you don't want to be communicating with (e.g., persons under the age of 18).

An unmastered person requires the record to have ANY of a valid <u>Primary Email Address</u>, <u>Home Phone Number</u> OR <u>Mobile Phone Number</u>.

File format

- Use 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.
- Example

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

{Source}_{File Type}_{YYYYMMDD-YYYYMMDD}

Examples:
LVM_CALLCENTERACTIVITY_20140801–20150731
LVM_CALLCENTERDEMOGRAPHIC_20140801–20150731

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

File Layout Requirements

File Types Included: Call Center Activity, Call Center Demographic
<mark>Required: Field is required for one or more function (see below)</mark>
- **L – Required for record to load. Record will be rejected if missing.**
- **M – Required for loading as a fully–mastered person. If ANY are missing, the person can't be fully mastered.**
- **U – Required for loading as an unmastered person. At least ONE must be present to load as an unmastered person. If data is not provided in at least one of the fields that are flagged (U), WebMD Ignite will not be able to consider the record for unmastered loading.**

Standard Value Required = We remove any record with a value not in the **standard value list.**

Table 1. Call center demographic file

Column order	Field	Header	Description	Example	Required	Standard Values Required	Impact statement
1	Person ID	person_id	A caller's identification number. For Outbound call activities, we expect to receive the person ID appointed on the Outbound Call Export List.	E14013212943			Useful Unique ID used to match individuals to their Activity, as well as across disparate sources. If not provided, WebMD Ignite will assign an ID. A caller's identification number. Person ID is unique and should not be shared as this will result in merging distinct individuals.
2	First Name	first_name	An individual's first name.	Mary	M		Required for person mastering and personalized communications.
3	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.
4	Last Name	last_name	An individual's last name, including any hyphenation.	Smith	M		Required for person mastering and in some communications depending on salutation.
5	Street Address 1	street_address_1	The first line of the individual's home address, not including city, state, zip.	1234 Main St.	M		Required to correctly link individuals at a household/family level both within the same system and between disparate systems.

6	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.
7	City	city	The city of an individual's home address.	Madison			Required to correctly link individuals at a household/family level both within the same system and between disparate systems.
8	State / Province	state_province	Standardized state or province. For US addresses, this should be the standard 2-character abbreviation.	WI			Required to correctly link individuals at a household/family level both within the same system and between disparate systems.
9	Postal Code	postal_code	The full postal (ZIP for US addresses) code, including ZIP+4 if present.	53717-1234	M		Required to correctly link individuals at a household/family level both within the same system and between disparate systems.
10	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.
11	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.
12	Gender	gender	Indicates the person's gender. Valid entries are M, F and U.	F		Y	Critical for campaign execution and predictive models.
13	Birth Date	birth_date	The person's date of birth. YYYY-MM-DD.	1973-04-23			Required for person mastering, campaign execution and predictive models.

14	Marital Status Code	marital_status_code	The code representing the marital status of a person.	S		Y	Useful for campaign execution and predictive models.
15	Marital Status Description	marital_status_desc	The marital status of a person.	Single		Y	Useful for campaign execution and predictive models.
16	Race Code	race_code	The code representing a person's race.	C		Y	Useful for campaign execution.
17	Race Description	race_desc	A person's race.	Caucasian		Y	Useful for some campaigns and messaging.
18	Home Phone Number	home_phone	The home phone number of a person. This should include area code and no dashes.	6088317880	U*		Useful for campaign execution and predictive models. * – Email OR phone is required for the activity to be associated with an unmastered person (see more details in Unmastered Persons above).
19	Mobile Phone Number	mobile_phone	A person's cell phone number. This should include area code and no dashes.	6088317880	U*		Useful for campaign execution and predictive models. * – Email OR phone is required for the activity to be associated with an unmastered person (see more details in Unmastered Persons above).
20	Primary Email Address	primary_email	A person's primary email address.	Mary@gmail.com	U*		Required for email campaigns and marketing automation. * – Email OR phone is required for the activity to be associated with an unmastered person (see more details in Unmastered Persons above).
21	Secondary Email Address	secondary_email	A person's secondary email address.	Mary@gmail.com	U*		Useful for email communication and marketing automation. * – Email OR phone is required for the person to be loaded as an unmastered person (see more details in Unmastered Persons above).
22	Social Security Number	social_security_number	A person's Social Security Number (SSN).	478000000			Useful in person mastering.

23	Employer Name	employer_name	A person's employer.	WebMD Inc			Useful for campaign execution targeting employees of certain companies.
24	Deceased Date	deceased_date	The date the person expired. Date format must be YYYY-MM-DD.	1973-02-25			Important for campaign execution to ensure known deceased persons are not communicated to.
25	Global Solicitable Status	global_solicitable_status_flag	Patient's global (all channel) solicitable status. Y - Solicitable N - Not Solicitable Blank = Y 'Y' value overrides the DNS value previously supplied. A null value is recommended if the solicitable status is unknown.	N		Y	Important to avoid contacting people who have previously requested not to receive any communications.
26	Direct Mail Solicitable Status (DNS, etc.)	dm_solicitable_status_flag	Patient's direct mail solicitable status. Y - Solicitable N - Not Solicitable Blank = Y, unless this person has been identified as not solicitable previously 'Y' value overrides the DNS value previously supplied.	N		Y	Important to avoid contacting people who have previously requested not to receive communications via direct mail.

			A null value is recommended if the solicitable status is unknown.				
27	Email Solicitable Status (DNS, etc.)	email_solicitable_status_flag	Patient's email solicitable status. Y – Solicitable N – Not Solicitable Blank = Y, unless this person has been identified as not solicitable previously 'Y' value overrides the DNS value previously supplied. A null value is recommended if the solicitable status is unknown.	N		Y	Important to avoid contacting people who have previously requested not to receive communications via email.
28	Phone Solicitable Status (DNS, etc.)	phone_solicitable_status_flag	Patient's phone solicitable status. Y – Solicitable N – Not Solicitable Blank = Y, unless this person has been identified as not solicitable previously 'Y' value overrides the DNS value previously supplied. A null value is recommended if the solicitable status is unknown.	N		Y	Important to avoid contacting people who have previously requested not to receive communications via a phone call.

| 29 | Fax Solicitable Status (DNS, etc.) | fax_solicitable_status_flag | Patient's fax solicitable status. Y – Solicitable N – Not Solicitable Blank = Y, unless this person has been identified as not solicitable previously 'Y' value overrides the DNS value previously supplied. A null value is recommended if the solicitable status is unknown. | N | | Y | Important to avoid contacting people who have previously requested not to receive communications via a fax. |

Table 1.1 Standard data values – Call Center demographic file

Attribute	Value	Value Description	Details
Gender	M	Male	
	F	Female	
	U	Unknown	
	NB	Non-Binary	
Marital Status	M	Married	
	U	Unknown	
	S	Single	
	D	Divorced	
	X	Legally Separated	
	O	Other	
	G	Significant Other	
	W	Widow/Widower	

Race	A	Asian	
	B	Black or African American	
	E	Eastern Indian	
	H	Hispanic or Latino	
	I	American Indian or Alaska Native	
	M	Multiracial	
	N	Native Hawaiian or Other Pacific Islander	
	O	Other	
	U	Unknown	
	W	White or Caucasian	
Global Solicitable Status	Y	Yes Solicitable – will override the previous value unless an N was sent via Solicitable List.	
	N	Not Solicitable	
	Null	A null sets the person to solicitable.	
Direct Mail Solicitable Status	Y	Yes Solicitable – will override the previous value unless an N was sent via Solicitable List.	
	N	Not Solicitable	

	Null	A null sets the person to solicitable.	
Email Solicitable Status	Y	Yes Solicitable – will override the previous value unless an N was sent via Solicitable List.	
	N	Not Solicitable	
	Null	A null sets the person to solicitable.	
Phone Solicitable Status	Y	Yes Solicitable – will override the previous value unless an N was sent via Solicitable List.	
	N	Not Solicitable	
	Null	A null sets the person to solicitable.	
Fax Solicitable Status	Y	Yes Solicitable – will override the previous value unless an N was sent via Solicitable List.	
	N	Not Solicitable	
	Null	A null sets the person to solicitable.	

Table 1. Call center activity file

Column order	Field	Header	Description	Example	Required	Standard Values Required	Impact statement
1	Activity Type	activity_type	Indicator for the type of activity. Set = 'Call' for all records	Call	L	Y	Required to know the type of activity we are receiving.
2	Activity Source	activity_source	The activity source system.	LVM	L		Required to know the source of the activity data.
3	Activity Date	activity_date	The date and timestamp of the activity file. yyyy-MM-dd'T'HH:mm:ss'Z'	2017-05-17T13:05:13Z	L		Required for call attribution reporting.
4	Campaign ID	campaign_id	The campaign ID associated with the call record. This ID is found on the outbound call list export.	999999	L - Outbound Only		Required for outbound call activities.
5	Call List ID	call_list_id	The ID of the call list export. This ID is found on the outbound call list export.	47503	L - Outbound Only		Required for Outbound Calling campaigns.
6	Call ID	call_id	Unique Identifier of the call.	123456	L		Required for all records.

7	Call Type	call_type	A standard code defining the type of call.	IB	L	Y	Required for call attribution reporting.
8	Call Sub Type	call_subtype	A client-provided call sub type or reason.	Follow-Up			Useful for reporting on call activities.
9	Call Status	call_status	The reported status of a call. Not as detailed as a call center disposition. Default to Answer is not provided.	ANS		Y	Useful for reporting and correct measurement of the data.
10	Call Start Time	call_start_time	The call start timestamp. yyyy-MM-dd'T'HH:mm:ss'Z'	1990-01-01T12:01:55Z			Important for calculating Quality Call counts in reports.
11	Call End Time	call_end_time	The call end timestamp yyyy-MM-dd'T'HH:mm:ss'Z'	1990-01-01T12:01:55Z			Important for calculating Quality Call counts in reports.
12	Call Duration	call_duration	The call duration in seconds.	313			Important for calculating Quality Call counts in reports.
13	Tracking Phone Number	tracking_phone_number	The number the customer dialed. This should include area code and no dashes.	6806572876			Critical to identify the display number that would be associated with an advertising campaign.
14	Destination Phone Number	destination_phone_number	The number that the call was forwarded to. This should include area code and no dashes.	8001237030			Useful for reporting purposes.
15	Caller Phone Number	caller_phone_number	The number of the caller - where the call originated from. This should include area code and no dashes.	3037778900			Useful for reporting purposes.

16	Target Phone Number	target_phone_number	The number that is hard-coded onto a page that gets swapped out in favor of the Tracking Number, depending on tactic. This should include area code and no dashes.	8007883200			Useful for reporting purposes.
17	Call Awareness	call_awareness	A client identified value used to track how callers heard or became aware of information/campaign.	Saw an ad online			Useful for drill down reporting.
18	Call Disposition	call_disposition	A client defined value used to track the disposition of the call.	Declined to be transferred			Useful in some campaign execution and reporting.
19	Transfer Flag	transfer_flag	Flag indicating the call resulted in a transfer. This is not as granular as Provider Referral Transfer Flag or Service Referral Transfer Flag. If result was warm transfer, transfer flag should be Y.	N		Y	Useful for reporting purposes.
20	Warm Transfer Flag	warm_transfer_flag	Flag indicating the call resulted in a warm transfer.	N		Y	Useful for reporting purposes.
21	Call Handled By	call_handled_by	The call center representative that handled the call.	John Smith			Useful for drill down reporting.
22	Call Facility Code	call_facility_code	The code of the facility associated with the call. Facility	2			Helpful for facility level reporting.

			code should match the client provided facility reference data.			
23	Call Facility Desc	call_facility_desc	The name of the facility associated with the call. Facility description should match the client provided facility reference data.	Memorial Hospital		Facility description should match the client provided facility reference data. Helpful for facility level reporting.
24	Is Billable	is_billable	A flag indicating if the call was billable.	Y	Y	Useful for drill down reporting.
25	Is First Time Caller	is_first_time_caller	A flag indicating the caller is a first time caller.	N	Y	Useful for drill down reporting.
26	Tracking Keyword	tracking_keyword	The paid search keyword that generated the call.	ortho		Useful for most campaign reporting.
27	Tracking Source	tracking_source	The source campaign or channel.	2018 Ortho Facebook		Useful for drill down reporting.
28	PDC Flag	pdc_flag	A flag indicating the call is for the HG Patient Direct Connect program.	N		Useful for cross product reporting.
29	EPP Flag	epp_flag	A flag indicating the call is for the HG Elective Provider Program product.	N		Useful for cross product reporting.
30	Source Person Id	person_id	The source person ID	12345	U	The Activity file is linked to the Demographics file via the Source Person Id. This is the only ID linkage between the two files. Without the Source Person Id, the call activity will be loaded without associated demographics, resulting in a disconnection between the two files. Person_id must not be shared between distinct individuals.
31	Event Date	event_date	The date of the event.	1990-01-01T12:01:55Z		Useful for most campaign reporting.

			yyyy-MM-dd'T'HH:mm:ss'Z'				
32	Event Code	event_code	The code of the class, health fair or other event for which the caller was registered.	0dd8b22	Yes, if Event Description is populated		Useful for most campaign reporting.
33	Event Description	event_desc	The description of the class, health fair or other event for which the caller was registered.	Endometriosis Lecture			Useful for most campaign reporting.
34	Event Group Code	event_group_code	The code of the client-defined high level event grouping.	WH			Useful for most campaign reporting.
35	Event Group Description	event_group_desc	The description of the client-defined high level event grouping.	Women's Health			Useful for most campaign reporting.
36	Event Type Code	event_type_code	The code of the client-defined type of event.	OSP			Useful for most campaign reporting.
37	Event Type Description	event_type_desc	The description of the client-defined type of event.	off-site promotions			Useful for most campaign reporting.
38	Event Sub Type Code	event_subtype_code	The code of client-defined sub-type of event.	GL			Useful for most campaign reporting.
39	Event Sub Type Description	event_subtype_desc	The description of client-defined sub-type of event.	guest lectures			Useful for most campaign reporting.
40	Event Registration Outcome	event_registration_outcome	The outcome of the event registration activity.	IO		Y	Useful for most campaign reporting.
41	Provider Referral Outcome	provider_referral_outcome	The outcome of the provider referral	REFG		Y	Useful for most campaign reporting.

42	Provider Referral Call Disposition	provider_referral_call_disposition	The disposition of the provider referral call.	Transferred call (appointment)			Useful for most campaign reporting.
43	Provider Referral Transfer Flag	provider_referral_transfer_flag	Flag indicating the provider referral resulted in a transfer	Y		Y	Useful to determine the success of physician referrals.
44	Provider Referral Warm Transfer Flag	provider_referral_warm_transfer_flag	Flag indicating the referral resulted in a warm transfer	N		Y	Useful for most campaign reporting.
45	Provider Referral Appointment Date	provider_referral_appointment_date	The date of the appointment. yyyy-MM-dd'T'HH:mm:ss'Z'	2015-12-12T06:00:00Z			Important to know the date of when the appointment was scheduled.
46	Provider Referral Provider NPI	provider_referral_provider_npi	Unique National Provider Identifier (NPI) for the provider.	1222223334			This code indicates the provider to whom a caller was referred as the outcome of a physician referral call (provider NPI).
47	Provider Referral Provider Code	provider_referral_provider_code	The client's provider code.	13146			Useful for maximum matching of providers between disparate systems.
48	Provider Referral Provider Name	provider_referral_provider_name	The full name of the provider.	Nancy Smith			Useful for maximum matching of providers between disparate systems.
49	Provider Referral Facility Code	provider_referral_facility_code	Code for the facility associated with the referral. Facility code should match the client provided facility reference data.	2			Useful for most campaign reporting.
50	Provider Referral Facility Description	provider_referral_facility_desc	Name for the facility associated with the referral.	Memorial Hospital			Useful for most campaign reporting.
51	Provider Referral Provider Specialty Code	provider_referral_provider_specialty_code	The code representing the referred provider's specialty.	PS412		Y	Useful for most campaign reporting.
52	Provider Referral Provider Specialty Description	provider_referral_provider_specialty_desc	The code representing the referred provider's specialty.	Internal Medicine		Y	Useful for most campaign reporting.

53	Service Referral Outcome	service_referral_outcome	The outcome of the referral	REFG		Y	Useful for most campaign reporting.
54	Service Referral Call Disposition	service_referral_call_disposition	The disposition of the referral call.	Declined to be transferred			Useful for most campaign reporting.
55	Service Referral Transfer Flag	service_referral_transfer_flag	Flag indicating the referral resulted in a transfer	N		Y	Useful to determine the success of service referrals.
56	Service Referral Warm Transfer Flag	service_referral_warm_transfer_flag	Flag indicating the referral resulted in a warm transfer	N		Y	Useful for most campaign reporting.
57	Referral Service Code	service_referral_service_code	The client-defined code for the service to which the caller was referred.	WMC			Useful for most campaign reporting.
58	Referral Service Description	service_referral_service_desc	The client-defined description for the service to which the caller was referred.	Weight Management Coaching			Useful for most campaign reporting.
59	Referral Service Group Code	service_referral_service_group_code	The client-defined code for the service group the caller was referred to.	C0332			Useful for most campaign reporting.
60	Referral Service Group Description	service_referral_service_group_desc	The client-defined description for the service group the caller was referred to.	Obesity Medicine			Useful for most campaign reporting.
61	Referral Service Specialty Code	service_referral_service_specialty_code	The specialty code for the referral service.	PS569		Y	Useful for most campaign reporting.
62	Referral Service Specialty Description	service_referral_service_specialty_desc	The specialty description for the referral service.	Obesity Medicine		Y	Useful for most campaign reporting.
63	Content Code	content_code	The code of the content.	VRF			Useful for most campaign reporting.
64	Content Description	content_desc	The description of the content.	Vascular Risk Factors			Useful for most campaign reporting.

| 65 | Content Type Code | content_type_code | The code of the type of content. | b06de6f | | | Useful for most campaign reporting. |
| 66 | Content Type Description | content_type_desc | The description of the type of content. | Email | | | Useful for most campaign reporting. |

Table 2.1 Standard data values – Call center activity file

Attribute	Value	Value Description
Activity Type	Call	Call
Call Type	IB	Inbound Call
	OB	Outbound Call
	IC	Internal Call
	WC	Web Chat
	OTH	Other
Call Status	ANS	Answered
	NANS	No Answer
	BUSY	Busy
	FD	Failed
	VM	Voicemail
	CLD	Canceled
	OTH	Other

Transfer Flag	Y	Yes
	N	No
Warm Transfer Flag	Y	Yes
	N	No
Is Billable	Y	Yes
	N	No
Is First Time Caller	Y	Yes
	N	No
Provider Referral Outcome	IO	Information Only
	REFG	Referral Given
	OREF	Other Referral
	CF	Can't Fill
	CLD	Canceled
	TRS	Transfer
Event Registration Outcome	CLD	Canceled
	RGS	Registered
	WL	Waiting List
	CF	Can't Fill

	IO	Information Only
Provider Referral Transfer Flag	Y	Yes
	N	No
Provider Referral Warm Transfer Flag	Y	Yes
	N	No
Service Referral Outcome	IO	Information Only
	REFG	Referral Given
	CF	Can't Fill
Service Referral Transfer Flag	Y	Yes
	N	No
Service Referral Warm Transfer Flag	Y	Yes
	N	No
Service Referral Warm Transfer Flag	Y	Yes
	N	No