



# Solicitable List Data Submission Guide

Updated: January 3, 2025

## Solicitable 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 proper channel-level exclusion for persons that have overtly asked to be excluded or that you have elected for exclusion.

## 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 contain First Name, Last Name, Street Address 1, AND Postal Code.**

**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.

Unmastered persons sourced from this data type (Solicitable List) will be suppressed by default in enhanced audience creation based on the channel solicitability of that person, as with fully-mastered.

**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 Primary Email, Secondary Email, Home Phone Number OR Mobile Phone Number.**

## 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}

### Example:

SOLICITABLELIST\_20220801

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

## File Delivery

### Standard

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

Standard Values Required: We remove any record with a value not in the [standard value list](#).

## File Layout Requirements

File Types Included: Custom Activity

**Required:** Field is required for one or more function (see below)

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.

**MH Standard Values Required:** We remove any record with a value not in the [standard value list](#).

## File Layout 1. Solicitable 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	M		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	M		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.	M		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	M		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	Deceased Date	deceased_date	The person's date of death. YYYY-MM-DD.	2023-01-17			Important for campaign exclusion.
14	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 person mastering.  * Email OR phone number is required for loading as an unmastered person (see more details in Unmastered Persons above).
15	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 person mastering.  * Email OR phone number is required for loading as an unmastered person (see more details in Unmastered Persons above).
16	Primary Email Address	primary_email	A person's primary email address.	Mary@gmail.com	U*		Required for email campaigns. <b>Note:</b> Email addresses that are not of the basic structure of xxx@yyy (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).  * Email OR phone number is required for loading as an unmastered person (see more details in Unmastered Persons above).
17	Secondary Email Address	secondary_email	A person's primary email address.	Mary@gmail.com	U*		Required for email campaigns. <b>Note:</b> Email addresses that are not of the basic structure of xxx@yyy (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).  * Email OR phone number is required for loading as an unmastered person (see more details in Unmastered Persons above).
18	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		Y	Important to avoid contacting people who have previously requested not to receive communications via direct mail.

19	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	N		Y	Important to avoid contacting people who have previously requested not to receive communications via email.
20	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	N		Y	Important to avoid contacting people who have previously requested not to receive communications via a phone call.
21	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	N		Y	Important to avoid contacting people who have previously requested not to receive communications via a fax.
22	Mailing Address Availability	mailing_address_availability	N - Not available for Direct Mail at the address listed. Blank = Is Available over direct mail at the address listed	N			Important to avoid contacting people who have had returned mail or are no longer at the address and new address is not known.
<b>Standard Data Values</b>							
Data Attributes with a 'Y' in the Standard Values Required column must contain one of the corresponding values found here.							
<b>Attribute</b>	<b>Value</b>	<b>Value Description</b>					
Gender	M	Male					
	F	Female					
	U	Unknown					
	NB	Non-Binary					