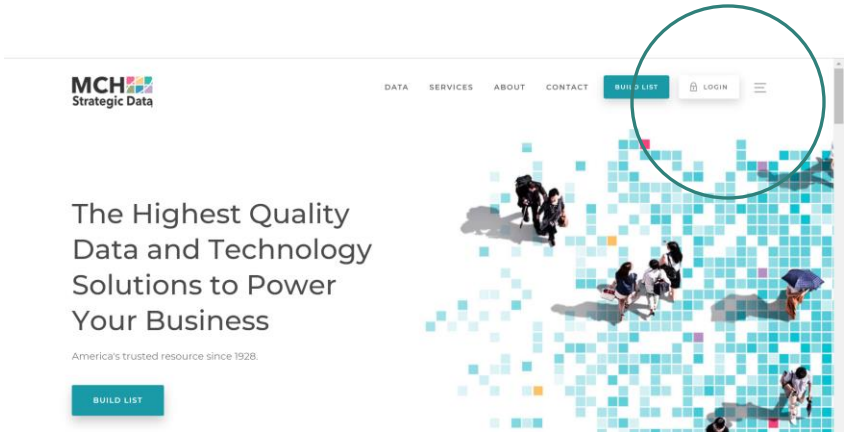
# MCH ListBuilder User Guide

SEPTEMBER 2021

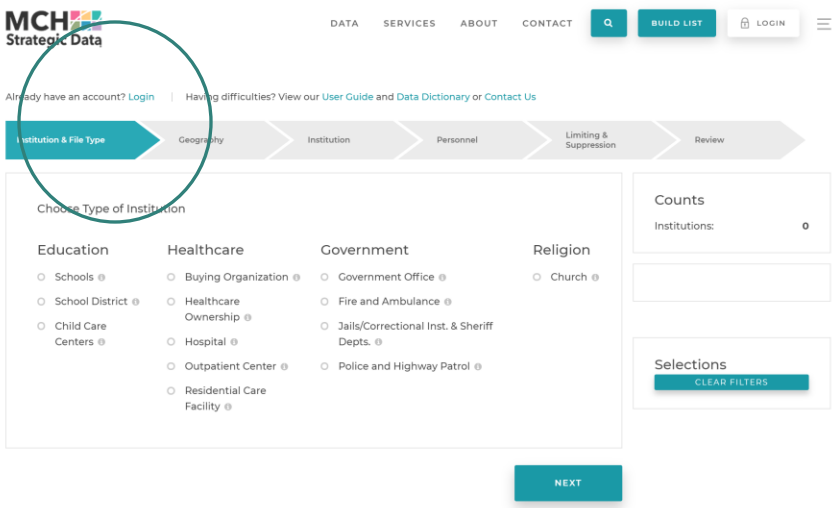
# ListBuilder Helpful tips

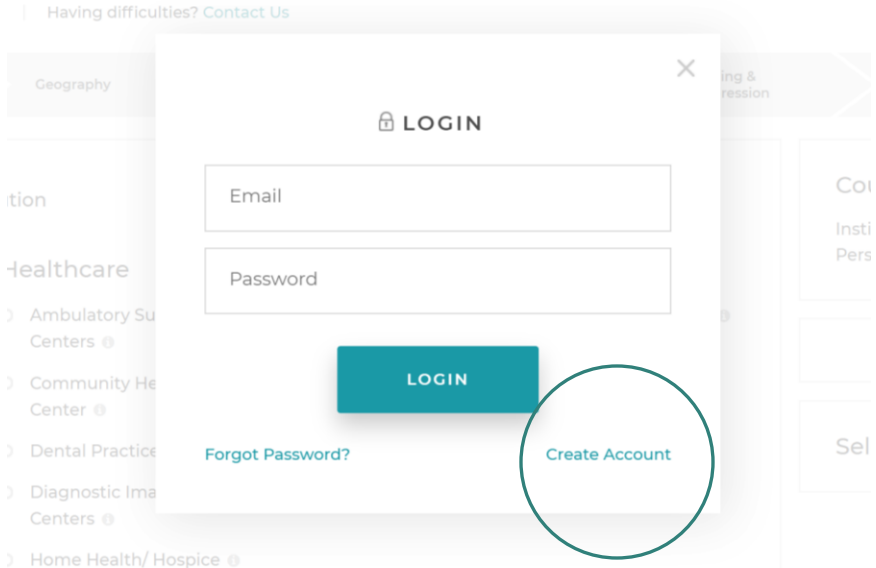
1. There is a $10K maximum dollar amount for each order.
2. Changing an email associated with an account must be managed by MCH's IT team. Please send an email to info@mchdata.com for assistance.
3. You can build a list without a login and see counts and pricing based on your selections, however, you will not be able to complete the check-out process unless you create a login.
4. Discounts and other features that are associated with user accounts will only display if a user is logged in.
5. If you forget your password, you may click on the **forgot password** link in the login box. MCH will send an email with a link to reset your password.




# Creating a LOGIN

Click on the LOGIN button at the top of the page or select the login hyperlink directly above the chevron bar on the ListBuilder page.





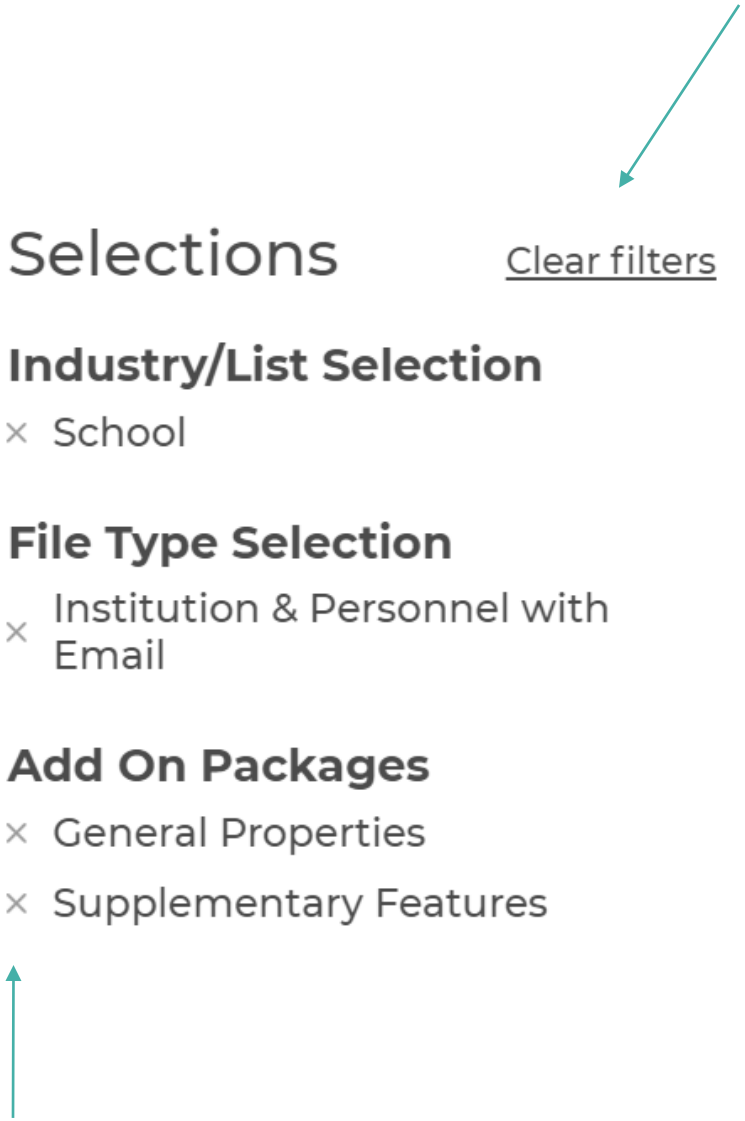

# Account Set-Up

When you see the LOGIN pop-up box, click on Create Account in the lower right corner.

This will prompt you to enter your email address and create a password.

Once you hit the SIGNUP button you will receive an email to verify your account.  After you verify your account, you will be prompted to log in and enter your profile information.

Once you have completed your profile you will be able to build and save a list, review your selections and complete your order.



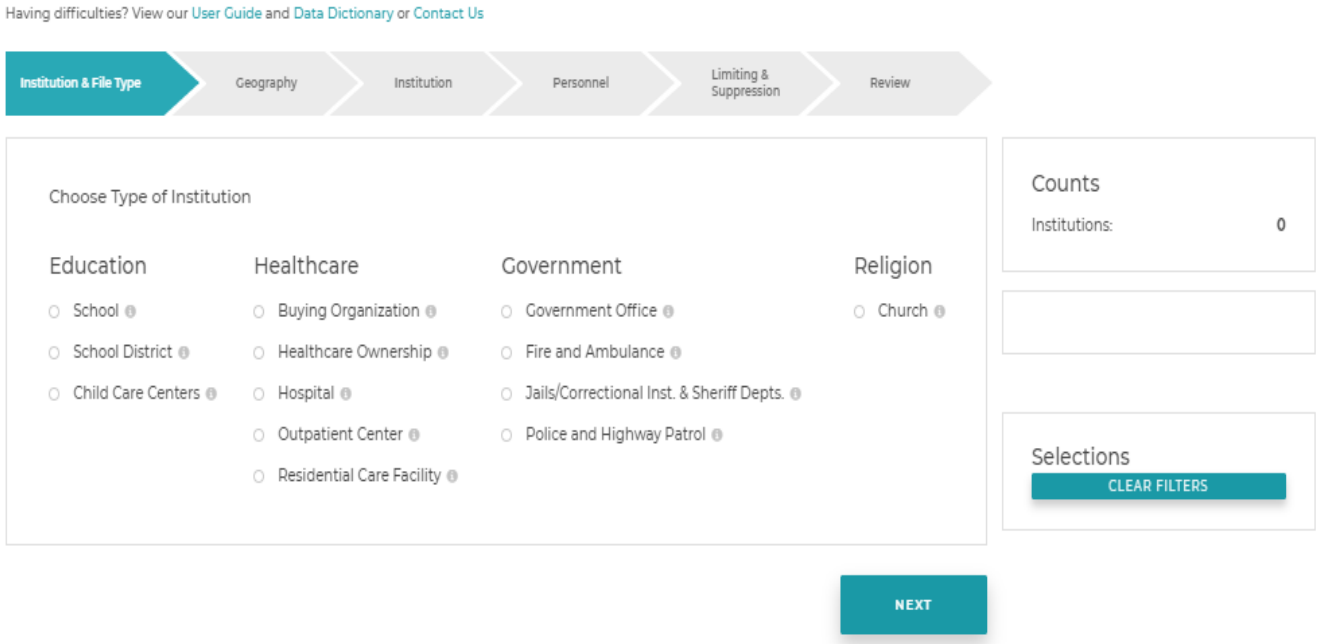

# Building a list

**Select Criteria.**

As you build your list, you can view the selection criteria you have added in the selections section to the right underneath the counts and pricing box. At any time if you want to remove a criteria, simply click the **x** next to the criteria you want to remove. To clear all criteria, select **clear filters** located in the top right corner of the selection box.

**Counts and Pricing.**

Once you select the institution type and file type, you will be able to view counts. If you select the institution only file type, you will also be able to view pricing. If you select any file type with personnel, you will be able to view pricing **after** the personnel selections are made.




# Choose Institution Type

MCH's data is categorized by industry. Select the institution type for the industry sector you need.

Education.

Healthcare.

Government.

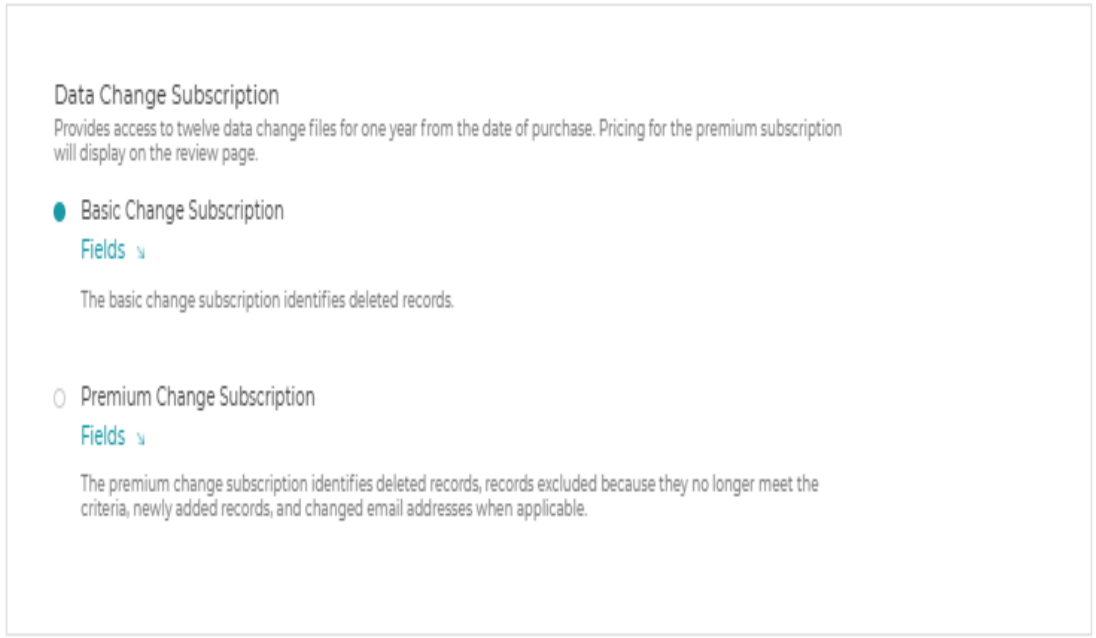
Religion.

# Choose File Type

Choose between three different file types:

1. **Institution Only:** A single file containing only institution and its attributes.
2. **Institution & Personnel:** A single file containing personnel that meet your selection criteria as well as the institution data associated with that person.
3. **Institution & Personnel with Email:** A single file containing personnel that have email addresses associated with them that meet your selection criteria as well as the institution data associated with that person.

**To see a list of the attributes included in the output file, click on the *Fields* link directly below the selection.**



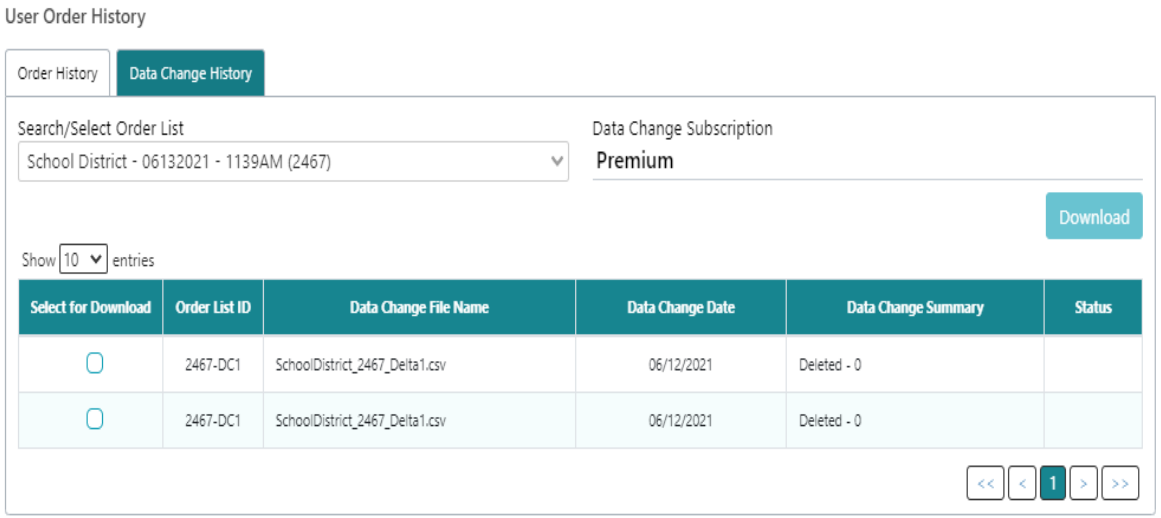

# Data Change Subscription

Basic Subscription is a **free** service that provides updates on records that were deleted from the MCH database.

Premium Subscription can be added for a for a small fee which provides updates to records that were:

- Added - Records added since last download that meet selection criteria.
- Changed - Records with an email address change. *Only applicable to order lists with emails included.
- Excluded by Criteria - Records no longer included because they do not meet the specified filter criteria.
- Deleted - Records removed from the database (closed, no longer employed, etc.).

Cost for the Premium Subscription will be available on the review page.

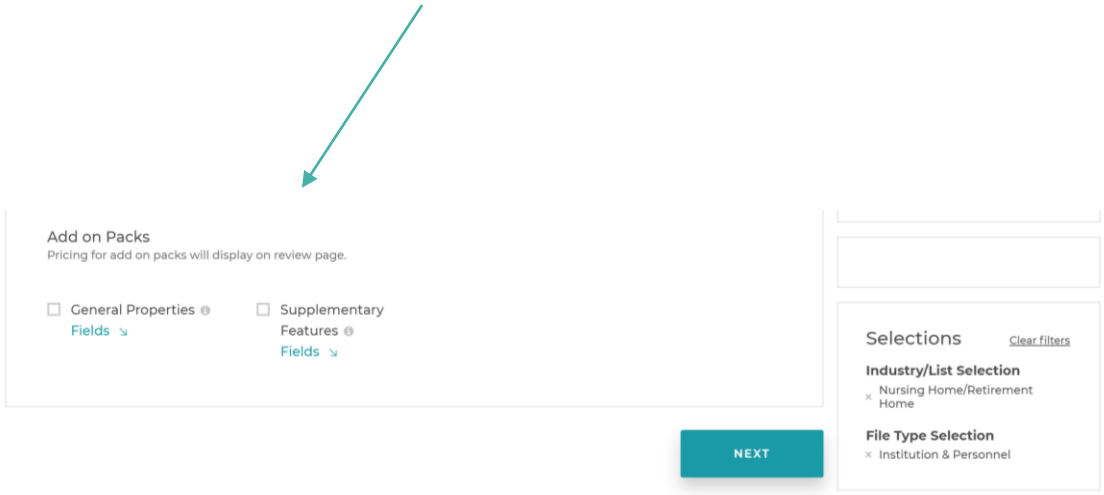



# Data Change Subscription

Generate and download your data change subscriptions on the order history page.

Retail Users: Files will automatically generate every 28 days and be available for selection to download.

Broker Users: Broker customers have the option to generate at their discretion if there is a 28-day interval between the last generation and the current generation.




# Add on Packs

MCH has made it easy to add bundled attributes to your output file with **Add on Packs**. To see the attributes included in each of the **Add on Packs**, click on the fields list directly below the package name.

Counts and pricing will be available on the review page.

**Filter Options:**

***State/County/City/Territory*** – You can choose individual states by clicking on the states you would like to include. In order to narrow down your list by county or city you must select only one state. When one state is selected you will then see the options to input either the county or city selection(s) you want to include. NOTE: you can only select city or county (not both) and for some list types you will see an option for State/Territory.

***Zip Code + Radius*** – This option allows you to enter a single zip code and enter a whole number in the text box up to a 500-mile radius you would like to apply. You can only enter one zip code and radius per list.

***Zip Code Filters*** – Zip code options allow multiple ways to filter by zip code. Either use the Zip Code List to enter up to 100 zip codes to include or use the Zip Code CSV to upload a larger quantity of zip codes to include. The CSV file should be formatted to have the list of zip codes in the first column with no header. The file will be used to limit the list you are building to only include records that have those zip codes that are in the file.

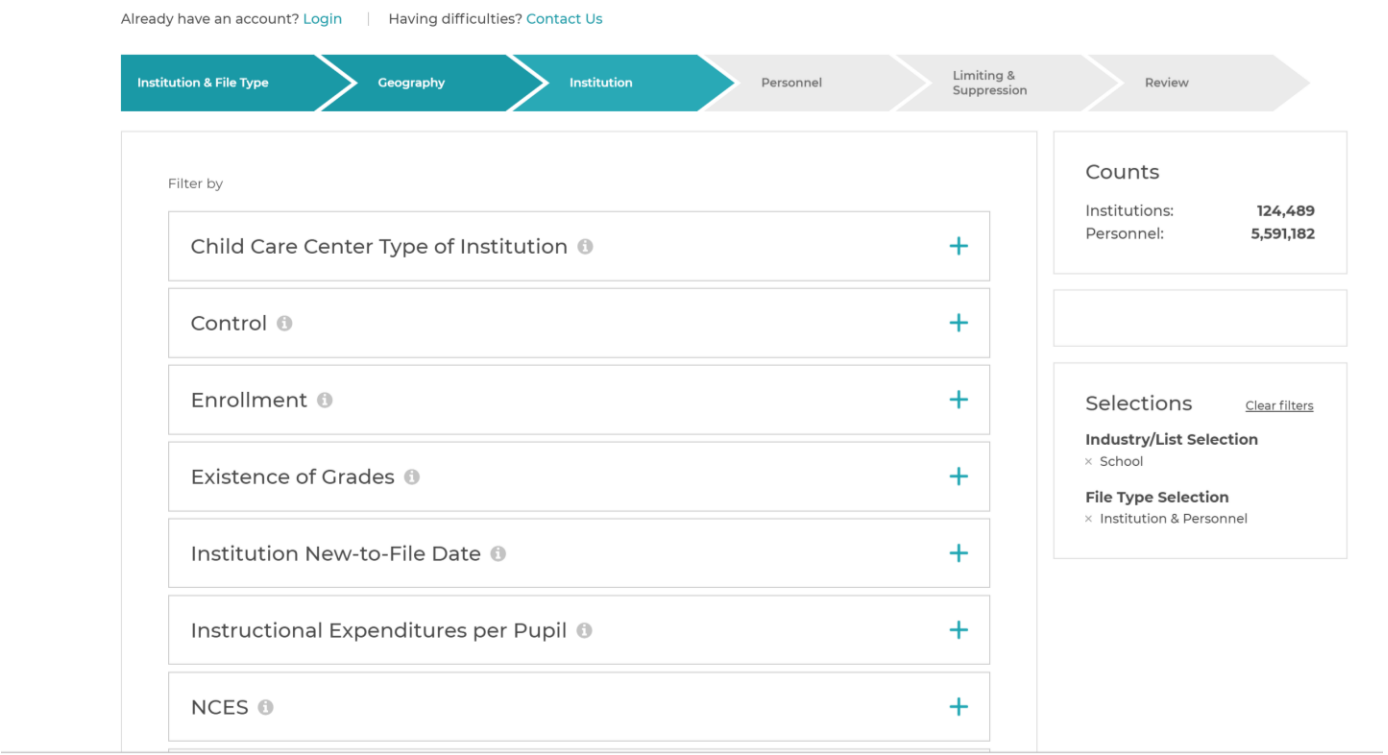
***SCF Filters:*** SCF options allow multiple ways to filter by SCF code. Either upload a CSV file of SCF codes or enter up to 100 SCF codes using the SCF list on the screen.

***CBSA/MSA Filters:*** Check a box to filter by a designated CBSA or MSA. These categories are grouped alphabetically and include CBSA/MSA ID, along with a search feature to help users easily find what they are looking for.

# Geography

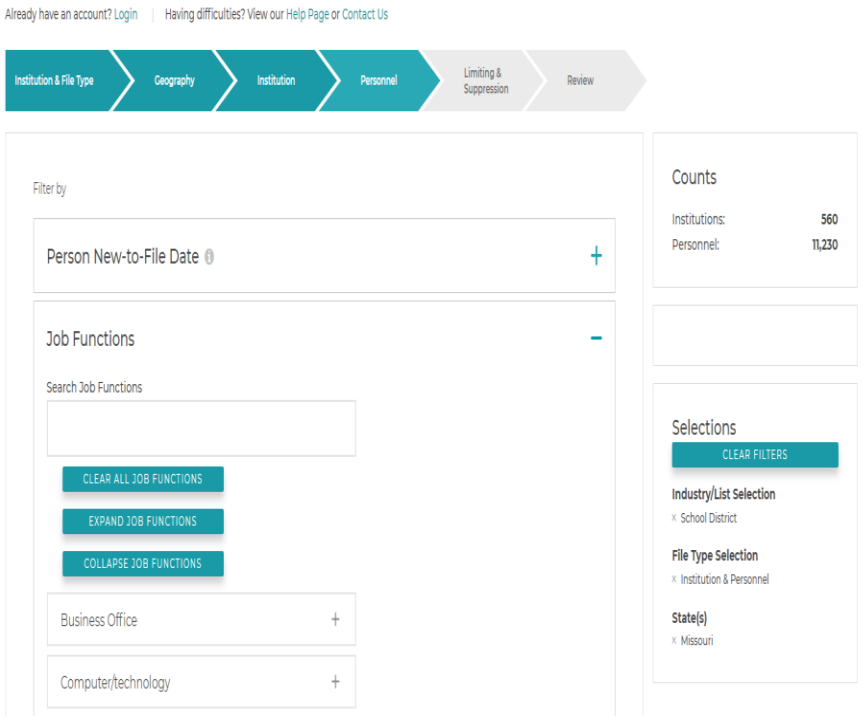
1. The default for geography is all states.
2. Choose one of the options to limit selection criteria.
3. Selections will appear in the criteria box.
4. Counts/prices will also be adjusted.

**NOTE: Prices will not display for lists that have personnel until the personnel selections are made. Counts and prices for Add on Packs will not display until the review page.**




# Institution

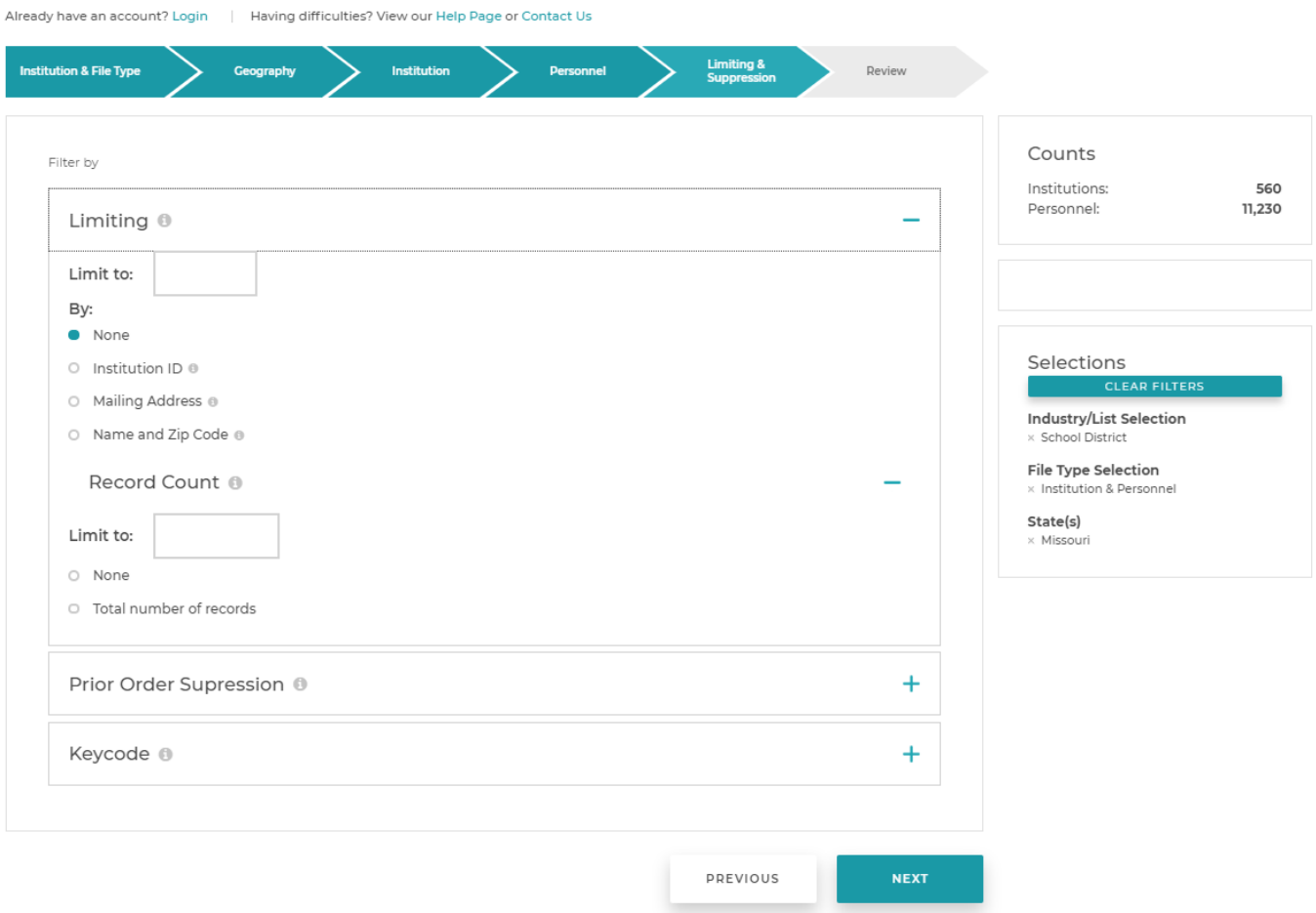
Within the institution tab you will find a list of institution level attributes you can use to filter your list. The list of attributes will vary based on the institution type selected. The filter options are different based on the data type of the attributes.




# Personnel

This tab will only display if you are building a list that is a file type which includes personnel (i.e., Institution & Personnel or Institution & Personnel with Email). This is where you can filter your list based on personnel-level attributes such a **new-to-file date** or by **job function**.

Job functions may be broken down into categories. You can expand the category groups and select individual job functions within the category. If you want all job functions within the category just double-click on the select all option in the category group. You can see what job functions have been selected by looking in the **Selections** section on the right side of the screen. To remove a job function, just click on the **x** next to the job function in the **Selections** list. You can also search for a job title by typing the text you are looking for and it will automatically expand and highlight job titles that meet the criteria to make them easier to find.

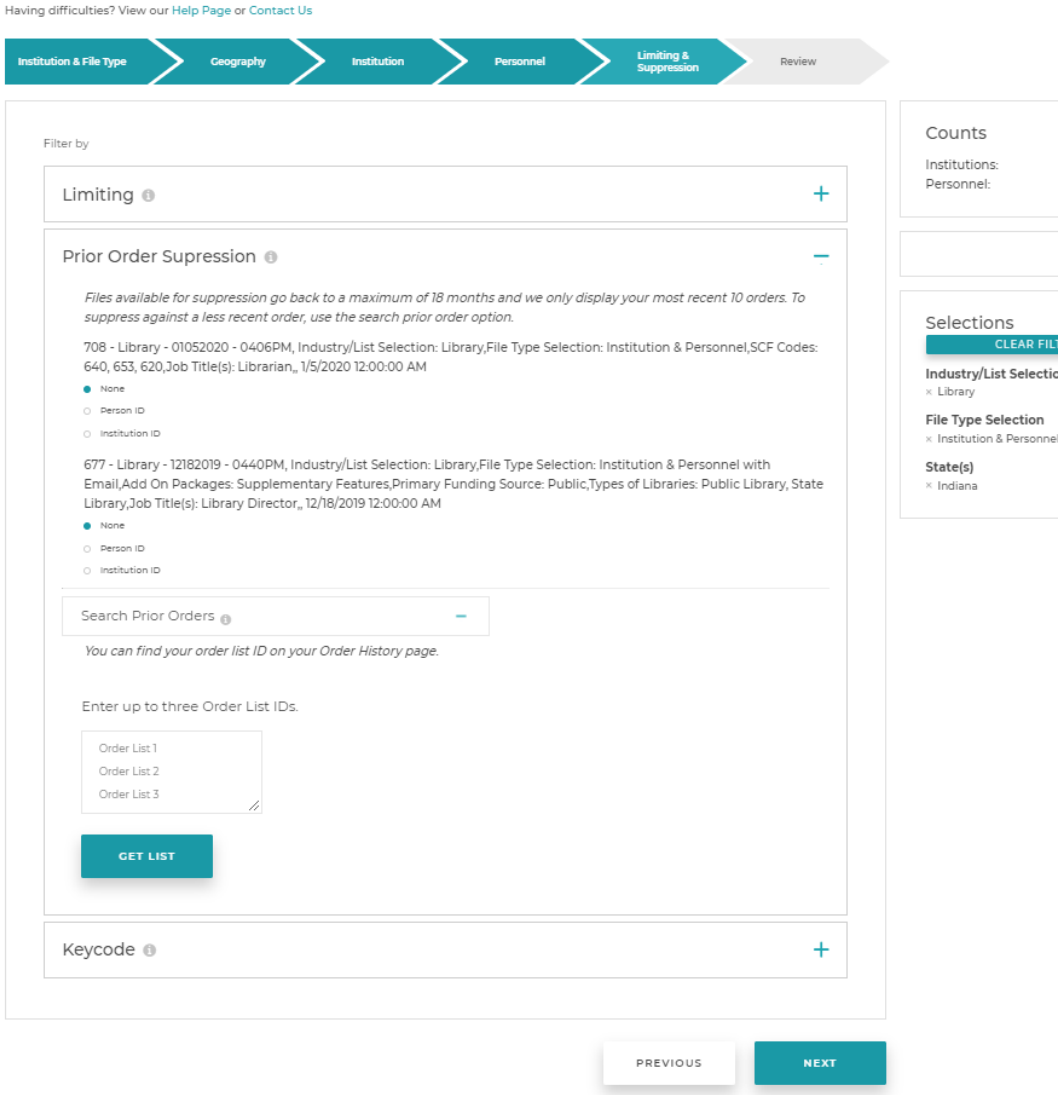



# Limiting and Suppression

*Limiting* – this option allows you to enter the maximum number of records you want included in a file based on the option you select.

The is also an option to limit the total records in the output file to a specified number.

For example, if you were building an **Institution & Personnel** list for **Schools** that included multiple job functions, you could limit the file to include 2 records per institution.



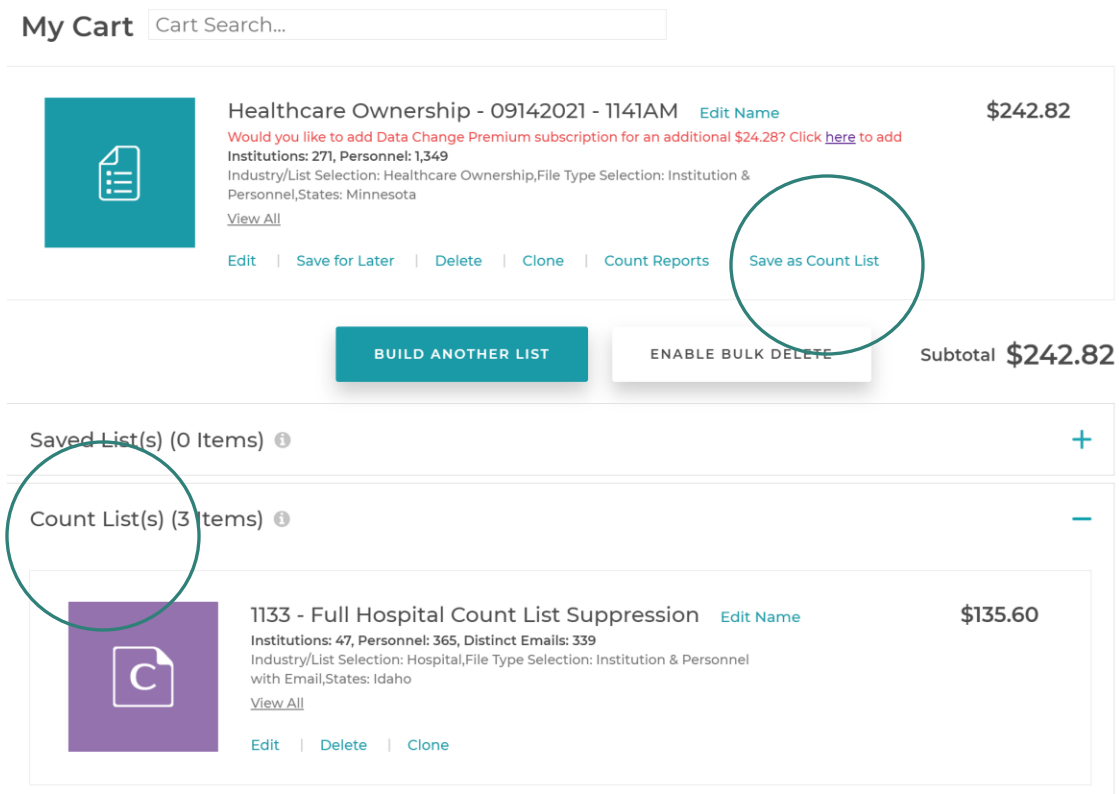

# Limiting and Suppression

*Prior Order and Upload Suppression* – In order to use the suppression functionality, you must be logged in with your user ID. This allows you to select a prior order or use the upload suppression option and upload a CSV file to remove records from your current order based on:

- Institution ID: The unique MCH ID for the institution. This option is available for all file types.
- Person ID: The unique MCH ID for the person. This option is available for Institution & Personnel or Institution & Personnel with Email file types.
- Email Address: The email address associated with the person. This option is available for the Institution & Personnel with Email file type.
- Name and Zip: Based on a person having an identical name within the same zip code.
- Various Identifiers: NCES ID, NPI Numbers, DEA Number, Provider State License Number.

*Search Prior Orders* – Search Prior Orders allows you to input up to three order list ID of prior order placed within the last 18 months for the Institution Type you are building the current list on. You can find the order list ID on your order history page. Once you input you order list id you hit the GET LIST button and it will return the information on those lists for you to select your suppression options.

*Keycode* – This is a text value field you can specify. A KeyCode column will be added to your output file with the value populated in that field for every record. **The field is alpha numeric, cannot have spaces and must not be longer than than 25 characters.**




# Limiting and Suppression

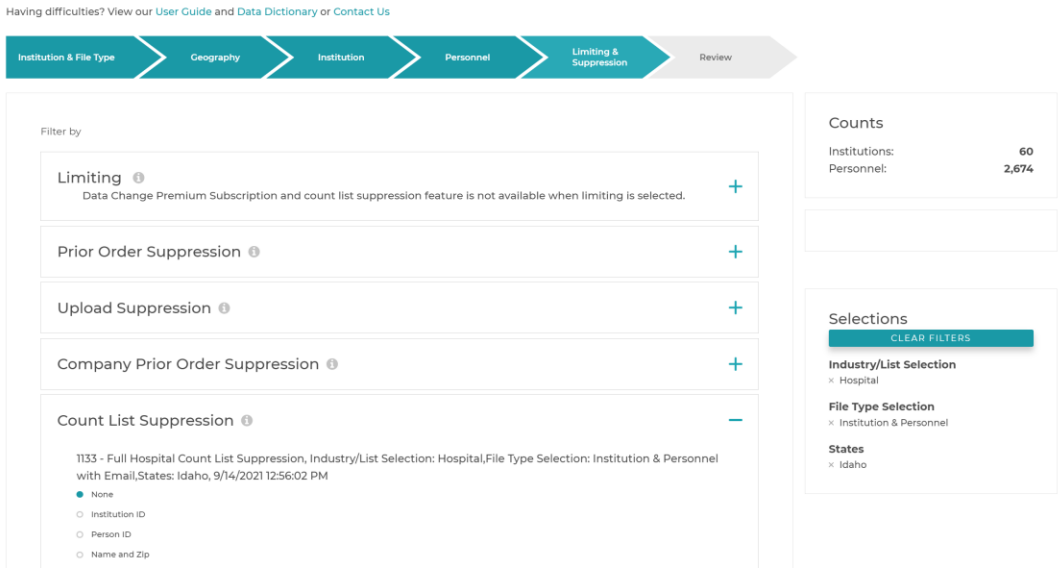
*Applies to Broker Users Only:*

*Count Suppression* – In order to use the suppression functionality, you must be logged in with your user ID. This feature allows you create a list that can be applied as a suppression to another order prior to checking out.

*Creating a List to use for Count List Suppression* - To create a count list, build a list and place it in your cart. If the feature is enabled, you will see the option to "Save as Count List." Clicking on "Save as Count List" will move the list to the "Count List" section in the cart and make the list available for selection from the count list suppression section on the limiting and suppression tab.

The "Save as Count List" option will not display as an option if:

- You are not a broker user
- The list you want to use for count suppression has any kind of limiting applied
- The list you want to use for count suppression already has another count suppression list applied




# Limiting and Suppression

*Applying Count List Suppression* – Count List Suppression, if enabled, will appear as an option in the Limiting and Suppression chevron. The count lists you created and saved will appear in the section for selection just like the prior order suppression. You will only see the lists available based on the list type and file type of the list you are currently building. Suppression options you may see are:

- Institution ID: The unique MCH ID for the institution. This option is available for all file types.
- Person ID: The unique MCH ID for the person. This option is available for Institution & Personnel or Institution & Personnel with Email file types.
- Email Address: The email address associated with the person. This option is available for the Institution & Personnel with Email file type.
- Name and Zip: This option is available for the Institution & Personnel or Institution & Personnel with Email file types. It will suppress based of off an identical name match within the same zip code.

NOTE: Once you have applied the count list to an order list for suppression it will no longer be available for selection. If you want to use the count list for more than one order list, you will need to clone it and save another copy to use as count list suppression.

Once you have added an order to your cart or checked out an order that has count list suppression applied it will not have the clone option enabled.

# Review and Cart

**Review:**

Includes a summary of the selections, counts and pricing of your order. This includes the counts and pricing for any Add on Packs you selected.

**Cart:**

When you add an item to your cart it will be given a system generated name for the list. To change the name, click **Edit Name**.

To make changes to a list in your cart, click on **Edit** below your list details. It will take you back to the list builder to make additional changes and place the item back in your cart. ***NOTE: If you choose to edit a list and do not hit add to cart after you are done making changes, that list will no longer be in your cart.***

To delete a list in your cart, click **Delete**.

To clone a list that is in your cart click the **Clone** option and that will create a copy of the order list.

If you have more than one list in your cart and are not ready to purchase all lists, you can move lists that you do not want to purchase at this time to your saved cart area. Just click **Save for Later.** The list will appear under **Saved Lists.** When you are ready to purchase a list in your saved list area, select **Move to Cart**.

# Check Out

In the checkout area you will see the payment method options that are available to you as either Open Account or Credit Card or Sample File.

NOTE: Open account is only shown if you have applied and been approved for an open account with MCH. Sample File is only shown if it has been enabled on your account and the order list meets the criteria for a sample file.

If paying by credit card, you will be prompted to enter your card number, card name, expiration date, and CVV. Your billing address will be prepopulated with the address associated with your profile. You can edit the address by typing over the information.

If paying by open account, you have the option to enter a PO number if you have one, but it is not required. Your billing address will be prepopulated with the address associated with your profile.

If you have a promo code you can enter it in the **Promo Code** box and hit **Apply**.

In order to complete the checkout you will be required to check the box that you agree to the terms and conditions noted.

**Once checkout is complete, you will see a confirmation page where you can print your receipt and download your list.**

# Menu

When you are logged in to ListBuilder, you will see **Menu** located in the upper right corner of the website. The options under **Menu** include:

**My Profile** where you will see the profile information you entered when you created your user profile. You may edit the information, except for email address. If you need to change the email address associated with your account, you will need to contact MCH at info@mchdata.com.

Order History will take to you our Order History page which allows you to view prior orders placed on ListBuilder over the past 18 months.

# Order History

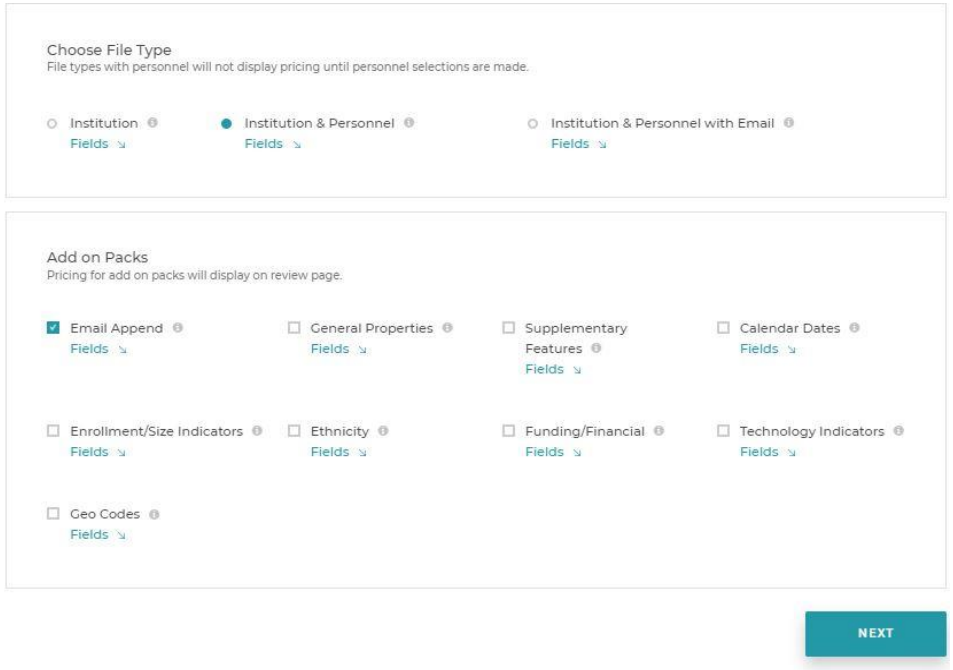
In the **Order History** section, you will be able to view your List Builder order history along with the order details, date created and the download expiration date.

Click **Order ID** to reprint a copy of your order receipt.

Click the **download button** to download your list.  List will be available to download for 30 days.

If you see a message indicating *your file is being generated* in lieu of the download button, check back in a few minutes, or refresh your screen to get your download.  Depending on the number of records ordered, it may take a few minutes for the order to process.

# Email Append




The Email Append Add on Pack is used to add available email addresses to all personnel meeting the selection criteria. If an email is not available, the name will still be included in the order.

This package is only available on the **Institution & Personnel** file type.

# Other Information

Distinct Email

- Order Lists that contain email will display a separate count for the number of distinct emails.
- The order amount or email append package amount will be calculated based on the number of distinct emails.
- The output file will contain all personnel records and may include duplicate emails.

Cross List Suppression –

- Within the same vertical (education, healthcare, etc.), users can choose a prior order to suppress against a new one. For example, if you had previously purchased a School District list with email addresses and now want to purchase a School list and exclude records with the same email address you can.
- To select a list to suppress that is from a different segment, you will need to enter the Order List ID in the search box and choose Get List.
- You will be able to use this feature to suppress the old healthcare files against the new data.