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[BUILD LIST](#)

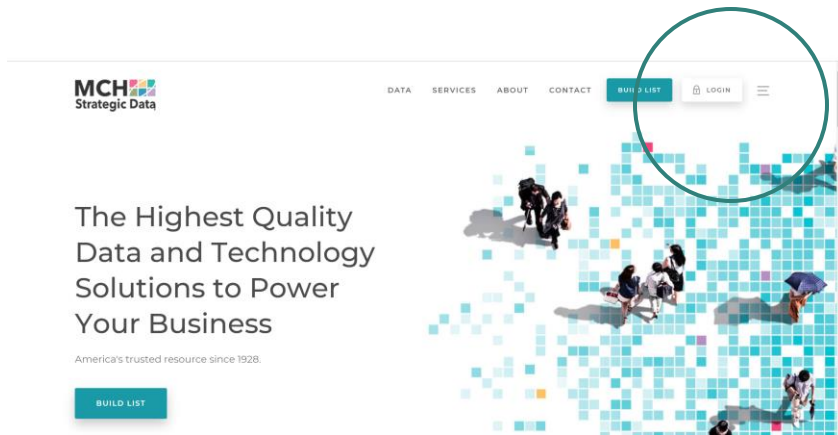


MCH ListBuilder User Guide

AUGUST 1, 2019

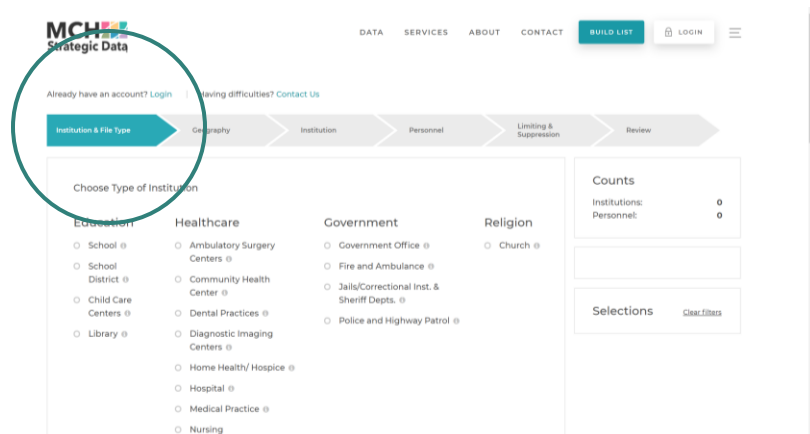
ListBuilder Helpful tips

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 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.



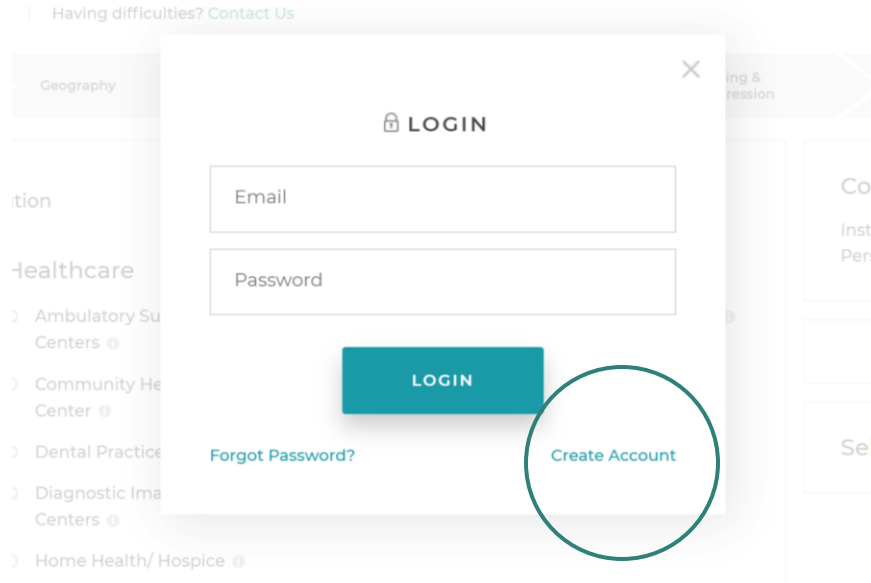
Account Set-Up

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.



Selections

[Clear filters](#)



Industry/List Selection

× School

File Type Selection

× Institution & Personnel with Email

Add On Packages

× General Properties

× Supplementary Features



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.

Institution & File Type

Geography

Institution

Personnel

Limiting & Suppression

Review

Choose Type of Institution

Education

☐ School ⓘ

☐ School District ⓘ

☐ Child Care Centers ⓘ

☐ Library ⓘ

Healthcare

☐ Ambulatory Surgery Centers ⓘ

☐ Community Health Center ⓘ

☐ Dental Practices ⓘ

☐ Diagnostic Imaging Centers ⓘ

☐ Home Health/ Hospice ⓘ

☐ Hospital ⓘ

☐ Medical Practice ⓘ

☐ Nursing Home/Retirement Home ⓘ

☐ Public Health Depts ⓘ

☐ Urgent Care Centers/ Corp Offices ⓘ

Government

☐ Government Office ⓘ

☐ Fire and Ambulance ⓘ

☐ Jails/Correctional Inst. & Sheriff Depts. ⓘ

☐ Police and Highway Patrol ⓘ

Religion

☐ Church ⓘ

Counts

Institutions:0

Personnel:0

Selections

[Clear filters](#)

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:

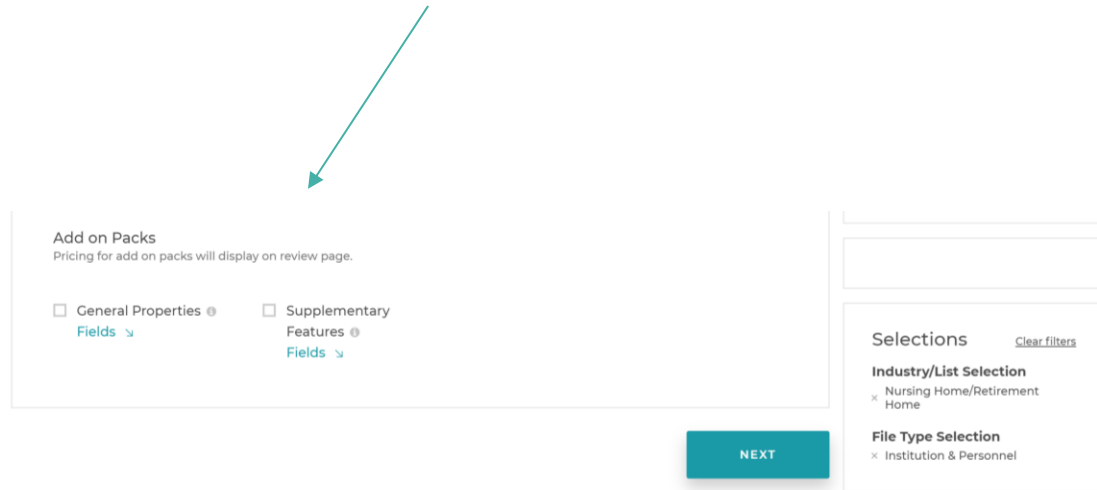
1. **Institution Only:** A single file containing only institution and its attributes.
2. **Institution & Personnel:** A single file containing personnel that meet your selection criteria as well as the institution data associated with that person.
3. **Institution & Personnel with Email:** A single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

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.



The screenshot shows a web interface for 'Add on Packs'. A teal arrow points from the top left towards the 'General Properties' section. The interface includes a 'NEXT' button and a 'Selections' panel on the right.

Add on Packs
Pricing for add on packs will display on review page.

☐ General Properties ⓘ
Fields ▾

☐ Supplementary Features ⓘ
Fields ▾

NEXT

Selections [Clear filters](#)

Industry/List Selection
× Nursing Home/Retirement Home

File Type Selection
× Institution & Personnel

Filter Options:

State/County/City – 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).

Zip Code + Radius – This option allows you to enter a single zip code and select from a drop down the radius you would like to apply. You can only enter one zip code and radius per list.

Zip Code List – Enter up to 100 zip codes to include.

Zip Code CSV Upload – This option allows you to select a list of up to 100 zip codes from a csv file. 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.

Geography

1. The default for geography is all state.
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.

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Filter by

Child Care Center Type of Institution ⓘ

+

Control ⓘ

+

Enrollment ⓘ

+

Existence of Grades ⓘ

+

Institution New-to-File Date ⓘ

+

Instructional Expenditures per Pupil ⓘ

+

NCES ⓘ

+

Counts

Institutions:

124,489

Personnel:

5,591,182

Selections

[Clear filters](#)

Industry/List Selection

× School

File Type Selection

× Institution & Personnel

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.

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Institution & File Type

Geography

Institution

Personnel

Limiting & Suppression

Review

Filter by

Person New-to-File Date ⓘ

Beginning (mm/dd/yyyy) — End (mm/dd/yyyy)

Job Functions

Bilingual Education

+

Business Education

+

Business Office

+

Computer/technology

+

Early Childhood

+

Counts

Institutions: 124,489

Personnel: 5,591,182

Selections [Clear filters](#)

Industry/List Selection

× School

File Type Selection

× Institution & Personnel

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.

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Institution & File Type

Geography

Institution

Personnel

Limiting & Suppression

Review

Filter by

Limiting ⓘ



Prior Order Supression ⓘ



Keycode ⓘ



PREVIOUS

NEXT

Counts

Institutions:	124,489
Personnel:	5,591,182

Selections

[Clear filters](#)

Industry/List Selection

× School

File Type Selection

× Institution & Personnel

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.

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

Limiting and Suppression

The screenshot shows the 'Limiting & Suppression' step in a multi-step process. The top navigation bar includes 'MCH Strategic Data', 'DATA', 'SERVICES', 'ABOUT', 'CONTACT', 'BUILD LIST', and 'LOGIN'. Below the navigation bar, a progress bar shows the current step: 'Limiting & Suppression'. The main content area is divided into two columns. The left column, titled 'Filter by', contains three input fields: 'Limiting', 'Prior Order Suppression', and 'Keycode', each with a plus icon to its right. The right column contains a 'Counts' section with 'Institutions: 124,489' and 'Personnel: 5,591,182', and a 'Selections' section with 'Industry/List Selection' (showing 'School') and 'File Type Selection' (showing 'Institution & Personnel'). At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

Suppression – In order to use the suppression functionality you have to be logged in with your user ID. This allows you to select a prior order and remove any records from your current order.

- 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.

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 rule for the field is alpha numeric, no more than 25 characters, and cannot have spaces in it.

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 on your cart. ***NOTE: If you choose to edit a list and do not hit add to cart after you are done making change that list will no longer be in your cart.***

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

If you have more than one list in your cart and you 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.

NOTE: Open account is only shown if you have applied and been approved for an open account with MCH.

If paying by credit card you will be prompted to enter your card number, name on the card, 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.

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 completed you will see a confirmation page where you can print your receipt and download your list.

My Account

When you are logged in to ListBuilder, you will see **My Account** located in the upper right corner of the website. If you select **My Account** you will see the profile information you entered when you created your user profile. You may edit the information, with the exception of email address. If you need to change the email address associated with your account, you will need to contact MCH at info@mchdata.com.

If you hover over the **My Account** button without clicking on it, you will see a drop down that gives you the option to go to **My Orders** which allows you to view your eCommerce order history.

My Orders

In the **My Order** section, you will be able to view your eCommerce 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 14 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 size of the list ordered it may take a few minutes for the order to process.

How to build a list with and without email addresses

In order to obtain a file that includes personnel with and without email addresses you will need to complete this in two separate orders.

Order 1: build a list for the file type of **Institution & Personnel with Email** and complete the checkout process for that list.

Order 2: Build the same list criteria as order 1, but, choose the file type of **Institution & Personnel**.

Go to the **Limiting & Suppression Tab** and expand the **Prior Order Suppression** option. You should see a list of prior orders you have placed for that list type. Select your order and choose the option to **suppress by Person ID** and complete the checkout process for the list.