

**HCP Program EXPOSURE & Engagement**

Interface PROTOCOL

Updated: September 6th, 2019

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# Overview

## Objective

This document is written for Publishers working directly with Publicis Health Media (hereafter referred to as “PHM”) to detail the data file(s) layout and exchange protocol related to HCP Program Exposure and Engagement. PHM expects Publishers to follow the specified layouts, formats, and protocols to accomplish the data exchange and to integrate/process data into PHM’s system(s).

## Scope

This document focuses on the requirements for data file(s) related to HCP Program Exposure and Engagement. Publisher will send data file(s) to PHM. PHM will perform file level and content level validations of the data received, and apply necessary cleansing and standardization rules. Further, PHM will use the data to generate applicable Client metrics and reports (not in scope of this document).

PHM has defined the following data files required from the Publisher:

* [**Exposure and Engagement Activity**](#_Exposure_and_Engagement) – the file provides HCP marketing interactions details
* [**HCP Detail**](#_HCP_Detail_File) – the file provides HCP profile information at individual entity level
* [**Control**](#_Control_File)– the meta data file to ensure completeness of transmission

# File Format Specifications

The following details each data file type and provides information on the file format, layout, and exchange protocol between Publisher and PHM.

## Exposure and Engagement Activity File

The file provides HCP marketing interactions details.

### File Format

| **Description** | **Specification** | **Examples** |
| --- | --- | --- |
| Format | ASCII |  |
| Delimiter | | (pipe) |  |
| File Extension | TBD as part of Publisher onboarding | .csv, .txt |
| File Name | <YYYY-MM-DD>\_<PUBLISHER\_ABBR>\_<YEAR>\_<CLIENT\_ABBR>\_<OTHER>\_ACTIVITY.<EXTENSION> | 20190706\_ABCD\_2019\_XYZ\_EMAIL\_ACTIVITY.csv  Note:  1. <YYYY-MM-DD> is to represent the latest date of the exposure & engagement activities presented in the file.  2. <PUBLISHER\_ABBR> – publisher name abbreviation provided by PHM  3. <YEAR> - year of the campaign  4. <CLIENT\_ABBR> - client abbreviation provided by PHM  5. <OTHER> - additional OPTIONAL attribute to be used where there is need to split files delivered to PHM further. |
| Header | Yes |  |
| Footer | No |  |
| Category/Type | Response |  |
| Uniqueness | TBD as part of Publisher onboarding | SPURCE\_HCP\_ID\_QUAL  SOURCE\_HCP\_ID  PRODUCT\_NAME  TACTIC\_CODE  EVENT\_CODE  ACTIVITY\_CODE  TRANSACTION\_DATETIME |
| Publisher Contact(s) | TBD as part of Publisher onboarding |  |
| Transmission Mode | SFTP |  |
| Transmission to Location | TBD as part of Publisher onboarding |  |
| Transmission Frequency | TBD as part of Publisher onboarding | Weekly, Monthly |
| Transmission Timing | TBD as part of Publisher onboarding | Every Monday by 6:00AM EST |
| First Transmission Date | TBD as part of Publisher onboarding |  |
| Publisher Transmission Issue Communication Contact(s) | TBD as part of Publisher onboarding |  |

### File Layout

| **#** | **Column Name** | **Description** | **Data Type** | **Requirement**  M – Mandatory  C - Conditional |
| --- | --- | --- | --- | --- |
| 1 | TRANSACTION\_ID | Unique record identifier in the file. The value is desired but might or might not be populated depending on Publisher capabilities. | INTEGER | C |
| 2 | SESSION\_ID | Identifier of the session or a batch of transactions the record is associated with. | INTEGER | C |
| 3 | PARENT\_TRANSACTION\_ID | Identifier of the transaction to which this action is attributed to. | INTEGER | C |
| 4 | CONTENT\_LOCATION\_NAME | Identifies placement, location, orientation, etc. driving HCP activity.  Examples: “Banner Top Page”, “Overlay”, “Instream Video” | VARCHAR(50) | M |
| 5 | CHANNEL\_NAME | Name of the channel through which Publisher executed the Tactics. PHM provided.  Examples: “Email”, “Brand Alert”, “Info site”,”POC”, etc. | VARCHAR(255) | C |
| 6 | SOURCE\_HCP\_ID\_QUAL | SOURCE\_HCP\_ID source system qualifier. Use to link to HCP Detail file to get additional HCP attributes.  Examples: “NPI”, “Veeva Network ID" | VARCHAR2(100) | M |
| 7 | SOURCE\_HCP\_ID | Source system HCP Identifier. Use to link to HCP Detail file to get additional HCP attributes. | VARCHAR(50) | M |
| 8 | ACTIVITY\_NAME | Activity code describing the activity performed by the HCP  Examples:  Impression, View, Click, Open, Send | VARCHAR(150) | M |
| 9 | ACTIVITY\_DATETIME | Date time of the activity. If TIME part is not available, set ‘HH24:MI:SS' to ’00:00:00’  Format-'YYYY-MM-DD HH24:MI:SS' | DATETIME | M |
| 10 | ACTIVITY\_DURATION\_VALUE | Integer representing count of seconds spent on activity | INTEGER | C |
| 11 | DEVICE\_TYPE\_NAME | Type of the device where the activity occurred.  Examples: Mobile, Desktop, Tablet | VARCHAR(50) | C |
| 12 | CAMPAIGN\_CODE | Campaign Identifier = PRISMA ID. PHM provided. | VARCHAR(100) | C |
| 13 | CAMPAIGN\_NAME | Campaign Name corresponding to CAMPAIGN\_CODE. PHM provided. | VARCHAR(255) | C |
| 14 | BRAND\_NAME | Name of the pharmaceutical product, device, or other medicinal product which is an object of the campaign. PHM Provided. | VARCHAR(255) | M |
| 15 | PLACEMENT\_NAME | Examples: PB~VPHMPFEE\_FM~PPOST\_TG~BHV\_TS~LISTM\_RT~CPM\_PG~SEQUENTIAL-BUY\_DT~MO\_VV~0DV\_PR~ADDERALL-XR\_CU~HCP\_AD~SS1x1\_SZ~300X600 | VARCHAR(2000) | C |
| 16 | PUBLISHER\_PRODUCT\_CODE | Identifier of the product offered by / purchased from Publisher such as Wave or Deployment Identifier. Publisher provided.  Examples: “FCH-US-0442-WEB”  Not populated for source systems like Speaker Programs, Webinars that are not executed at Tactic level | VARCHAR(100) | C |
| 17 | PUBLISHER\_PRODUCT\_NAME | Product descriptive name. Publisher provided.  Examples: “Brand Alert 360” | VARCHAR(255) | C |
| 18 | PUBLISHER\_PRODUCT\_START\_DATETIME | Start date of the product. If TIME part is not available, set ‘HH24:MI:SS' to ’00:00:00’. Publisher provided.  Format-'YYYY-MM-DD HH24:MI:SS' | DATETIME | C |
| 19 | PUBLISHER\_PRODUCT\_END\_DATETIME | End date of the product. If TIME part is not available, set ‘HH24:MI:SS' to ’00:00:00’. Publisher provided.  Format-'YYYY-MM-DD HH24:MI:SS' | DATETIME | C |
| 20 | TACTIC\_CODE | Code associated with TACTIC\_NAME which is used to track engagement defined by PUBLISHER\_PRODUCT\_CODE at the more the more granular level. Publisher provided.  Example: "BA360-22" | VARCHAR(100) | C |
| 21 | TACTIC\_NAME | Used to track engagement defined by PUBLISHER\_PRODUCT\_CODE at the more the more granular level. Publisher provided.  Examples: "Brand Alert 360 - Georgia" | VARCHAR(255) | C |
| 22 | EVENT\_CODE | Event Code. Applicable only for Peer to Peer channels such as Speaker Program, Webinars etc., otherwise not populated. | VARCHAR(255) | C |
| 23 | REFERRAL\_ID\_QUAL | REFERRAL\_ID qualifier  Examples:  “URL”, “Sign Up List”, etc. | VARCHAR(100) | C |
| 24 | REFERRAL\_ID | Value of the transaction referrer defining how the HCP arrived to the stimulus recorded. For example, Website address, Newsletter Sign-Up form ID, etc. | VARCHAR(255) | C |
| 25 | REFERRAL\_CONTENT\_ID | Value of the referring content if available. Allows to differentiate versions of creative that have directed the HCP to the stimulus.  Examples: Banner ID, Page ID, Email Template ID, etc. | VARCHAR(255) | C |
| 26 | TRAFFIC\_SOURCE\_TYPE\_NAME | Descriptive name identifying how HCP arrived to the referring content.  Examples: Direct Traffic, Social Traffic, Organic Traffic, Referral Traffic, Paid Search Traffic, Display Traffic |  |  |
| 27 | CONTENT\_ID | Identifier for creative collateral that was presented to the HCP for this transaction. PHM provided.  Examples: Banner ID, Page ID, Email Template ID, etc. | VARCHAR(255) | C |
| 28 | CONTENT\_NAME | Name for creative collateral that was presented to the HCP for this transaction. . PHM provided.  Examples: "Learn More" | VARCHAR(255) | C |
| 29 | DESTINATION\_ID\_QUAL | Provides the type of value to be stored in DESTINATION\_ID field.  Examples: “URL”, “Sign Up List”, etc. | VARCHAR(100) | C |
| 30 | DESTINATION\_ID | Value that identifies the destination HCP was taken to by taking call to action. | VARCHAR(255) | C |
| 31 | DESTINATION\_CONTENT\_ID | Value of the destination content HCP was taken to by taking call to action. Allows to differentiate versions of content that HCP is pushed to, e.g. landing page A/B testing.  Examples: Banner ID, Page ID, Email Template ID, etc. | VARCHAR(255) | C |
| 32 | KEY\_MSG\_DESC | Key Message Description such as Email Subject Line or Creative Name.  Examples:  “Efficacy and Reputation”, “Clinical Research” | VARCHAR(255) | C |
| 33 | KEY\_MSG\_1 | [See Offer Type List for examples.](file:///C:\Users\annfievi\Documents\DUA\GILEAD_HCP_Interface_Map.xlsx#RANGE!_Offer_Type_List) | VARCHAR(255) | C |
| 34 | KEY\_MSG\_2 | [See Offer Type List for examples.](file:///C:\Users\annfievi\Documents\DUA\GILEAD_HCP_Interface_Map.xlsx#RANGE!_Offer_Type_List) | VARCHAR(255) | C |
| 35 | KEY\_MSG\_3 | [See Offer Type List for examples.](file:///C:\Users\annfievi\Documents\DUA\GILEAD_HCP_Interface_Map.xlsx#RANGE!_Offer_Type_List) | VARCHAR(255) | C |
| 36 | KEY\_MSG\_4 | [See Offer Type List for examples.](file:///C:\Users\annfievi\Documents\DUA\GILEAD_HCP_Interface_Map.xlsx#RANGE!_Offer_Type_List) | VARCHAR(255) | C |
| 37 | KEY\_MSG\_5 | [See Offer Type List for examples.](file:///C:\Users\annfievi\Documents\DUA\GILEAD_HCP_Interface_Map.xlsx#RANGE!_Offer_Type_List) | VARCHAR(255) | C |
| 38 | ATTRIBUTE1\_VALUE\_QUAL | Qualifier / type / name of ATTRIBUTE1\_VALUE | VARCHAR(100) | C |
| 39 | ATTRIBUTE1\_VALUE | Any important attribute value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(255) | C |
| 40 | ATTRIBUTE2\_VALUE\_QUAL | Qualifier / type / name of ATTRIBUTE2\_VALUE | VARCHAR(100) | C |
| 41 | ATTRIBUTE2\_VALUE | Any important attribute value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(255) | C |
| ….. | …… | ……. | ……. | C |
| 86 | ATTRIBUTE25\_VALUE\_QUAL | Qualifier / type / name of ATTRIBUTE25\_VALUE | VARCHAR(100) | C |
| 87 | ATTRIBUTE25\_VALUE | Any important attribute value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(255) | C |

## HCP Detail File

The file provides HCP profile information at individual entity level

### File Format

| **Description** | **Specification** | **Examples** |
| --- | --- | --- |
| Format | ASCII |  |
| Delimiter | | (pipe) |  |
| File Extension | TBD as part of Publisher onboarding | .csv, .txt |
| File Name | <YYYY-MM-DD>\_<PUBLISHER\_ABBR>\_<YEAR>\_<CLIENT\_ABBR>\_<OTHER>\_HCP\_DETAILS.<EXTENSION> | 20190706\_ABCD\_2019\_XYZ\_EMAIL\_HCP\_DETAILS.csv  Note:  1. <YYYY-MM-DD> is to represent the latest date of the exposure & engagement activities presented in the file.  2. <PUBLISHER\_ABBR> – publisher name abbreviation provided by PHM  3. <YEAR> - year of the campaign  4. <CLIENT\_ABBR> - client abbreviation provided by PHM  5. <OTHER> - additional OPTIONAL attribute to be used where there is need to split files delivered to PHM further. |
| Header | Yes |  |
| Footer | No |  |
| Category/Type | HCP Profile Data |  |
| Uniqueness | TBD as part of Publisher onboarding | SOURCE\_HCP\_ID\_QUAL  SOURCE\_HCP\_ID |
| Publisher Contact(s) | TBD as part of Publisher onboarding |  |
| Transmission Mode | SFTP |  |
| Transmission to Location | TBD as part of Publisher onboarding |  |
| Transmission Frequency | TBD as part of Publisher onboarding. At least as often as updates to the target list are provided. | Weekly, Monthly |
| Transmission Timing | TBD as part of Publisher onboarding | Every Monday by 6:00AM EST |
| First Transmission Date | TBD as part of Publisher onboarding |  |
| Publisher Transmission Issue Communication Contact(s) | TBD as part of Publisher onboarding |  |

### File Layout

| **#** | **Column Name** | **Description** | **Data Type** | **Requirement**  M – Mandatory  C - Conditional |
| --- | --- | --- | --- | --- |
| 1 | SOURCE\_HCP\_ID\_QUAL | SOURCE\_HCP\_ID source system qualifier.  Examples:  “NPI”, “Veeva Network ID" | VARCHAR2(100) | M |
| 2 | SOURCE\_HCP\_ID | Source system HCP Identifier | VARCHAR(50) | M |
| 3 | NPI | National Provider Identifier(10 digit) assigned to HCPs by CMS | VARCHAR(10) | M |
| 4 | ME\_ID | Medical Education Number (11 digit) assigned to every AMA member | VARCHAR(11) | C |
| 5 | HCP\_ID1\_QUAL | Qualifier / type / name of HCP\_ID1.  Examples:  “IMS HCP ID”, “Symphony HCP ID” | VARCHAR(50) | C |
| 6 | HCP\_ID1 | Any important HCP Identifier value that client, Publisher or PHM may think will be necessary for analytics. For example, IMS HCP Identifier. | VARCHAR(50) | C |
| 7 | HCP\_ID2\_QUAL | Qualifier / type / name of HCP\_ID2 | VARCHAR(50) | C |
| 8 | HCP\_ID2 | Any important HCP Identifier value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(50) | C |
| 9 | HCP\_ID3\_QUAL | Qualifier / type / name of HCP\_ID3 | VARCHAR(50) | C |
| 10 | HCP\_ID3 | Any important HCP Identifier value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(50) | C |
| 11 | HCP\_ID4\_QUAL | Qualifier / type / name of HCP\_ID4 | VARCHAR(50) | C |
| 12 | HCP\_ID4 | Any important HCP Identifier value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(50) | C |
| 13 | HCP\_ID5\_QUAL | Qualifier / type / name of HCP\_ID5 | VARCHAR(50) | C |
| 14 | HCP\_ID5 | Any important HCP Identifier value that client, Publisher or PHM may think will be necessary for analytics | VARCHAR(50) | C |
| 15 | FIRST\_NAME | HCP First Name | VARCHAR(50) | M |
| 16 | LAST\_NAME | HCP Last Name | VARCHAR(30) | M |
| 17 | GENDER | HCP Gender  Examples:  “M”, “F” | VARCHAR(15) | C |
| 18 | DATE\_OF\_BIRTH | HCP Date Of Birth  Format - YYYY-MM-DD | DATE | C |
| 19 | CREDENTIALS\_DESC | HCP credentials such as MD, DO, NP. | VARCHAR(255) | C |
| 20 | SPECIALITY\_DESC | HCP primary specialty related to the campaign | VARCHAR(255) | C |
| 21 | PRIMARY\_ADDRESS\_1 | HCP Primary Address.  Examples:  “222 W Thomas Rd Ste 304” | VARCHAR(100) | C |
| 22 | PRIMARY\_ADDRESS\_2 |  | VARCHAR(100) | C |
| 23 | PRIMARY\_ADDRESS\_3 |  | VARCHAR(100) | C |
| 24 | PRIMARY\_CITY | Examples:  “Phoenix”, “Los Angeles” | VARCHAR(75) | M |
| 25 | PRIMARY\_STATE | Examples:  “Arizona”, “California” | VARCHAR(55) | M |
| 26 | PRIMARY\_COUNTRY | Examples:  “USA” | VARCHAR(75) | M |
| 27 | PRIMARY\_ZIP\_CODE | Examples:  “45098” | VARCHAR(20) | M |
| 28 | SECONDARY\_ADDRESS\_1 | HCP Alternative address.  Examples:  “222 W Thomas Rd Ste 304” | VARCHAR(100) | C |
| 29 | SECONDARY\_ADDRESS\_2 |  | VARCHAR(100) | C |
| 30 | SECONDARY\_ADDRESS\_3 |  | VARCHAR(100) | C |
| 31 | SECONDARY\_CITY | Examples:  “Phoenix”, “Los Angeles” | VARCHAR(75) | C |
| 32 | SECONDARY\_STATE | Examples:  “Arizona”, “California” | VARCHAR(55) | C |
| 33 | SECONDARY\_COUNTRY | Examples:  “USA” | VARCHAR(75) | C |
| 34 | SECONDARY\_ZIP\_CODE | Examples:  “45098” | VARCHAR(20) | C |
| 35 | TERTIARY\_ADDRESS\_1 | HCP Alternative address.  Examples:  “222 W Thomas Rd Ste 304” | VARCHAR(100) | C |
| 36 | TERTIARY\_ADDRESS\_2 |  | VARCHAR(100) | C |
| 37 | TERTIARY\_ADDRESS\_3 |  | VARCHAR(100) | C |
| 38 | TERTIARY\_CITY | Examples:  “Phoenix”, “Los Angeles” | VARCHAR(75) | C |
| 39 | TERTIARY\_STATE | Examples:  “Arizona”, “California” | VARCHAR(55) | C |
| 40 | TERTIARY\_COUNTRY | Examples:  “USA” | VARCHAR(75) | C |
| 41 | TERTIARY\_ZIP\_CODE | Examples:  “45098” | VARCHAR(20) | C |
| 42 | EMAIL\_ADDRESS | HCP primary email address | VARCHAR(255) | C |
| 43 | TEL\_NUMBER | HCP primary phone number | VARCHAR(255) | C |
| 44 | FAX\_NUMBER | HCP primary fax number | VARCHAR(255) | C |
| 45 | HCP\_SOURCE\_LIST\_TYPE | This field is for the source of list matching. In addition to client-provided Target Lists, some programs include look-alike list in addition to target-list this sourcing of target can be denoted here.  Examples:  Client Target List, Publisher List | VARCHAR(50) | C |
| 46 | REP\_ID\_QUAL | Qualifier of the REP\_ID source system, specified by the client.  Examples: “Veeva ID”, “Salesforce ID” | VARCHAR(50) | C |
| 47 | REP\_ID | Client assigned identifier of an individual in the field force servicing HCP  Examples:  “AB31248ZY” | VARCHAR(50) | C |
| 48 | TERRITORY\_CODE | Client designated identifier of the geographical territory HCP falls into.  Examples:  “Southwest Zone 2”, “SWZ2” | VARCHAR(100) | C |

## Control File

The meta data file to ensure completeness of data transmission. A single control file is expected as part of each data delivery with a record for each data file provided.

### File Format

| **Description** | **Specification** | **Examples** |
| --- | --- | --- |
| Format | ASCII |  |
| Delimiter | | (pipe) |  |
| File Extension | TBD as part of Publisher onboarding | .csv, .txt |
| File Name | <YYYY-MM-DD>\_<PUBLISHER\_ABBR>\_<YEAR>\_<CLIENT\_ABBR>\_<OTHER>\_CONTROL.<EXTENSION> | 20190706\_ABCD\_2019\_XYZ\_EMAIL\_CONTROL.csv  Note:  1. <YYYY-MM-DD> is to represent the latest date of the exposure & engagement activities presented in the file.  2. <PUBLISHER\_ABBR> – publisher name abbreviation provided by PHM  3. <YEAR> - year of the campaign  4. <CLIENT\_ABBR> - client abbreviation provided by PHM  5. <OTHER> - additional OPTIONAL attribute to be used where there is need to split files delivered to PHM further. |
| Header | Yes |  |
| Footer | No |  |
| Category/Type | Control |  |
| Uniqueness | TBD as part of Publisher onboarding | FILE\_NAME |
| Publisher Contact(s) | TBD as part of Publisher onboarding |  |
| Transmission Mode | SFTP |  |
| Transmission to Location | TBD as part of Publisher onboarding |  |
| Transmission Frequency | TBD as part of Publisher onboarding | Weekly, Monthly |
| Transmission Timing | TBD as part of Publisher onboarding | Every Monday by 6:00AM EST |
| First Transmission Date | TBD as part of Publisher onboarding |  |
| Publisher Transmission Issue Communication Contact(s) | TBD as part of Publisher onboarding |  |

### File Layout

| **#** | **Column Name** | **Description** | **Data Type** | **Requirement**  M – Mandatory  C - Conditional |
| --- | --- | --- | --- | --- |
| 1 | FILE\_NAME | Data File Name.  Examples:  20150706\_ABCD\_XYZ\_HCP\_DETAILS.csv | VARCHAR(50) | M |
| 2 | RECORD\_COUNT | Number of records in the data file, including header and footer if provided | INTEGER | M |

## Offer Type List

Examples are as following:

| # | Offer Type |
| --- | --- |
| 1 | Awareness |
| 2 | Chronic Care |
| 3 | Clinical data |
| 4 | Coordinated Care |
| 5 | Copay |
| 6 | Coverage and Reimbursement |
| 7 | Distribution/Insurance Questions |
| 8 | Dosing |
| 9 | Dosing/Administration |
| 10 | Early Treatment/Detection |
| 11 | Efficacy |
| 12 | First line use |
| 13 | Initiating therapy |
| 14 | Switching therapy |

# Error Handling

## Validation process overview

PHM will utilize a rigorous quality control process to validate that files are received on time and the data quality is acceptable for processing. Data quality checks are performed at the file level, as well as, the content level for each file received.

The validations performed by PHM include, but not limited to:

* File receipt
* File readability
* Missing or malformed header and/or footer
* Mandatory fields population
* List values check
* Date formats check
* Dates range check
* Uniqueness check
* Referential Integrity check

## Error Remediation Process

In case validation process results in errors, an email will be sent to Publisher’s designated contact(s) within 48 hours of file receipt or not receipt. The notification will detail the cause of error. It is expected that issues from validation will be corrected by the Publisher and resubmitted to the designated SFTP location within 48 hours of notification receipt in order to avoid critical business impact.