SCHOOLMESSENGER®

Voice Call Opt-Out Guide

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Introduction

To help you and your organization improve compliance with the FCC's latest Telephone Consumer Protection Act (TCPA), SchoolMessenger has implemented a simple and friendly way for recipients of the telephone voice messages you send through Communicate to request that they be blocked from receiving future calls.

How does Opting-Out work?

At any time, while listening to a phone message broadcast through SchoolMessenger Communicate, recipients can press "5" on their phone to initiate the opt-out process. After pressing 5, they will be given 3 choices:

- To unsubscribe from messages like these, please press 1

- To unsubscribe from all Non-Emergency messages, press 2

- To opt-out of all phone notifications, please press 3

Following a recipients' completion of this process, a report of their election is sent to your Communicate account so that, based on your accounts settings, either the account administrator can take action to ensure compliance with their request or the system will automatically unsubscribe the number accordingly.

Important: Opting-Out is done on a phone-by-phone basis and will only initiate a request for the phone number upon which the recipient is currently receiving a message and following these prompts. They must complete the process from every phone for which they wish to opt-out.

Getting Started

The Voice Call Opt-out feature is already active and working on all Communicate accounts and there are three ways you can ask for SchoolMessenger Communicate support staff to configure it to work:

- **Default**: Default Setting - no verbiage in your intro message but if a recipient presses "5", they will be given the 3 options for opting out of future voice calls. Account Administrators must run a report and manually adjust settings for the recipient's phone number.

- **Manual Compliance**: Intro Message contains verbiage prompting recipients to press "5" to be given the 3 options for unsubscribing from future voice calls. Account Administrators must run a report and manually adjust the recipients' phone number preferences to unsubscribe them from specific broadcast types, or put the number on the accounts block list if the recipient wants to be opted-out of all calls.

- **Automated Compliance**: Intro Message contains verbiage prompting recipients to press "5" to be given the 3 options for unsubscribing from future voice calls. The Communicate system will automatically adjust for the recipient's phone's election to unsubscribe it from specific broadcast types or put it on the block list.

Note: If you choose to utilize either Option 2 or 3, the first thing you must do to prepare is to put verbiage in your voice broadcast Intro Message which informs call recipients that the options are available to them.

Recording your Intro Messages

Your first step in this process should be to write a script for the introduction messages for your school(s), which might sound something like this:

"This is an important message from Springfield Elementary. Please press 1 to play this message immediately. Press pound to place this call on hold. If you would like to hear options to unsubscribe this phone out of future voice messages from our schools, press 5 at any time during the message."

Note: If you use multiple languages on your Communicate account and/or have different introductions for various broadcast types, such as emergencies, please have a script and available persons prepared for those as well.

While logged in to your Communicate account,

1. Click on the **Broadcasts tab**, then select the **Messages sub-tab.**

2. Click the **Add New Message button.**

Click the Broadcasts tab then the Messages subtab.

Click Add New Message.

3. In *Message Settings*, enter a "**Message Name**" and "**Message Description**" then click the **Next button**.

4. In the *Message Content* section, click on the drop-down next to the first language you will record and select "**Record**".

5. In the *Voice Recording* section, enter the phone number where you (or the person who will be recording) can be reached in the "**Number to Call**" box and click "**Call Now to Record**".

6. The phone will begin ringing almost immediately. Answer and follow the prompts to record the intro message script. Remember to press "1" to save your message before hanging up.

7. On your Communicate account, the screen will change to give you the option to *Play* or *Rerecord* your message.

8. When you are satisfied with the recording, click the "**Done**" button. You will be returned to the Message Editor screen where you can see a green check next to the message type you selected.

9. Repeat steps 1 through 7 for any additional languages and/or broadcast types.

Configuring Intro Messages

Now that your message has been saved, you will need to configure your Communicate account to use the appropriate Intro Message for each broadcast type.
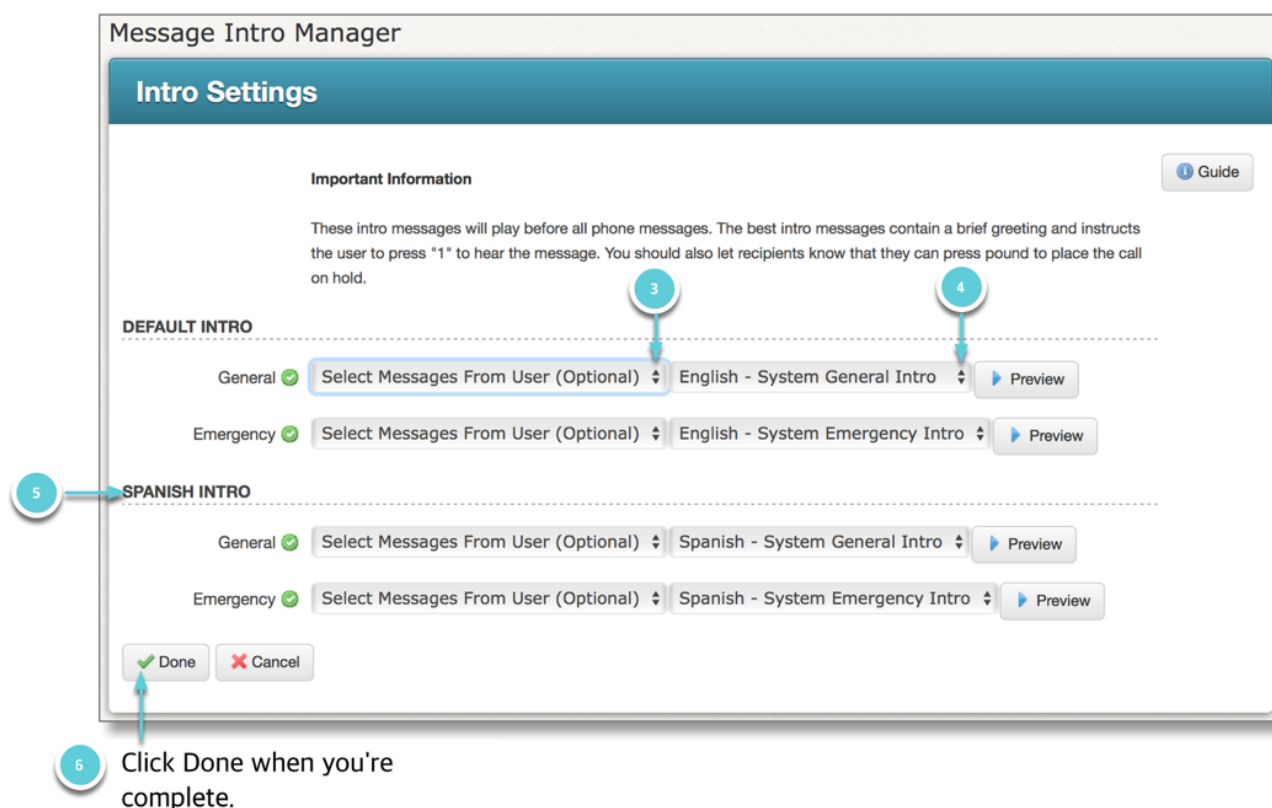
In the *Message Intro Manager> Intro Settings*, you will see a list of all the different languages your account uses, and the broadcast types under each of those.

1. Click the **Admin tab** and then the **Messages sub-tab.**

2. Click the **Message Intro link**.

3. Use the drop-down menu in your *Default Intro* section to select yourself (or the user's account who recorded the intro message you want to use).

Message Intro Manager

Intro Settings

Guide

Important Information

These intro messages will play before all phone messages. The best intro messages contain a brief greeting and instructs the user to press "1" to hear the message. You should also let recipients know that they can press pound to place the call on hold.

DEFAULT INTRO

General — Select Messages From User (Optional) — English - System General Intro — ▶ Preview

Emergency — Select Messages From User (Optional) — English - System Emergency Intro — ▶ Preview

SPANISH INTRO

General — Select Messages From User (Optional) — Spanish - System General Intro — ▶ Preview

Emergency — Select Messages From User (Optional) — Spanish - System Emergency Intro — ▶ Preview

✔ Done   ✖ Cancel

Click Done when you're complete.

4. To the right of that, use the drop-down menu to select the appropriate message. We recommend using the "Preview" button to listen to each selected message to make sure it is the correct message.

5. Repeat steps 1 through 4 for each of the broadcast types and languages.

6. Click **Done** when you're complete.

Taking Action on Opt-Out Requests

Recording and configuring the Intro Message is just the first step in the Voice Call Opt-Out process. When recipients of your messages *do* elect to opt-out of receiving further messages, there are distinct options for how your account will handle those requests.

Option 1 - Default

If your organization chooses Option 1, saying nothing about the opt-out options during your accounts intro message, recipients could still possibly press "5" during a phone broadcast message to access the opt-out options. You can still view the reports and take the actions described below for **Option 2,** if you choose.

Option 2 - Manual Adjustments

Having your account set for Option 2 leaves it up to someone *at your organization* to review requests and take specific action to ensure compliance with their wishes. With this option, a report must be generated, and the numbers requesting to either unsubscribe or opt-out completely must be manually adjusted within your Communicate account. This method is suitable for organizations wishing to double-check and/or confirm recipient elections to insure against accidental or malicious opt-outs, but does require the most effort to maintain.

1. Click the **Reports tab.**

2. Click the **Phone-Out link.**

3. Select a date range. The range should reflect the period of time since you last took action on an Opt-Out report.

4. If you wish your Opt-Out report to reflect only contacts associated with certain schools, use the check boxes under *School* to select all those which apply. (If any contact is not specifically associated with a school, checking any boxes will eliminate them from the results.)

5. You can use the "*Sort By*" drop-downs to create a sort order for viewing the report if desired. (This can be altered on-the-fly from within the report as well.)

6. Click the "**View Report**" button to view the report.

The "**Search Results**" will display a list of all Opt-Out requests from the selections you made in steps 2 through 4.

7. "**CSV**" **link:** allows you to open a CSV file (usually in Microsoft Excel) as an easy way to view the persons and phone numbers upon which you need to take action.

8. **Count**: shows how many times a person has completed the request during the timeframe selected.

9. **Save/Schedule**: allows you to give this report a name and save it for future use. You will also have the options to schedule an automated email of the report for specific times and dates.

Once you have a copy of this report available and open to view, it is time to review the list and decide on the appropriate action for each request. Just as there are multiple options for recipients to opt out, there are multiple ways to accommodate their opt-out requests.

Opt-Out of All Phone Notifications

The most common and easiest types of requests are those asking to be opted out of all future voice calls. When the Phone Opt-Out report shows "**Block requested by recipient**", this means the recipient pressed "3" and wishes to be blocked from receiving any other phone notifications on the number shown in the report.

The options to add numbers to your account's Block List are found in the *System* tab under the "**Blocked Lists**" sub-tab.
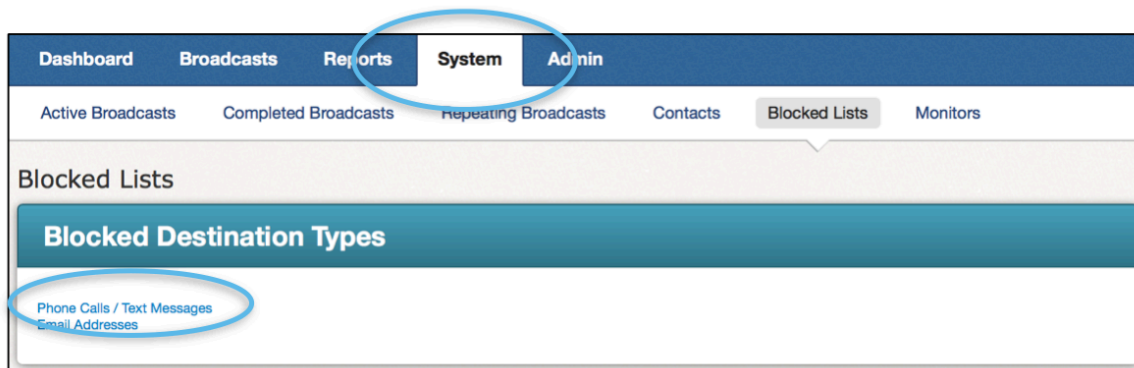
1. Click the **System tab.**

2. Click the **Blocked Lists sub-tab.**

3. Click the **Phone Calls / Text Messages link.**

4. Select "**Block Calls Only**" (As this is only a request to block voice calls, and SMS and Email blocks have their own methods of requesting to opt-out).

5. Add the 10-digit phone number in the "**Phone**" field.

6. Type a "**Reason**" that helps others understand why this number was blocked.

7. Click **Add**. The number and information will be presented in the list of "**Blocked Phones**" below.

In some cases, schools will choose to verify an opt-out request in order to ensure that the request is valid and has been initiated by the appropriate party.

Note: Not all user accounts will have access to adding numbers to the Blocked List. Contact your system administrator concerning access to this feature.

Numbers which have been added to the SchoolMessenger Communicate Blocked List can be removed at any time, should the recipient change their mind or if a mistake has been identified.

Opt-Out of Specific Notification Types

When recipients unsubscribe from specific broadcast types or send a request to unsubscribe from "All but Emergency Priority" calls, you will make adjustments to that recipients preferences in their *Contact Details*. The option to edit preferences is found in the *System* tab of your account under the "**Contacts**" sub-tab.

1. Click the **System tab** and then the **Contacts sub-tab.**

2. Select **"Search for Person"** as your Search Option then click **Search**.

3. Click the **magnifying glass** to view that contact's details.

4. Within the *Contact Details – Phone* section, look for the phone number which you need to adjust. If found, click on the **Edit button** at the top or bottom of this screen. Please click **"OK"** when your browser warns you that you are about to edit information that could affect other users.

5. All of the check boxes for your account's various broadcast types will become editable and you should uncheck those which the recipient has indicated in the Phone Opt-Out Report.

6. When you have finished making the appropriate adjustments, click the "**Save**" button at the top or bottom of the page. You will be returned to the main *Contacts* page.

Important: If your account is configured for the Guardian Data Model, you will also want to look at the "Guardians" section and click the "View" icon in the Actions column to locate the phone number.

Option 3 - Automated Adjustments

This is the option where unsubscribe and block requests are **automatically** updated by the system. If a recipient presses "5" during a message and then presses option "3", Communicate will automatically put them on your accounts *Blocked List*. If they unsubscribe from a specific type of broadcast by pressing "1", or from all but emergency broadcasts by pressing "2", those preferences will be automatically set by the system. You will still be able to view reports or opt-outs and preferences, just as with Option 2, above, but you will *not* need to make any manual adjustments yourself.

Note: You always have the full ability to make manual adjustments to blocked numbers and preferences should a recipient notify you that a change has been made by mistake or that they have changed their mind about receiving calls.

Preparing Your School Community

While creating a clear Intro Message, informing your call recipients of the Voice Call Opt-Out feature, is the first and most important step in implementing this important feature, you may also wish to enact a campaign to inform all of your school community members as well. Things like a letter sent home and an email about this feature and how it works can also be a big help – especially for those who have been receiving voice messages from you for a while, as they may have become accustomed to skipping or ignoring the intro message.

We also suggest that you make sure to reinforce a few of the facts about this feature:

- Requests to opt-out may not be instantaneous. Let people know that your organization processes requests on a regular basis, and to please send their request again should they feel it is not being processed in a timely manner.

- Opt-out requests **only apply to the number on which they submit the request**.

- Voice Call opt-out requests only apply to **voice** broadcast messages, not SMS Text or Email.

Please call the school if you wish to be opted back **in** or feel your number has been opted out by mistake.

Questions?

If you have any questions regarding the above, please contact support.

SchoolMessenger Support Number

Email: support@schoolmessenger.com

Phone: 800-920-3897

Chat live with a support rep here:

www.schoolmessenger.com/support