



Phone Opt-Out Guide

SchoolMessenger

100 Enterprise Way, Suite A-300

Scotts Valley, CA 95066

888-527-5225

www.schoolmessenger.com

What is Phone Opt-Out and why do we need it?

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 your telephone voice messages to request that they be blocked from receiving future calls.

 **Note:** For more information about SchoolMessenger and the TCPA, please refer to our document, "The Telephone Consumer Protection Act and Your School Mass Communication System" found here: www.schoolmessenger.com/positionTCPA



How does Opting-Out work?

At any time, while listening to a recorded phone message sent through SchoolMessenger, 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 SchoolMessenger 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 Phone Opt-out feature is already active and working on all SchoolMessenger accounts and there are three ways you can ask for SchoolMessenger support to configure it to work.

Option 1: 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 Admins must run a report and manually adjust settings for the recipients phone number.

Option 2: Intro Message contains verbiage prompting recipients to press "5" to be given the the 3 options for unsubscribing from future voice calls. Account Admins must run a report and manually make changes to the recipients' phone numbers to unsubscribe them from specific broadcast types or put them on the block list.

Option 3: Intro Message contains verbiage prompting recipients to press "5" to be given the the 3 options for unsubscribing from future voice calls. The SchoolMessenger 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.

 **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

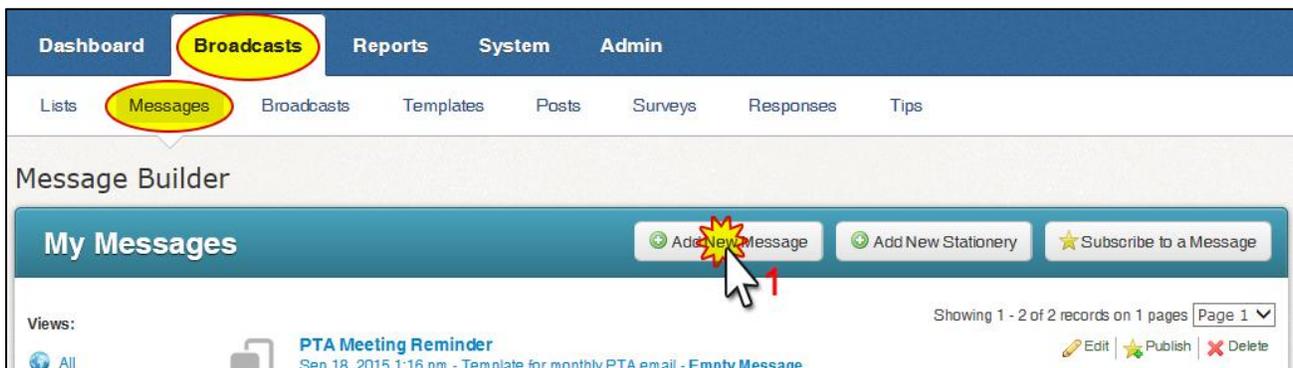
Your first step in this process should be to write a script for the introduction messages for your school(s) which might sound something like this:

“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 SchoolMessenger 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 SchoolMessenger account, click on the **“Broadcasts”** tab, then select the **“Messages”** sub-tab.

1. Under the *My Messages* section of the Message Builder, click on the **“Add New Message”** button.

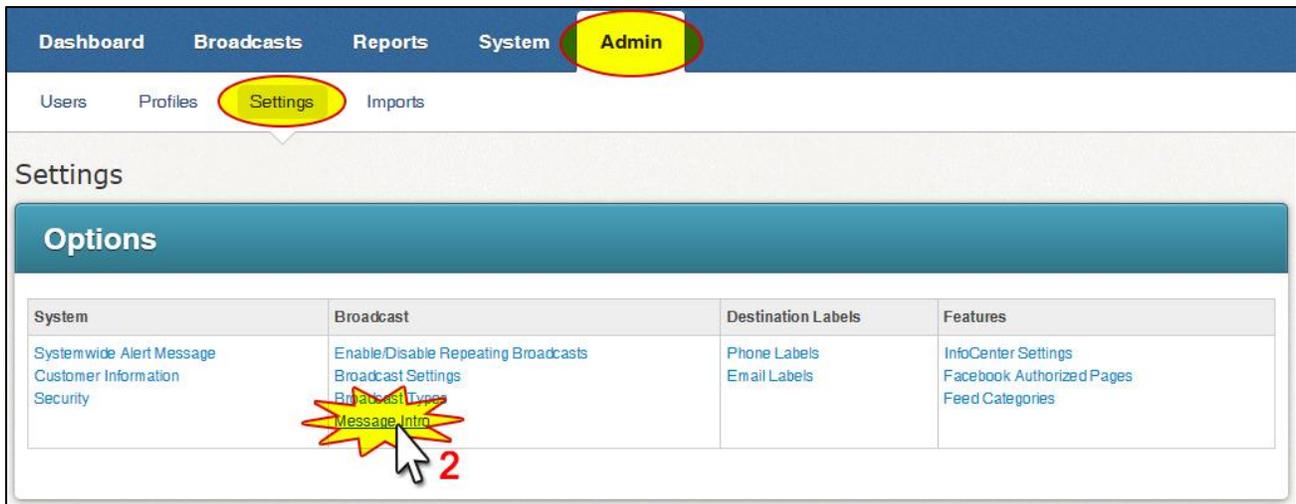


2. In *Message Settings*, enter a **“Message Name”** and **“Message Description”** then click the **“Next”** button.
3. In the *Message Content* section, click on the drop-down next to the first language you will record and select **“Record”**.
4. In the *Voice Recording* section, enter the phone number where you (or the person who will be recording) can be reached in the **“Number to Call”** box and click **“Call Now to Record”**.
5. 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.
6. On your SchoolMessenger account, the screen will change to give you the option to *Play* or *Rerecord* your message.
7. 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.
8. Repeat steps 1 through 7 for any additional languages and/or broadcast types.

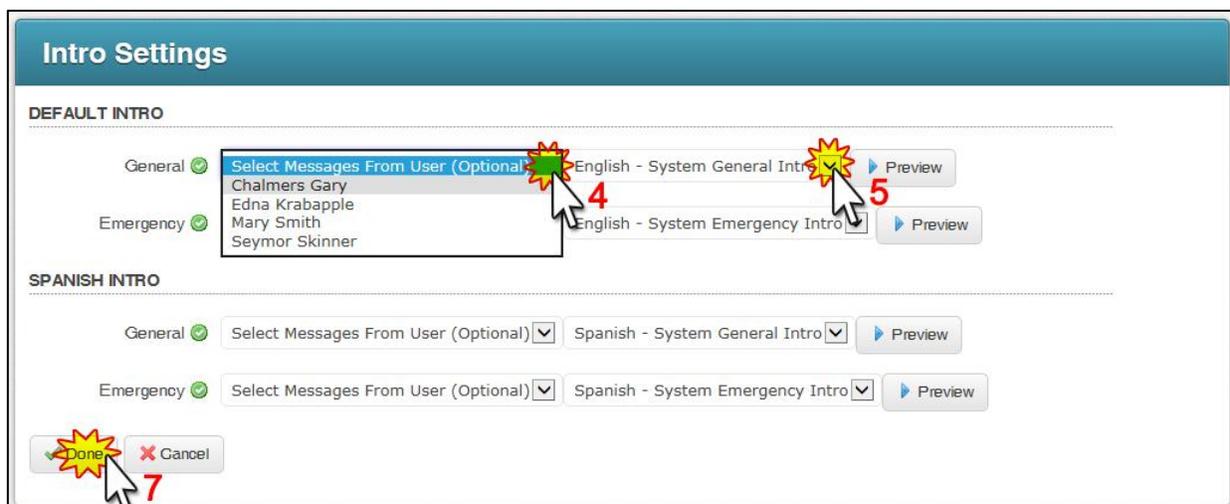
Configuring Intro Messages

Now that your message has been saved, you will need to configure your SchoolMessenger account to use the appropriate Intro Message for each broadcast type.

1. Go to the *Admin* tab and click on the **“Settings”** sub-tab.
2. In the *Broadcast* section of *Settings*, click on **“Message Intro”**.



3. 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.
4. 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).
5. 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.
6. Repeat steps 1 through 5 for each of the broadcast types and languages.
7. Click the **“Done”** button when you’ve successfully made all settings.



Taking Action on Opt-Out Requests

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

Option 1

If your organization chooses Option 1, to leave the message about unsubscribing out of your accounts intro message, recipients could still possibly press “5” to access the opt-out options, and you can still view the reports and take the actions described below for **Option 2**, if you choose.

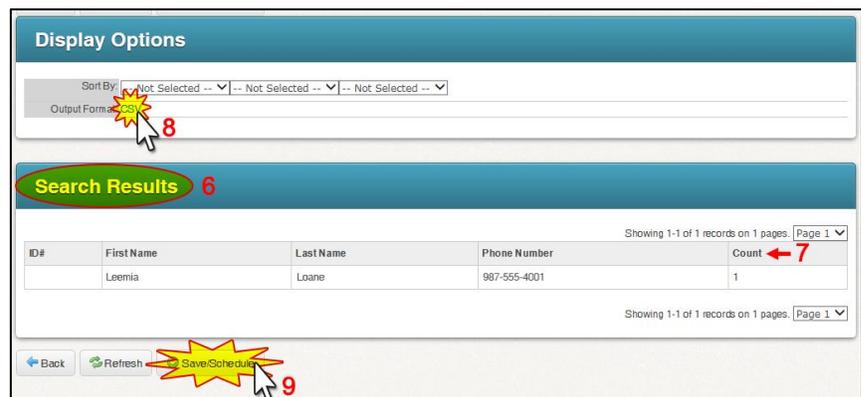
Option 2

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 SchoolMessenger 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. Go to the “Reports” tab and click on “**Phone Opt-Out**” in the *Other* section of the Report Builder’s “*Select a Template*” section.
2. In the *Phone Opt-Out* page, begin by selecting a date range. The range should reflect the period of time since you last took action on an Opt-Out report.
3. 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.)
4. 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.)
5. Click the “**View Report**” button to view the report.



6. The “**Search Results**” will display a list of all Opt-Out requests from the selections you made in steps 2 through 4.
7. The “**Count**” column shows how many times a person has completed the request during the timeframe selected.



8. Clicking the **“CSV”** link next to *Output Format* in the *Display Options* section will allow 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.
9. Clicking the **“Save/Schedule”** button 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.

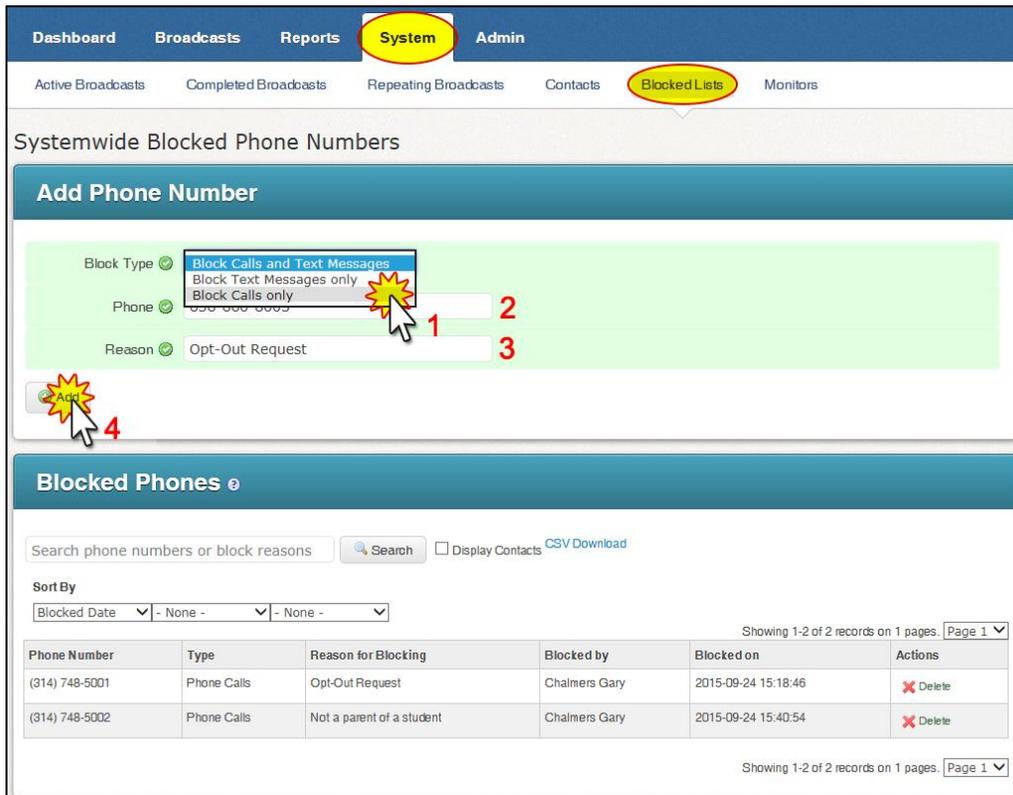
Once you have a copy of this report available and open to view, it is time to review the list and decide on the appropriate action for each request. Just as there are multiple options for recipients to opt out, there are multiple ways to accommodate their opt-out requests.

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 SchoolMessenger account’s Block List are found in the *System* tab under the **“Blocked Lists”** sub-tab.

1. Use the **“Block Type”** menu to 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*).
2. Add the 10-digit phone number in the **“Phone”** field.
3. Type a **“Reason”** that helps others understand why this number was blocked.
4. Click **“Add”**. The number and information will be presented in the list of **“Blocked Phones”** below.



Systemwide Blocked Phone Numbers

Add Phone Number

Block Type **Block Calls and Text Messages**
 Block Text Messages only
 Block Calls only

Phone 030 000 0000

Reason Opt-Out Request

Blocked Phones

Search phone numbers or block reasons Display Contacts [CSV Download](#)

Sort By
 Blocked Date

Showing 1-2 of 2 records on 1 pages. Page 1

Phone Number	Type	Reason for Blocking	Blocked by	Blocked on	Actions
(314) 748-5001	Phone Calls	Opt-Out Request	Chalmers Gary	2015-09-24 15:18:46	<input type="button" value="Delete"/>
(314) 748-5002	Phone Calls	Not a parent of a student	Chalmers Gary	2015-09-24 15:40:54	<input type="button" value="Delete"/>

Showing 1-2 of 2 records on 1 pages. Page 1

Another option for ensuring compliance with a Phone Opt-Out request is to remove from or change the phone number in your student information system and/or SchoolMessenger list files.

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.*

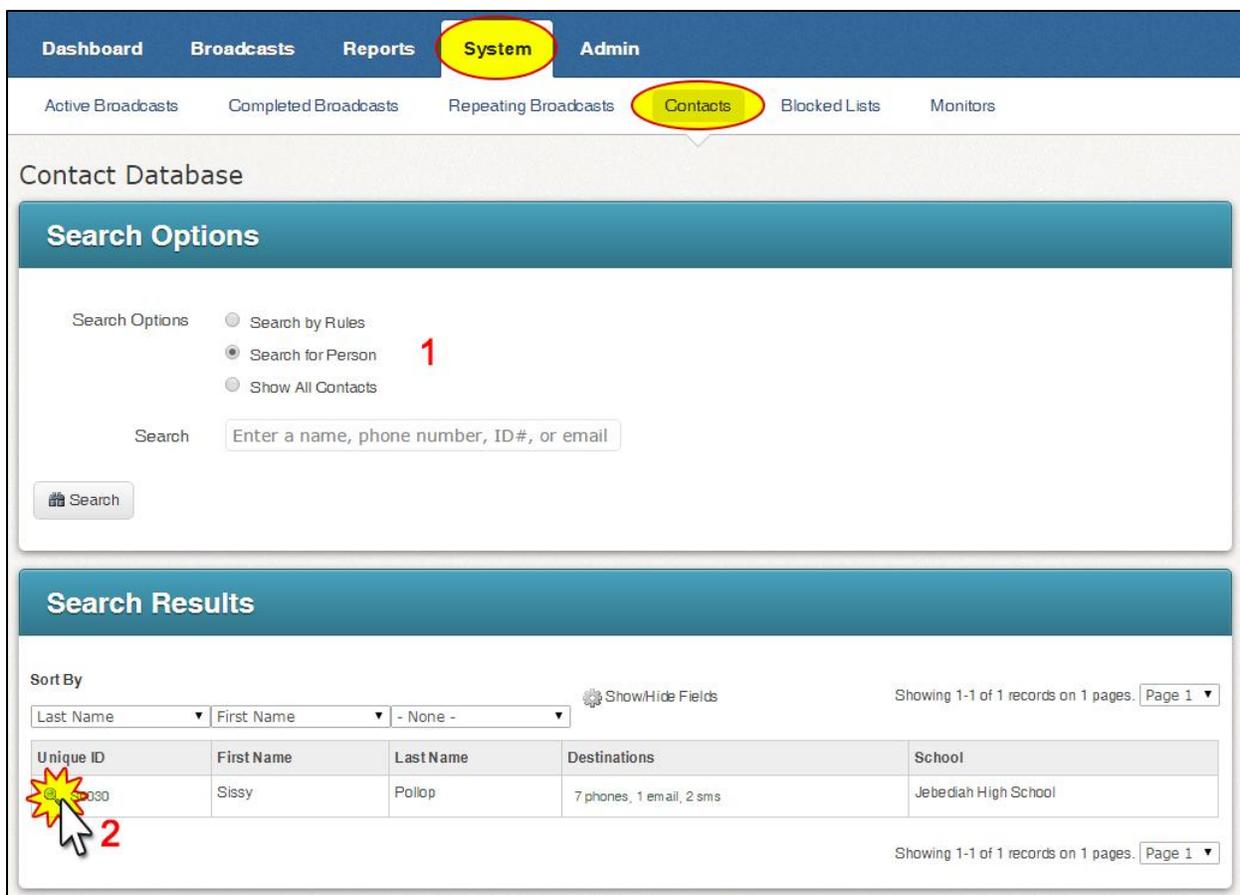
 **Note:** *Numbers which have been added to the SchoolMessenger Blocked List can be removed at any time should the recipient change their mind or if a mistake has been identified.*

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 SchoolMessenger account under the “**Contacts**” sub-tab.

1. Use the **Search Options** to select the best way for you to locate the contact(s) whose preferences you are going to adjust.
2. In **Search Results** click the magnifying glass icon in the *Unique ID* column in front of the contact.



The screenshot shows the SchoolMessenger interface. The top navigation bar includes 'Dashboard', 'Broadcasts', 'Reports', 'System' (highlighted in yellow), and 'Admin'. Below this, a sub-navigation bar includes 'Active Broadcasts', 'Completed Broadcasts', 'Repeating Broadcasts', 'Contacts' (highlighted in yellow), 'Blocked Lists', and 'Monitors'. The main content area is titled 'Contact Database' and contains a 'Search Options' section with three radio buttons: 'Search by Rules', 'Search for Person' (selected, with a red '1' next to it), and 'Show All Contacts'. Below the radio buttons is a search input field with the placeholder text 'Enter a name, phone number, ID#, or email' and a 'Search' button. The 'Search Results' section below shows a table with columns: 'Unique ID', 'First Name', 'Last Name', 'Destinations', and 'School'. The first row contains the data: Unique ID: 5030, First Name: Sissy, Last Name: Pollop, Destinations: 7 phones, 1 email, 2 sms, School: Jebediah High School. A magnifying glass icon with a red '2' is positioned over the Unique ID cell. The page also includes 'Sort By' dropdowns and 'Showing 1-1 of 1 records on 1 pages. Page 1' indicators.

3. 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.
- ❗ **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.
4. 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.
5. 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.

Contact

 Save
 Cancel

5 ID#: S0030
Name: Sissy Pollop
Language: English
Preference:
Grade: 10
Homeroom#Teacher: Beardsley
Bus Number:
Lunch Balance: \$12.57
Lunch Balance Date: 03/06/2015
Absence Count:
Absence Type:
Absence Date:
Faculty#Staff:
Job Title:
Grades Taught:
Contact Type: Guardian
Activity: Softball, FFA
School: Jebediah High School
Address:

Contact Details: Phone

Contact Type	Override	Destination	Emergency	Attendance	General	Newsletter	Survey
Phone 1 (Primary Phone)	<input type="checkbox"/>	(314) 999-5001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone 2 (Secondary Phone)	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 3 (Emergency Phone)	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 {

Email

Contact Type	Override	Destination	Emergency	Attendance	General	Newsletter	Survey
Email 1	<input type="checkbox"/>		<input checked="" type="checkbox"/>				
Email 2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SMS

Contact Type	Override	Destination	Emergency	Attendance	General	Newsletter
SMS 1	<input type="checkbox"/>	(314) 999-5001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Device

Contact Type	Destination	Emergency	Attendance	General	Newsletter
None		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Guardians:

First Name	Last Name	Category	Actions
Seraphena	Jacobs	Emergency 1	 View
Donald	Pollop	Secondary	 View
Ophelia	Jacobs-Pollop	Primary	 View

 Guardian Data Here

Associated Accounts

User Name	Last Login	Actions

 Save
 Cancel

Option 3

This is the option where unsubscribe and block requests are **automatically** updated by the SchoolMessenger system. If a recipient presses “5” during a message and then presses option “3”, SchoolMessenger 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.*

Preparing Your School Community

While creating a clear Intro Message, informing your call recipients of the Phone 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**.
- Phone 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.

As always, if you have any further questions or concerns regarding the Phone Opt-Out feature or procedures, please feel free to contact SchoolMessenger Support.

email: support@schoolmessenger.com

phone: (800) 920-3897