



Phone Opt-Out Guide

SchoolMessenger

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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 asked to press "1" to confirm they no longer wish to receive any recorded messages on that phone through your SchoolMessenger account.

After the recipient opting-out has completed this process, a report of their opt-out decision is sent to your SchoolMessenger account so that you or your account administrator can take action to ensure compliance with their request.



Important: Opting-Out is done on a phone-by-phone basis and will only initiate a request for the phone upon which the recipient is currently receiving a message and following these prompts. They must complete the process on 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. The first thing you should do to prepare your organization for this opt-out feature is to put verbiage in your voice broadcast **Intro Message** which informs call recipients that the option is available to them. The intro message has always been a required component of SchoolMessenger voice broadcasts - as it plays an important role on all broadcast calls and is key for the accurate delivery of messages to live recipients.

Your first step should be to write a script for an introduction message 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 opt this phone out of all future voice messages from our schools, press 5 at any time during the message."



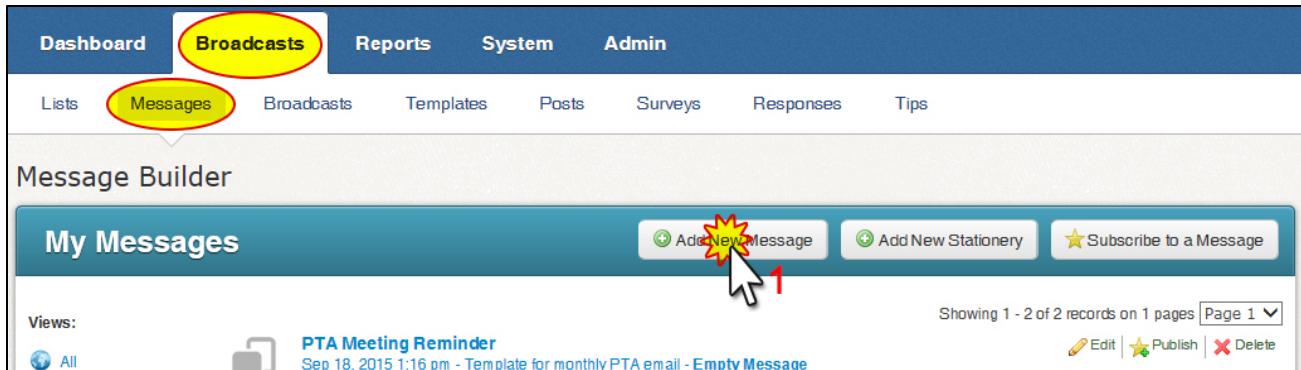
Note: If you use multiple languages on your SchoolMessenger account and/or have different introductions for various broadcast types, such as emergencies, please have a script and available persons prepared for those as well.

Once your Intro Message scripts are ready, proceed to the instructions in *Recording your Intro Messages* below.

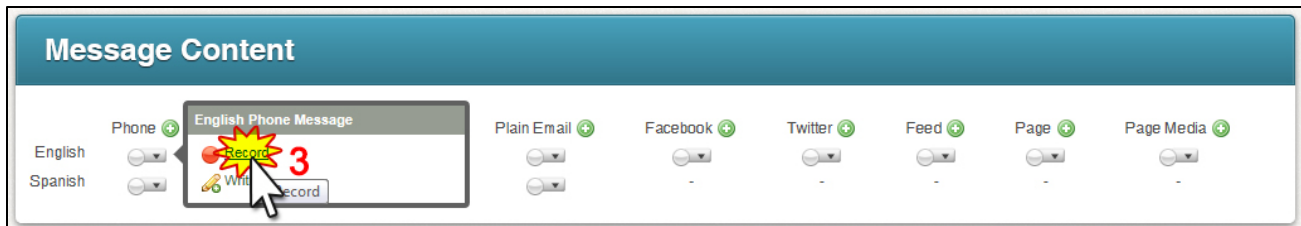
Recording your Intro Messages

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**”.



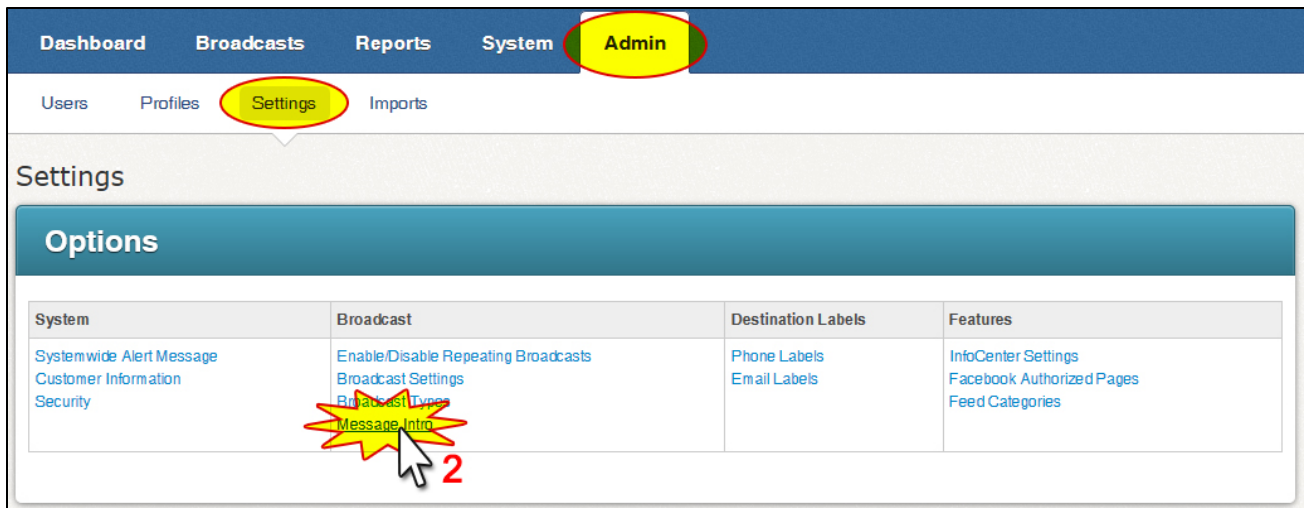
4. In the *Voice Recording* section, enter the phone number where you (or the person who will be recording) can be reached in the “**Number to Call**” box and click “**Call Now to Record**”.
5. The phone will begin ringing almost immediately. Answer and follow the prompts to record the intro message 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* and *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.



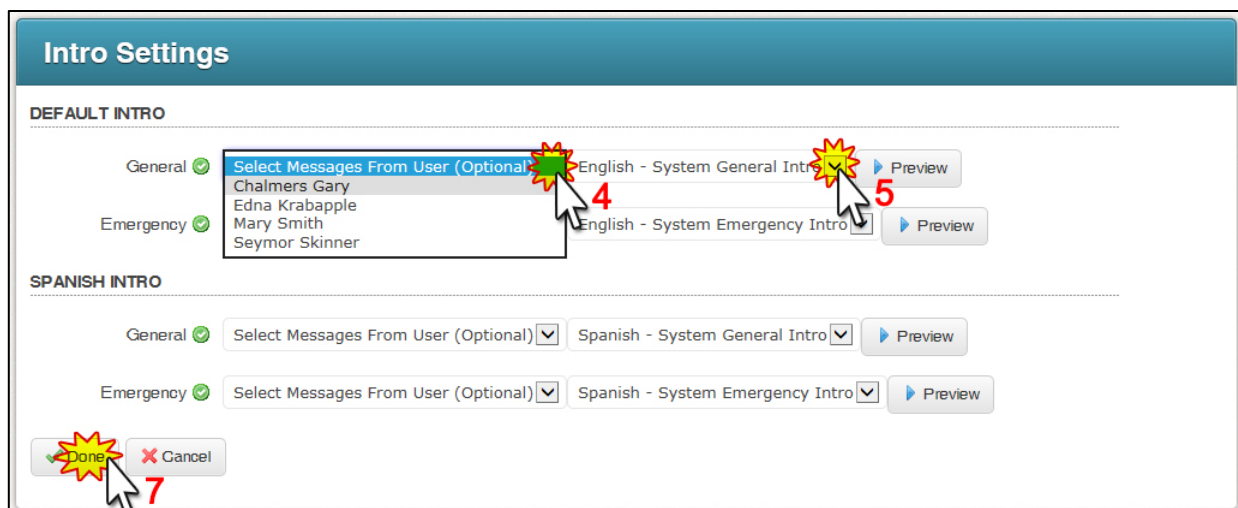
Configuring your Intro Messages

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.

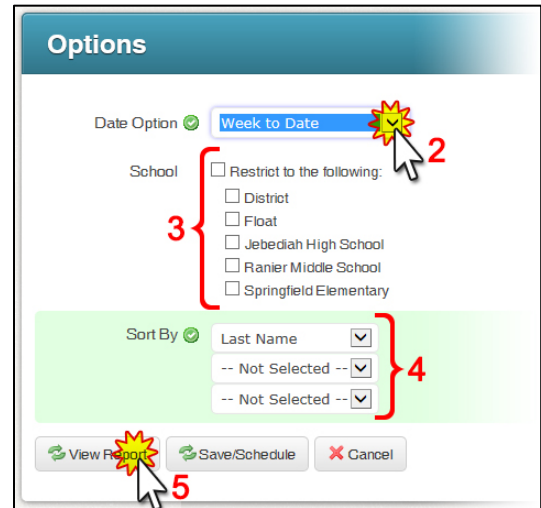
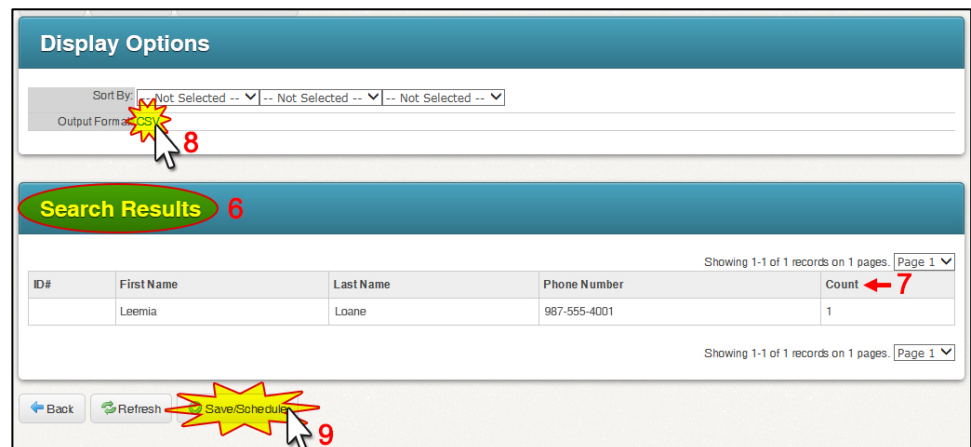


Taking Action on Opt-Out Requests

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, it is up to someone at your organization to review those requests and take specific action to ensure compliance with their wishes.

Important: Phone Opt-Out requests are **not** automatic. A report must be generated, and the numbers requesting to opt-out must be placed in your SchoolMessenger account's Blocked List, or edited in your student database and/or lists before broadcast voice messages will no longer ring their phone.

- Go to the "Reports" tab and click on "**Phone Opt-Out**" in the *Other* section of the Report Builder's "Select a Template" section.
- 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.
- 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.)
- 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.)
- 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.
- The "**Count**" column shows how many times a person has completed the request during the timeframe selected.
- 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 on which you need to take action.
- 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.

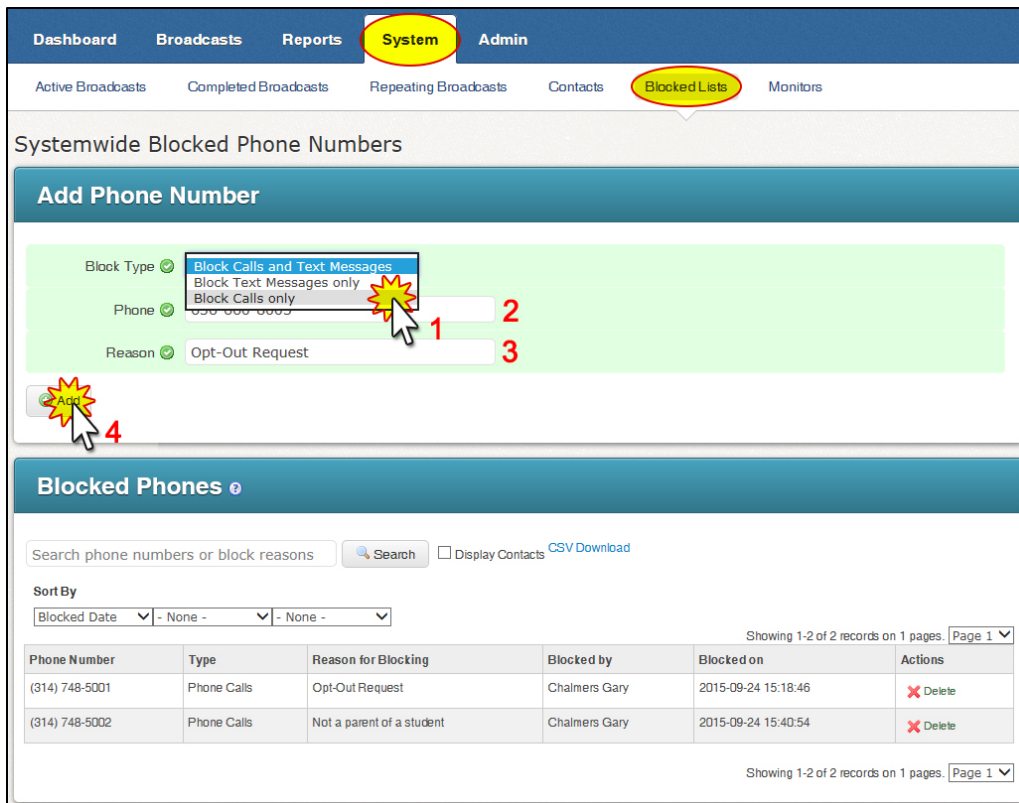



ID#	First Name	Last Name	Phone Number	Count
	Leemia	Loane	987-555-4001	1

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.

Usually the best choice is to put an opted-out phone number on your SchoolMessenger accounts *Blocked List*. The *Blocked List* is located in your accounts *System* tab in the *Blocked Lists*.

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 ☒ 000 000 0000

Reason ☒ Opt-Out Request

Add

Blocked Phones

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

Sort By
Blocked Date - None - - None -

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 checked="" type="button" value="Delete"/>
(314) 748-5002	Phone Calls	Not a parent of a student	Chalmers Gary	2015-09-24 15:40:54	<input checked="" 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 lists.

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.

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