Appendix A

Employee Guidelines for Opt-in/Opt-out process

***Opt-in/Opt-out Mechanisms for Individuals***

Individuals will have clear call to action to “opt-in” and “opt-out” of all types of SMS/text messages. Each mechanism will contain, the SUNY Empire name and specific text services provided, customer service contact information, “opt-in” and “opt-out” instructions, recurring-messages program disclosure and the “Msg&Data rates may apply” discourse.

Individuals will provide a mobile number consenting initially, with the understanding a message will be sent confirming consent to receive SMS/text messages. A confirmation will always be sent to confirm consent for “opt-in,” and a message acknowledging “opt-out.”

Below are various mechanisms for individuals to “opt-in/opt-out” messages.

* **Webpage**: one webpage (type of messages for prospects and applicants/ type of messages for students/ type of messages for alumni) will specifically detail what individuals are consenting to when “opting-in,” the frequency of such messages, and instructions on how to “opt-out” if individual no longer wishes to receive SMS/ text messages from that particular program(s) and employee.
* **Email invitation**: an email will be sent to a specific audience providing a link using a keywork “START.” “START” will bring individual to the appropriate webpage which will describe the type of messages the individual will receive if he/she “opts-in.”
* **Mobile device**: language will confirm consent to receive messages once individual “opts-in” to receive SMS/text messages. A keyword “**STOP**” will be included in all messages so individual can request to stop receiving messages at any time.
* **Phone in**: individuals calling SUNY Empire to “opt-in/opt-out”, college employees will be required to use the appropriate webpage/form to add the individual to the correct form, walking the individual thru the “opt-in” steps, describing the type of SMS/text messages the individual will receive and how often, and if individual wishes to stop receiving messages, request the individual to visit the appropriate webpage to send “STOP” or text from a recent message or to halt future messages. Employee will inform the individual a SMS/text message will be sent, within the hour, to confirm consent to receive SMS/text messages or to acknowledge SMS/text messages will stop.
* **Walk-in**: individuals walking into one of our SUNY Empire locations to “opt in/opt-out,” college employees will be required to use the appropriate webpage/form to add the individual to the correct form, walking the individual thru the “opt-in” steps, describing the type of SMS/text messages the individual will receive and how often, and if individual wishes to stop receiving messages, request the individual to visit the appropriate webpage to send “STOP” or text from a recent message or to halt future messages. Employee will inform the individual a SMS/text message will be sent, within the hour, to confirm consent to receive SMS/text messages or to acknowledge SMS/text messages will stop.
* **Request for Information form**: form will include a field for mobile phone number and check box field to opt-in, with a link to SMS/text message webpage for types of messages an individual will receive. A message will be sent via the CRM acknowledging consent to receive SMS/text messages.
* **Application:** application will include a field for mobile phone number and check box field to opt-in, with a link to SMS/text message webpage for types of messages an individual will receive. A message will be sent via the CRM acknowledging consent to receive SMS/text messages.
* **Event registration:** form will include a field for mobile phone number and check box field to opt-in, with a link to SMS/text message webpage for types of messages an individual will receive. A message will be sent via the CRM acknowledging consent to receive SMS/text messages.
  + **Opt-in**:
    - Refer individual to the SMS/text message webpage **[LINK to be included when complete]**, via email or verbally, to provide their mobile number consenting to receive specific program SMS/text messages. Individual will receive a text message confirming their consent with the option to “**STOP**” messages if this was a mistake, within the hour via the appropriate CRM application communication plan.
    - Go to the SMS/text message webpage **[LINK to be included when complete]**, add individual’s information, walking individual thru each step detailing the type of information described on the SMS/text message webpage the individual is consenting to receive via SMS/text message. Employee will inform individual a text message will be sent, within the hour, to confirm their consent, and if this was not what the individual expected, a keyword “**STOP**” can be text back to halt any future text messages.
  + **Opt-out**:
    - Ask individual if they have a text message with a keyword “**STOP**”, if so, request they text “**STOP**”, which in turn a text message will be sent to acknowledge no more messages will be sent within the hour, OR
    - Refer individual to the SMS/text message webpage **[LINK to be included when complete]**, via email or verbally, to provide their mobile number and a message “**STOP**”. Employee will inform individual will receive a text message acknowledging their request to stop receiving messages within the hour.