



Compliance



Checklist

Best practices indicate that message senders should gain contact consent and maintain their preferences in order to text through platforms like Cadence. Mongoose's compliance checklist proactively protects and empowers you with the information you need to be compliant with increased carrier sensitivity to high opt-out rates and spam complaints. These changes will positively impact your Cadence experience, ensuring you maintain an engaged, attentive audience.

Follow these best practices recommended below to deliver text messages and set your school up for long-term success.

Obtain Consent

To obtain consent to send the recipient relevant text messages, the collection method should include:

- What types of messages the recipient can expect to receive
- An indication of the frequency of messages
- A place to provide a valid phone number
- A specific selection/checkbox giving consent to text messaging

Establish a Collection Process

Methods for obtaining consent should be documented and provable in the event that your institution's messaging activity leads to large spikes in opt-out rates or spam complaints. We recommend keeping a record of all opt-ins.

Places to ask for consent (opt-in) include:

- Application or document submissions
- Forms that ask for contact information
- Websites or student portals
- Event registrations
- Appointment scheduling

Store Texting Preferences

Contacts should opt into texting on a per-team basis. Each contact should have a separate preference per team or department which is aligned with how opt-in status is stored in Cadence.

Data fields associated with texting preferences should include:

- Contact name and mobile number
- Opt-in status
- Date/time that the status was last updated

Re-Establish Consent When Necessary

Obtaining consent to text an individual does not mean that consent is provided indefinitely. We recommend that your institution's texting policy includes when consent to text was last established. Storing a date/time stamp along with a contact's opt-in status is the best way to track this information. If a reasonable time (10-12 months) has passed without any messages being sent to the contact, re-establishing their consent and opt-in is recommended.

Manage Opt-Outs

There are a few possible ways that a contact may opt-out of receiving text messages which can include: texting a keyword such as "STOP," texting a statement such as "stop texting me" or indicating a desire to opt-out or remain opted out via a form, document, email, etc.

Include Opt-out Language in the First Text

Every message you send should clearly identify you (your institution's name and your department) as the sender, except in follow-up messages of an ongoing conversation. The initial message that you send to an individual should include instructions for opting out at the end of the message such as "Reply STOP to unsubscribe."



Need help creating your texting policy?
Please see our template [here](#).

Opt-in examples from Cadence users showing how to prevent campaigns from being denied by telecommunication carriers

CATEGORIES

- Announcements** (Student Support, Success Center, and Orientation announcements and student news)
- Mail and Calendar Alerts** (New action items, email, and scheduled events)
- Social Alerts** (Community-related updates, discussions, and forum replies)
- Career Development** (Notifications regarding job opportunities, internships, and career management)
- Records and Financial Services** (Notifications regarding your admissions, financial aid, enrollment status, and updates to your student record)
- Academic Messages** (Notifications regarding your courses, cohorts, and assessments, and direct communication from your mentors)

Text Messaging Edit Profile

Student Mobile Number:

Activate mobile text messaging to receive a four-digit passcode by having a code sent to your phone and to allow to send you text notifications.

Status/Success: Your mobile number has been confirmed. You can now receive partial notifications via SMS.

Advanced Settings

Message Limit

Total per month:

*Messages beyond the number entered each month will not be delivered through SMS, but will be available via other notification methods. If you do not select a limit, the number of monthly messages will not be restricted.

STUDENT

By activating mobile text messaging I give permission to send text notifications and authentication codes for password recovery to the mobile phone listed as

I understand that I am responsible for any charges to my wireless carrier for text messages sent to my mobile phone. I also understand that I may opt in for password recovery but opt out of other text notifications by changing my notification settings. I can opt out of both password recovery and notifications at any time by replying to a text message with the word "STOP" or by turning off the setting on this page.

SMS PERMISSIONS

We will send text messages to your phone number . To change this phone number, please log into . Navigate to your personal information at the bottom of the page and select demographic data. Select Phone Numbers at the top of the page. From here you can update your mobile phone number.

The following shows what groups could send you text messages and your opt-in or opt-out status. To opt in to or out of receiving text messages from a group, toggle the switch to the right of the group.

Notification	Description	Decision
Academic Messages	Users may receive messages about advising, tutoring, class scheduling, academic support services, etc.	<input type="checkbox"/> OPT OUT <input checked="" type="checkbox"/> OPT IN
Enrollment Management	Users may receive messages related to admissions information, registration and information related to enrollment.	<input type="checkbox"/> OPT OUT <input checked="" type="checkbox"/> OPT IN
Finance	Users may receive messages about payments, student financial aid and scholarships.	<input type="checkbox"/> OPT OUT <input checked="" type="checkbox"/> OPT IN
Information Technology	Users may receive messages about login/ask work orders and possible security issues with your accounts.	<input type="checkbox"/> OPT OUT <input checked="" type="checkbox"/> OPT IN
Student Affairs	Users may receive messages about student affairs	<input type="checkbox"/> OPT OUT <input checked="" type="checkbox"/> OPT IN

The form below is not the application to - this is for questions, inquires, and guidance only. Students must apply at

First Name

Last Name

Phone

Email

Previous School Name

Birth Date

Contact Preference

Phone

Email

Text

Opt in for text messages

Program of Study Request Info

Please complete this form to receive more information about your degree program of interest.

First Name *

Last Name *

Date of Birth *

Email *

I would like to receive emails. * Yes No

Mobile Phone Number *

I would like to receive texts. * Yes No

Zip/Postal Code *

How do you prefer to be contacted?

What is your primary goal? *

I'd like to: *

Apply: I know the program I'm interested in and I'm ready to apply.

Get More Info: I'm interested in . . . but am not quite ready to apply. I need more information or have a question.

Ideally, when would you want to start taking classes? *

Are you an international student? * Yes No



Over 4,000 teams across over 950 higher education institutions partner with Mongoose to Make Every Message Count™. Our SaaS platform is an integral part of how these colleges and universities live their missions — but it's only a part.

By choosing Mongoose as their holistic engagement partner, our clients unleash the power of:

- An evolving engagement platform with digital communication solutions for every stage of the student lifecycle, from guiding students through the admissions process to transforming alumni into donors.
- A team of former higher ed professionals who live and breathe an empathy-centered approach to collaboration and customer service.
- And industry-wide insights that only a team with our long-standing, expansive footprint and technical acumen is in the position to uncover and make actionable.