

Telephone and Fax Standard

OVERVIEW

The College's Telephone and Fax Standard (Standard) establishes and describes the required customary tasks authorized users of telephone and fax messaging must follow to comply with College policy, industry best practices, Federal Communications Commission (FCC) regulations, the Telephone and Consumer Protection Act and relevant state law. It also aims to protect individuals' privacy and prevent unwanted, unsolicited calls, faxes and voice messages.

SCOPE

1. This standard applies to all authorized users of phones, faxing services and voice messages: live or automated; including employees, contractors, and third-party vendors who use phone, fax and voice messaging on behalf of the College.
2. This Standard applies to all live or recorded telephone and fax messaging sent to individuals or groups on behalf of the College, a College department or College official to **non-Palmer owned or controlled** devices or applications.

DEFINITIONS

1. **Automatic Telephone Dialing System (Auto Dialers)** – refers to those departments and individuals determined by the College to have business necessity to send use electronic communication.
2. **Fax Message:** A printed message delivered to a recipient's fax machine.
3. **National Do Not Call Registry:** A list of phone numbers from consumers who have indicated their preference to limit the telemarketing calls they receive. The registry is managed by the Federal Trade Commission.
4. **Recipient:** The telephone number receiving the phone call, voice mail live or fax message
5. **Sender:** When used in respect to commercial electronic messages, means the individual who initiates such a message and whose product, service, or Internet web site is advertised or promoted by the message.
6. **Telephone Solicitation:** The initiation of a telephone call or message for the purpose of encouraging the purchase or rental of goods, or services, which is transmitted to any person.
7. **Unsolicited Advertisement:** Any material advertising the commercial availability or quality of any property, goods, or services which is transmitted to any person without that person's prior express invitation or permission, in writing or otherwise.
8. **Voice Message:** A recorded or live message delivered via a telephone call to a recipient's phone.

COMMERCIAL AND MARKETING PHONE AND FAX MESSAGES

1. **Primary Purpose for Communication:** to advertise or promote a product or service
2. **Requirements Prior to Calls, Auto Voice Recordings or Fax** – The following must be completed prior to making call, leaving auto voice recordings or fax messages:
 - a. **Notification Requirement** - Mass messaging must be submitted to and approved by Marketing & Communication and must comply with College Policy and this Standard.
 - b. **Consent Requirement:** requires express opt-in consent from the recipient before sending messages including use of auto-dialers to call recipients.
 - c. **Disclosure Requirement:** requires disclosure of _____ and _____. This can be obtained through electronic means, such as a web form or email, as long as the disclosure clearly informs the recipient.
 - d. **Registration Requirement** – requires obtaining a registered phone number from the College's IT Department prior to sending text messages. Be advised the registration process can take up to 30 days for approval.
3. **Consent Requirements Prior to Contacting Recipients** – The following must be completed prior to contacting recipients via phone or fax:
 - a. **Opt-In Consent:** Recipients must provide express written opt-in consent before receiving artificial voice calls or recordings to their residences or their cellular phones, containing commercial information.
 - b. **National Do Not Call Registry:** Calls of a commercial nature to numbers on the National Do Not Call Registry are prohibited.
 - c. **Auto-Dialers:** The use of auto-dialers to cell phones without prior written consent is prohibited.
 - d. **Unsolicited faxes:** Unsolicited fax advertisements are prohibited without an existing business relationship with the recipient. The sender is responsible for proving that they have permission from the recipient.
 - e. **Opt-Out Mechanism:** Provide a clear, conspicuous, easy, and free method for recipients to opt-out of future text messages (e.g., "Reply STOP to unsubscribe"), no other information should be required to opt-out of phone calls and fax messages other than the recipient's name and phone number.

4. **Disclosure Requirement:** *Disclosure Requirement:* requires disclosure of [Palmer's SMS Terms and Conditions](#) and [SMS Privacy Statement](#). This can be obtained through electronic means, such as a web form or email, as long as the disclosure clearly informs the recipient.
5. **Requirements specifically for fax:**
 - a. *Fax Messages:* Whether sent via fax machine or computer, sender must clearly mark, in a margin at the top or bottom of each transmitted page of the message or on the first page of the transmission, the date and time it is sent and an identification of the business, other entity, or individual sending the message and the telephone number of the sending machine or of such business, other entity, or individual.
6. **Requirements specifically for phone:**
 - a. *Pre-recorded or Artificial Telephone Messages:* At the beginning of the message, state clearly the identity of the business or individual initiating the call. During or after the message, clearly state the telephone number or address of entity initiating the message.
7. **Message Content Requirement:** All phone and fax messaging must include the following:
 - a. *Clear Identification of the caller:* Clearly identify the caller (e.g., College name, department name, sender's name).
 - b. *Physical Address:* Include a valid physical postal address for Palmer College.
 - c. *Clear Identification of the purpose for the message:* The purpose must be clearly identified (e.g. an advertisement, solicitation, marketing)
 - d. *Fax Subject Line:* If applicable, the subject line must accurately reflect the content of the message.
 - e. *Relevance to Consent:* The content must be relevant to the purpose for which the recipient provided their consent or enrolled or subscribed to.
 - f. *Transparency:* The message must not contain misleading or deceptive information
 - g. *Accuracy:* The message must contain accurate information.
 - h. *Message Time:* Message times should generally occur during College business hours but not before 8 AM or after 9 PM. Messages must reflect the receiver's local time.
8. **Requirements After a Recipient Makes an Opt-Out Request**
 - a. *Opt-Out Requests:* Honor opt-out requests within 10 business days.
 - b. *Record-keeping:* Maintain written record of opt-out requests and comply with College Record Retention requirements regarding the message content.

RESOURCES

1. [Electronic Messaging PowerPoint Presentation Training](#)

