

# Campaign Vetting Checklist

Note: Requirements for opt-in may vary based on the use case (conversational, informational, or promotional).

## Brand Details

- If you have not included a website in your brand registration, please go back and add this in
- Brand Support Email Address domain should match Website/Online presence if possible

## Campaign and Content Attributes

- Subscriber Opt-In: Provide the opt-in keywords if applicable. **The Opt-in Message is required and must contain the following details:**
  - Brand name
  - Message frequency disclosure
  - "Message and data rates may apply" disclosure
  - HELP information
  - STOP information
  - Example: "Thank you for opting in to receive recurring messages from [Company Name]. Msg frequency varies. Msg & data rates may apply. Reply HELP for help. Reply STOP to cancel."
- Subscriber Opt-out: Provide the opt-out keywords. **The Opt-out Message is required to contain the following details:**
  - Brand name and confirmation the consumer will receive no further messages.
  - Example: "You have successfully opted out of messages from [Company Name]. You will receive no further messages."
- Subscriber Help: Provide the Help keywords. **The Help Message must contain the following details:**
  - Brand name
  - Email address, phone number, or website link the consumer can use for assistance
  - Example: "Thank you for reaching out to [Company Name]. Please call us at [phone number] or email us at [email address] for support. Reply STOP to opt-out."
- Number Pooling: This must be selected as "Yes" if the campaign is later submitted for a Number Pool (needing more than 49 TNs on the campaign).
- Direct Lending or Loan Arrangement: Must be checked "Yes" if the brand engages in lending, even if the messaging on the campaign is not related to the lending.
- Embedded Link: Indicates if the campaign will send embedded links in the messages.
  - If selected "Yes", an embedded link must be included in at least one of the sample messages.
- Embedded Phone Number: Indicates whether the campaign will send embedded phone numbers in the messages (excluding providing a contact for HELP in the help response).

- If checked "Yes", an embedded phone number must be included in at least one of the sample messages.
- Age-Gated Content: Must be checked "Yes" if the content includes any age-gated materials.
- Terms & Conditions: Must be checked "Yes" and the Terms & Conditions link needs to be provided in the Terms and Conditions Link field. *You can visit our [Tips and Tricks article](#) for an example Terms and Conditions.*

## Campaign Details

- Campaign Description** This field is used to give a clear and detailed description of what the campaign will be used for.
  - Ensure description aligns with registered use case (i.e., registered as 2FA campaign but campaign description references customer care messages would result in a rejection)
  - If multiple use cases are registered, describe all use cases in the description (i.e., Low volume mixed campaign that includes 2FA and Marketing use cases. Both use cases should be mentioned in the campaign description.)
  - If donations are collected, it must be clearly stated.
- Call to Action / Message Flow:** This field is used to describe how a consumer opts-in to the campaign, therefore giving consent to the sender to receive their messages. The call-to-action must be explicitly clear and inform the consumer of the nature of the program. If multiple opt-in methods can be used for the same campaign, you must list them all.
  - Clearly explains how the consumer agrees to receive text messages from the brand
  - Provide a script, link, or attachment of the opt-in collection material (webform, physical form, verbal opt-in script, keyword marketing material, etc.). Attachments can be provided in the CTA (Call-to-Action), Privacy Policy and/or Terms and Conditions Multimedia Upload field.
  - Note: the vetting review will include the call to action disclosure provided at the time of opt-in collection. This is not a field in TCR, but the disclosure given to the consumer when they opt-in. *Please visit our [Tips and Tricks article](#) for examples.*
  - All opt-in methods (consumer-initiated, keyword, IVR, verbal, written forms, webforms, etc.) are required to contain the following disclosures:
    - Brand name
    - Types of messages being sent
    - Message frequency disclosure
    - "Message and data rates may apply" disclosure
    - Help information
    - Stop information
    - Link to the Privacy Policy
    - Link to the Terms and Conditions
- Privacy Policy Link:** Use this field instead of adding links to the CTA field
  - Privacy Policy must include a disclaimer that no mobile opt-in will be shared with third parties for marketing purposes.

- Terms and Conditions Link:** Use this field instead of adding links to the CTA field
  - Terms and Conditions must have an SMS disclosure that includes the types of messages consumers can expect to receive, texting cadence, message and data rate notices, privacy policy links, HELP information, and opt-out instructions.

## Sample Messages

- Sample Messages must correspond to the registered use case.
- If a campaign is registered under multiple use cases (mixed), a sample message for each use case should be provided.
- Identify the brand in the message
- Provide at least one sample message that includes opt out language
- If Embedded Link was selected “Yes” under Campaign and Content Attributes, an embedded link must be included in at least one of the sample messages.