COMPLIANCE GUIDE

Guide to A2P Text Messaging Compliance

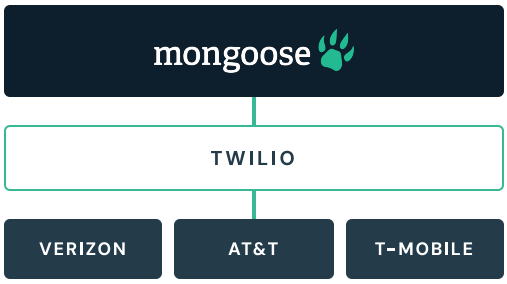
The Big Picture

Over the last year, mobile carriers and Twilio have tightened rules around texting to reduce spam and protect consumers.

As of 2023, all application-to-person (A2P) text messaging in the U.S. must be registered and approved before messages can be sent. If messages aren't registered, carriers can block them entirely.

Who Twilio Is (and Why They Matter)

Twilio is the messaging gateway that connects platforms like Mongoose to carriers like Verizon, AT&T, and T-Mobile. Because of that, Mongoose—and all of our clients—must follow Twilio and carrier compliance rules in order for texts to be delivered.



What Campaign Registration Means

To send texts, organizations must register their messaging "campaigns." That registration tells Twilio:

- Who you are
- What types of messages you'll send
- How you collect consent

In Mongoose:

- ✓ Personal inboxes are registered at the organization level
- ✓ Shared inboxes are registered at the team level

Once submitted, Twilio reviews and approves the campaign, based on compliance with carrier rules.

Consent & Opt-in (the Most Important Part)

Carriers now require clear, documented consent before you text anyone. That means:

- People must know they're opting into texts
- Consent can't be purchased or shared
- You need to be able to show how and when consent was collected

WHILE REGISTRATION IS PENDING, MESSAGES CAN'T BE SENT YET. THIS PROTECTS DELIVERABILITY LONG-TERM.

BEST PRACTICE IS TO INCLUDE THIS WHEREVER SOMEONE GIVES YOU THEIR MOBILE NUMBER—APPLICATIONS, PORTALS, FORMS, UPDATES, ETC.

What This Means For You as a Client

What Consent Must Include

When someone opts in, the form or flow needs to clearly state:

1. **What types of messages they'll receive**
2. **Message frequency**
3. **That message & data rates may apply**
4. **How to opt out (e.g., texting STOP)**
5. **How to get help (HELP or a phone number)**
6. **A link to your Privacy Policy**
7. **A link to your Terms & Conditions**

Mongoose also automatically supports opt-out messaging once texting begins.

Reassurance

For new customers:



We guide you through registration during onboarding



We help review your consent language and forms



If nothing is in place yet, that's okay—we'll help you get there

> **This isn't unique to Mongoose—these rules apply to all business texting platforms. Our role is to translate the complexity and protect your deliverability, even as carrier rules continue to evolve.**

Required Disclosures

The following information is required when collecting consent. Opt-in consent must be obtained through a selectable checkbox that is unchecked by default.

Opt-In Consent Requirements

Message Description
Brief explanation of the types of messages being sent

Message Frequency
Example: “4 messages per month” or “Message frequency may vary”

Fee Disclosure
“Message and data rates may apply”

Opt-Out Instructions
Example: “Text STOP to opt out at any time”

Help / Customer Care
Example: “Text HELP for help” or “Help at XXX-XXX-XXXX”

Privacy Policy Link
Must include SMS-specific language (T-Mobile requirement)

Terms & Conditions Link
Must describe SMS terms of service (T-Mobile requirement)

Opt-In Checkbox Requirements

- ✓ Consent must be collected via a single checkbox
- ✓ Checkbox must be unchecked by default
- ✓ Checkbox must not be a required field
- ✓ Consent language must be clear and explicit

Required Layout (Very Important)

- → The SMS disclosure text must appear directly under the phone number field
- → The opt-in checkbox must appear immediately beneath the disclosure
- → Twilio and carriers review layout as part of compliance

Example of a Compliant SMS Disclosure

Here is an example of a form that meets all Twilio and carrier requirements for collecting consent. On all forms, the following information must be added or updated near the phone number field, as Twilio requires this content to be grouped together. Underneath the phone number field, include an unchecked checkbox with the following label:

Phone Number:

☐ I agree to receive SMS messages from Mongoose University. Mongoose University utilizes text messages to send out important notifications and updates about opportunities from Mongoose University. Message frequency may vary. Message and data rates may apply. You can text STOP to opt out at any time. Text HELP for assistance. For more information visit our privacy policy and SMS policy.

The layout of this information is just as important for successful registration. The example below shows how Twilio and carriers expect the consent statement to appear directly beneath the phone number field. Here is a color-coded breakdown of how this is compliant:

Phone Number:

☐ I agree to receive SMS messages from Mongoose University. Mongoose University utilizes text messages to send out important notifications and updates about opportunities from Mongoose University. Message frequency may vary. Message and data rates may apply. You can text STOP to opt out at any time. Text HELP for assistance. For more information visit our privacy policy and SMS policy.

- The statement is directly under the phone number field
- The opt-in consent should be provided through a single selectable checkbox for the end-user, it should not be pre-selected, and this should not be a required field on the form
- Brief description of the types of messages being sent
- Service delivery frequency (“4 messages per month”, “Message frequency varies”, etc)
- Fee disclosure
- Customer care information (typically “Text HELP for help” or Help at XXX-XXX-XXXX
- Link to Privacy Policy describing how end user opt-in information will be used with specific SMS language in it AND/OR a link to SMS Terms and Conditions describing terms of service

Privacy Policy & SMS Terms Requirements

If a dedicated SMS policy does not exist, Twilio will accept a general privacy policy only if it includes an SMS-specific section.

Minimum Requirements for SMS Language in a Privacy Policy

SMS Section Must Clearly State:

- ✓ How SMS consent is collected
- ✓ What SMS messages are sent / how SMS is used
- ✓ How users can opt out
- ✓ That mobile numbers and SMS consent are not sold or shared for marketing

Omitting any of the following may result in campaign rejection.

SMS Terms & Conditions

Example reference: Mongoose University Sample SMS Terms & Conditions.

Purpose

The Office of Admissions sends text messages using an SMS messaging service to communicate with students about:

- Application and enrollment deadlines
- Application updates
- Event notifications
- Reminders

Opt-Out

- Text STOP to stop receiving messages
- Text HELP for assistance

Opt-In

- Users may opt in by submitting a form, creating an account, or updating communication preferences.
- SMS consent is optional
- Consent is not a condition of applying, enrolling, or participating
- Message frequency may vary

Privacy

- Mobile numbers and SMS consent are not sold or shared for marketing
- Information may only be shared with service providers to support message delivery