



Short code program application readiness checklist

Canada

Version number: 3.0

Effective date: November 2022

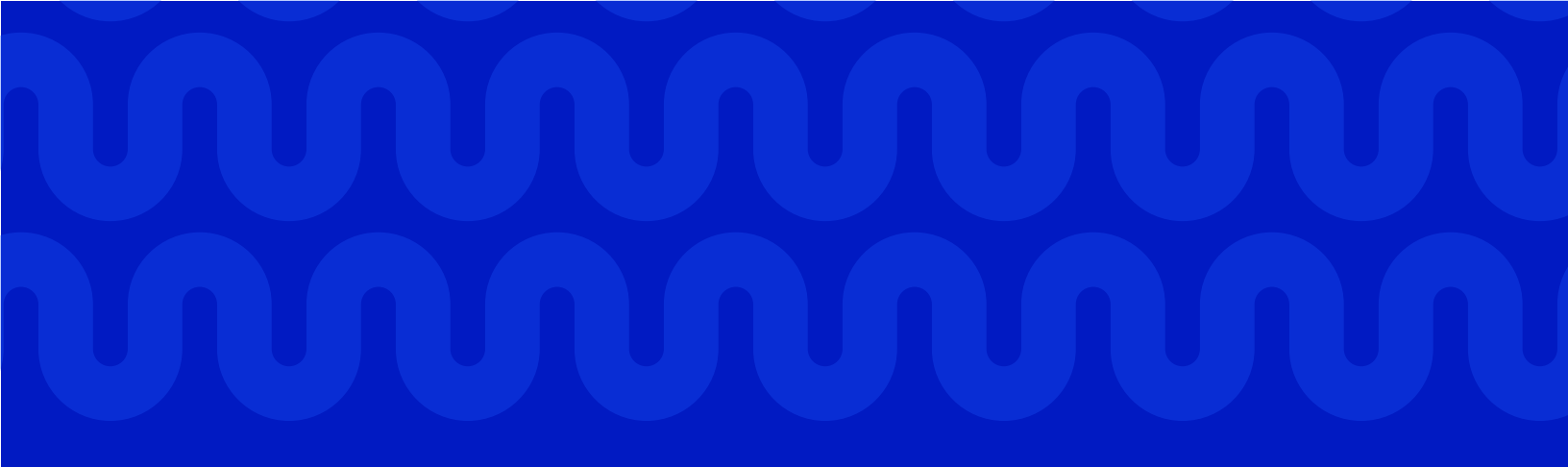


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Overview

The Short Code Program Application Readiness Checklist will assist you with preparing for the submission of your short code campaign with Telesign. It is recommended that the checklist is completed in its entirety for a seamless campaign submission process when completing the submission process online. This document outlines the information that is required from the carriers in order to approve and launch your short code program. Once your campaign has been submitted to the carriers, the expected timeframe for carrier approvals is 8 – 12 weeks. Customers are responsible for the short code fees upon completion and submission of the program application to Telesign. Please be advised that sweepstakes short code campaigns are currently not accepted by Telesign.

It is also recommended that the **Canada Short Code Guidelines** (found here <https://www.txt.ca/en/apply-for-a-short-code/>) are reviewed to ensure that your program is in alignment with SMS industry compliance requirements. Once a short code program is launched, it can be audited at any time by the mobile carriers, therefore compliance with current industry standards is required. Failure to comply with these guidelines can result in short code suspension and/or audits.

Please note that the guidelines provided are not intended to be used as a comprehensive guide or interpretation of compliance rules, laws or regulations that apply to text message programs in the Canada. Telesign recommends that customers seek legal counsel for guidance and questions relating to interpreting applicable legal and regulatory requirements that are specific to their business practices and use cases.

Company Details

Please provide us with some information about your company.

<input type="checkbox"/>	Company Name	Provide the name of the company applying for the short code
<input type="checkbox"/>	Company URL	Provide the company website
<input type="checkbox"/>	Point of Contact Name: First and Last Name is needed	Who is the main point of contact managing the short code submission?
<input type="checkbox"/>	Point of Contact Phone Number	What is the phone number of the person managing the short code submission?
<input type="checkbox"/>	Point of Contact Email	What is the email address of the person of contact managing the short code submission?

Short code vetting

Please provide some additional details about the short code that you are requesting and your short code submission history.

<input type="checkbox"/>	Short Code Request (Random or Vanity/Select)	Random & Vanity: 5-6 digit numbers are \$1500/month (includes lease and program filing fees). <i>Note: A \$1500 one-time carrier pass through fee applies, in addition to the monthly lease fees and program filing fees..</i>
<input type="checkbox"/>	Short Code Lease	Do you currently manage and pay for the lease of your own short code? If YES, please attach your SC lease receipt. YES or NO <i>Note: Short code program fees excluding lease fees are \$1000/month + a \$1500 one-time carrier fee.</i>
<input type="checkbox"/>	Vanity Short Code (if applicable)	If you have requested a vanity short code, please provide your preferred choice first. In case that selection is not available, please provide at least 2 more alternatives.
<input type="checkbox"/>	Estimated Total Messages	What is the expected total number of messages being sent to end-users monthly? What is the estimated ratio of Outbound and Inbound traffic (monthly)? What is the estimated number of subscribers x numbers of messages sent/received on a monthly basis, please also include the forecast methodology
<input type="checkbox"/>	Traffic Spikes Expected?	Do you expect to send bulk SMS text messages at once? If so, please provide expected frequency (daily, weekly or monthly)?

Campaign details

Please provide more details about the campaign you are launching. This information will be used when submitting to the carriers for approval.

<input type="checkbox"/>	Campaign Name	What will be the name of your campaign? Ex: 'Mobile Alerts' or '<Your Company Name> Security Alerts'
<input type="checkbox"/>	Campaign Description	How do you plan on using this short code? Please select one of the following options: <ul style="list-style-type: none"> Alerts & Notifications Appointment & Event Reminders Two-Factor Authentication One-Time Passcodes
<input type="checkbox"/>	Message Frequency	How often will users receive a message for this Campaign? Ex: 2x/week, 8 messages/month, 1 messages per inquiry or 'message frequency may vary'
<input type="checkbox"/>	Campaign URL	If available, please provide the domain where users will interact with your campaign or short code. Ex: http://verifyalerts.com/
<input type="checkbox"/>	Callback Topic	Provide the callback topic where you would like the SMS MOs for your short code forwarded? If you don't have the call back topic, put 'TBD'. Ex: http://verifyalerts.com/callback/stop <i>The callback topic is required to receive all MOs, specifically STOP opt-out requests from your users.</i>
<input type="checkbox"/>	Customer Care Email/ Phone	How will end-users contact you for assistance with your short code program? *Brand Contact Email: must be an actual person that represents the brand
<input type="checkbox"/>	Terms of Service URL	Provide the link to the Terms of Service Page
<input type="checkbox"/>	Privacy Policy URL	Provide the link to the Privacy Policy Page
<input type="checkbox"/>	Campaign Launch Date	When do you expect your campaign to launch?
<input type="checkbox"/>	Campaign Testing Date	When do you expect to begin testing your campaign? (if applicable)

Call-to-action

Please provide more details about how users will opt-in and interact with your campaign.

<input type="checkbox"/>	Opt-In Process	<p>How will users opt-in or begin receiving text messages from your short code program?</p> <p>Keyword Opt-in? YES or NO YES: Attach the keyword opt-in flow.</p> <p>Web Opt-in? YES or NO YES: Attach screen shots of the web opt in flow.</p>
<input type="checkbox"/>	CWTA Compliant Opt-In	<p>Review the CWTA Guidelines to confirm your opt-in method is compliant https://www.txt.ca/en/apply-for-a-short-code/</p>
<input type="checkbox"/>	Std Msg & Data Rates May Apply Disclosure	<p>Include 'Std Msg and Data Rates May Apply' disclosure in the short code program's call-to-action.</p>
<input type="checkbox"/>	Message frequency disclosure	<p>1 msgs/request, Msg freq may vary</p>
<input type="checkbox"/>	Terms of Service Disclosure	<p>Include the 'Terms of Service' hyperlink on the short code program's call-to-action page.</p>
<input type="checkbox"/>	Privacy Policy Disclosure	<p>Include 'Privacy Policy' hyperlink on the short code program's call-to-action page.</p>

Message flow checklist

To ensure that your message content is compliant, please review the following message flow checklist to ensure you have all the required disclosures within your messages.

<p>Opt-in confirmation message: Requirements for a recurring messaging campaign.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Campaign Name and Campaign Description <input type="checkbox"/> "Std Msg&Data Rates May Apply" disclosure <input type="checkbox"/> Message Frequency (Ex: 2msgs/wk, 8msg/mo) <input type="checkbox"/> Reply HELP for Help <input type="checkbox"/> Reply STOP to cancel <input type="checkbox"/> Customer Support Info (email, phone, or URL) 	<p>SAMPLE: 160 character maximum</p> <p>"Welcome to [Campaign Name/Description]: [Message Frequency]. Reply HELP for help, STOP to cancel. Std Msg and Data Rates May Apply. [Customer Support Info]"</p>
<p>HELP (AIDE) message: Requirements for the HELP keyword response.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Campaign Name and Campaign Description <input type="checkbox"/> "Std Msg&Data Rates May Apply" disclosure <input type="checkbox"/> Message Frequency (Ex: 2msgs/wk, 8msg/mo) <input type="checkbox"/> Reply STOP to cancel <input type="checkbox"/> Customer Support Info (email, phone, or URL) 	<p>SAMPLE: 140 characters maximum</p> <p>It is now required we respond to AIDE in French: <AIDE>: This keyword will return the same information as <HELP> but the one (1) MT response should be in French.</p>
<p>STOP (ARRET) message: Requirements for the STOP keyword response.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Campaign Name and Campaign Description <input type="checkbox"/> Confirmation of message termination 	<p>SAMPLE: 140 characters maximum</p> <p>It is now required we respond to ARRET in French <ARRET>: This keyword will return the same information and have the same effect as <STOP> but the one (1) MT response should be in French.</p>
<p>INFO message: The response should include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Content provider company name <input type="checkbox"/> Customer service contact 	<p>The response should be bilingual [Campaign Name/Description customer support contact (phone/email) in both English and French</p>

Glossary of terms

Short code	A short code is a 5- or 6-digit number that can send and receive SMS (and MMS) to and from mobile phones.
Audit	Auditors check program advertisements and service messages against lists of violations to identify non-compliance.
Campaign Name / Description	Consistent program names and product descriptions in advertisements and messages help consumers connect all parts of the short code experience. All short code programs are required to disclose program names, product description, or both in service messages, on the call-to-action, and in the terms and conditions. The program name is the sponsor of the short code program, often the brand name or company name associated with the short code. The product description describes the product advertised by the program.
Customer Support Contact Info	Customer care contact information must be clear and readily available to help users understand program details as well as their status with the program. Customer care information should result in users' receiving help. Programs must always respond to customer care requests, regardless of whether the requestor is subscribed to the program.
Terms of Service URL	Complete terms and conditions should include customer care contact information, complete opt-out instructions, a recurring message disclosure, a product description, and a program (brand) name.
Privacy Policy URL	Service providers are responsible for protecting the privacy of user information and must comply with applicable privacy law. Service providers should maintain a privacy policy for all programs and make it accessible from the initial call-to-action. When a privacy policy link is displayed, it should be labeled clearly.
Call-to-Action	The primary purpose of disclosures is to ensure a consumer consents to receive a text message and understands the nature of the program.
Message Flow	Recurring-messages programs confirming opt-in with a single text message MUST state explicitly to which program the user enrolled and provide clear opt-out instructions in the Opt-In Confirmation MT. Although single-message programs are not required to display HELP and STOP keywords, they should support HELP and STOP commands
Opt-In Confirmation Message	Short code programs should send a single opt-in confirmation message displaying information verifying the customer's enrollment in the identified program and describing how to opt out. The opt-in confirmation message must be delivered immediately after the customer opts into the short code program. Additionally, opt-in messages must contain the program (brand) name or product description, customer care contact information, product quantity or recurring-messages program disclosure, and the "message and data rates may apply" disclosure.

Opt-In Methods	<p>Messages must be delivered to a consumer's mobile device only after the user has opted in to receive them. A user might indicate interest in a program in several ways. For example, a user might:</p> <ul style="list-style-type: none"> · Enter a phone number online, · Click a button on a mobile webpage, · Send an MO message containing an advertising keyword
Message Frequency	<p>The Message Frequency of recurring messages must be included in the Call-to-Action, Terms and Conditions, Opt-In Confirmation MT, and HELP response. Ex/ 1msg/wk, 4msgs/mo, Msg Freq May Vary</p>
Message & Data Rates May Apply	<p>The 'Message and Data Rates May Apply' disclosure must be included in the Call-to-Action, Terms and Conditions, Opt-In Confirmation MT, and HELP response.</p>
HELP Response	<p>Message service providers send a HELP message after customers text the HELP keyword. Short codes should reply with additional contact information to customer requests for help.</p>
STOP/Opt-Out Response	<p>Message service providers send an opt-out message after customers text the STOP keyword. The opt-out message confirms that the customer has been opted out of the program.</p>