CardSmart Training

EAB Navigate Text-Messaging Policy at the University of Louisville

The University of Louisville values communicating with students promptly and efficiently using communication processes which engage students, without overwhelming them. The EAB Navigate platform (CardSmart) offers text-messaging functionality that can be utilized for staff members to communicate with students.

Students will only receive text messages on the phone number that they identified as a TEXT phone type in PeopleSoft or other directory information. Students will have the ability to opt out of receiving text messages by replying STOP. Students who have opted-out of receiving text-messages will receive messages to their university email address.

Text messages should be sent to no more than 100 students at a time to ensure that students can respond to the text message. As configured in the Navigate platform, the content of text messages may not exceed 160 characters. The staff member who initiates text messages, individually or at scale, is responsible for the content of their messages and for managing responses.

Automatic Text Messages – For all appointments made in CardSmart, students will automatically receive a reminder of their appointment details via text message 2 hours prior to their appointment.

Approved User-Generated Mass Text Messages:

1) **Campaign Reminders** – campaigns can only be set-up via email. However, once an appointment campaign is launched, advisors may text non-responsive students and refer them to their email where they can schedule their appointment on-line.

Staff Role: Academic Advisors; Timing of Message: During appointment campaigns

2) **Registration Reminders** – A month before the semester is scheduled to begin, students who are eligible to register but have not yet done so will receive an e-mail communication with instructions and information. They will also receive a text message follow-up.

Staff Role: Student Success Coordinators; Timing of Message: Month before the start of a new term

3) **Graduation Application –** Students eligible to graduate will receive a text-message to remind them to apply for their degree via ULink.

Staff Role: Academic Advisors; Timing of Message: Two months before the commencement date

4) **Registration Holds** – Students with registration holds for specific items that must be addressed for continued enrollment will receive a text message alerting them to the requirement.

Staff Role: Student Success Coordinators (except adv); Timing of message: As appropriate - Before registration opens & before the upcoming term

Mass text messaging should not be used beyond the messaging outlined above. Other mission-critical text messages may be sent as determined by the EAB Leadership Team.

When sending text messages users should:

Always

- Identify themselves in the text message
- Be responsive to any and all replies
- Proof-read messages for errors before sending
- Double check filters in search for the intended recipients
- Send to 100 student or less at a time
- Use professional judgement in content

Never

- Include personal/sensitive information such as GPA or Academic Status
- Send text messages at odd hours
- Send mass text messages outside of the allowed messages in the policy
- Use text messaging for voluntary programs such as campus event attendance
- Send to over 100 students at a time (since students won't be able to respond)

Please be aware SMS messages are NOT password protected by the university like emails

Text message activity will periodically be reviewed to check compliance and to ensure that student contact information is being utilized in an ethical manner. Users who send mass text messages for purposes not listed in the policy could have their ability to send text messages through CardSmart suspended.

Please send any questions or concerns to the CardSmart service account- cardsmart@louisville.edu

Standard text messaging rates from the recipient's wireless carrier may apply.
We reserve the right to revise this policy at any time upon review of messaging activity and student response.

Last Updated: May 9th, 2023