



Bay Advisor Text Messaging Information and Format Guidelines

As of 9/30/2020

Important Information

- Text messages are limited to 160 characters or less.
- All text messages sent via the Bay Advisor are saved to a student's conversation record and are viewable by any user with the appropriate permission. All text messages sent are also saved to the users conversation record and are viewable by select users with the appropriate permission.
- Bay Advisor sends the text message to the cell phone number in a students PeopleSoft file. This information is gathered during the application process and can be inaccurate.
- Text messages sent to less than 100 recipients come from a random 10 digit number or long code. Text messages sent to 100 or more recipients come from one of three generic six-digit codes also known as a short code. Text messages sent from Bay Advisor are not from your personal number.
- Unique to Long Codes (less than 100 recipients):
 - Students can reply to text messages for up to 90 days. If there is any text response in the chain, the 90 day clock resets. The user that initiated the text can **only** respond through the Bay Advisor as either a text or email. The sender will also receive the message in their campus email, but will receive an error if they respond to it there.
- Unique to Short Codes (100 or more recipients):
 - Recipients cannot respond to text messages. If they do, they will receive a message saying it was not received.
 - Automated text message appointment reminders are sent via Short Code.
 - Students can opt-out. If they do, all short code messages will be sent as an email.

The Bay Advisor Leadership requests that any user who utilizes the texting feature adhere to the following format guidelines.

Text Message Format Guidelines

- All text messages must include a greeting to include name of individual/office sending text message.
- Text messages can be used to acknowledge receipt of a document.
- Text messages can be used to support other forms of communication.
- Text messages can be used as a follow-up tool after an appointment to confirm they took recommended action.
- Text messages should be used sparingly and not as a replacement for email.
- Text messages can be used to encourage students to visit or schedule an appointment with an advisor.
- Text messages can be used for nudging a student into a previously discussed action.
- Text messages can be used for congratulating student achievements.
- Text messages should not be used to market student or campus events.
- Text messages should not contain sensitive academic information.



Examples of Properly Formatted Text Messages

When possible, include a greeting AND ALWAYS name of individual/office sending message:	<ul style="list-style-type: none"> • Hi David, this is the GE office... • Hi Sarah, your petition has been approved. Dean Scharburg
Acknowledging receipt of a document:	<ul style="list-style-type: none"> • Hi Carlos, this is CBE Advising Office letting you know that we received your major change form and it has been processed
To support other forms of communication:	<ul style="list-style-type: none"> • Hi Mark, please respond to my email sent to your horizon email account on 9/1. I need your response by tomorrow. Thank you, Sam, FASST Advisor
To encourage students to schedule an appointment:	<ul style="list-style-type: none"> • We noticed you have not made an advising appointment in over a year, we strongly encourage you to schedule one soon. ~ HRT&KIN Advising
To nudge a student into a previously discussed action:	<ul style="list-style-type: none"> • Andrea, this is Bill your FASST advisor, please remember to complete your withdraw form and submit it via BaySync. Respond to this text when complete.
Congratulating a student achievement:	<ul style="list-style-type: none"> • CONGRATULATIONS Madeline!!! I am so proud of you for getting the internship. > Steve, Major Advisor
Follow up from an appointment:	<ul style="list-style-type: none"> • Hi Selem, it was good to see you yesterday. Did you load the classes discussed into your shopping cart for spring enrollment? Let me know. Natalia

Please note, any user’s ability to text students can be revoked by Bay Advisor administrators. Please make sure to adhere to the above guidelines and use your best professional judgement when sending a text message. If you have any questions or concerns, please contact Bill Irwin at bill.irwin@csueastbay.edu