IntegrityCONNECT Permission To Contact & Subscription Management — Quick Reference Guide

What is this?

A built-in system to help you **stay compliant when contacting clients** by managing:

- Permission to Contact (PTC)
- Communication preferences (email, SMS, calls)

PTC Statuses (What to look for)

Each client now has a PTC status:

- **Consent Required** — No permission yet
- **Active** — You can contact the client
- **About to Expire** — 90 days before expiration
- **Expired** — Consent must be reacquired

PTC is valid for **12 months** from when consent is obtained.

How to Get Consent

Option 1: Send Consent Form

- Click **PTC** button on the client profile
- Send form to the client
- Client reviews and submits ▯ PTC becomes Active

Option 2: Self-Attest (when allowed)

You can self-attest consent when:

- Importing contacts (bulk upload)
- Creating campaigns
- No email is available
- Client has “Consent Required”

▶ You must confirm you have permission to contact!

Bulk Import

- Self-attestation applies to **all imported contacts**

When You Can’t Contact a Client

You **cannot send campaigns** if:

- Client has **opted out**
- Contact appears as **grayed out**

Integrity mobile app

On the Integrity mobile app, you can:

- ✅ View PTC status
- ✅ Send consent forms

But cannot:

- ❌ Toggle opt-ins/outs
- ❌ Self-attest

If a Client Needs to Opt Back In

Client can:

- Visit your Agent-personalized Webpage
- Submit the contact form again
- PTC and communication permissions are reactivated