

# SCRUBBING YOUR DATA FILE ON THE DO NOT SOLICIT SCRUBBING TOOL JOB AID

**Purpose:** This job aid will help you upload and scrub your data file containing addresses and/or phone numbers using the Do Not Solicit Scrubbing Tool.

**When:** Use this job aid whenever you need to upload and scrub your data file containing addresses and/or phone numbers.

**IMPORTANT:** It is important that you keep your data file as current as possible to comply with the Allstate Corporate Do Not Call Policy and the Allstate Do Not Call list as well as the state and federal lists included in the Allstate Do Not Call list. The Allstate Do Not Call list is updated regularly, so be aware that results are considered scrubbed from Monday through Saturday during the week they were originally scrubbed. Violation of state and federal telemarketing rules can result in significant fines and penalties so any telephone solicitation should be as close to the time of the scrub as possible to ensure the most accurate scrubbing data available.

**Additional Note:** Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live, 10-digit manually dialed call to a wireless number is not subject to these rules. **The Do Not Solicit tool will identify wireless numbers (including VoIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.**

**Materials:** You will need this job aid and at least Internet Explorer 7.0.

**Note:** This job aid starts with a "Quick Steps" section listing the steps required to complete the task(s). The remainder of the job aid provides detailed descriptions and graphics for each step.

## Quick Steps (Comprehensive Steps Follow)

<b>1</b>	Navigate to the <a href="#">Do Not Solicit Scrubbing Tool Home Page</a> with Internet Explorer. (A link to the DNS Scrubbing Tool's Home Page also appears on Gateway.)
<b>2</b>	Click the <b>File Scrub</b> tab or the <b>Scrub your data file (against Phone &amp; Address) for DNS Indicator</b> hyperlink on the Home Page.
<b>3</b>	<p><b>Ensure your file is properly formatted before uploading.</b> See the Important Note on <b>Page 3</b> that <b>only Comma Delimited (.CSV) files can be scrubbed. All spaces must be removed from file names prior to submission. Spaces in filenames will be removed and replaced by periods.</b></p> <p>Refer to both the <i>File Scrub Upload Directions</i> on the File Scrub tab and to the <i>File Scrub Tip Sheet</i> which can be found on the Help tab in the scrubbing tool.</p> <p style="color: red;"><b>DNS results are not returned in the order records are submitted; they are returned in the order a match is found.</b> If your data needs to be in a specific order, <b>sort and save a master file in Excel</b> before saving it to .CSV format. Then <b>sort the results file in the same order</b> as the master file and save to Excel.</p>
<b>4</b>	Click the <b>Browse</b> button to select the folder on your computer where your file is located.
<b>5</b>	Select the file you want to upload from the folder on your computer that you navigated to, then Click <b>Open</b> . Verify that the correct <b>file name</b> displays in the <i>Browse</i> field.

**Quick Steps (Comprehensive Steps Follow)**

6	<p>Choose the type of file scrub you'd like and click that option's checkbox:</p> <ul style="list-style-type: none"> <li>• <b>Do Not Solicit only</b> (default)</li> <li>• <b>Do Not Solicit with customers, former customers and prospects identified</b></li> <li>• <b>FACTA</b> status of customers</li> </ul>
7	<p>The system should pre-fill your email address. If the <i>Email address</i> field is empty or incorrect, type your <b>email address</b> (YourEmail@allstate.com) in the <i>Email address</i> field.</p>
8	<p>Click <b>Submit</b> to upload the file. A <b>note</b> will appear on the bottom of the page informing you <b>the file is at a certain position in the queue. Your scrub may be completed within the hour or many hours later, depending on the number of files in the queue that are ahead of your file.</b></p> <ul style="list-style-type: none"> <li>• <b>Please do not submit the same file multiple times per day if you are already waiting for results from your prior submission.</b></li> <li>• <b>Refresh your File Status screen often to ensure that you are seeing the most current scrubbing status.</b></li> <li>• <b>When the file scrub is complete, you will receive an email from DoNotSolicit@allstate.com.</b> See Step 9 to access the completed file.</li> <li>• If the system is temporarily unavailable, a <b>"System Unavailable"</b> message will appear.</li> </ul>
9	<p>To access the completed file, navigate to the <a href="#">Do Not Solicit Scrubbing Tool Home Page</a> with Internet Explorer. (A link to the DNS Scrubbing Tool's Home Page also appears on Gateway.) <b>Select the File Status tab.</b> The status of your file is shown. (<b>Tip:</b> Refresh your File Status screen often to ensure that you are seeing the most current scrubbing status.) If the File Status is <b>Complete</b>, click on the associated <b>Download File</b> link. Access the file as soon as possible because the system will delete the file on the Sunday after your scrub was completed.</p> <p>In the File Download dialog box, click on either the <b>Open</b> or <b>Save</b> button.</p> <ul style="list-style-type: none"> <li>• If <b>Open</b> is chosen, go to Step 11 since you will be able to review your results immediately.</li> <li>• If <b>Save</b> is chosen, go to Step 10.</li> </ul>
10	<p>If you opted to first <b>Save</b> your file, select a location on your computer from the <i>Save in</i> drop-down menu to save the document.</p> <p>In the <i>File name</i> field, type a <b>file name</b>.</p> <p>In the <i>Save as type</i> drop-down menu, select <b>Comma Separated Values (*.CSV)</b>. Click <b>Save</b>.</p> <p><b>NOTE: The file is returned in .CSV format.</b> You may later save the .CSV file as another file type such as an Excel workbook if you plan to format it (e.g. sort rows, move columns) and want to save the formatting, however the .CSV file type is the only file type available if <i>Save</i> was originally selected in the File Download dialog box.</p> <p>To view your results file, go to the location where you saved the file and open the file then see Step 11.</p>
11	<p>Review the results of the scrub. (See the <b>Notes about Scrub Results page</b> for more information about results.) <b>Compliance information (and compliance details specific to the type of scrub selected, when applicable)</b> will appear in the top portion of the results file <b>as well as the date through which the results are considered valid.</b></p> <ul style="list-style-type: none"> <li>• <b>NOTE: All file scrub results will include a column identifying wireless numbers (including VoIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an Automated Telephone Dialing System (ATDS). Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.</b></li> <li>• If you selected the <b>Identify customers, former customers, and prospects option</b>, an additional column will be added to the results indicating the customer status of each record.</li> <li>• If you selected the <b>FACTA</b> scrub, you will see a column reflecting the FACTA status of customers in addition to their DNS status.</li> </ul>

**Quick Steps (Comprehensive Steps Follow)**

**12** To save the opened .CSV file, select File then select a location on your computer from the *Save in* drop-down menu to save the document.

In the *File name* field, type a **file name**.

**Note:** The file is returned in .CSV format. **If you choose to reformat the file (e.g. sort rows, move columns) you must save the file as an Excel workbook or other non-CSV file to save the formatting changes you made, or they will be lost.** (*Saving a file as another file type is an option if you opted to **Open** the file in the File Download dialog box. If you opted to **Save** the file from the File Download dialog box, your only option is to first save the file in .CSV format then later save that file as another file type.*)

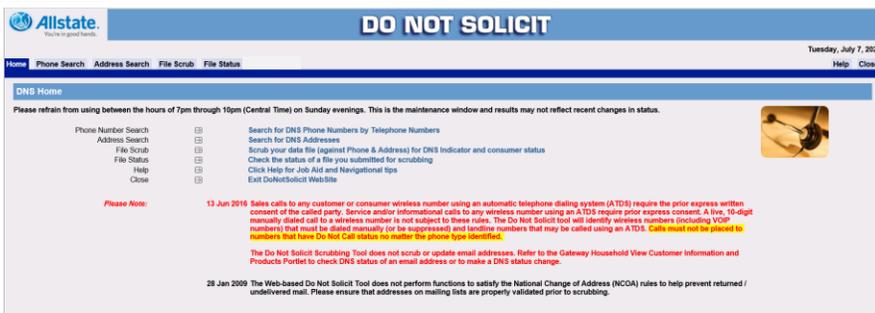
In the *Save as type* drop-down menu, select **Comma Delimited (\*.CSV)** if no formatting changes are needed. **Select Excel Workbook or another non-CSV file type to save any formatting changes you made** (e.g. sort rows, move columns). Click **Save**.

You are finished uploading and scrubbing this data file. To upload and scrub more files, return to Step 2.

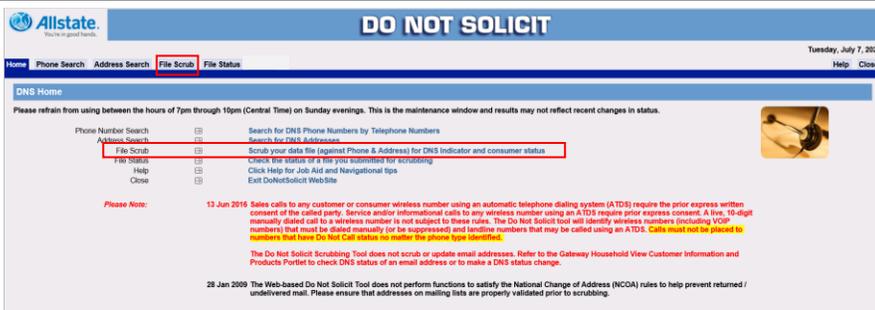
**Steps**

**Additional Detail**

- Navigate to the [Do Not Solicit Scrubbing Tool Home Page](#) with Internet Explorer. (A link to the DNS Scrubbing Tool Home Page also appears on Gateway.)



- Click the **File Scrub** tab or the **Scrub your data file (against Phone & Address)** for DNS Indicator hyperlink on the Home Page.



The **File Scrub** page displays.

**Steps**

**Additional Detail**

3. **Ensure your file is properly formatted before uploading.** See the Important Notes below.

**IMPORTANT NOTES:**

**All spaces must be removed from file names prior to submission. Spaces in filenames will be removed and replaced by periods.**

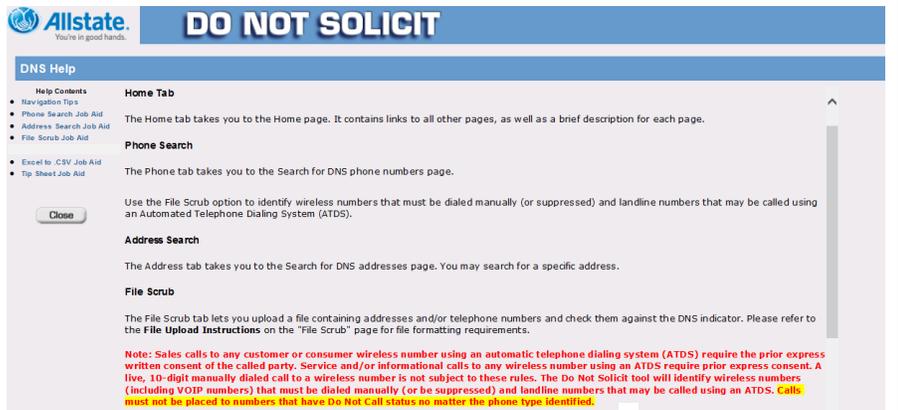
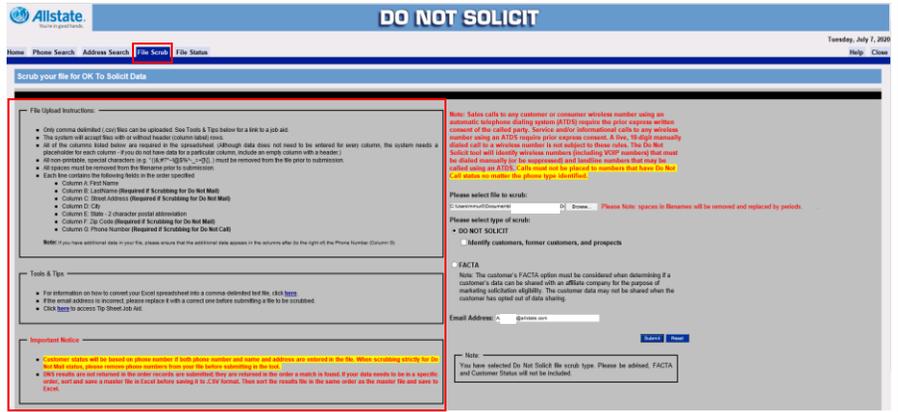
**Only Comma Delimited files (those with a .CSV extension) can be scrubbed.**

(Example: *leads.CSV*) If your file is in an Excel format (*leads.XLS*), refer to the **Converting an Excel File to a .CSV File Job Aid** which can be accessed via the link on the Help tab of the scrubbing tool. After converting the Excel file to a .CSV file, return to this step.

**DNS results are not returned in the order records are submitted; they are returned in the order a match is found.**

If your data needs to be in a specific order, **sort and save a master file in Excel** before saving it to .CSV format. Then **sort the results file in the same order** as the master file and save to Excel.

Refer to both the **File Scrub Upload Directions** on the **File Scrub** tab and to the **File Scrub Tip Sheet** which can be found on the **Help** tab in the scrubbing tool.



### Steps

- Click the **Browse** button to select the folder on your computer where your file is located.

### Additional Detail

- Select the file you want to upload from the folder on your computer that you navigated to, then Click **Open**.

The file name will appear in the **Browse** field. Verify it is the file you intended to scrub.

Steps	Additional Detail
<p>6. Choose the type of file scrub you'd like and click that option's checkbox:</p> <ul style="list-style-type: none"> <li>• <b>Do Not Solicit only</b> (default)</li> <li>• <b>Do Not Solicit with customers, former customers and prospects identified</b> (If you select this option your file must have complete data in Columns A-F.)</li> <li>• <b>FACTA status of customers</b> (<b>Note:</b> The FACTA option should not be used when scrubbing prospect lists for Do Not Solicit status. This option only provides Do Not Solicit status for customers.)</li> </ul>	<p><b>Note:</b> Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live, 10-digit manually dialed call to a wireless number is not subject to these rules. The Do Not Solicit tool will identify wireless numbers (including VOIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.</p> <p>Please select file to scrub:</p> <p>crubs - misc\Scrubbing - Lists for\demo\SamplefileAuto.csv Browse...</p> <p>Please select type of scrub:</p> <p><input checked="" type="radio"/> <b>DO NOT SOLICIT</b></p> <p><input type="checkbox"/> Identify customers, former customers, and prospects</p> <p><input type="radio"/> <b>FACTA</b></p> <p>Note: The customer's FACTA option must be considered when determining if a customer's data can be shared with an affiliate company for the purpose of marketing solicitation eligibility. The customer data may not be shared when the customer has opted out of data sharing.</p>
<p>7. The system should pre-fill your email address. If the <b>Email address</b> field is empty or incorrect, type your email address in the <b>Email address</b> field. (YourEmail@allstate.com)</p>	<p><b>Note:</b> Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live, 10-digit manually dialed call to a wireless number is not subject to these rules. The Do Not Solicit tool will identify wireless numbers (including VOIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.</p> <p>Please select file to scrub:</p> <p>crubs - misc\Scrubbing - Lists for\demo\SamplefileAuto.csv Browse...</p> <p>Please select type of scrub:</p> <p><input checked="" type="radio"/> <b>DO NOT SOLICIT</b></p> <p><input type="checkbox"/> Identify customers, former customers, and prospects</p> <p><input type="radio"/> <b>FACTA</b></p> <p>Note: The customer's FACTA option must be considered when determining if a customer's data can be shared with an affiliate company for the purpose of marketing solicitation eligibility. The customer data may not be shared when the customer has opted out of data sharing.</p> <p><b>Email Address:</b> Scrubber@allstate.com x</p> <p>Submit Reset</p> <p>Note: You have selected Do Not Solicit file scrub type. Please be advised, FACTA and Customer Status will not be included.</p>

**Steps**

8. Click **Submit** to upload the file.

A **note** will appear on the bottom of the page informing you **the file is at a certain position in the queue.**

- **Your scrub may be completed within the hour or many hours later, depending on the number of files in the queue that are ahead of your file.**
- **Do not submit the same file multiple times per day if you are already waiting for results from your prior submission.**
- **Refresh your File Status screen often to ensure that you are seeing the most current scrubbing status.**

When the file scrub is complete, you will receive an email from [DoNotSolicit@allstate.com](mailto:DoNotSolicit@allstate.com). (See sample on next page.)

- If the system is temporarily unavailable, a **“System Unavailable”** message will appear.

**Additional Detail**

**Note: Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live, 10-digit manually dialed call to a wireless number is not subject to these rules. The Do Not Solicit tool will identify wireless numbers (including VOIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.**

Please select file to scrub:

crubs - misc\Scrubbing - Lists for demos\SamplefileAuto.csv Browse...

Please select type of scrub:

DO NOT SOLICIT

Identify customers, former customers, and prospects

FACTA

Note: The customer's FACTA option must be considered when determining if a customer's data can be shared with an affiliate company for the purpose of marketing solicitation eligibility. The customer data may not be shared when the customer has opted out of data sharing.

Email Address:  X

Note:  
You have selected Do Not Solicit file scrub type. Please be advised, FACTA and Customer Status will not be included.

Please select file to scrub:

Browse...

Last Selected: C:\Users\...Documents\Data\Excel\Scrubs - misc\Scrubbing - Lists for demos\SamplefileAuto.csv

Please select type of scrub:

DO NOT SOLICIT

Identify customers, former customers, and prospects

FACTA

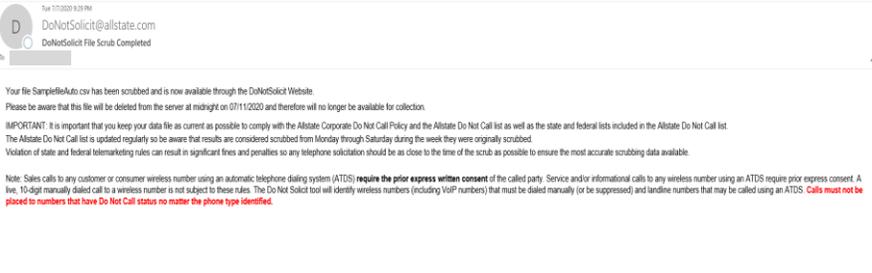
Note: The customer's FACTA option must be considered when determining if a customer's data can be shared with an affiliate company for the purpose of marketing solicitation eligibility. The customer data may not be shared when the customer has opted out of data sharing.

Email Address:

Note:  
You have selected Do Not Solicit file scrub type. Please be advised, FACTA and Customer Status will not be included.

**Your file is at position 1 in the queue.**

- Please do not submit the same file multiple times per day if you are already waiting for results from your prior submission.
- Refresh your File Status screen often to ensure that you are seeing the most current scrubbing status.

Steps	Additional Detail
<p>Sample of <b>email notification</b> that the file scrub is complete.</p> <p>See Step 9 to access the completed file.</p>	
<p>9. Navigate to the <a href="#">Do Not Solicit Scrubbing Tool Home Page</a> with Internet Explorer. (A link to the DNS Scrubbing Tool Home Page also appears on Gateway.)</p> <p><b>Select the File Status tab.</b></p> <p>The status of your file is shown. If the File Status is <b>Complete</b>, click on the associated <b>Download File</b> link.</p> <p><b>Remember to refresh your File Status screen often to ensure that you are seeing the most current scrubbing status.</b></p> <p>In the File Download dialog box, click on either the <b>Open</b> or <b>Save</b> button.</p> <ul style="list-style-type: none"> <li>• If <b>Open</b> is chosen, <b>go to Step 11</b> since you will be able to review your results immediately.</li> <li>• If <b>Save</b> is chosen, <b>go to Step 10</b>.</li> </ul> <p><b>Note:</b> Access the file as soon as possible because the system will delete the file on the Sunday after your scrub was completed.</p>	

**Steps**

**Additional Detail**

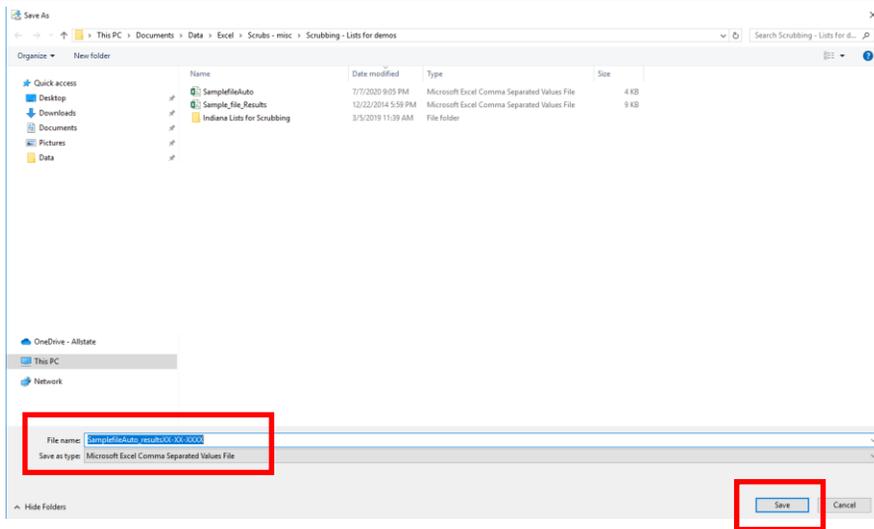
10. If you opted to first **Save** your file, select a location on your computer from the **Save as** drop-down menu to save the document.

In the *File name* field, type a **file name**.

In the *Save as type* drop-down menu, select **Comma Separated Values file (\*.CSV)**. Click **Save**.

**NOTE: The file is returned in .CSV format.** You may later save the .CSV file as another file type such as an Excel workbook **if you plan to format it (e.g. sort rows, move columns) and want to save the formatting**, however the .CSV file type is the only file type available if *Save* was originally selected in the File Download dialog box.

**To view your results file, go to the location where you saved the file, open the file, then see Step 11.**



**Steps**

**Additional Detail**

11. Review the results of the scrub. (See **Notes about Scrub Results** page for information on how the scrub results are displayed.)

**General compliance information (and compliance details specific to the type of scrub selected, when applicable)** will appear in the top portion of the results file. The **date through which the results are considered valid** will also appear.

**NOTE: All file scrub results will include a column identifying wireless numbers (including VoIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an Automated Telephone Dialing System (ATDS). Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.**

If you selected the *Identify customers, former customers, and prospects* option, an **additional column has been added to the results**, indicating the customer status of each record. See **last 3 pages** for more information about your results.

If you selected the **FACTA** scrub, you will see a column reflecting the FACTA status of customers in addition to their DNS status.

1	IMPORTANT: It is important that you keep your data file as current as possible to comply with the Allstate Corporate Do Not Call Policy and the Allstate Do Not Call list as well as the state and federal lists included in the Allstate Do Not Call list.									
2										
3										
4	The Allstate Do Not Call list is updated regularly so be aware that results are considered scrubbed from Monday through Saturday during the week they were originally scrubbed									
5										
6	Violation of state and federal telemarketing rules can result in significant fines and penalties so any telephone solicitation should be as close to the time of the scrub as possible to ensure the most accurate scrubbing data available.									
7										
8										
9	Note: Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live 10-digit manually dialed call to a wireless number is not subject to these rules. The Do Not Solicit tool will identify wireless numbers (including VoIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. CALLS MUST NOT BE PLACED TO NUMBERS THAT HAVE DO NOT CALL STATUS NO MATTER THE PHONE TYPE IDENTIFIED.									
10										
11										
12										
13										
14	DNS Indicator for Addresses and Phone Numbers as of 07/08/2020 at 21:28:13.									
15										
16	The scrub results are valid until 07/11/2020. All solicitations beyond this date require a new scrub.									
17										
18	First Name	Last Name	Street Address	City	State	Zip	Phone	Mail Status	Call Status	Wireless or Landline Phone Number
19	Jane	Doe	123 Main St	Atlanta	LA	71404	3182018000	OK to Mail	Do Not Call	Wireless - No Sales Calls Permitted
20	John	Smith	123 Anyplace Ave	Cheyenne	WY	82009	3076314000	OK to Mail	Do Not Call	Wireless - No Sales Calls Permitted
21	John	Doe	Po Box 123	Grambling	LA	71245	3182476000	OK to Mail	OK to Call	Wireless - Dial Manually
22	Jane	Smith	123 Anywhere Rd	Kentwood	LA	70444	9852298000	OK to Mail	Do Not Call	Landline - ATDS OK
23	John	Johns	123 Any St	North Richland Hills	TX	76180	8179875000	OK to Mail	Do Not Call	Wireless - No Sales Calls Permitted
24	Jane	Janes	123 Anyplace Court	Riverton	WY	82501	3076514000	OK to Mail	Do Not Call	Wireless - No Sales Calls Permitted
25	John	Anyname	123 Any RD	Scottsdale	AZ	85251	6027517000	OK to Mail	OK to Call	Wireless - Dial Manually
26	Jane	Anyone	123 Main Ave	Reading	PA	19604	6103743000	Do Not Mail	Do Not Call	Landline - ATDS OK
27										

## Steps

12. To **save** the **opened** .CSV file, select *File* then select a location on your computer from the *Save as* drop-down menu to save the document.

In the *File name* field, type a **file name**.

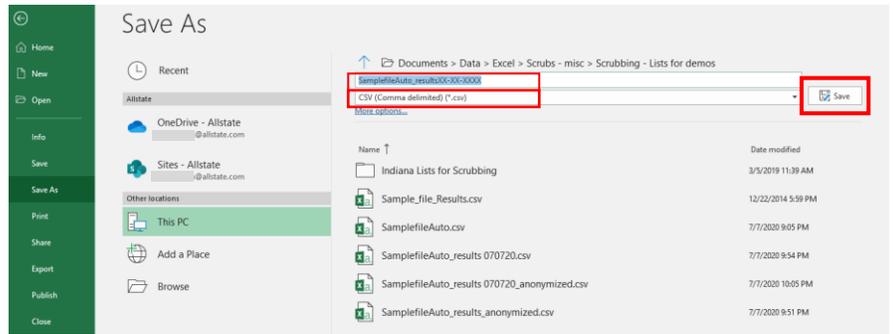
**Note: The file is returned in .CSV format. If you choose to reformat the file (e.g. sort rows, move columns) you must save the file as an Excel workbook or other non-CSV file from the *Save as type* drop-down menu to save the formatting changes you made, or they will be lost.**

*(Saving a file as another file type is an option if you opted to **Open** the file in the File Download dialog box. If you opted to **Save** the file from the File Download dialog box, your only option is to first save the file in .CSV format then later save that file as another file type.)*

In the *Save as type* drop-down menu, select **Comma Delimited (\*.CSV)** if no formatting changes are needed. **Select Excel Workbook or another non-CSV file type to save any formatting changes you made** (e.g. sort rows, move columns). Click **Save**.

You are now finished uploading and scrubbing this data file. To upload and scrub more files, return to Step 2.

## Additional Detail



## NOTES ABOUT SCRUB RESULTS

- If the result is “Invalid Phone” or “Invalid Address”, the information in the original file should be corrected and rescrubbed.
- If you received an email notification that your file did not scrub due to incorrect formatting, check the original file to make sure all columns are been accounted for and that you have placed your data in the proper columns. Refer to both the **File Scrub Upload Directions** on the File Scrub tab and to the **File Scrub Tip Sheet** found on the Help tab in the scrubbing tool.
- **Customer status will be based on phone number if both phone number and name and address are entered in the file.**

The following table explains the different statuses that are returned when scrubbing a file:

### DO NOT SOLICIT STATUS EXPLANATIONS

<b>Do Not Call</b>	Phone number entered was found on the DNC list; solicitation calls may not be placed to the number.
<b>Do Not Mail</b>	Name and address entered were found on the DNM list; solicitation mail may not be sent to the name and address.
<b>OK to Call</b>	Phone number entered was not found on the DNC list; solicitation calls may be placed to the number.
<b>OK to Mail</b>	Name and address entered were not found on the DNM list; solicitation mail may be sent to the name and address.
<b>No Phone</b>	No phone number was entered in the file or phone number was all characters and no numbers
<b>No Name</b>	No last name was entered in the file.
<b>No Address</b>	None of the required address data elements were entered in the file (last name, street address, state & zip code)
<b>Invalid Phone</b>	Phone number does not contain 10 digits or is otherwise invalid
<b>Invalid Address</b>	Not all of the required address data elements were entered or zip code was not numeric

### WIRELESS OR LANDLINE NUMBER EXPLANATIONS

<b>Wireless</b>	Phone number has been identified as a wireless (cell/mobile) number. Sales calls to any customer or consumer wireless number using an automatic telephone dialing system (ATDS) require the prior express written consent of the called party. Service and/or informational calls to any wireless number using an ATDS require prior express consent. A live, 10-digit manually dialed call to a wireless number is not subject to these rules. <b>The Do Not Solicit tool will identify wireless numbers (including VoIP numbers) that must be dialed manually (or be suppressed) and landline numbers that may be called using an ATDS. Calls must not be placed to numbers that have Do Not Call status no matter the phone type identified.</b>
<b>Landline</b>	Phone number has been identified as a landline number which may be called using an Automated Telephone Dialing System (ATDS). <b>Calls must not be placed to landline numbers with Do Not Call status.</b>
<b>No Phone</b>	No phone number was entered in the file or phone number was all characters and no numbers
<b>Invalid Phone</b>	Phone number does not contain 10 digits or is otherwise invalid.

### CUSTOMER IDENTIFICATION STATUS EXPLANATIONS

<b>Customer</b>	This individual currently has an established business relationship with Allstate
<b>Former Customer</b>	This individual does not currently have an established business relationship with Allstate, but has had such a relationship in the past
<b>Prospect</b>	This individual does not currently have an established business relationship with Allstate
<b>Claim Contact</b>	An individual with whom Allstate has no relationship other than via a claim (e.g. another insurance company's customer whose car was hit by an Allstate customer). <b>Allstate customers with an open claim are displayed as Customers, not Claim Contacts.</b> A Claim Contact's DNS status is by default DNC and DNM. They remain a Claim Contact unless they become a Customer (i.e. they purchase a policy) or a Prospect (i.e. they request a quote or their information is purchased from a third-party vendor), at which time the WBST will display any DNS preferences they have made.

FACTA STATUS EXPLANATIONS	
<b>OPT-IN</b>	The customer has opted in for data sharing. They will allow their customer data to be shared across affiliates for marketing solicitation eligibility purposes.
<b>OPT-OUT</b>	The customer has opted out from data sharing. They will not allow their customer data to be shared across affiliates for marketing solicitation eligibility purposes.
<b>OPT-OUT PERM</b>	The customer has a policy with a company that does not share data with affiliates and cannot opt in for data sharing
<b>OPT-OUT PEND</b>	A privacy letter notification had been sent but the customer has yet to respond with their option (30-day timeframe to do this)
<b>BLANK</b>	The customer had not been notified and had not opted in or out
<b>UNAVAILABLE</b>	The ICS (data management) system is down, so the customer's status is unknown
<b>NOT AVAILABLE</b>	Will always display for an <b>organization</b> , which has no option.

## UNDERSTANDING UNEXPECTED DO NOT CALL OR CUSTOMER STATUS RESULTS

### Issue

- Agency Gateway shows a Customer phone number as OK to Call and the same number for a Prospect or other non-customer shows DNS. The same phone number shows Do Not Call in the DNS Scrubbing Tool.
- Similar issue occurs when an **unexpected customer status** appears in file scrub results (e.g., Customer appearing as Prospect).

### Cause

- The phone number is listed on both a customer record and a non-customer record in different households, usually due to a change in phone number ownership.
- Call status of a phone number in Allstate's applications is determined by 1) the Do Not Call list(s) on which the number is registered (or the wireless or VoIP list on which a mobile number appears), **and** 2) the customer status (customer, former customer, prospect, claim contact) associated with the number.
  - A **non-customer** number should appear Do Not Call when it is on **any DNC list** (e.g., Federal, State, Allstate-specific) and/or is a **wireless or VoIP number in one of 5 restrictive states**.
  - A **customer** number should appear OK to Call when it is only on any non-Allstate-specific DNC list (e.g., Federal, State) due to the established business relationship (EBR) exemption to federal and state DNC rules and regulations. **See exception below.**
- Customer status is based on phone number** if both phone number and name and address are entered in the file submitted to the Scrubbing Tool.
- EXCEPTIONS:** Effective 6/23/19, the most restrictive call status (Do Not Call) and customer status (non-customer) are applied in the Scrubbing Tool when a number is listed on both a customer record and a non-customer record.

### Resolution/Workaround

- Conduct a phone search in Gateway and select the specific record of the individual you were planning to call. The DNS status in each Gateway record is specific to the number and the individual shown, however, **if multiple search results appear, the customer phone number was likely reassigned to the non-customer.**
  - In the customer record, hover over the DNS Details; if the number is on **any** non-Allstate-specific DNC list (e.g., Federal, State) or is wireless/VoIP in certain states, the number should be considered DNS even if the ADNS icon does not appear.
- When an **unexpected customer status** appears in scrubbing results, additional investigation should be performed via Gateway to determine if numbers are associated with customers, prospects, former customers and/or claim contacts. The most restrictive customer status will appear in the Scrubbing Tool when the phone number is associated with multiple individuals in different households.

### Note

- The most restrictive status changes have only been made in the Scrubbing Tool because it is heavily used for prospecting.
- This change is expected to impact 3% of numbers scrubbed.