

AAOS Concierge — SMS Consent Documentation

AAOS Concierge SMS Opt-In Policy Proof for Member-Initiated Informational Messaging

Purpose: This document describes the AAOS Concierge SMS consent model for toll-free number (+1 877-735-9125) registration and serves as Opt-In Policy Proof for member-initiated informational messaging. The document outlines the consent approach for members whose mobile numbers match AAOS records and for situations where a mobile number cannot be matched to an AAOS member record.

1. Program Overview

The American Academy of Orthopaedic Surgeons (AAOS) is a nonprofit professional medical association serving orthopaedic surgeons and allied health professionals.

The AAOS Concierge is an AI-powered customer-care messaging service that allows AAOS members to ask questions by SMS about membership status and dues, education and continuing medical education, event registration, and general AAOS services.

The SMS channel is intended for member support and informational/service-related responses only. AAOS does not use this toll-free number to send marketing, promotional, fundraising, or unsolicited outbound campaigns. AAOS does not sell or share mobile phone numbers with third parties. Message and data rates may apply, and consent is not a condition of purchase.

2. Twilio Policy Basis for This Consent Model

Twilio Messaging Policy reference: [Twilio Messaging Policy](#)

AAOS relies on two provisions of the Twilio Messaging Policy: (1) Consent for Messages Initiated by an Individual to You, under which an inbound message constitutes consent and proof of consent for the conversational exchange, and (2) Consent for Informational Messages, under which prior express consent applies to non-marketing informational messages related to an action or transaction a recipient has taken or agreed to. AAOS does not treat the inbound interaction as consent for ongoing recurring engagement, promotional messages, or unrelated outreach.

Policy section	Applicable policy language and AAOS application
Consent for Messages Initiated by an Individual to You	Twilio policy states that if an individual sends a message, the recipient may respond in an exchange with that individual, and the inbound message constitutes both consent and proof of consent. AAOS applies this only to the member-initiated conversational exchange.
Consent for Informational Messages	Twilio policy requires prior express consent for informational messages. AAOS applies this to non-marketing, service-related responses where a member has provided a mobile number in the AAOS membership relationship and initiates the SMS request.
Consent limitation	The member-initiated exchange does not authorize ongoing recurring engagement. AAOS will not use the SMS interaction for marketing, promotional, fundraising, or unrelated outbound campaigns.

3. Consent Model

3.1 Matched AAOS Member Number

- A member sends an inbound SMS to the AAOS Concierge toll-free number from a mobile number that matches the member's cell phone number on file in the AAOS Association Management System (AMS).
- AAOS uses the existing member relationship and the inbound SMS request as the basis for **prior express consent** for a direct informational response to that member's question.
- AAOS responds to the member's specific question and includes clear STOP and HELP instructions in the response.
- AAOS does not treat that exchange as consent for ongoing recurring messaging, marketing, promotions, fundraising, or unrelated outbound campaigns.

From	Sample message
Member	Hi
AAOS Concierge	Hi, I'm your AAOS Concierge. I can help with membership, education, events, and AAOS services. Reply: 1 - Membership & dues, 2 - Education & CME, 3 - Other Reply STOP at any time to stop receiving messages. Reply HELP for assistance.
Member	How many CME credits do I have?
AAOS Concierge	You currently have [XXXX] CME credits. Reply STOP at any time to stop receiving messages. Reply HELP for assistance.

3.2 Unmatched Number or Number Not on File

- If the inbound SMS comes from a number that does not match a mobile phone number on file for an AAOS member, AAOS does not provide member-specific informational content through SMS.
- AAOS sends a limited administrative response explaining that the sender must update the mobile phone number in their [AAOS profile](#) before using AAOS Concierge by SMS. Screenshot provided in Appendix C.
- The response includes STOP and HELP instructions and a link to the AAOS Member login page.
- After the limited response, AAOS sends no further messages unless the individual updates the profile and initiates a new SMS conversation from the updated mobile number.

Sample unmatched number response: AAOS Concierge is available by SMS for AAOS members using the mobile number on their AAOS profile. To use this service, please update your cell phone number in your AAOS profile: [\[AAOS Sign-in\]](#). Reply STOP at any time to stop receiving messages. Reply HELP for assistance.

4. Complete SMS Workflow for Twilio Opt-In Policy Proof

Step	Condition	Action	Consent/Proof Rationale
1	Inbound SMS received	AAOS receives an inbound message at +1 877-735-9125.	The individual initiated the SMS conversation.
2A	Number matches AAOS member mobile number on file	AAOS responds to the member's specific informational/service-related request.	Inbound message constitutes consent and proof of consent for the conversational exchange; existing member mobile number supports prior express consent for informational messages.

2B	Number does not match a member mobile number on file	AAOS sends a limited administrative response asking the sender to update the mobile number on the AAOS profile before using SMS Concierge.	No member-specific information is provided. No ongoing or recurring message program is initiated.
3	Every response	AAOS includes: “Reply STOP at any time to stop receiving messages. Reply HELP for assistance.”	Provides clear opt-out and help instructions.
4	After response	AAOS sends no unrelated or unsolicited follow-up texts.	The exchange is not used as consent for recurring, promotional, fundraising, or campaign messaging.

5. Twilio Opt-In Policy Proof Requirements and Where Addressed

Twilio item	How AAOS addresses it	Evidence in this document
Keyword customers text to opt in	No campaign keyword is required for members. The member initiates by sending any question or request to the AAOS Concierge toll-free number.	Sections 3.1 and 4
Short code or long code number to text	AAOS Concierge toll-free number: +1 877-735-9125.	Sections 1 and 4
Welcome message explaining the service	AAOS responds directly to the member’s request when the mobile number matches AAOS member records. The response is limited to AAOS Concierge service-related assistance.	Sections 3.1 and 4
Message frequency information	Messages are not recurring. Message frequency depends on member-initiated conversational exchanges. AAOS does not send unsolicited outbound or campaign messages.	Sections 1, 2, and 4
Standard message and data rate disclaimer	Message and data rates may apply. Consent is not a condition of purchase.	Section 1
HELP and STOP instructions	Every response includes: “Reply STOP at any time to stop receiving messages. Reply HELP for assistance.”	Sections 3.1, 3.2, 4, and 6
Terms and Privacy Policy	AAOS Terms of Use and Privacy Policy are provided in Section 7.	Section 7
Final confirmation	Not applicable to this member-initiated informational messaging model. For matched member numbers, the inbound message constitutes consent and proof of consent for the exchange. For unmatched numbers, no member-specific content is provided.	Sections 2, 3, and 4
Confirmation message	Not applicable because AAOS is not enrolling the member into a recurring text program through this flow. AAOS responds to the inbound request and includes STOP/HELP instructions.	Sections 2, 3, and 4

6. Opting Out and Getting Help

Members may opt out at any time by replying STOP to any message. Opt-out is enforced at the mobile carrier level, so all further messages to that number are blocked immediately. Messaging resumes only if the member sends START or UNSTOP from the same number. Replying HELP returns support information for the program. AAOS includes STOP and HELP instructions in all SMS responses.

Keyword	What happens
STOP	Unsubscribes the member from further SMS messages through the program. No further content is sent unless the member re-initiates consent as permitted by carrier/Twilio flows.
HELP	Returns AAOS Service Center contact details and assistance information.
START or UNSTOP	Allows messaging to resume only where permitted by carrier and Twilio opt-in/opt-out handling rules.

7. Terms, Privacy, and Contact

- **Terms of Use:** <https://www.aaos.org/about/meet-aaos/aaos-policies/organizational-policies/website-disclaimer/terms-of-use/>
- **Privacy Policy:** <https://www.aaos.org/about/meet-aaos/aaos-policies/organizational-policies/privacy-policy>
- **Contact AAOS:** <https://www.aaos.org/about/contact-the-aaos/>

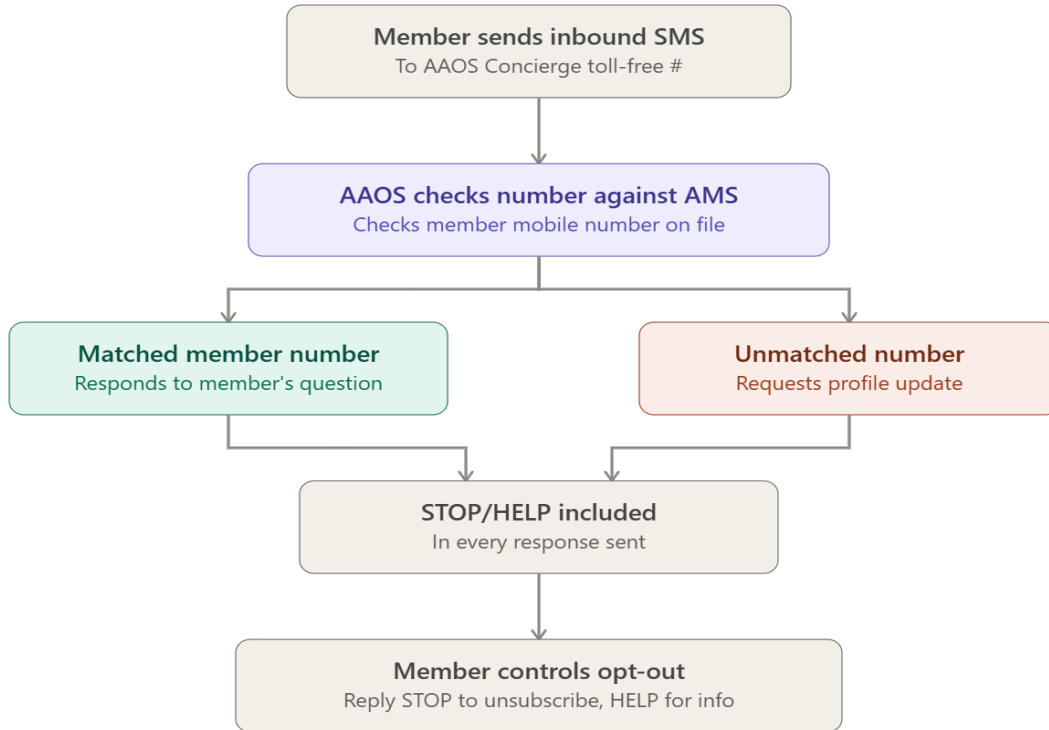
AAOS Service Center: 800-626-6726 (U.S.) or 847-823-7186 (outside the U.S.), Monday through Friday, 8:00 a.m. to 5:00 p.m. Central.

8. Submission Note

This document is intended to support Twilio Toll-Free Verification as the Opt-In Policy Proof for the AAOS Concierge SMS service. It documents the consent basis, member verification process, informational messaging workflow, HELP/STOP handling, and the controls in place to prevent unsolicited, promotional, or recurring messaging.

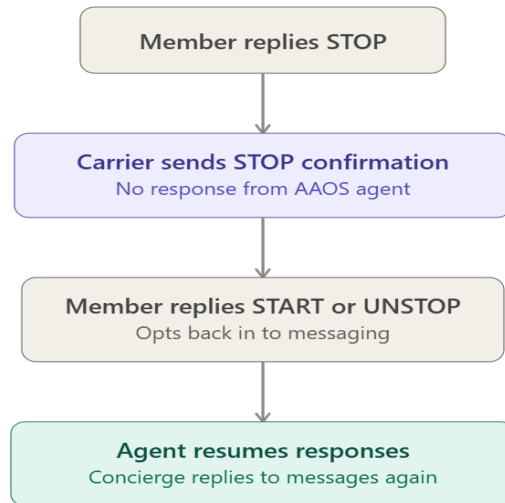
Appendix: A

SMS Message Work Flow



Appendix: B

SMS OPT-OUT Work Flow



Appendix: C

Account Profile Screenshot from AMS system

PHONES

Business Phone *

+1 ▾

222-123-1234

Mobile Phone

+1 ▾

224-111-1234

Home Phone

+1 ▾

1251251234

SOCIAL MEDIA

Facebook

LinkedIn

X (Twitter)

Instagram

+ Credentials (Click to View and Select)

Demographics

We strive to promote a culture of inclusivity that best serves the diversity of the AAOS community. To help inform our efforts, we are asking the following questions about gender, gender identity, sexual orientation, age, race, and ethnicity to ensure that we are advancing this goal. Your responses are anonymous and will be kept private and secure. Any data will only be reported in aggregate.