TCPA + TSR outbound checklist

For every outbound campaign, human agents or AI. Federal rules are the floor, and a stricter state rule wins for calls into that state. Updated for the FCC opt-out rules of November 25, 2026.

Before you dial

- [ ] Prior express written consent on file for every marketing lead you autodial, text or call with a prerecorded or AI voice: signed, with clear disclosures, and you can produce it on demand.
- [ ] List scrubbed against the National Do Not Call Registry using data no more than 31 days old.
- [ ] Internal do-not-call list under a written policy, applied across every campaign, with agents trained on it. A request stays in force for 5 years.
- [ ] Numbers checked against the FCC Reassigned Numbers Database for the date you got consent.
- [ ] Dialing hours set by the called party's state: 8am to 9pm federal; 8am to 8pm in Florida, Oklahoma and Maryland; 9am to 7pm and no Sundays in Pennsylvania.

Dialer settings

- [ ] Unanswered calls ring at least 15 seconds or 4 rings.
- [ ] Abandoned calls at 3% or less of live answers, measured per campaign over 30 days.
- [ ] An answered call reaches a live agent within 2 seconds of the person's greeting, or it counts as abandoned.
- [ ] Caller ID accurate, with a number people can call back.

On the call

- [ ] The agent gives their name, the seller's name, that the call is to sell, and what's on offer, before any pitch.
- [ ] Recording notice on calls into all-party-consent states.
- [ ] Approved script only. Under the TSR the script is a record you keep.
- [ ] "Stop calling" ends the pitch, and the number goes on the internal list.

After the call

- [ ] Opt-out method decided before November 25, 2026: one designated method disclosed on the call, or any reasonable means. Honor it within 10 business days.
- [ ] TSR call records kept for 5 years: telemarketer and seller, what was sold, consumer or business, outbound or inbound, prerecorded or not, calling and called numbers, date, time and duration, script used, caller ID sent, and how the call ended (answered, dropped, transferred, and to which number).
- [ ] Recordings kept and easy to find by number or lead ID, so you can show what was said on any call.
- [ ] Vendors and BPOs that dial for you held to this same list in the contract, with audit rights.

Klariqo connects to VICIdial and turns every recorded call into a Klariqo Call Record: the transcript, a digital signature and an independent timestamp, checkable at verify.klariqo.com. Your first 10,000 recorded calls are free: app.klariqo.com/onboarding