

Twilio Instructions

*Adapted by CHOP REDcap Team
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Note: Reach out to your REDCap admin team at redcap@email.chop.edu with questions at any point in this process. It's important to set this up correctly and your REDCap team can help.

- **What is it?** See *What Is Twilio?* *handout*.
 - Third party program
 - Send REDCap survey invitations as a text message or as a voice call
 - Secure to use, but be sensitive about PHI and sensitive information—think about who might have access to your participant's phone
- **How to set this up** (reach out to your REDcap admin team at redcap@email.chop.edu with questions at any point in this process)
 - Got to Twilio.com and create an account, funding it with a credit card (you won't be able to add a test account to a REDCap project)
 - Set up a payment method—you can use a credit card or PayPal
 - Buy a phone number; numbers are \$1/month
 - Turn off the Request Inspector feature
 - This feature stores data on Twilio's server and is not HIPAA compliant, so it must be turned off
 - Find it at this path:
 - Dashboard
 - Programmable voice
 - Settings
 - Request Inspector- Disable
 - Enable Twilio in REDCap on your Project Setup page
 - Enter your account SID and Authorization (found in Twilio account settings)
 - Enter the phone number (found on your Twilio dashboard)
- **Configuring Twilio**
 - A new box will appear on the Project Setup page allowing you to configure Twilio
 - There are two ways to send your survey—SMS messages and voice calls
 - SMS will send the participant a link, or if no PHI you can ask your REDCap admin to enable SMS conversations (survey questions AND responses sent by text)
 - Voice calls (rarely used) require your survey be multiple choice only
 - Choose a default invitation type
 - Designate a phone number field (similar to designating an email field for email invites)
 - Decide how to handle overlapping messages, if applicable

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- **Ways to send surveys out**
 - **Public survey link**
 - Send invitation to a list of phone numbers
 - Get a code the participants can send to your phone number for voice calls (rare)
 - **Participant list and Automated Survey Invitations**
 - Can enter phone number, email, or both
 - Select the participant's preference if applicable (SMS vs email)
 - You have the option to send out invitations via SMS, email, or the participant's preference