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)
  - Go 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