

Navigation Sheet – Twilio SMS

Compliance & Data Office

Research Support and External Relations



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Introduction

This guide explains how text messages can be used in REDCap to send out survey links to study participants.

As default, REDCap utilises email addresses to distribute survey links to participants. With the external service Twilio, survey links can also be sent out via SMS/text messaging. Twilio can be used as an alternative to emails or combined with emailing.

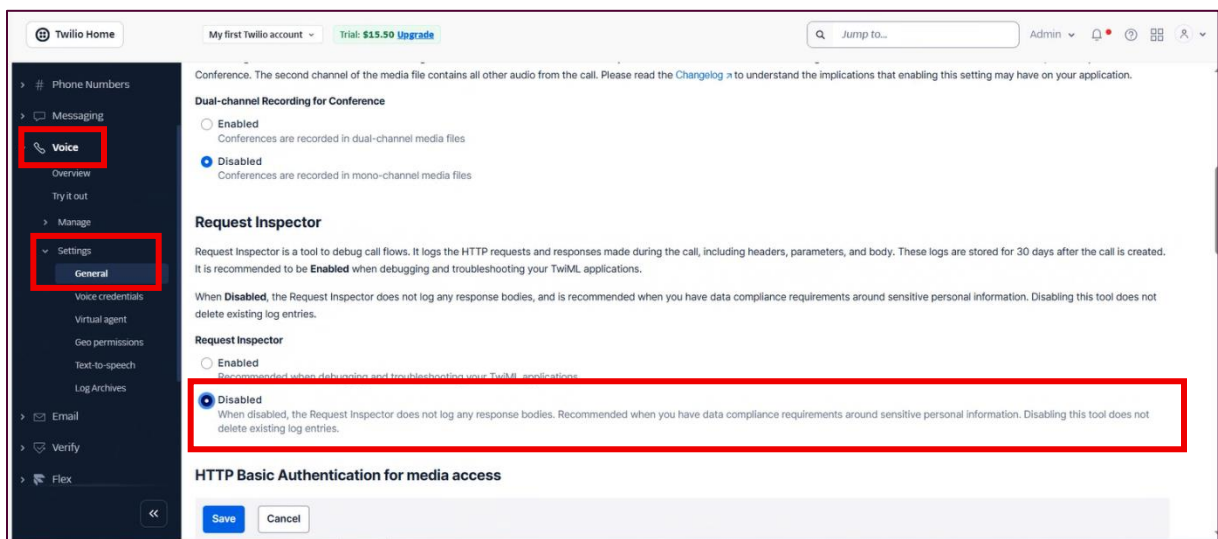
Note that Twilio is not a free service. Additionally, since Twilio is an external service based in the USA, extra care needs to be taken in informing participants about where and how their information – in this case phone number – is being stored.

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Important considerations when using Twilio in REDCap

1. You may use Twilio in your REDCap project for as long as the text messages only contain survey links and not entire surveys within the body of the SMS.
2. The function “Request Inspector” logs and stores all activity on Twilio servers. Therefore, this function must be turned off before you start using Twilio in your project. This can be done under *Voice – Settings – General* – set *Request Inspector* to “Disabled”:

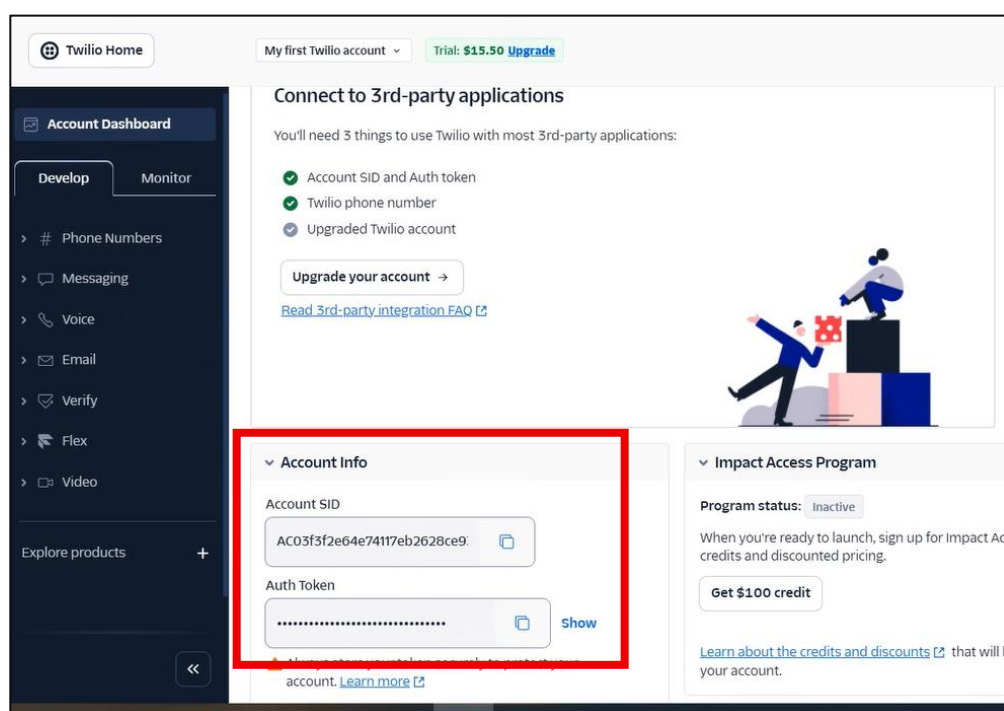


3. Each phone number can be used in only one REDCap project. If you want to use Twilio in an additional REDCap project, you will need to purchase a separate/new phone number.

How do I activate TwilioSMS in my project?

KI allows the use of Twilio as long as the Request Inspector function is turned off and as long as not the entire survey is conducted via SMS. Please follow the instructions below to activate the Twilio function in your project.

1. **Create a Twilio account** at www.twilio.com.
2. **Fund your Twilio account with money**, this is done via the Billing page in Twilio.
3. **Purchase a phone number** to be used for your REDCap project. This is done via the Numbers page in Twilio. **Note** that it is possible to purchase Swedish phone numbers.
4. Once a phone number has been purchased for the account, obtain the *Account SID* and *Auth Token* for your account. To find these, go to Main Account Settings – API Credentials in Twilio. **Send the Account SID, Auth Token and phone number along with your REDCap username, project title, and Project ID to your REDCap administrators** (redcap@ki.se) so that they can enable Twilio in your project. You may also choose an alphanumeric sender ID of up to 11 characters, which means the receiver will see the ID rather than just a phone number.



- Upon activation, REDCap will check with your Twilio account to confirm that all credentials are correct. Once activated, you can start using SMS within your REDCap project.

Overview of Twilio settings within REDCap

Configure Twilio's main settings on the *Project Setup* page



Not started

I'm done!

Twilio SMS and Voice Call services

To begin utilizing the Twilio SMS and Voice Call services in this project, click the 'Configure' button below. Once you have the Twilio service enabled, the Configuration popup will allow you to enable Twilio for 1) Alerts & Notifications and/or 2) surveys and survey invitations. If using Twilio for surveys, you will need to first designate an instrument as a survey in this REDCap project, after which you may click the 'analyze surveys' button to run an analysis on all your surveys to determine if they can be used as an SMS survey or as a Voice Call survey.

Go to [Configure settings](#) or [Analyze surveys for SMS & Voice Calls](#)

Once Twilio has been activated, a new settings menu appears on the *Project Setup* page. Here you can:

- ❖ Determine for which project features SMS will be used

Configuration Settings

Language and gender used for voice calls
Choose the language of your survey question text and/or alert message, and select the regional dialect in which you want it to be spoken (used in voice calls only).

English, United States (Male voice) ▼

Select the project features for which the telephony services will be enabled (e.g., surveys and/or alerts)

Surveys and survey invitations only (default) ▼

Surveys and survey invitations only (default)

Alerts & Notifications only

Survey-specific settings:

ALL: Surveys and survey invitations + Alerts & Notifications

- ❖ Choose your survey invitation type – this should be set to “Survey as webpage”

Survey-specific settings:

Choose survey invitation types to use
You may select several different ways for participants to be invited to take surveys and also the medium in which they will take the surveys

Survey as webpage
☒ Send survey invitation with survey link via SMS

Survey as voice call
☐ Send survey invitation with survey link via voice call

- ❖ Choose whether SMS is the default invitation preference for your project

Choose the default invitation preference for new survey participants
If new participants are created via data entry form (rather than via survey), then you may select their default survey invitation preference that will get assigned to them when their record is created. This is useful if you are creating records using a data import or on a data entry form, but wish to send survey invitations later for SMS surveys or voice call surveys, in which this setting automatically sets their invitation preference for you. Without this setting, you would otherwise have to set each participant's preference individually in the Participant List. Also, this value will be used as the pre-selected setting of the delivery preference on the Participant List page when adding new participants to the list.

SMS invitation (contains survey link) ▼ ?

Email invitation

SMS invitation (contains survey link)

SMS invitation (take survey via SMS conversation)

Voice call (participant receives voice call)

SMS invitation (contains phone number to call)

SMS invitation (reply via SMS to receive voice call)

- ❖ You can set up a multiple-choice field in one of your instruments where participants can choose how they want to be contacted (i.e. SMS or email) and then activate that field here in the settings

 Control each participant's invitation preference using a multiple choice field	--- map the invitation preference to a field --- ▾
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- ❖ You can designate a phone number field so REDCap knows where to find participants' phone numbers (this function is similar to the "Designate an email field for communications" on the *Project Setup* page)

 Designate a phone number field for survey invitations sent via SMS or voice call (optional)	phone "Phone number" ▾ Listed above are all Text fields having an
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- ❖ Finally, you can choose how overlapping SMS invitations are handled

Behavior for overlapping SMS invitations If you will be sending SMS invitations for multiple surveys within this project, then you will need to choose the default behavior for when a participant has received SMS invitations to multiple surveys at the same time, in which they will be replying to the same SMS thread for multiple invitations. (This is rare but must still be accounted for.) If the participant has received multiple SMS invites, you can have it behave according to the option selected in the drop-down to the	Use only most recent invitation (ignore previously sent invitations) ▾ Use only most recent invitation (ignore previously sent invitations) Take surveys in same order as participant received the invitations Allow participant to choose which survey to take next
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Distribute the public survey link via SMS

Under *Survey Distribution Tools – Public Survey Link*, you can add phone numbers and directly send the survey link for the first instrument in *Designer* via SMS.

 Voice Calling and SMS options for the Public Survey You may invite participants to complete the public survey via voice call or SMS. If you wish to invite them directly *right now*, click the button below to open a popup for entering phone numbers to call or send an SMS text message to the participants. 1) Invite participants now: Invite participants via Voice Call or SMS Alternatively, if you instead want the participants to initiate the survey themselves, then you may provide your participants with the instructions for one of the options below.
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Manually distribute individual survey links via the “Participant List”

Phone numbers can also be added to the Participant List under *Survey Distributions Tools*. When sending out SMS via the Participant List, individual (i.e. traceable) survey links are sent out via SMS or email depending on what invitation preference you choose.

Check the status of your invitations

Under *Survey Distribution Tools – Survey Invitation Log*, you can see what SMS/emails are planned or have already been sent. This is a good way to keep track of your survey invitations.