How to Use Twilio in REDCap

Twilio is a third-party web service that integrates with REDCap, allowing users to send survey invitations and alerts/notifications to participants as SMS text messages or voice calls. It acts as a conduit between participants’ mobile devices and your REDCap project. For example, a project that requires participants to take daily surveys could send automated survey invitations either by text message or email, depending on a participant’s preference.

Twilio Account Fees

Before requesting Twilio to be enabled on your project, you must have an active Twilio account with a payment method set up. There is a fee to buy a phone number, starting at $1 per month, and additional fees for each text message or voice call sent and received, starting at $0.0075 per message or minute. Costs vary depending on the type of phone number used (e.g., local, toll), frequency of messages, length of calls exchanged, and the recipients’ carrier (e.g., AT&T, Verizon). Twilio also offers volume and committed-use discounts. For more detailed information on pricing or billing visit Twilio Pricing and Twilio Billing. Please contact your departmental financial administrator with any questions about paying for Twilio.

Basic instructions on getting an account are listed below. For additional help setting up an account visit Twilio’s Help Center.

Note: The Illinois REDCap team is not responsible for managing Twilio accounts or the costs associated with them.

Setting up a Twilio Account

1. Go to https://www.twilio.com/try-twilio to create an account. You must upgrade to a full account. Free, trial accounts will not work.
2. Set up your payment method (i.e., credit card). Contact your departmental financial administrator with any questions on setting up payment.
   a. You will need the following information:
      i. Service address (the location where you will use Twilio services, typically your office’s address)
      ii. Billing address associated with the p-card/credit card
      iii. P-card/credit card information
      iv. University business tax ID (available through OBFS)
   b. Once payment is added, you will be prompted to add funds to your Twilio account. The minimum amount is $20.
3. Purchase a phone number. Numbers may be local or toll-free numbers. Fees start at $1 per month for each number purchased.
   a. There can only be one phone number per REDCap project. If multiple REDCap projects need Twilio, you must have a unique phone number for each project. Old numbers can only be re-used if the REDCap project previously using it has been deleted.
4. Disable the Request Inspector Feature. This feature is not HIPAA compliant and will store data on Twilio’s servers. Twilio will not be enabled on a REDCap project if this is left as “Enabled”.
   a. From your Twilio Dashboard, go to the Programmable Voice Dashboard (the phone icon), then scroll down to Settings to go to the Voice Settings page:

   ![Voice Settings](image)

   b. Under the “Request Inspector” heading, change it to “Disabled.”

   c. You will need to provide a screenshot of “Request Inspector” disabled before we will enable Twilio on a REDCap project. The screenshot must include the account holder name in the top, right-hand corner.

Enabling Twilio on a REDCap Project

We recommend having Twilio enabled while the project is still in development to allow for thorough testing of its features without the risk of losing or affecting data. Furthermore, once Twilio is enabled in a project and in production mode, it cannot be disabled.

1. Complete an [Enable Twilio Request Form](#). You will need the following information from your Twilio account to complete it:
   a. Account SID
   b. Authorization Token
   c. Twilio Phone Number (unique to each REDCap project)

2. Once Twilio has been enabled for your project, a new box will display on the Project Setup Page. Select “Configure Twilio Settings”. 
3. Select the language and gender preferences for voice calls. Please note that there might be slight differences in how different voices will read text, even when the same language is selected.

4. Select the modules in which Twilio will be used: Surveys and survey invitations, alerts and notifications, or both.
   a. **Surveys and survey invitations (default)** – Twilio features (e.g., text messaging) will be used for sending survey invitations, and in limited cases, collecting survey data (see Step 5.a). Some project design elements to keep in mind if using this option include:
      i. Surveys must be enabled in the project
      ii. Action tags do not function in Twilio when using voice or SMS text surveys
      iii. Question language should be non-specific (i.e., do not refer to sensitive or confidential data) when using voice or SMS text distribution options
   b. **Alerts & Notifications only** – Twilio features will only be used to send alerts.
      i. If a participant replies to a Twilio text when this is enabled, they will receive the following message: [Auto-Reply: This SMS phone number is not monitored]. This text is hard-coded and cannot be customized.
   c. **Surveys and survey invitations and Alerts & Notifications** – Twilio features will be used for sending survey invitations and alerts. The same project design elements mentioned above apply to this option.

5. Configure your survey-specific settings.

   **Survey-specific settings:**
   
<table>
<thead>
<tr>
<th>Choose survey invitation types to use</th>
<th>Survey as webpage</th>
</tr>
</thead>
<tbody>
<tr>
<td>You may select different ways for participants to be invited to take surveys and also the medium in which they will take the surveys</td>
<td></td>
</tr>
<tr>
<td><a href="#">Only REDCap administrators are allowed to enable the Twilio option to initiate a survey as an SMS conversation. Much like email, SMS is not considered a secure form of communication, so you may not want to administer surveys as SMS conversations if the participant will be submitting identifying information (PHI or PII) unless you have been granted special permission from the participant to do so. Given such sensitive privacy issues, only your local REDCap administrator can enable the optional setting to use SMS surveys. Please notify your administrator about this if you wish to have this option enabled.</a></td>
<td></td>
</tr>
<tr>
<td>Send survey invitation with survey link via SMS</td>
<td></td>
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<tr>
<td>Survey as voice call</td>
<td></td>
</tr>
<tr>
<td>Initiate survey as voice call</td>
<td></td>
</tr>
<tr>
<td>Send survey invitation via SMS to take survey as voice call (respondent makes call)</td>
<td></td>
</tr>
<tr>
<td>Send survey invitation via SMS to take survey as voice call (respondent receives call when replying via SMS)</td>
<td></td>
</tr>
<tr>
<td>Survey as SMS conversation</td>
<td></td>
</tr>
<tr>
<td>Initiate survey as SMS conversation</td>
<td></td>
</tr>
</tbody>
</table>

   a. There are three survey invitation types to choose from:
      i. **Survey as webpage**: Similar to an email invitation, this will send a link via SMS text messaging to the participant.
      ii. **Survey as voice call**: Note that these options are limited to surveys that only contain questions in multiple-choice, single-answer format and/or number-validated text fields.
1. **Initiate as a voice call** – REDCap calls the participant and they take the survey via phone call using the number pad to answer (e.g., “Press 1 for yes and 0 for no”).

2. **Send survey invitation** – REDCap texts the participant the project Twilio phone number. The participant calls the number when they are ready to take the survey via phone call.

3. **Invite via SMS to take as voice call** – The REDCap user provides the participant with the project Twilio phone number. The participant then texts the number with a pre-defined message when they’re ready to start the survey, triggering REDCap to call the participant.
   a. This option may be preferable since some phone carriers do not charge for incoming calls.

iii. **Survey as SMS conversation**:
   1. This option allows a survey to be administered via a SMS text message conversation. Limited to multiple-choice, single-answer format and text fields. **It is not HIPAA compliant and only allowable in certain circumstances** (e.g., no PHI/PII requested).
   b. Choose the default invitation preference for new survey participants. This value is used as the pre-selected setting of the delivery preference on the “Participant List” page when adding new participants.
   c. Control which field will establish a participant’s invitation preference moving forward. A participant’s invitation preference can be changed any time in the “Participant List” under “Survey Distribution Tools”.
      i. Only radio or dropdown fields can be used.
      ii. Each choice represents a survey invitation delivery method and must be coded as specified below. Only include the choices needed (e.g., if you are not using ‘Survey as SMS conversation’ do not include SMS_INITIATE). An example of what a field set up to record participant preference is below:

```
Control each participant’s invitation preference using a multiple choice field

If survey participants require using different methods (e.g., email, SMS w/ link, voice call survey) for receiving survey invitations and/or taking surveys, you can select a multiple choice field (radio and drop-down fields only) whose choices represent each survey invitation delivery method. After mapping the invitation preferences to a field, whenever the value of the field is added or modified, the participant’s invitation preference will automatically be changed accordingly. **IMPORTANT:** The multiple choice codings for the selected field must be defined exactly as delineated on.

Required choice codes with example choice labels:

- **EMAIL**, Email invitation
- **SMS_INVITE_WEB**, SMS invitation (contains survey link)
- **SMS_INITIATE**, SMS invitation (take survey via SMS)
- **VOICE_INITIATE**, Voice call (participant receives voice call)
- **SMS_INVITE_MAKE_CALL**, SMS invitation (contains phone number to call)
- **SMS_INVITE_RECEIVE_CALL**, SMS invitation (reply via SMS to receive voice call)
```
d. You can also set a designated phone number field, automatically append response instructions to questions, and set behavior for when SMS invitations for multiple surveys overlap.
   i. **Auto-append response questions** – If multiple mediums will be used to collect responses (e.g., a participant can respond using phone call or take the survey online), we recommend setting this to “Yes” so that REDCap will display the survey appropriately for each medium.

6. If surveys will be administered via SMS text messaging and/or voice call, use the “Analyze surveys for SMS & Voice Calls” feature to determine if your surveys are appropriately set up to be delivered in these formats.
   a. This feature can be reached on the “Designer” or “Project Setup” pages.
   b. Once selected, a popup will appear displaying any issues that might be experienced when using the survey as a SMS or voice call. Fields that may have issues, unless fixed, will be skipped when a participant completes the survey. Select the “view” link to see what the issue is.
Analyze surveys for SMS & Voice Calls

The table below displays any issues that might be experienced if using a survey as a voice call survey or as an SMS survey. To see the details of any issue, click the 'view' link next to it, which will display the field with the issue, as well as a description of why this field would be problematic. NOTE: If a survey below is administered as a voice call survey or SMS survey, then **any field having an issue will be skipped** in the survey unless the issue described below is remedied by changing or removing the field.

<table>
<thead>
<tr>
<th>Voice Call Survey Issues</th>
<th>SMS Survey Issues</th>
<th>Survey Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="image" /></td>
<td><img src="image2.png" alt="image" /></td>
<td>Landing Page</td>
</tr>
<tr>
<td><img src="image3.png" alt="image" /></td>
<td><img src="image4.png" alt="image" /></td>
<td>Survey version 2</td>
</tr>
</tbody>
</table>

**Voice Call Survey Issues**
- pet_type_y2 (“What kind(s) of pets do you have?”)
  - **ISSUE:** Checkbox fields cannot be used in voice call surveys.

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</thead>
<tbody>
<tr>
<td><img src="image5.png" alt="image" /></td>
<td><img src="image6.png" alt="image" /></td>
<td>Basic Demography Form</td>
</tr>
</tbody>
</table>

7. Go to “Survey Distribution Tools” on the left-hand panel to begin messaging participants or scheduling invitations.
   a. The options you select in step 5.a. will affect the methods listed in the “Voice Calling and SMS options for the Public Survey” box. To immediately send survey invitations via phone, click “Invite participants via Voice Call or SMS”. Selecting this will open a popup where you can enter phone numbers, select how participants will take the survey, and customize the SMS message that will send.

   ![image](image7.png)

   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.

   ![image](image8.png)

   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.

   ![image](image9.png)

   i. Sending a survey link immediately will be recorded in the project log (see “Logging” under “Applications”), but not the “Survey Invitation Log” nor will their information be saved in the “Participant List”.

![ILLINOIS](image10.png)
b. Once Twilio is enabled, dropdown menus for selecting the invitation type are available under the “Add Participants” and “Compose Survey Invitations” menus.

i. A participant’s preference can be changed anytime by selecting the icon under “Invitation preferences” in the record’s row on the “Participant List” tab.

ii. Invitation preferences can also be selected in the “Automated Survey Invitations” and “Alerts & Notification” menus.
c. In the “Survey Invitation Log”, you can view past invitations to check if there were any errors in sending invitations. Your Twilio account may have more information on why messages are not being sent (e.g., no funds).

8. It is highly recommended to include “Stop Logic” in any automated survey invitation or alert/notification. This can be achieved by using a combination of fields or creating a “kill switch” field (e.g., “Do you want to opt out of text notifications? 1= Yes, 0 = No”) that can be used in conditional logic (e.g., [opt_out] <> ‘1’) for sending invitations or alerts/notifications.
   a. In Step 3 of an Automated Survey Invitation (or Step 1 in Alerts & Notifications), place conditional logic needed to send the alert and check the “Ensure logic is still true” box.
   b. Participant-driven opt-out can be achieved by the participant responding with “Stop” to the SMS survey invite. REDCap does not automatically include instructions for opting out in survey invitations. Once a participant responds “Stop” via text message, all future invites will be halted from reaching the participants’ device until the participant chooses to “re-subscribe”. The image below is an example of how this appears for a participant with a Samsung S9 phone using Verizon. Note that it does not matter how “Stop” or “Start” is typed.

Other Tips

- When composing an invitation that will be sent via SMS text message, keep the message brief (<160 characters, including smart variable names within brackets, such as [survey-url]) to ensure it
is not broken into multiple, smaller texts. Detailed instructions should be included in the “Survey Instructions” modifiable in “Survey Settings”.

- If the invitation is a voice call, the computer will say the information listed in “Survey Instructions” and the field labels for each question. The setting “Auto-append response questions” will automatically add “Press 1, press 2…etc.” to the end of answer options.
- Some mobile carriers will block repeated texts and phone calls from unsaved numbers. Having participants save your project Twilio number into their contacts may help prevent this.
- Some mobile carriers block SMS text messages containing the word “COVID”. For more information on why messages may be blocked visit Twilio.com.
- Thoroughly test your project with different cell phone types (e.g., Samsung Galaxy S9, iPhone 12) and carriers (e.g., Verizon, T-Mobile).

References