

REDCap Twilio integration

REDCap has the capability to make voice calls and send SMS text messages for surveys and for Alerts & Notifications by using a third-party web service named Twilio (www.twilio.com). In this way, you could invite a participant to take a survey by sending them an SMS message or by calling them on their phone, in which the data would be collected in REDCap directly from their phone without having to use a webpage. There are many different options available for how you can invite participants and how they can take your surveys, either as a voice call survey or as an SMS conversation. You may also send Alert & Notifications to recipients via Voice Call or SMS instead of via email.

Twilio integration can only be enabled by REDCap administrator with IRB approval and available funding.

Twilio is enabled via the Control Center Project Setup Screen:

Twilio SMS and Voice Call services

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[How do I set this up?](#)

Twilio SMS and Voice Call services

Disabled

Twilio account credentials (obtained from Twilio website)

Twilio Account SID

Twilio Auth Token

[Show auth token](#)

Twilio phone number

⚠ IMPORTANT NOTE: A Twilio feature named the 'Request Inspector' causes all activity to be logged in detail and stored on Twilio's servers. For the highest level of privacy, it is HIGHLY RECOMMENDED that you manually DISABLE THE REQUEST INSPECTOR in your Twilio account if you will be collecting identifying information (e.g., PHI) via Voice Calls and SMS messages in REDCap. You will find this setting on the Settings page under Programmable Voice in your Twilio console. Once there, disable the Request Inspector and click Save.

Save

Cancel

And the configured via the Twilio SMS and Voice Call services panel:

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 Twilio settings

or

Analyze surveys for SMS & Voice Calls

Twilio SMS and Voice Call services

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Cancel