* What is it?
  + Third party program
  + Send 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 it up
  + Got to Twilio.com and sign up
  + Set up a payment method—you can use a credit card or PayPal
  + Buy a phone number; numbers are $1/month
    - You can select specific capabilities for the number (text, multi-media messages)
    - You can select local or toll free numbers
  + Turn off the Request Inspector feature
    - This feature stores data on Twilio’s server and is not HIPAA compliant, so it must be off to use Twilio with REDCap
    - Find it at this path:
      * Dashboard
      * Programmable voice
      * Settings
      * Request Inspector
    - You can test in REDCap to make sure it’s off
  + Enable Twilio in REDCap on the Project Setup page
    - Enter your account SID and Authorization (found on the account settings page)
    - Enter the phone number (found on your dashboard)
* Configuring Twilio
  + A new box will appear on the Project Setup page allowing you to configure Twilio
  + Choose a language and a voice (male/female)
  + There are two ways to send your survey—SMS messages and voice calls
    - SMS will send a link
    - Voice calls require your survey be multiple choice only
    - For voice calls, there are a number of different options for how to initiate the survey
  + Append instructions for voice calls, if necessary
  + Choose a default invitation type
  + Designate a phone number field (similar to designating an email field to use for the Participant List)
  + Decide how to handle overlapping messages
* Ways to send it 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 call
  + Participant list and Automated Survey Invitations
    - Can enter both or either of phone number and email
    - Select the participant’s preference when adding them to the list
    - You have the option to send out invitations via email, SMS, or the participant’s preference

I found the best way to begin was to just sign up and put $5 into your account, and then you can work your way through these instructions to start experimenting.