SMS Self Registration

> ⊘ This feature is only available on CommCare version 2.44.4 and below. It is <u>not</u> supported in the current CommCare version available in the Play Store.

Overview

Users must be registered in CommCare before they can receive reminders or SMS surveys. Users can be registered in a variety of ways (a web-based application, in bulk through Excel (Bulk Registration of Contacts)). They can also register themselves using SMS.

To self-register, the person must send the following message, replacing <projectname> with the name of your CommCareHQ project. The message to send also depends on whether the person is registering to become a case or a mobile worker:

> Case Registration over SMS:

>> *join <projectname>*

> Mobile Worker Registration over SMS:

>> *join <projectname> worker <username>*

This message is sent to one of the SMS gateways supported by the project (see Setup SMS Connection for Project). Also, when registering cases, it's highly recommended that a follow-up survey is sent to capture additional information to identify the case (name, etc.). This is described in Send a Welcome Message or Survey. When registering users, if the optional <username> is omitted, the name of the mobile worker will be the same as its phone number.

Enable Self-Registration Over SMS for Cases

1. Go to your project's SMS Settings page (Messaging -> General Settings). You must a be project admin in order to do this.

2. To enable case registration over SMS, enable the "Case Self-Registration" option. The following information needs to be provided:

- *Default Case Type*: This is the case type that will be assigned to the newly created case.
- *Default Case Owner*: This is the mobile worker or group that will own this newly registered case. In some situations, you may need to create a dummy mobile worker for these directly registered cases.
- *Registration Submitter*: This is the mobile worker that is specified as submitting the registration. The majority of the time, this is a same as the registration owner.

The above configuration will create a *participant* case owned by the user gc if a case registration message is sent to one of the SMS gateways configured for the project. Once this is done, its is recommended that additional information is captured about that person by sending a welcome survey.

Enable Self-Registration Over SMS for Mobile Workers

1. Go to your project's SMS Settings page (Messaging -> General Settings). You must a be project admin in order to do this.

2. To enable mobile worker registration over SMS, enable the "SMS Mobile Worker Registration" option:

SMS Mobile Worker
Registration

Enabled ▼

Advanced Mobile Worker SMS Registration Workflow

It is also possible to initiate a mobile worker self-registration workflow over SMS which will lead to automatically installing a CommCare app from your project on the user's phone after they register, as long as the user has an Android phone.

If you know your users are using Android phones, you can follow these steps to initiate this workflow:

1. Enable Self-Registration over SMS for Mobile Workers as noted above.
2. Navigate to Messaging -> Mobile Worker Registration
3. Click "Create Registration Invitation"
4. Choose:
    a. the application you wish to be installed on the user's phone once they register
    b. the phone numbers of the user(s) (in international format) that you are sending this registration invitation to
    c. select "Android Only" under "Recipient phones are"
5. Optionally, you can expand the Advanced options to also:
    a. choose a custom SMS message that will be sent to the users as the first registration message
    b. make email address be a required field to capture when the user signs up
6. Click "Send Invitation".

This workflow from the Android user's perspective is:

1. Receive an SMS with a link to sign up for a mobile worker account on CommCareHQ.
2. Receive an SMS with a link that will be used by CommCare to install the app you selected from your project. This will start with the phrase "[commcare app - do not delete] ..." and can be ignored by the user but should not be deleted until CommCare has installed.
3. Sign up for a mobile worker account using the link from (1).
4. After signing up, the user will be directed to download and install CommCare from the Google Play store. Once CommCare installs, it will automatically install the app you selected from your project when you sent the invitation, using the SMS from (2).
5. The user can then sign into CommCare on their mobile device and begin using your app to submit forms.

Note that if not all of your users are Android users, you can also choose "Android or Other" instead of "Android Only" when sending the invitation. In that case, the first SMS the user receives will ask them if they are using an Android phone or not. If the user responds that they are using an Android phone, the workflow will continue from the user's perspective as mentioned above. If the user responds that they are not using an Android phone, they will be directed to sign up over SMS as described at the top of this page.