SMS Self Registration

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:
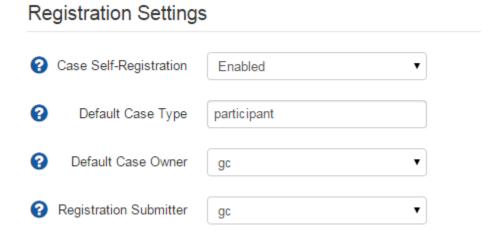
> Case Registration over SMS:
>
>> *join <projectname>*
>
> Mobile Worker Registration over SMS:
>
>> *join <projectname> worker <username>*

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.

Registration Settings

❓	Case Self-Registration	Enabled ▾
❓	Default Case Type	participant
❓	Default Case Owner	gc ▾
❓	Registration Submitter	gc ▾

> 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 ▾