Mosio integration with UNMC REDCap

Mosio is a “text messaging software enabling researchers to efficiently communicate with, collect data from, and engage research participants.” UNMC researchers can integrate Mosio with REDCap to do text messages through their REDCAP project:

Project Workflow

1. UNMC researchers who require text messages in their REDCap projects, need to obtain IRB approval to use the Mosio integration with your REDCap project. It is also required to set up a 30-mins consultation meeting with RITO (rito@unmc.edu) before you pursue the integration.
2. To purchase the Mosio plan, UNMC researchers should visit https://www.mosio.com/plans/ to request the invoice/pay by credit card (see fig 1) **for “DIRECT” plan only** which allows Mosio to be used as an integration with REDCap and not independently(see plan details in fig 2). Should you need to choose a different plan and use Mosio messaging independently from REDCap, you must get approval from both ITS and IRB.
3. Once you purchased the Mosio plan, a texting number will be generated by Mosio. Mosio team will handle the 10DLC registration for you. Each of your REDCap project in your Mosio Account has to have a dedicated texting number.

Fig 1.

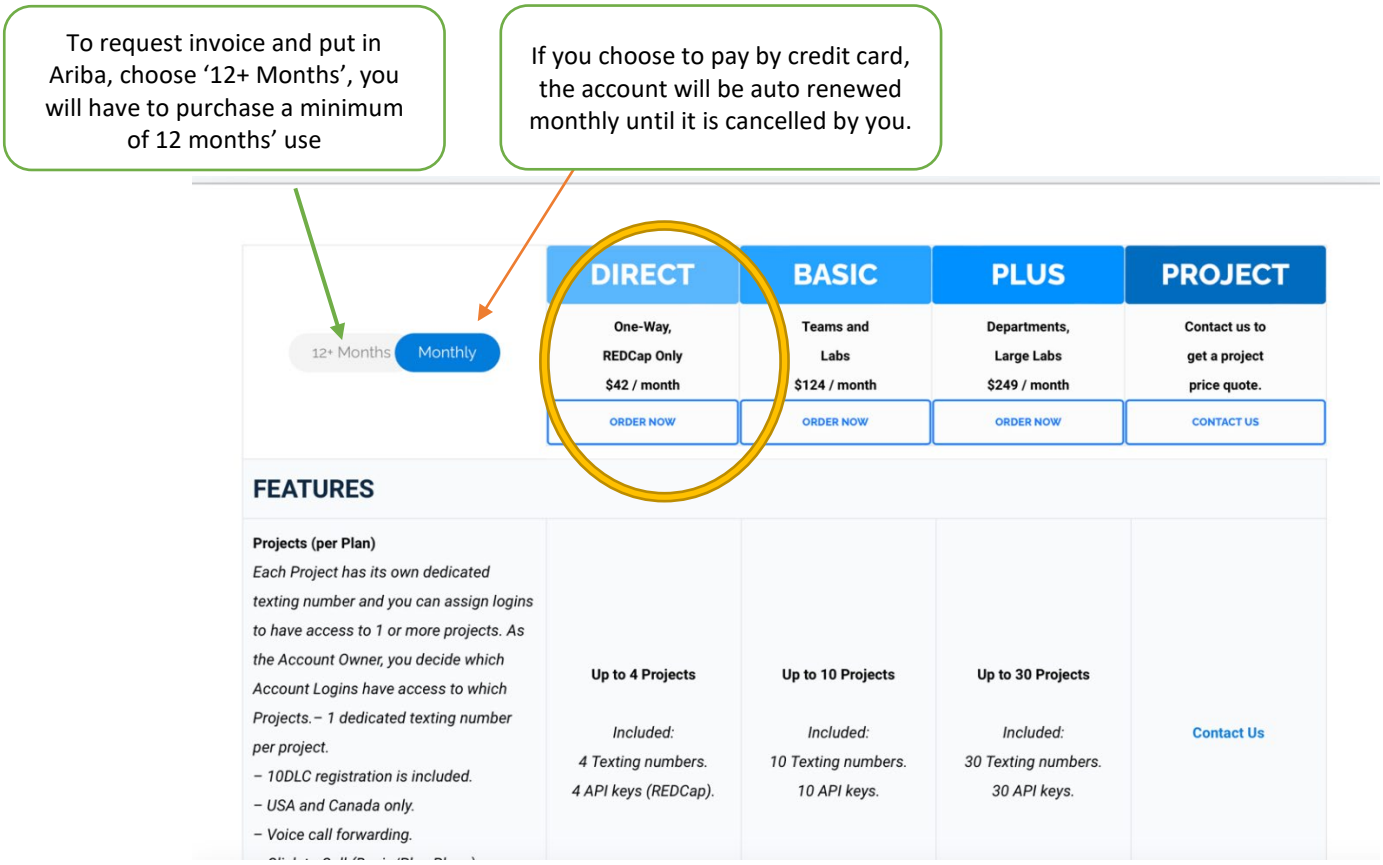
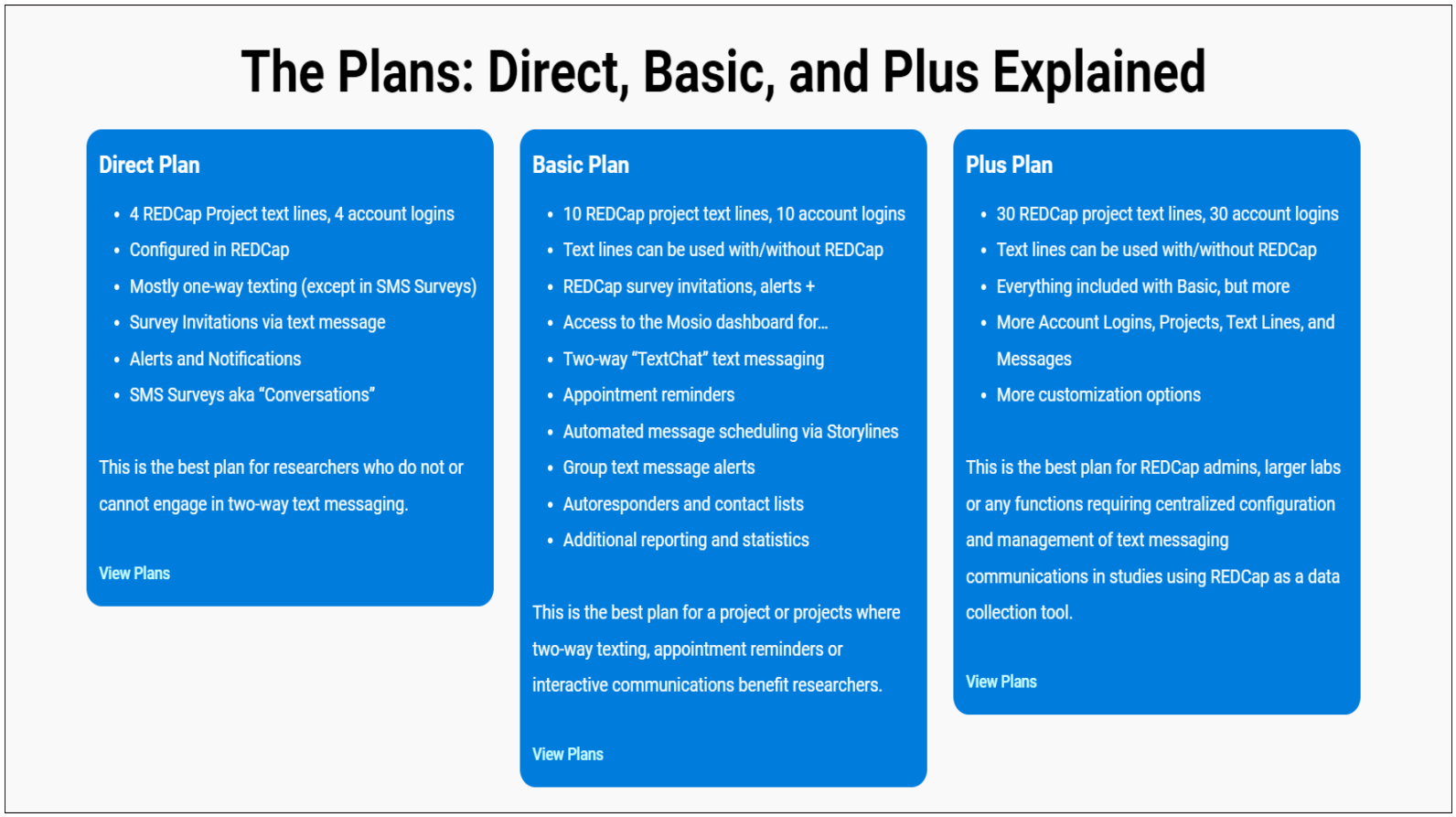


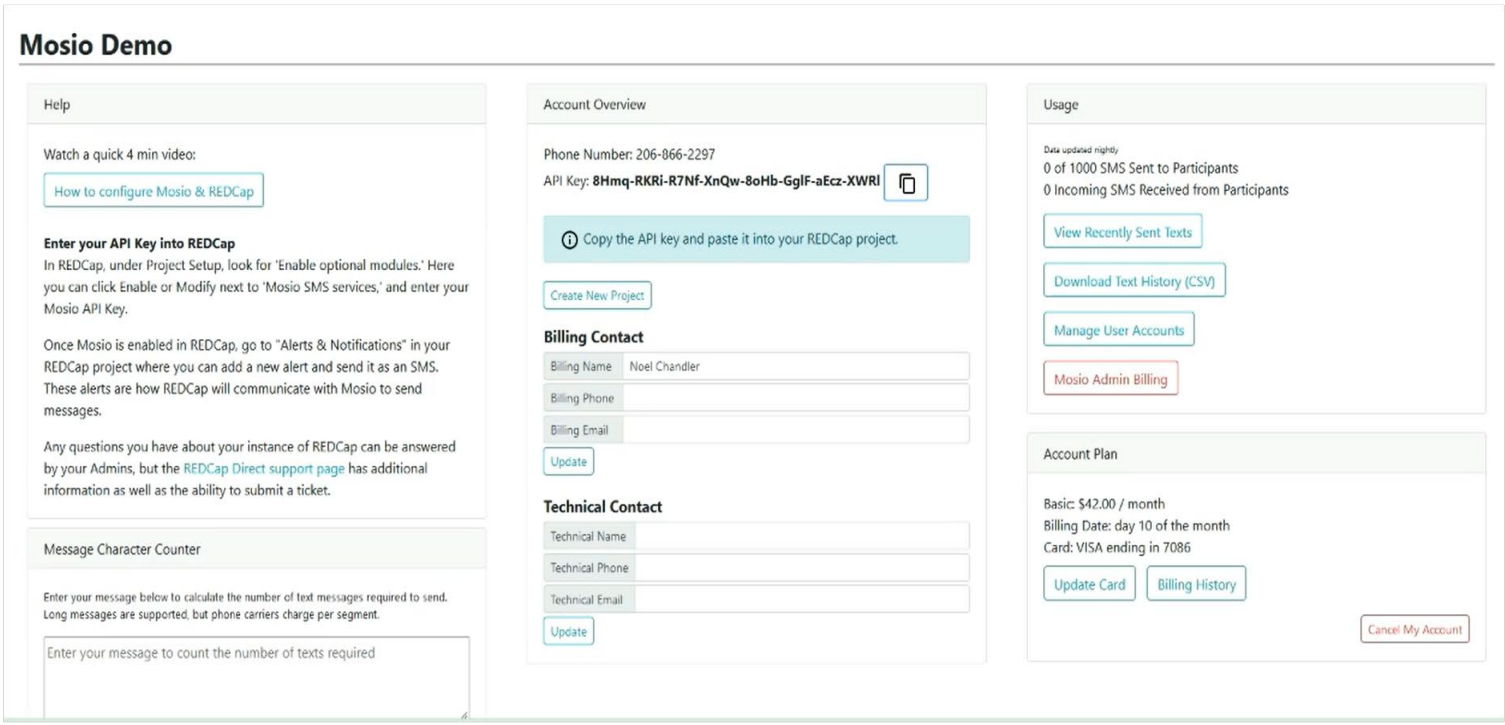
Fig2.



4. **Complete the order form**
    - Contact info required: Name, work email, phone, organization, Desired Area code for texting number
    - Agree on the disclaimer "*This will only be used for texting in research or health projects with participants/patients in the United States and Canada*."
    - Billing info required: First Name, Last Name, Email, Phone, Organization Name and Address.

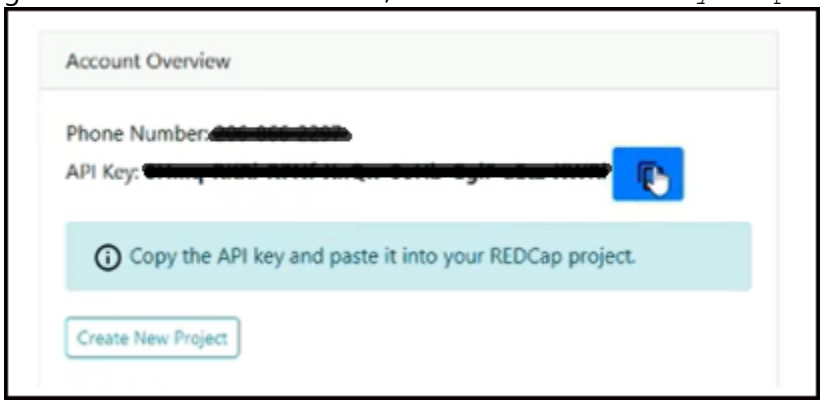
5. **Access the Mosio Dashboard**:
    - Once your account is created by Mosio (within 24-48 hours after you make the payment), follow Mosio prompts to log in to your Mosio dashboard and access your account settings and features (see example in fig 3)

Fig3.



6. **Setup Mosio text messaging survey on REDCap**

   - Mosio messaging function is enabled by UNMC REDCAP admin on https://unmcredcap.unmc.edu/redcap/; Obtain the project API : In the Mosio dashboard, go to the `account overview`, Note down the `API Key` and `phone number`.



   - Go to your specific REDCap project and enable the Mosio module in the Project Setup under External Modules.
   - Click Enable and then Configure to set up the module for your project.

- Select the field in your REDCap project where participant phone numbers are stored.
- Use REDCap's Alerts & Notifications feature to trigger SMS messages based on data entry or project events.
- Enter participants in your REDCap project, including a phone number and consent to receive SMS messages.
- Enter a message in the designated message field and save the record. The Mosio module should send this message to the phone number via Mosio.
- Check the Mosio dashboard to verify that the message was sent.
- Use the Mosio dashboard to monitor all SMS activities, including sent messages, delivery statuses, and participant responses.
- Monitor REDCap logs to track message triggers, errors, and API interactions between REDCap and Mosio.
- If you need to modify any settings, such as changing keywords or message templates, update the Mosio dashboard and the REDCap module configuration accordingly.

7. Compliance and Security

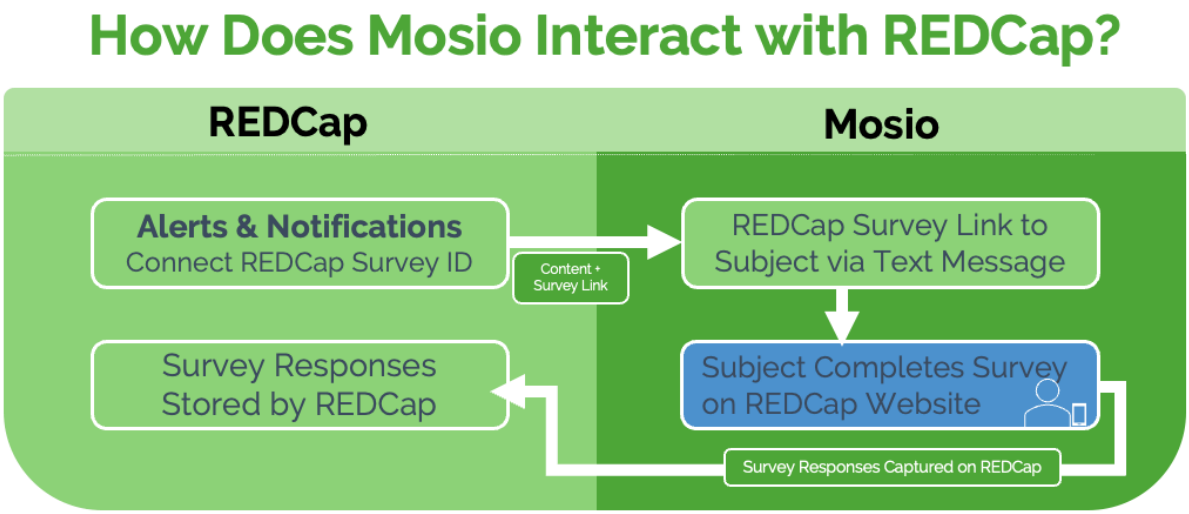
1. **Data Privacy**:
    - Ensure that you get IRB approval for using REDCap/Mosio messaging function
    - Ensure that no PHI (Protected Health Information) is sent through SMS messages.
    - Use generic messages and avoid including identifiers or sensitive information in SMS content.
2. **Participant Consent**:
    - Always ensure participants have given explicit consent to receive SMS communications. Document this consent in IRB and REDCap accordingly.
3. **Regular Review**:
    - Regularly review your SMS workflows and data management practices to ensure they comply with UNMC IRB regulations, ITS policies and UNMC REDCap guidelines.

REDCAP/Mosio use case:

There are only two ways UNMC REDCap currently works with the Mosio Direct Plan:

1**).Survey Invitations (Send REDCap Links via SMS)**

On UNMC REDCap, Selecting SMS will remove all settings specific to email (subject line, attachments, etc) and reveal a text box where you can enter the phone number(s) of the recipients. The alerts will still function as usual, but the invitation will be sent as an SMS message instead of an email. You can use the Mosio character counter in your dashboard to design your messages (brevity is important in SMS) and then paste your messages into REDCap when you schedule the invitations.

2). **Send Alerts and Notifications via Text Message**

Setting up alerts and notifications in REDCap is a useful way to communicate with study subjects outside of sending survey links. You can send welcome messages to new study participants or create repeating messages as reminders for tasks, text-based interventions, etc.