

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.

To request invoice and put in Ariba, choose '12+ Months', you will have to purchase a minimum of 12 months' use

If you choose to pay by credit card, the account will be auto renewed monthly until it is cancelled by you.

	DIRECT	BASIC	PLUS	PROJECT
	One-Way, REDCap Only \$42 / month	Teams and Labs \$124 / month	Departments, Large Labs \$249 / month	Contact us to get a project price quote.
	ORDER NOW	ORDER NOW	ORDER NOW	CONTACT US

FEATURES				
<p>Projects (per Plan)</p> <p><i>Each Project has its own dedicated texting number and you can assign logins to have access to 1 or more projects. As the Account Owner, you decide which Account Logins have access to which Projects. – 1 dedicated texting number per project.</i></p> <ul style="list-style-type: none"> – 10DLC registration is included. – USA and Canada only. – Voice call forwarding. 	<p>Up to 4 Projects</p> <p><i>Included:</i></p> <p>4 Texting numbers. 4 API keys (REDCap).</p>	<p>Up to 10 Projects</p> <p><i>Included:</i></p> <p>10 Texting numbers. 10 API keys.</p>	<p>Up to 30 Projects</p> <p><i>Included:</i></p> <p>30 Texting numbers. 30 API keys.</p>	<p>Contact Us</p>

Fig2.

The Plans: Direct, Basic, and Plus Explained

Direct Plan

- 4 REDCap Project text lines, 4 account logins
- Configured in REDCap
- Mostly one-way texting (except in SMS Surveys)
- Survey Invitations via text message
- Alerts and Notifications
- SMS Surveys aka "Conversations"

This is the best plan for researchers who do not or cannot engage in two-way text messaging.

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Basic Plan

- 10 REDCap project text lines, 10 account logins
- Text lines can be used with/without REDCap
- REDCap survey invitations, alerts +
- Access to the Mosio dashboard for...
- Two-way "TextChat" text messaging
- Appointment reminders
- Automated message scheduling via Storylines
- Group text message alerts
- Autoresponders and contact lists
- Additional reporting and statistics

This is the best plan for a project or projects where two-way texting, appointment reminders or interactive communications benefit researchers.

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Plus Plan

- 30 REDCap project text lines, 30 account logins
- Text lines can be used with/without REDCap
- Everything included with Basic, but more
- More Account Logins, Projects, Text Lines, and Messages
- More customization options

This is the best plan for REDCap admins, larger labs or any functions requiring centralized configuration and management of text messaging communications in studies using REDCap as a data collection tool.

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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.

The screenshot displays the Mosio Demo dashboard with the following sections:

- Help:** Includes a video link "How to configure Mosio & REDCap" and instructions on entering the API key into REDCap. It also provides information on alerts and notifications and a link to the REDCap Direct support page.
- Account Overview:** Shows the phone number (206-866-2297) and API key (8Hmq-RKRI-R7Nf-XnQw-8oHb-GgIF-aEcz-XWRI). A prominent instruction says "Copy the API key and paste it into your REDCap project." Below this are fields for Billing Contact (Name: Noel Chandler) and Technical Contact, each with an "Update" button.
- Usage:** Shows "Data updated nightly" and "0 of 1000 SMS Sent to Participants". It includes buttons for "View Recently Sent Texts", "Download Text History (CSV)", "Manage User Accounts", and "Mosio Admin Billing".
- Account Plan:** Lists the plan as "Basic: \$42.00 / month" with a billing date of "day 10 of the month" and a card type of "VISA ending in 7086". It has buttons for "Update Card", "Billing History", and "Cancel My Account".
- Message Character Counter:** A section for entering a message to calculate the number of text messages required to send.

6. Setup Mosio text messaging survey on REDCap

- o 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.

This close-up screenshot highlights the "Account Overview" section, showing the "Phone Number" and "API Key" fields. A blue copy icon is visible next to the API key, and a light blue instruction box below reads "Copy the API key and paste it into your REDCap project." A "Create New Project" button is also visible at the bottom of this section.

- o Go to your specific REDCap project and enable the Mosio module in the Project Setup under External Modules.
- o 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.

How Does Mosio Interact with REDCap?



