

### *How do I use Mosio with REDCap?*

Mosio is a third-party texting service that allows researchers to communicate with participants by text message through REDCap. To use Mosio with REDCap, you must have both an active REDCap project and a paid Mosio plan. Once you have a Mosio account, Mosio will provide an API key. This API key is used to connect your Mosio account to your REDCap project and enable text messaging features within REDCap.

The steps below outline how to get started.

#### Getting Started

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1. Identify the REDCap project that will use Mosio.
  - a) This may be a new or existing project.
2. Select and purchase a Mosio Plan.
  - a) Review the [Mosio page on the Yale REDCap website](#) for information about available plans.

**Pro Tip:** When setting up your Mosio account, use your Yale email address. This enables Yale single sign-on authentication, which is required for HIPAA-compliant use.

3. Activate your Mosio Account.
4. Register your SMS Campaign.
  - a) Before sending any text messages, you must register your texting campaign with Mosio. Allow at least one week for the registration to be processed.
  - b) Note: You may proceed with the REDCap integration steps while registration is pending, but text communications cannot be sent until campaign registration is complete. If registration is not complete, REDCap will display the warning as shown in the figure below.

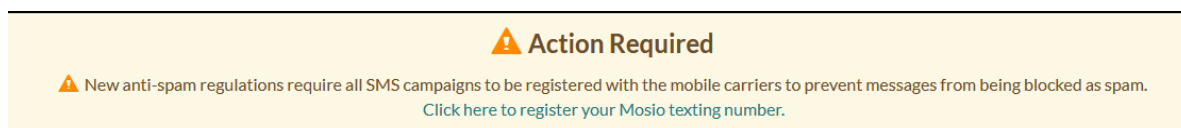
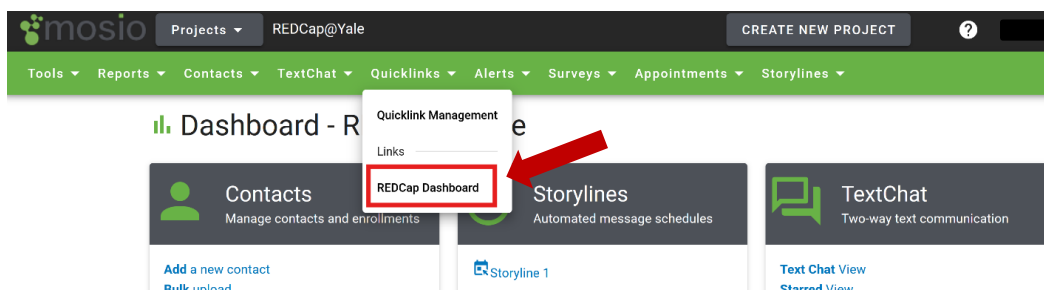




Figure 1. Mosio Warning Message When Texting Campaign Is Not Registered

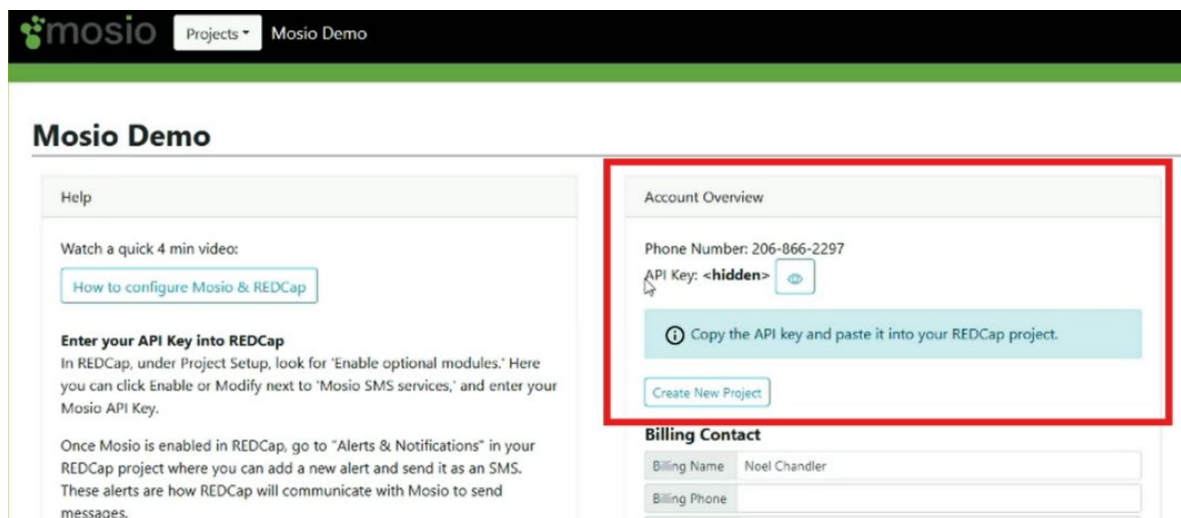
## Frequently Asked Question (FAQ) Library

### Integration

1. Open the link in your Mosio welcome email to access your account.
2. Access the Mosio API.
  - a) For Mosio Direct, the API and information will display automatically.
  - b) For Mosio Basic/Plus, locate **Quicklinks** in the top menu and select **REDCap Dashboard** from the drop-down options as shown below.



3. Under **Account Overview**, locate the phone number for your project. Click the eye icon  to reveal your API key, then click on the 'copy' icon  to copy the key. You will paste this API key into your REDCap project in the next step.

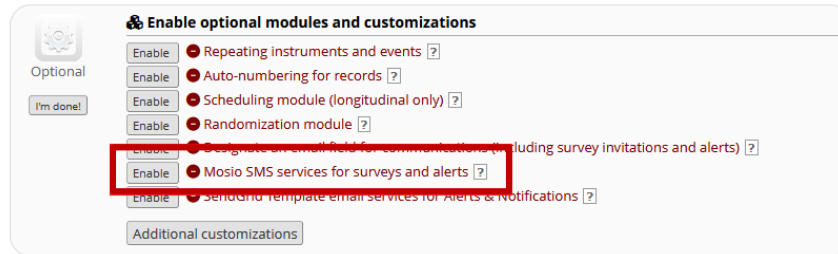


**Pro Tip:** Only one Mosio phone number can be associated with each REDCap project. To use Mosio with another REDCap project, create a new Mosio Project within your account to obtain a separate phone number.

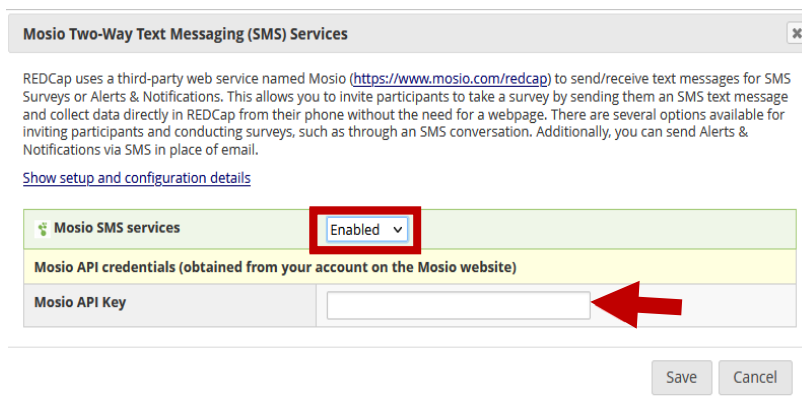
4. Open your REDCap project and select **Designer** from the left navigation menu.

## Frequently Asked Question (FAQ) Library

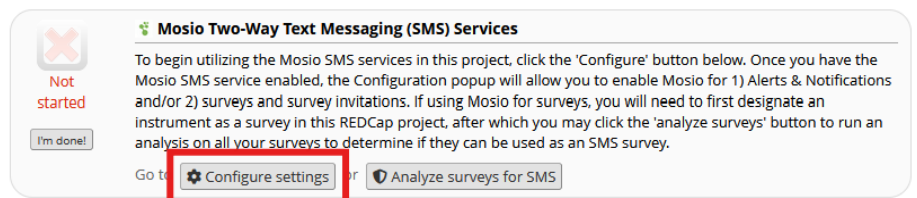
- Under the Project Setup tab, scroll to *Enable optional modules and customizations* and click **Enable** next to Mosio SMS Services for Surveys and Alerts.



- In the pop-up window:
  - Set **Mosio SMS Services** to *Enabled*.
  - Paste your Mosio API key into the text field and click **save**.



- If the integration is active, the Mosio dashboard will display the message: *"You are connected to REDCap Project ID\_."*
- After Mosio is enabled, a new Mosio section will appear on the Project Setup page in REDCap. Select **Configure Settings** to customize and complete setup.



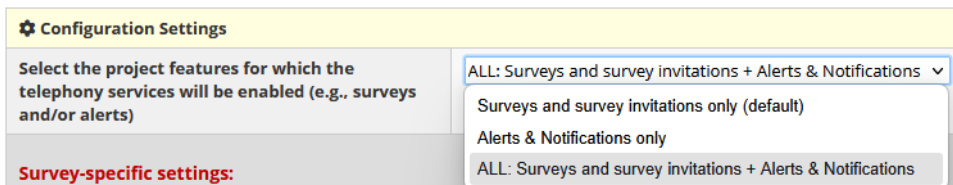
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### Configuration

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1. The configuration for Mosio will depend on your study design.

a) Enable Mosio for survey invitations, alerts, or both.



**Configuration Settings**

Select the project features for which the telephony services will be enabled (e.g., surveys and/or alerts)

**Survey-specific settings:**

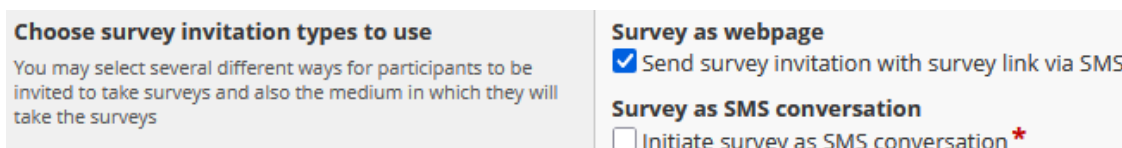
ALL: Surveys and survey invitations + Alerts & Notifications

Surveys and survey invitations only (default)

Alerts & Notifications only

ALL: Surveys and survey invitations + Alerts & Notifications

b) Select the survey invitation types that you plan to use.



**Choose survey invitation types to use**

You may select several different ways for participants to be invited to take surveys and also the medium in which they will take the surveys

**Survey as webpage**

Send survey invitation with survey link via SMS

**Survey as SMS conversation**

Initiate survey as SMS conversation \*

**Note:** ‘Survey as SMS conversation’ is not recommended for most projects. This option sends surveys one question at a time by text message. Users with Mosio Basic or Plus plans can send two-way texts through the Mosio website, but messages and surveys created directly in Mosio are not captured in REDCap. Any data collected through Mosio outside of REDCap will need to be imported into REDCap as a CSV file.

**Pro Tip:** Create a test project in REDCap to test Mosio functionality before using it in production. Confirm that branching logic, calculations, survey invitations, alerts, and SMS Conversations work as expected.

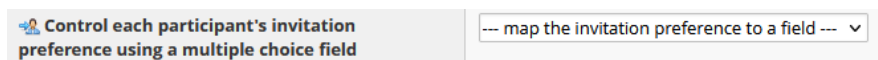
c) You can allow participants to select their preferred survey invitation method (*email, text message with survey link, SMS conversation*). To do this, create a multiple-choice field in REDCap for the participant’s preference.

REDCap requires the following choice codes:

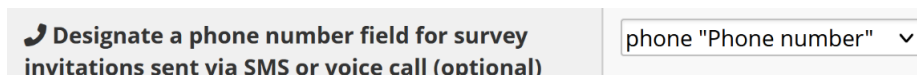
Required choice code	Example choice code label
EMAIL	Email invitation
SMS_INVITE_WEB	SMS invitation (contains survey link)
SMS_INITIATE	SMS invitation (take survey via SMS invitation)

## Frequently Asked Question (FAQ) Library

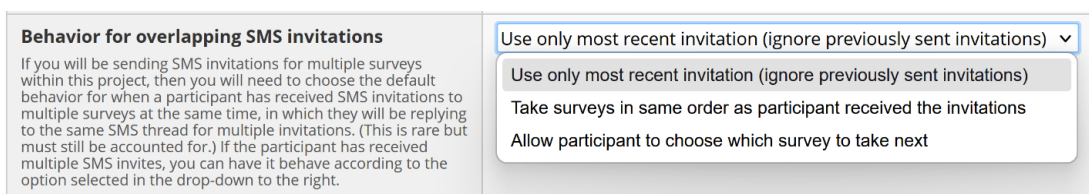
d) Then select the preference variable you created from the drop-down menu:



e) Designate a **phone number field** for participant communication. This field must use *Phone Number* or *Integer* validation.



f) If your project sends SMS invitations for multiple surveys, specify how overlapping invitations should be handled. Use the drop-down menu to select the default behavior. This ensures participants receive survey invitations appropriately and prevents scheduling conflicts.

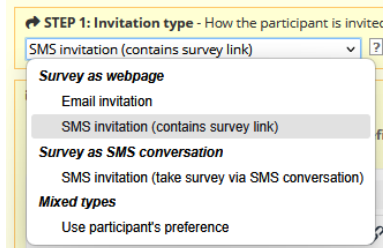


### Sending SMS invitations

1. After Mosio Settings are configured, 'SMS Invitation' will appear in the *Invitation Type* drop-menu for survey invitation conditions and Alerts & Notifications.

For additional guidance on surveys:

- [FAQ: How do I automatically send a survey?](#)
- [FAQ: How do I set up an alert or notification?](#)



### SMS Message Tips:

- Be intentional about the text that you will send by SMS. Do not simply reuse your email text as your SMS text. SMS messages should be short and concise. You can check message length using Yale's [Mosio Message Calculator](#).
- SMS Formatting is limited: bolding, italics, logos will not work. Piping does work.
- Unicode special characters may use additional characters, requiring more message 'units' to send.

### Troubleshooting

- Participants may need to opt-in by texting START to the designated Mosio phone number.
- If a participant is not receiving messages, first confirm they have opted in.
- If issues persist, verify that the phone number field is correctly formatted and validated in REDCap.