

Mosio & Integration with REDCap

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Learning Objectives

- Describe what Mosio is and how it is used to communicate with research participants.
- Recognize availability of Mosio on REDCap servers.
- Understand key regulatory requirements, including IRB review, DUA, and HIPAA considerations.
- Identify Mosio plans, common use cases, and differences in available features.
- Understand the steps required to get started with Mosio and integrate it with REDCap.

What is Mosio?

- Mosio is a third-party text messaging platform used to communicate with research participants.
- It enables study teams to send text messages without a physical phone.
- Messages can be managed directly in the Mosio website or through REDCap integration.



What is Mosio?

Researchers can use Mosio to:

- Distribute survey links to research participants.
- Send reminder messages for surveys, study activities, or follow-up tasks.
- Schedule appointment reminders with the option for participants to confirm by text response.
- Conduct two-way communication with participants using Mosio's text chat feature.



REDCap/Mosio Integration Availability

Mosio is available on the University servers

Location	Server Name	URL	Mosio Integration
Yale	REDCap I	redcap.med.yale.edu	YES
Yale	REDCap II	redcap.research.yale.edu	YES
YNHH	YNHH Standard	redcapynh.ynhh.org	NO
YNHH	Part 11 REDCap	redcapynh-p11.ynhh.org	NO

[More Info on REDCap and Mosio](#)

How does it work?

- Mosio is a fee-for-service platform provided through a third-party vendor.
- REDCap Admins do not manage Mosio accounts.
- Investigators are responsible for setting up a Mosio account and purchasing a Mosio plan directly with the vendor.

Regulatory & Security Considerations

Cybersecurity

- Yale's Information Security Office (ISO) has completed a Security Planning Assessment (SPA) of Mosio.
- When used in accordance with Yale security policies, Mosio meets HIPAA security requirements for high-risk data, including PHI.



Business Associate Agreement

- Yale University maintains a Business Associate Agreement (BAA) with Mosio to support HIPAA compliance.

Regulatory & Security Considerations

Human Subjects Protection

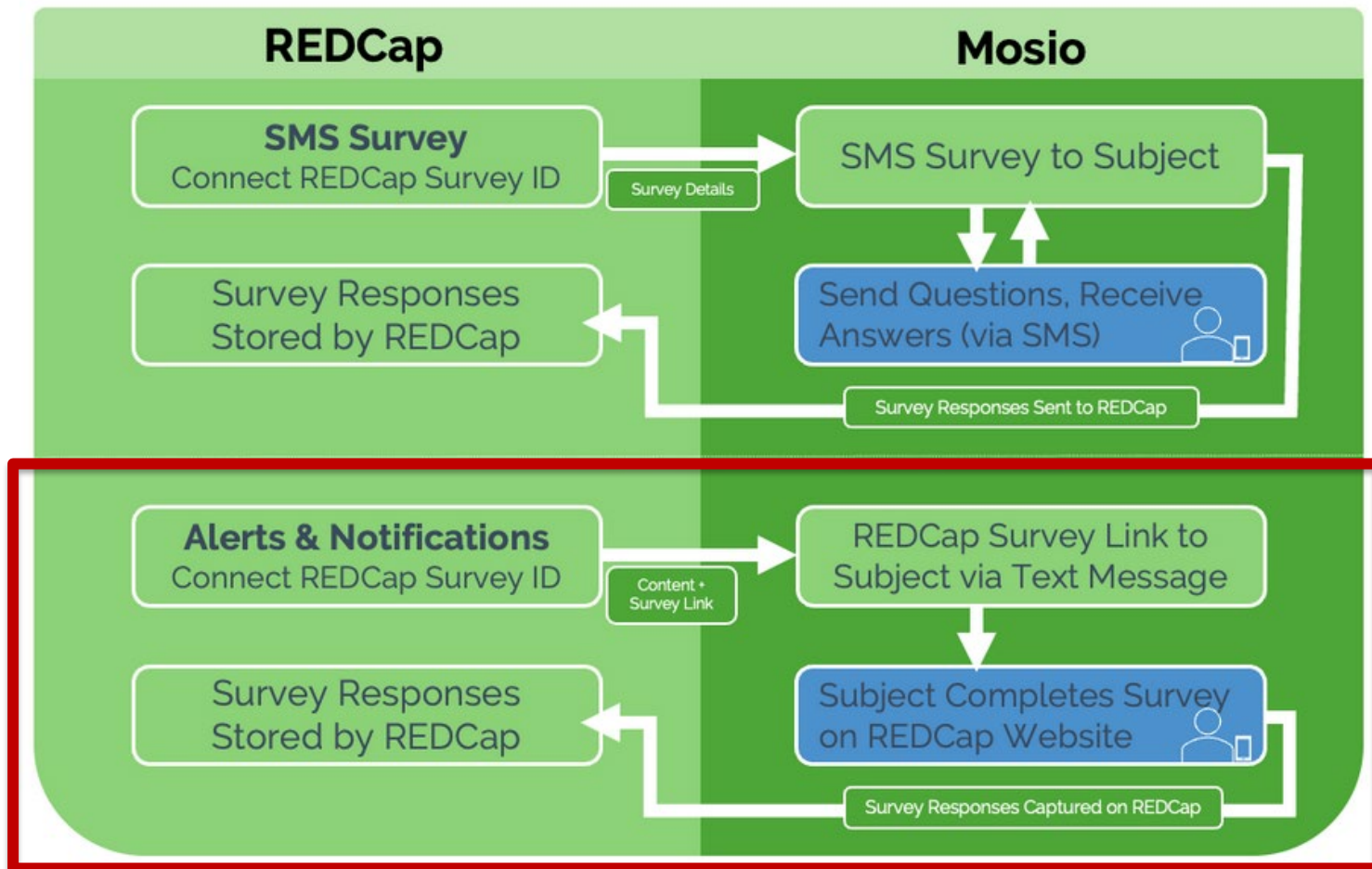
- Researchers must obtain Institutional Review Board (IRB) approval to use Mosio.
- Two-way SMS (text) conversations are **not** considered secure communication.
- Researchers must not administer surveys or collect personally identifiable information (PII) or protected health information (PHI) through SMS unless explicitly approved by the IRB.

Plans, Features, & Configuration

Feature	REDCap Direct	Basic	Plus
Best For	Studies only sending survey invitations or REDCap alerts	Studies needing participant interaction	Large or multi-project research programs
REDCap Project Text Lines	4	10	30
User Logins	4	10	30
Messaging Type	One-way messages	Two-way messaging	Two-way messaging
Works Outside REDCap	—	Yes	Yes
Survey Invitations	Yes	Yes	Yes
Alerts & Notifications	Yes	Yes	Yes
Mosio Dashboard	—	Yes	Yes
TextChat	—	Yes	Yes
Appointment Reminders	—	Yes	Yes
Auto-Responders / Contact Lists	—	Yes	Yes

Mosio and REDCap

How Does Mosio Interact with REDCap?



REDCap
Direct

Campaign Registry

- Research teams sending text messages from a 10-digit long code (10DLC) using application-to-person (A2P) messaging must have an approved messaging campaign on file.
- Mosio manages the registration process for you.
- Approval typically takes about one week from the time of submission.
- Campaign approval is required before sending any text messages, otherwise your number may be blocked by mobile carriers.

REDCap Integration and Configuration



09/01/23



REDCap@Yale

Help

Watch a quick 4 min video:

[How to configure Mosio & REDCap](#)

Enter your API Key into REDCap

In REDCap, under Project Setup, look for 'Enable optional modules.' Here you can click Enable or Modify next to 'Mosio SMS services,' and enter your

Mosio API Key

Go to [Configure settings](#) or [Analyze surveys for SMS](#)

Account Overview

Phone Number

API Key: <hidden>

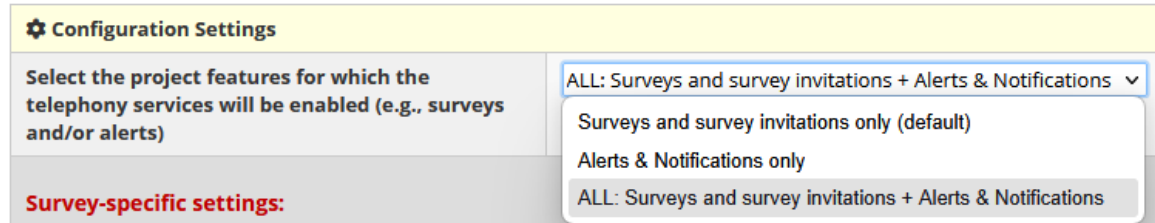


You are connected to REDCap Project Id

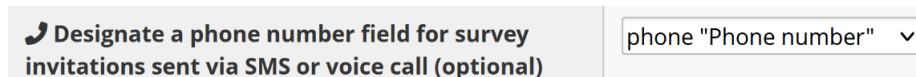
[Create New Project](#)

REDCap Configuration

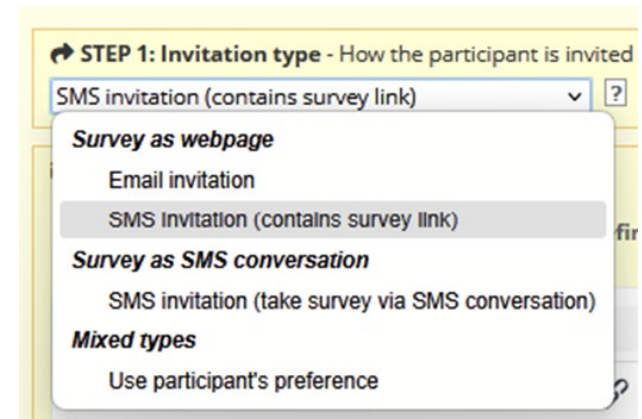
- REDCap has Mosio-specific settings that will allow you to enable surveys, alerts, or both.



- You will also need to classify the phone number field for text messages.



- Once Mosio is enabled, you will see new options to use SMS messaging for sending survey invites and alerts & notifications.



*Mosio Representative:
Noel Chandler*

Guest Presenter



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Q & A

Support and Next Steps

- Mosio is new at Yale and new to our team, and we are learning alongside our user community.
- We are happy to help. Please contact redcap@yale.edu with questions.
- Additional Information about Mosio is available on our REDCap portal [website](#).
 - A REDCap–Mosio integration FAQ with step-by-step instructions will be added soon.
 - We also provide access to a [text message calculator](#) tool to help researchers estimate the number of messages and SMS segments their study needs.

Thank you!