

# Text Messaging in Research

## PLAYBOOK

20 practical tips for using text messaging to improve participant engagement, streamline study operations, and stay compliant.



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# Text Messaging in Research

## A Playbook for Study Teams

20 practical tips for using text messaging to improve participant engagement, streamline study operations, and stay compliant.

### Sections

BEFORE YOU START (PLANNING)  
COMPLIANCE AND CARRIER RULES  
MESSAGE DESIGN AND DELIVERY  
STUDY OPERATIONS AND ENGAGEMENT

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## BEFORE YOU START (PLANNING)

### TIP 1

## Document Your Communication Requirements First



- Before evaluating any platform, write down who you need to reach (participants, caregivers, site staff), what messages you need to send (reminders, surveys, alerts), and when they need to go out.
- Create a simple matrix: rows are participant touchpoints, columns are channels (text, email, phone). Identify where text fills a gap that other channels cannot.
- Share this requirements document with your IRB, legal, and study team early so everyone is aligned before you sign a contract. We realize you may already be required to share with some people, but additional feedback can be great.
- A clear requirements doc also speeds up vendor demos because you can evaluate platforms against your actual needs, not hypothetical ones.
- The good news is you don't need to be this thorough for each study. Once you get a template down, it'll be easier for every other use case.

Source: Mosio: "How to Plan Your Research Texting Program" (<https://mosio.com/solutions/>)

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## TIP 2

### IRB Clearance: Know What to Include

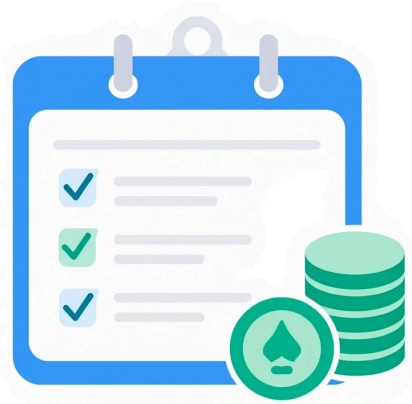


- Adding onto the first tip, you'll probably need to submit your texting plan to the IRB as part of your protocol. You'll want sample messages, opt-in/opt-out language, and a description of how participant data will be stored.
- Clarify in your consent form that participants will receive text messages, how frequently, and that standard messaging rates may apply. Mosio provides ICF guidelines for adding messaging content to your ICFs. Contact us and we'd be happy to share it with you.
- If you are collecting data via text (surveys, symptom reports), describe the data flow: where responses are stored, who has access, and how long data is retained.
- Many IRBs have approved texting protocols before. Ask your IRB contact for examples or templates to streamline the process.

Source: Mosio: "IRB and Compliance" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 3

### Budget for Delays: Plan for 3 Extra Months of Platform Licensing



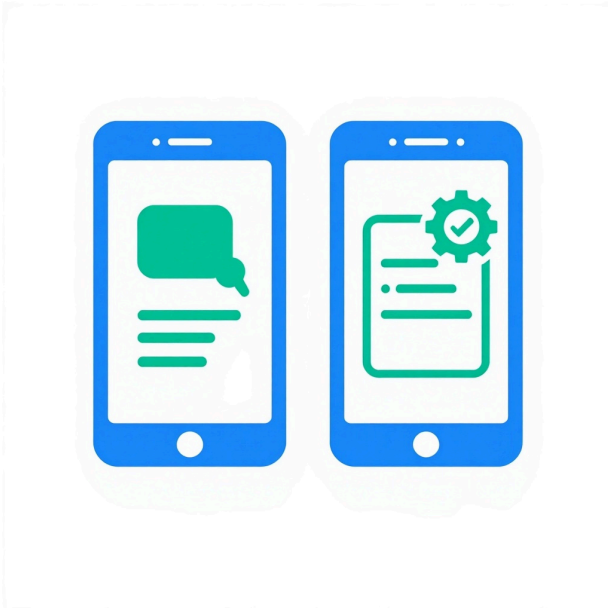
- Research studies almost always run longer than planned. Recruitment delays, protocol amendments, and IRB revisions can add weeks or months to your timeline.
- When budgeting for a texting platform, add at least three months of licensing beyond your expected study end date to avoid a gap in service.
- Include the buffer in your original budget justification. It is far easier to include it upfront than to request a no-cost extension later.
- Discuss flexible licensing terms with your vendor so you are not locked into rigid annual contracts when your timeline is uncertain.

Source: Mosio: "Pricing and Licensing" (<https://mosio.com/pricing/>)

## BEFORE YOU START (PLANNING)

### TIP 4

## Decide How Your Team Will Handle Incoming Messages



- Two-way TextChat (live back-and-forth messaging with participants) requires someone on your team to monitor and respond, which can be a significant time commitment.
- If your team does not have the bandwidth for real-time monitoring, look for a platform with smart autoresponders that can manage reply expectations automatically.
- Autoresponders can acknowledge incoming messages, and set expectations about response times without requiring a live person.
- Define your response protocol before launch: who responds, within what timeframe, and what happens after hours or on weekends.
- If you aren't interested in chatting "live" with study participants, autoresponders are a must.

Source: Mosio: "TextChat vs. Automated Messaging" (<https://mosio.zendesk.com/hc/en-us>)

## BEFORE YOU START (PLANNING)

### TIP 5

#### Ask Where Email and the Phone Have Fallen Short



- The strongest use case for text messaging is the one your team already feels: missed appointment reminders, unanswered follow-up emails, phone calls that go to voicemail.
- Survey your coordinators: which participant touchpoints consistently underperform? Those are your first candidates for texting.
- Common pain points include no-show visits, delayed survey responses, and participants forgetting medication or diary entries. Text messaging addresses all of these with timely, hard-to-ignore nudges.
- Start with one or two high-impact use cases rather than trying to replace every communication channel at once.

Source: Mosio: "Why Text Messaging for Research" (<https://mosio.com/>)

## COMPLIANCE AND CARRIER RULES

### TIP 6

## Know the Difference Between HIPAA and Carrier Compliance



- HIPAA compliance governs how you store, transmit, and protect participant health information. Carrier compliance governs what you can send via text and under what conditions.
- A platform can be HIPAA-compliant (encrypted, access-controlled, BAA in place) but still violate carrier rules if messages are sent without proper opt-in or registration.
- Make sure your vendor can demonstrate both: a signed Business Associate Agreement for HIPAA, and active carrier registrations (10DLC registration) for messaging compliance.
- Ask your vendor whether they handle 10DLC registration on your behalf or whether that is your responsibility. Some platforms register the number for you as part of onboarding; others leave it to you, which can delay your go-live date significantly.
- Find out how your vendor manages opt-outs. Carrier rules require that a "STOP" reply immediately removes a participant from all messaging. A compliant platform handles this automatically. If your vendor requires manual opt-out processing, that is both a compliance risk and a coordinator burden.
- Ask your vendor for information about both. If they cannot clearly explain the difference, that is a red flag.

Source: Mosio: "HIPAA Compliance" (<https://mosio.zendesk.com/hc/en-us/articles/204579498-Is-Mosio-HIPAA-Compliant>)

## TIP 7

### Get Your IT and Security Team Involved Early

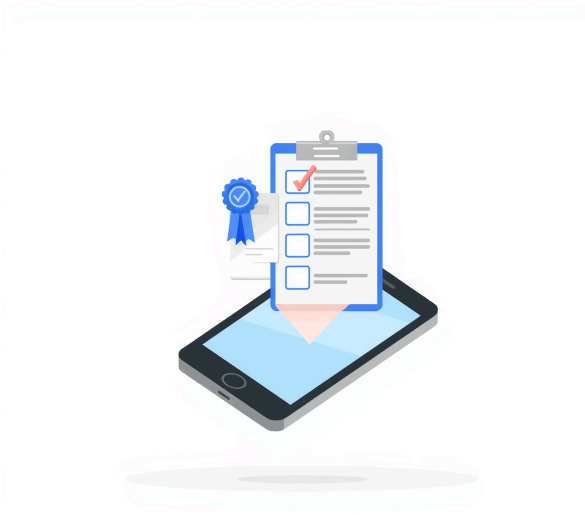


- IT and security reviews can add weeks or even months to your timeline if you wait until after you have selected a platform. Loop them in during your planning phase, not after.
- Provide your IT team with the vendor's security documentation upfront if you can. This prevents back-and-forth delays later.
- IT teams will need to confirm that the platform meets your institution's data handling policies, including where participant data is stored, how it is encrypted, and who has access.
- If your institution requires a formal security review or vendor risk assessment, start that process at the same time you begin your IRB submission. Running them in parallel saves significant time.

Source: Mosio: "Getting Started with Mosio" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 8

### Register Your 10DLC Campaign/Numbers Before Going Live



- 10DLC (10-Digit Long Code) registration is now required by all major U.S. carriers for any application-to-person text messaging. Unregistered numbers face filtering, throttling, or outright blocking.
- Registration involves two steps: registering your organization (brand) and registering your messaging campaign (use case). Both must be approved before you send your first message.
- The approval process can take anywhere from a few days to several weeks depending on your organization type. Start this process as soon as you select a vendor.
- Your platform vendor should be able to assist or handle the registration process for you. If they do not offer this, there are other vendors who do.

Source: Mosio: "10DLC Registration" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 9

### Opt-in and Opt-Out Language



- For 10DLC registration you need to be able to show how you opt participants in. They want to see that the users have given permission to text with them.
- As mentioned elsewhere in this playbook, Mosio is happy to provide you with ICF guidelines for phrasing how text messaging will be used to communicate with your study subjects/patients.
- Every text messaging program must include clear opt-out instructions. The industry standard is: "Reply STOP to unsubscribe." This is not optional, but you can make it more personalized to your study or organization.
- Include opt-out language in your initial welcome message and periodically in ongoing communications, especially in longer studies.
- When a participant texts STOP, your platform must immediately honor the request and stop all messages. Confirm the opt-out with a final message.
- Find out if your vendor has the ability for a participant to opt back in if they opted out accidentally. They should be able to text START to opt back in.

Source: Mosio: "Opt-Out and STOP Compliance" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 10

### Use a Research-Focused Platform, Not a Marketing Tool



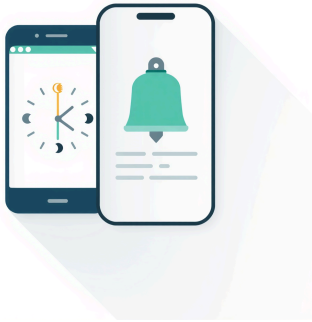
- SMS marketing platforms (Twilio or Vonage-based DIY solutions, Mailchimp SMS, etc.) are designed for promotional campaigns, not for research with compliance requirements and participant privacy obligations.
- A research-focused platform should offer HIPAA compliance with a signed BAA, IRB-friendly consent workflows, data export to research systems like REDCap, and audit trails.
- Marketing tools often lack features researchers need: scheduled survey delivery, longitudinal drip messaging, participant segmentation by study arm, and two-way communication logging.
- Choosing the wrong platform creates compliance risk and costs more time in workarounds than you save in licensing fees.

Source: Mosio: "Why Mosio for Research" (<https://mosio.com/solutions/>)

## MESSAGE DESIGN AND DELIVERY

### TIP 11

## Respect Participant Time Zones and Quiet Hours

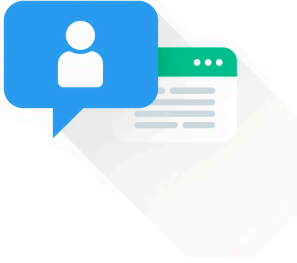


- Sending a reminder at 9 AM Eastern is 6 AM Pacific. If your study spans multiple time zones, your platform must support time-zone-aware scheduling.
- Define quiet hours (for example, no messages before 9 AM or after 8 PM in the participant's local time) and enforce them at the platform level if you can, not manually.
- Quiet hours are especially important for studies with daily or frequent messages. A 6 AM text about a symptom diary will frustrate participants and increase opt-outs.
- Ask your vendor how their platform handles time zone logic. The best platforms offer flexibility so everyone is getting the same message at the same “time,” wherever they’re located.

Source: Mosio: "Scheduling and Time Zones" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 12

### Personalize with Custom Fields to Boost Engagement



- Messages that start with "Hi [First Name]" consistently outperform generic messages. Personalization signals that the message is real and relevant, not spam.
- Beyond first name, use custom fields for visit dates, medication names, study arm, or coordinator name to make messages feel specific and actionable.
- Personalization also helps with carrier filtering. Generic, identical messages sent to many recipients are more likely to be flagged as spam by carriers.
- Set up your custom fields during onboarding so they are available when you build your message templates. Retrofitting personalization mid-study is avoidable extra work.

Source: Mosio: "Custom Fields and Personalization" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 13

### Use Natural, Conversational Language



- Write messages the way you would speak to a participant in person: warm, clear, and direct. Avoid clinical jargon, all-caps, or overly formal phrasing.
- Instead of "Please complete your PRO assessment at your earliest convenience," try "Hi Maria, your weekly check-in is ready. It takes about 2 minutes. Here's the first question, simply reply to this message with your response."
- Keep messages under 160 characters when possible to avoid splitting across multiple texts, which can feel disjointed on some devices. Some platforms (like Mosio) offer the ability to send longer messages, concatenated for a better user experience.
- Read every message out loud before finalizing it. If it sounds robotic or stiff, rewrite it until it sounds like something a friendly coordinator would say.

Source: Mosio: "Best Practices for Research Messaging" (<https://mosio.com/resources/>)

## TIP 14

### Know When to Use SMS Surveys vs. Survey Links



- SMS Surveys (where participants reply directly in the text thread) are best for short, simple questions: 1 to 5 items, single-choice or numeric responses.
- Survey links (sending a URL to an external form like REDCap or Qualtrics) are better for longer instruments, branching logic, or validated scales that need precise formatting.
- In-text surveys have higher completion rates because participants do not have to leave the messaging app. Use them for daily symptom checks, mood scales, or quick yes/no questions.
- Match the method to the question. Do not force a 30-item questionnaire into text replies, and do not send a link for a single "How are you feeling today?" question.

Source: Mosio: "Text Message Surveys" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 15

### Write Your Messages as a Team, Not Solo



- Have at least two people review every message template before it goes live. Coordinators catch tone issues, PIs catch clinical accuracy problems, and a fresh set of eyes catches typos or confusing phrasing the writer missed.
- Read each message out loud during your review. If it sounds stiff, clinical, or robotic when spoken, it will feel that way to the participant reading it on their phone.
- Include someone from outside the study team if possible. A colleague who knows nothing about the protocol is the best test for clarity: if they do not understand the message, your participants will not either.
- You can visit <https://www.mosio.com/counter> for a character counter to craft your messages. It has a secondary benefit of providing you with clarity as to how many message/segment credits you'll need with your vendor.
- Save your final approved templates in a shared document so the whole team is working from the same version. This prevents coordinators from sending outdated or unapproved messages during the study.

Source: Mosio: "Best Practices for Research Messaging" (<https://mosio.com/resources/>)

## TIP 16

### Welcome Participants at Enrollment and Ask Them to Save Your Number

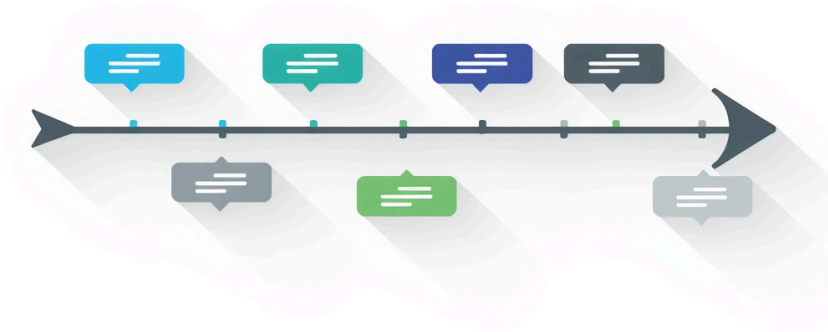


- Send a welcome message immediately after enrollment while the study is still fresh in the participant's mind. Include your study name, a brief reminder of what to expect, and the opt-out instructions.
- Ask participants to save your texting number as a contact (for example, "Save this number as 'ABC Study Team'"). Saved contacts are far less likely to be reported as spam.
- A strong welcome message sets the tone for the entire study. It tells participants that you value their time and that communication will be clear and consistent.
- Include a simple confirmation step: "Reply YES to confirm you received this message." This verifies the number is active and creates a record of engagement.

Source: Mosio: "Onboarding Participants" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 17

### Use Storylines for Automated Message Sequences



- Storylines (also called drip campaigns or automated sequences) let you schedule a series of messages that go out on a set timeline relative to each participant's enrollment date.
- This is essential for longitudinal studies where participants enroll on different dates but need the same sequence of reminders, surveys, and check-ins.
- Build your storyline before enrollment begins. Map every message to a specific day or week post-enrollment so coordinators do not have to send messages manually.
- Include logic branches where possible: if a participant completes a survey, skip the reminder. If they miss a visit, trigger a follow-up. Automation reduces coordinator workload and keeps the study on track.

Source: Mosio: "Storylines and Drip Messaging" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 18

### Use Text Message Surveys for Data Collection, Check-Ins, or Compliance Confirmation



- Text message surveys are one of the most effective ways to collect real-time data from participants without requiring them to log into a portal or open an email.
- Use them for daily symptom tracking, medication adherence checks, mood assessments, or any brief data point you need at regular intervals.
- Response rates for text surveys consistently outperform email and web-based surveys in research settings, particularly among younger and underserved populations.
- Pair text surveys with automated reminders, to remind a subject to take their medicine or complete a desired task: if a participant has not responded by a certain time, send a gentle follow-up. Most platforms can automate this sequence.

Source: Mosio: "Text Message Surveys for Research" (<https://mosio.zendesk.com/hc/en-us>)

## TIP 19

### Plan for Lost-to-Follow-Up Before Participants Go Silent



- Do not wait until a participant has missed three visits to act. Build a re-engagement protocol into your study plan from the start.
- Define escalation steps: first, an automated text reminder; second, a personalized message from the coordinator; third, a phone call or alternative contact method.
- Use your platform's tracking features to flag participants who have not responded to messages within a defined window (for example, 48 hours for daily studies, one week for weekly studies).
- A proactive re-engagement protocol can recover participants who would otherwise be counted as lost, improving your retention rate and data completeness.
- Text messaging is great, but sometimes a phone call or voice mail is what gets someone to answer. Use what you need to keep them engaged and in your study!

Source: Mosio: "Participant Retention Strategies" (<https://mosio.com/resources/>)

## TIP 20

### Integrate with Your Existing Tools to Reduce Coordinator Burden



- If your team already uses REDCap, Qualtrics, or another data management system, choose a texting platform that integrates with it so data flows automatically instead of requiring manual entry.
- Integration means survey responses collected via text can land directly in your database, enrollment triggers can start automated message sequences, and opt-outs can sync across systems.
- Even simple integrations save significant coordinator time over the life of a study. Ask your vendor about API access, Zapier compatibility, or native connectors to research tools.
- Even if your text messaging vendor doesn't have built-in integrations, there are many useful ways third-party platforms can be leveraged.
- Reducing manual work is not just about efficiency. It also reduces errors. Every manual data transfer step is an opportunity for a mistake.

Source: Mosio: "Integrations and API" (<https://mosio.zendesk.com/hc/en-us>)

## Conclusion

**We hope this playbook gives your team a solid foundation for adding text messaging to your study communications.**

Text messaging works best when it is planned thoughtfully, set up correctly, and matched to the real needs of your participants and your team. Whether you are just exploring the idea or ready to get started, Mosio is here to help.

### **Learn more and explore resources:**

- Browse our website for platform details, case studies, and pricing: [www.mosio.com](http://www.mosio.com)
- Visit our Help Center for setup guides, FAQs, and best practices: [mosio.zendesk.com/hc/en-us](https://mosio.zendesk.com/hc/en-us)
- Get a free, instant quote: <https://www.mosio.com/plans>
- Join our virtual office hours to ask questions and see the platform live: <https://www.mosio.com/office-hours>

**Questions? We would love to hear from you.** Reach us at [www.mosio.com](http://www.mosio.com) or text us at 425-559-9993.

