



SMS Technical Document for US Sites

Contents

General Overview	3
How to set up a user for SMS questions after enrollment into MTN-035.	4
SMS phone numbers assigned to the sites	7
Day and Time Considerations.....	7
Modifying Scheduled Messages.....	8
Final SMS Surveys	11

General Overview

At the Enrollment Visit (Visit 2), study staff will provide the participant with general use instructions and train the participant on using the SMS system to report on product use and acceptability. The training should be done using the cell phone that the participant will use during study product the study (remind participants during the screening visit to bring their cell phone to the enrollment visit (Visit 2)). Site staff should follow the general use instructions below.

The 035 behavioral team will be available to assist in troubleshooting and resolving any problems as they arise. To facilitate the troubleshooting process, sites should provide a description of the problem, including a copy of the error message(s), if any, date and time of when the problem occurred, and the password and phone number that was used, if available.

If sites encounter any problems with the SMS, sites should notify the team by sending an email to mtn035sms@mtinstopshiv.org.

General Use Instructions:

1. Inform the participant that the study procedures include responding to brief text messages about product use, and that he/she will receive compensation per SMS session (compensation varies by site) and that their phone number and message content will be shared with a third party messaging service provider to transmit the electronic messages.
2. Inform the participant that he/she can choose the most convenient day and time of the day to get the text message and that this time will be programmed once their information is entered into the system. The day and time can be changed later on by site coordinators.
3. The participant should respond to an SMS weekly immediately after receiving it during study product the 4 weeks of follow-up. Inform the participant that if he/she does not receive the weekly SMS for any reason, to let the site staff know.
4. The participant should be informed that site staff will contact her if he/she has not sent any SMS text messages for two consecutive weeks, in order to make sure that he/she is not having problems with the SMS system.
5. The participant should be reminded that their responses should be as honest as possible when answering study product the study product questions via SMS. Their responses will help to develop a product that will be useful to people like them.
6. Alert the participant that the SMS should not be used for reporting to the clinic staff any medical problems that may result from the study product. If the participant has any medical problems, he/she should contact the site clinic staff.

How to set up a user for SMS questions after enrollment into MTN-035.

1. From a browser, navigate to <https://mtn035.nursing.upenn.edu>
 2. Click **Log In** using the credentials that were created during the MTN-035 site training.
 4. Enter the password, which was sent to you prior to site training.
 5. After successful login, you will be presented with a “dashboard” screen. From there you will need to choose **Participants**, which you will find either on the gray navigation bar on the left side of the screen.
 6. Once you are in the Participants section, select “**Add Participant**” on the right side of the screen.
- NOTE: Participants/staff at each site will see only the services available for their site.

a. Below is an example of the participant landing page.

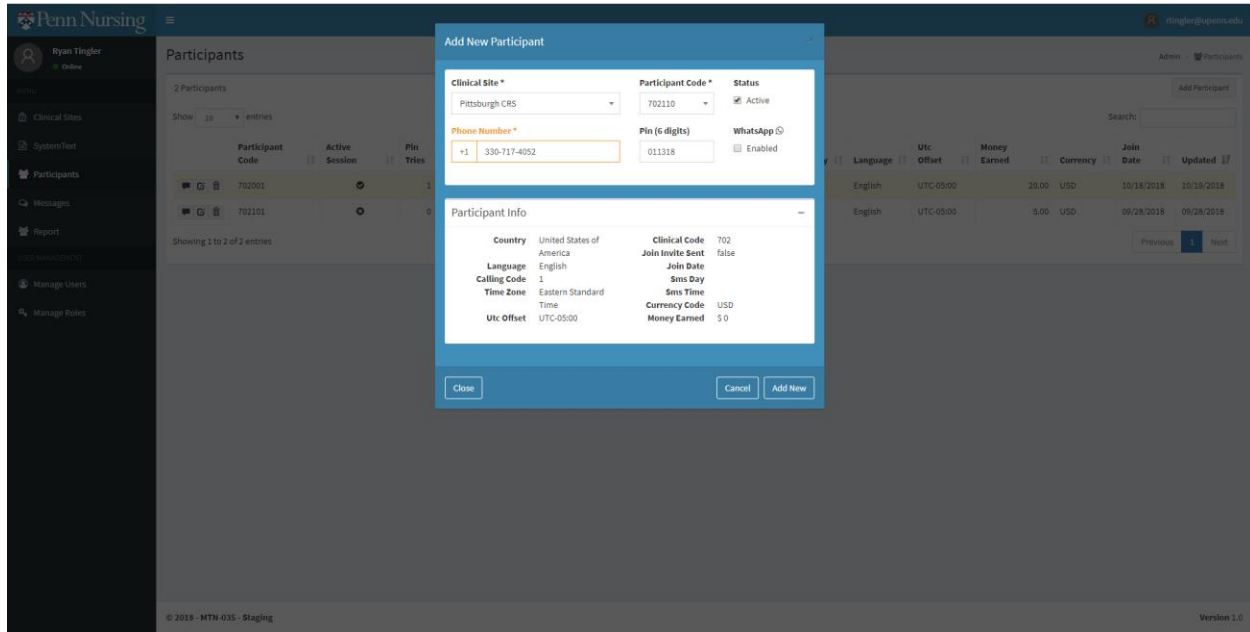
The screenshot shows the 'Participants' page in the MTN-035 Staging environment. The user is logged in as Ryan Tingler. The page displays a table with 2 participants. The table columns are: Participant Code, Active Session, Pin Titles, Calling Code, Phone Number, Pin, WhatsApp, Clinical Site, Country, Language, UTC Offset, Money Earned, Currency, Join Date, and Updated. The data rows are as follows:

Participant Code	Active Session	Pin Titles	Calling Code	Phone Number	Pin	WhatsApp	Clinical Site	Country	Language	UTC Offset	Money Earned	Currency	Join Date	Updated
702001	1	1	+1	(267) 990-8646	123456	No WhatsApp	Pittsburgh CRS	US	English	UTC-05:00	20.00	USD	10/18/2018	10/19/2018
702101	0	0	+1	(856) 296-0158	654321	No WhatsApp	Pittsburgh CRS	US	English	UTC-05:00	5.00	USD	09/28/2018	09/28/2018

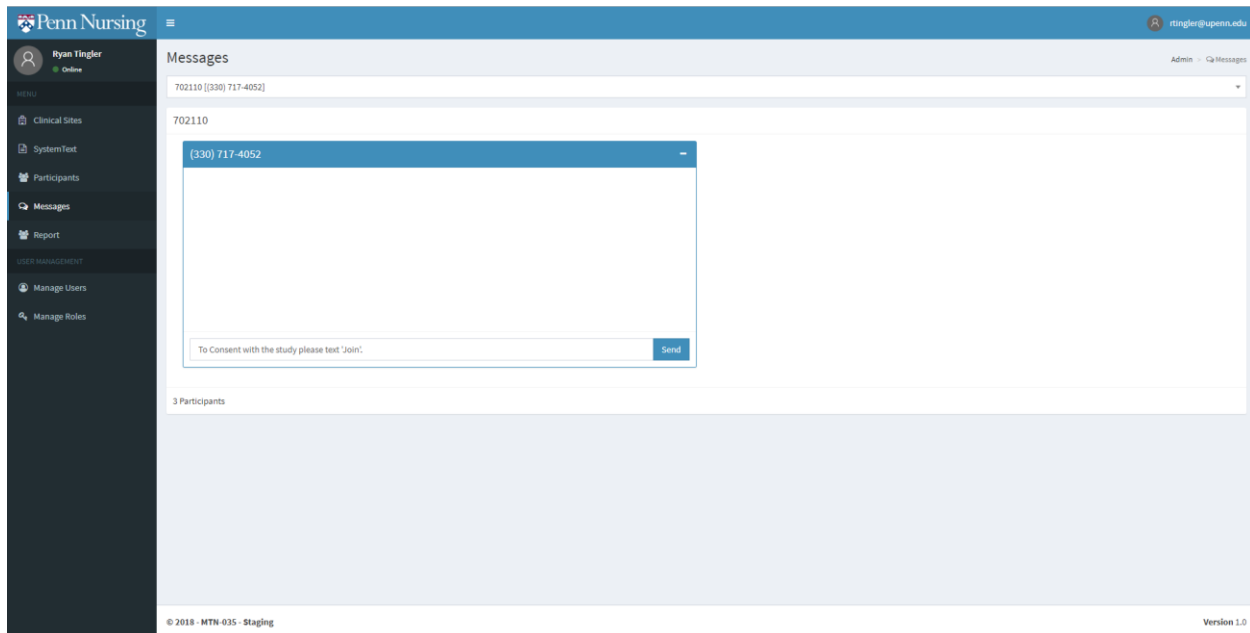
The page also includes a search bar, a pagination control showing 'Showing 1 to 2 of 2 entries', and a footer with '© 2018 - MTN-035 - Staging' and 'Version 1.0'.

NOTE: Staff of the BRWG will have access to the data for all sites.

7. Enter participants contact information, CASI ID code, a participant created PIN, check WhatsApp (if applicable), and mark the participant as active, then select “**add participant**”.



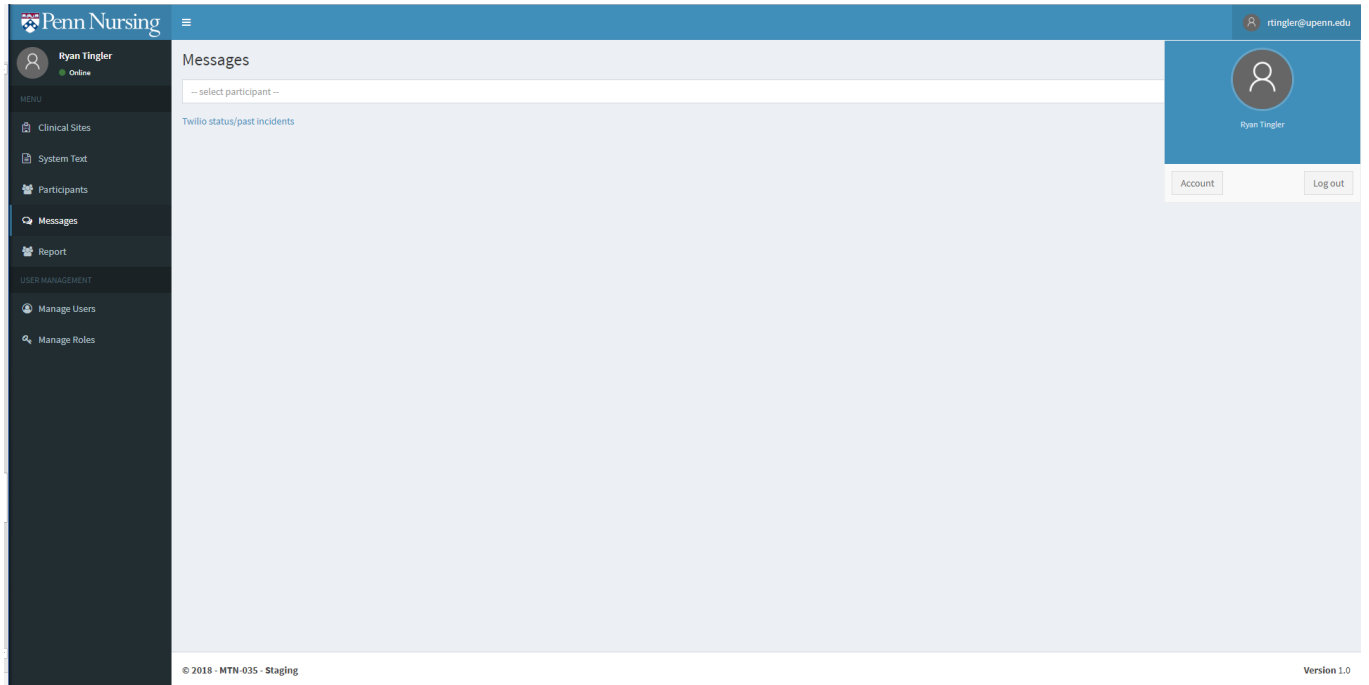
8. Once added to the system, select messages on the left side of the screen, select which participant to message, and press “send” in the blue box.



- a. After pressing send, walk through the SMS set up with participant.
- b. After Day and Time for SMS survey is saved, have the participant message “**Practice**” the system.
- c. After the practice session, remind the participant that if they have any questions, to let staff know.

Logging out of the SMS portal

1. After completing your analysis or work inside the SMS portal, please click on your user name in the top right of the screen. Once the pop-up appears, click **“log out”**.



SMS phone numbers assigned to the sites

Each of the sites has a pre-established SMS phone number that will be used to send the SMS surveys. Site staff may want to suggest that participants program the appropriate number listed below into their phones so that they are recognized by the participant when he/she receives the text messages. The numbers are assigned as follows:

- All US Sites: (265)-204-3414

Day and Time Considerations

As mentioned during training, when setting the participant selected day and time for the SMS survey, date selection must be in numerical format. Below is a reminder of the format on how the questions related to days of the week and time should be responded.

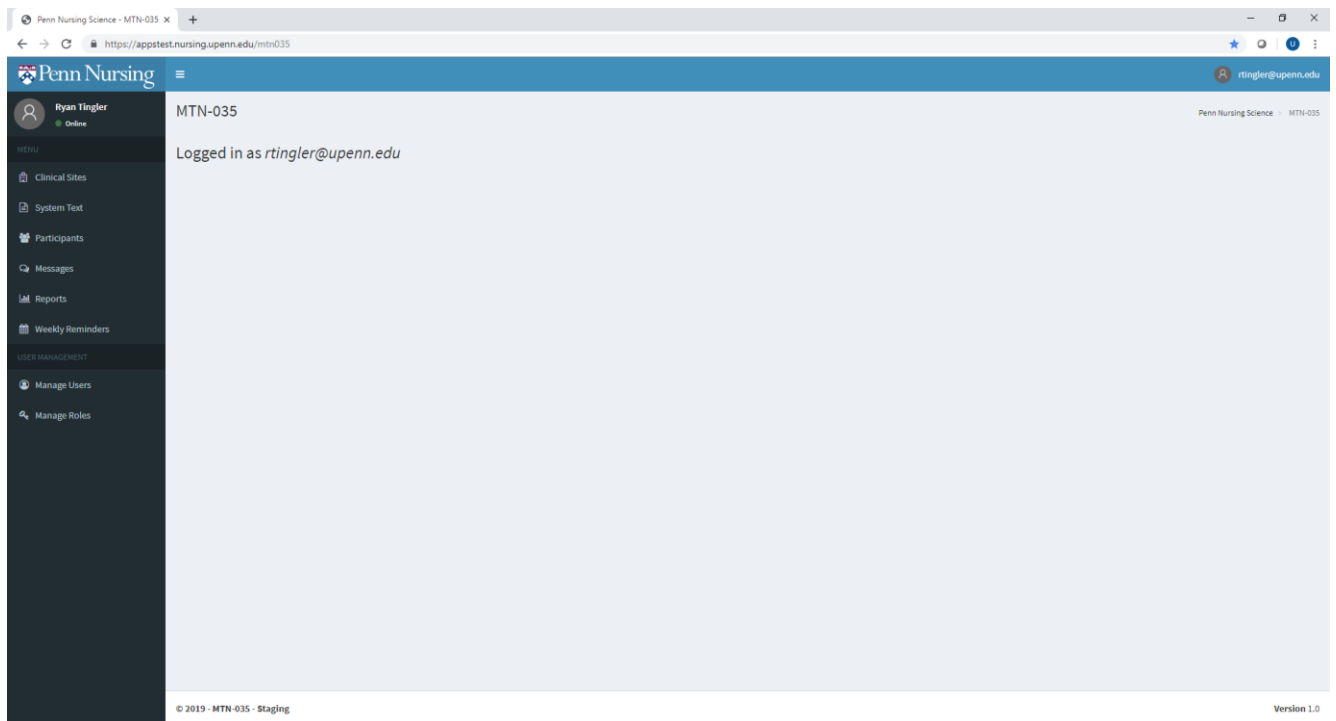
Days	Number	Hour	AM	PM
Sunday	1	1	0100	1300
		2	0200	1400
Monday	2	3	0300	1500
		4	0400	1600
Tuesday	3	5	0500	1700
		6	0600	1800
Wednesday	4	7	0700	1900
		8	0800	2000
Thursday	5	9	0900	2100
		10	1000	2200
Friday	6	11	1100	2300
		12	1200	0000
Saturday	7			

Modifying Scheduled Messages for Participants

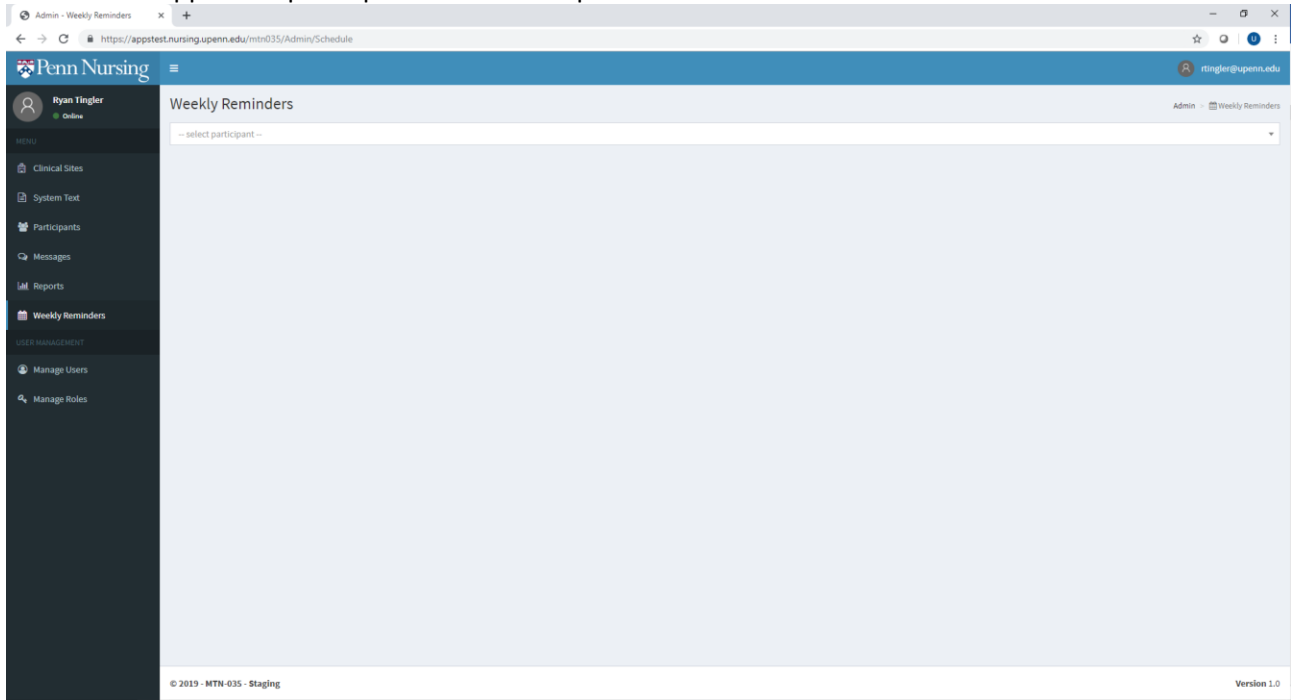
If for any reason you need to delay the participant from receiving the SMS surveys, you may delay the participant by selecting the “delay weeks” tab in the weekly reminder tab in the sequence block above the sequence they are entering. For example, if you are delaying the participants Sequence 2 and 3, you would select “delay weeks: 1” in the Sequence 1 block.

How to delay a participants SMS Survey

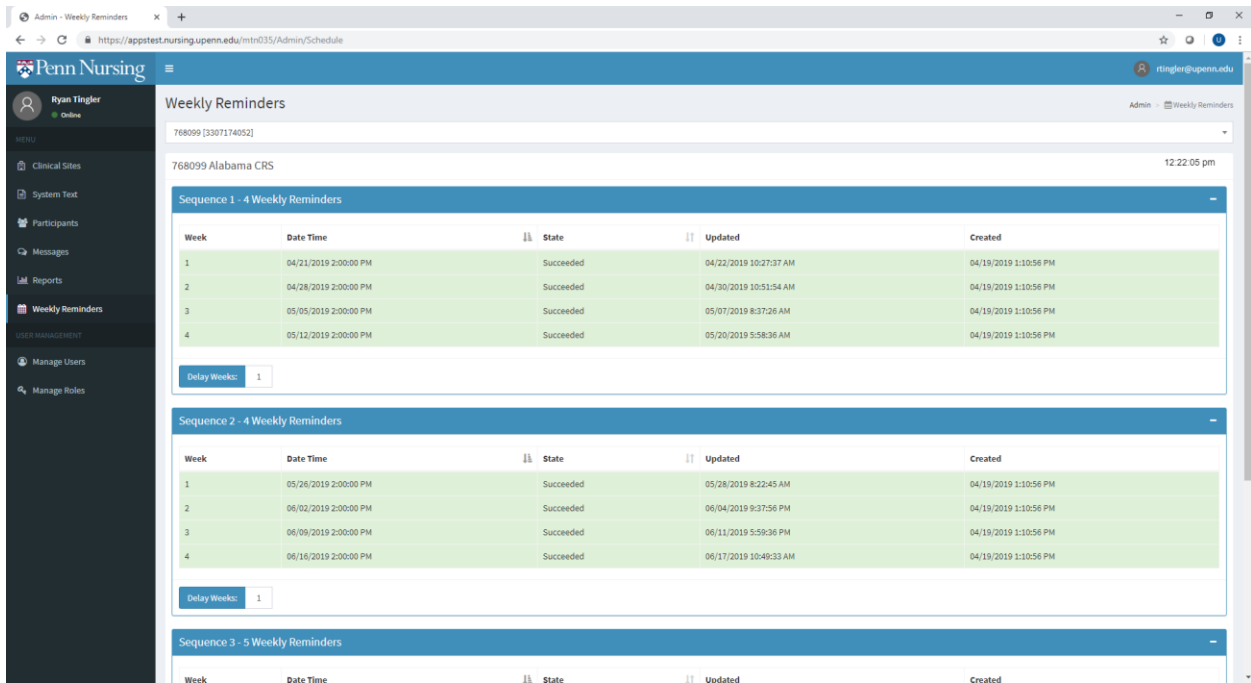
1. Log into the SMS system and select “Weekly Reminders” in the left-hand column.



2. Select the applicable participant from the drop down menu in the middle of the screen.



3. Enter the number of weeks you desire to delay the SMS messages from being delivered to the participant and press “Delay Weeks”.



4. Once the system is updated, old scheduled messages will be deleted and in grey/white and new rescheduled messages will appear in yellow/gold.

Sequence 3 - 11 Weekly Reminders					
Week	Date Time	State	Updated	Created	
1	07/14/2019 4:00:00 PM	Deleted	07/02/2019 3:24:44 PM	04/30/2019 6:42:28 PM	
2	07/21/2019 4:00:00 PM	Deleted	07/02/2019 3:24:44 PM	04/30/2019 6:42:28 PM	
1	07/28/2019 4:00:00 PM	Deleted	07/02/2019 3:27:08 PM	04/30/2019 6:42:28 PM	
1	08/04/2019 3:00:00 PM	Scheduled	07/11/2019 4:09:51 AM	07/11/2019 4:09:51 AM	
1	08/04/2019 4:00:00 PM	Deleted	07/11/2019 4:09:51 AM	04/30/2019 6:42:28 PM	
2	08/11/2019 3:00:00 PM	Scheduled	07/11/2019 4:09:51 AM	07/11/2019 4:09:51 AM	
2	08/11/2019 4:00:00 PM	Deleted	07/11/2019 4:09:51 AM	07/02/2019 3:24:44 PM	
3	08/18/2019 3:00:00 PM	Scheduled	07/11/2019 4:09:51 AM	07/11/2019 4:09:51 AM	
3	08/18/2019 4:00:00 PM	Deleted	07/11/2019 4:09:51 AM	07/02/2019 3:24:44 PM	
4	08/25/2019 3:00:00 PM	Scheduled	07/11/2019 4:09:51 AM	07/11/2019 4:09:51 AM	
4	08/25/2019 4:00:00 PM	Deleted	07/11/2019 4:09:51 AM	07/02/2019 3:27:08 PM	

Delay Weeks: 1

Note: The system may take a second to load, do not click delay weeks more than once. If it does not automatically reload, click refresh at the top of your window.

Below, are the possible options for delay weeks:

- If “delay weeks” is pressed in the sequence 1 block, the system will delay the scheduled reminders in blocks 1, 2 & 3
- If “delay weeks” is pressed in the sequence 2 block, the system will delay the scheduled reminders in block 2 & 3
- If “delay weeks” is pressed in the sequence 3 block, the system will delay the scheduled reminders in block 3

Final SMS Surveys

Short Message Service (SMS) Script for Weekly Reporting

P = Participant text, S = SMS system text, [CAPS] = System action or programming instruction that is not seen by the participant

INITIAL SETUP

STUDY STAFF PROVIDES PARTICIPANT'S PASSWORD AND HELPS PARTICIPANT TO SELECT A TIME WHEN THEY WOULD LIKE TO RECEIVE WEEKLY REMINDER MESSAGES. PARTICIPANT THEN SENDS THE FOLLOWING MESSAGE TO THE SMS SYSTEM.

STAFF: Please reply with join to start SMS session

P: Join

S: A third-party message provider will process your messages sent to the study team. Message providers may have access to your contact number and message content. Please reply with "1" if you are willing to proceed with the SMS component of this study, and you understand that you will be sharing sexual behavior information via messaging as described above.

P: "1"

S: [ADD PARTICIPANT]: Thank you for joining. You will receive a weekly reminder to start your SMS session. Questions and answer choices may vary depending on your response. (msg 1/2)

Message speed varies by phone. For helpful options you can text "help". Please send your desired reminder day now (ex: 1 = Sunday or 7 = Saturday). (msg 2/2)

P: (Reminder DAY)

S: You will receive a weekly reminder on [Day Selected] to start your SMS session. Questions and answer choices may vary depending on your response. (msg 1/2)

Message speed varies by phone. Please send your desired reminder time now (ex: 0800 = 8:00am or 1500 = 3:00pm). (msg 2/2)

P: (Reminder DAY & TIME)

S: [SETS PARTICIPANT'S REMINDER TIME] Your reminder time is now [Day Selected] at [Time Selected]. If you are available, text "practice". If not, text NO.

TEST PRACTICE SESSION

S: Now, we are going to test the questions you will be receiving every week. Please respond to the questions accordingly and if at any time you need help, please ask the clinic staff member. [System starts practice sessions]

WEEKLY SMS SESSION

S [SCHEDULED REMINDER]: If you are available, text your password now and earn compensation for today. If not, text NO.

P: no

S: Thank you. A reminder will be sent at the time you requested.

P: (password)

S [START SESSION]:

Questions*	Observations
Q1. Since your last report, how many times have you used the product?	(Range 0-20)
Q2. Since your last report, how many times did you have RAS?	{IF Q1 > 0 & Q2 = 0; GO TO Q4} {IF Q1 = 0 & Q2 = 0; END SESSION}
Q3. {If Q2>0}Of those [Q2] times, how many times did you use the product before RAS?	(Range: 0 to Q1)
Q4. On a scale from 1-10, how much did you like the product since your last report? (1 = Extremely dislike, 10=Extremely Like)	(Range: 1-10)

* Participants will be trained to understand the meaning of abbreviations during enrollment visit.

**Error Message: That is an invalid response. Please try again or contact clinic staff at [INSERT CLINIC NUMBER]

S [END SESSION]: Thank you! You earned compensation by reporting this week. *Delete this session and/or lock your phone*

OTHER POSSIBLE SMS ACTIONS (Vary per Country)

P: staff

S: TO REACH STAFF: [INSERT CLINIC NUMBER]

P: balance

S: You have earned \$_

P: <non key word>

S: Thank you for your message. Please contact staff at [INSERT CLINIC NUMBER]

P: <incorrect PIN>

[Attempt 1/3, 2/3.] **S:** That is an incorrect PIN. Please try again.

[Attempt 3/3] **S:** That is an incorrect PIN. You have maxed out your attempts. Please contact clinic staff at [INSERT CLINIC NUMBER}
