Mobilizing the Participant Voice

Getting Started Quick Guide

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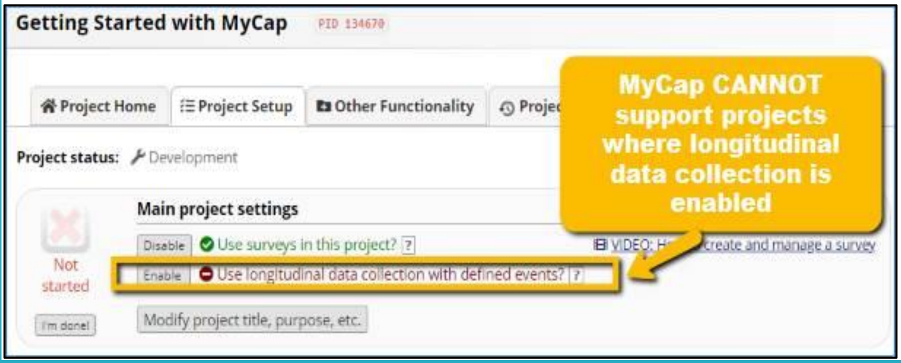
SECTION A	Preparing Your REDCap Project for Using MyCap

STEP 1

CREATE YOUR REDCAP PROJECT

- ☐ Click **New Project** in REDCap.
- ☐ Fill in the project title, purpose, and any project-related notes you want to include.
- ☐ Enable the "Use surveys in this project?" question on the next screen.

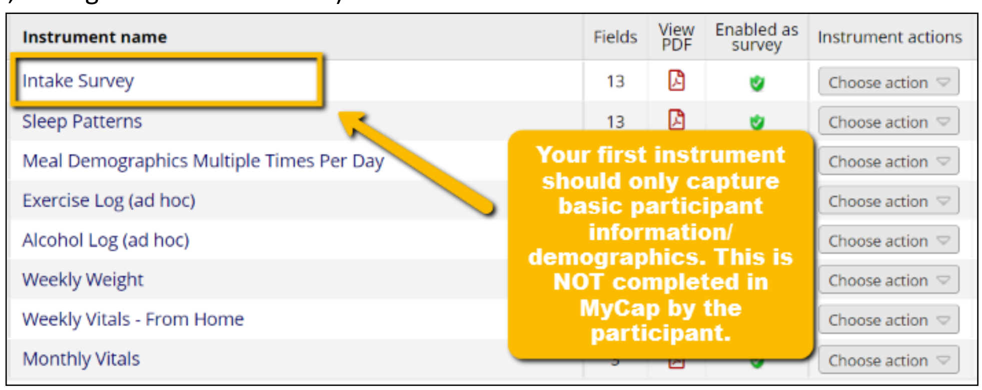


⊗ *Note: Do not enable 'longitudinal data collection with defined events'. MyCap is not compatible with this setting. Instead, longitudinal data collection is supported when scheduling tasks in the MyCap interface.*

STEP 2

DESIGN YOUR INSTRUMENTS WITHIN REDCAP

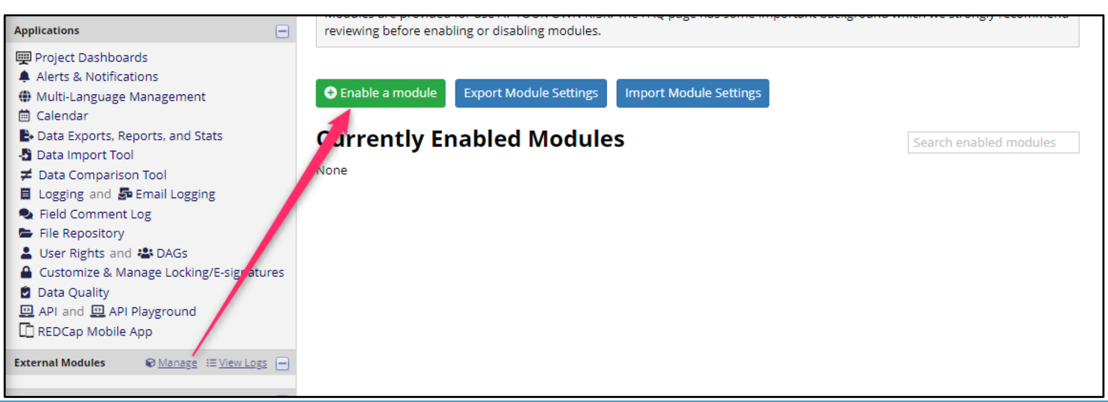
- ☐ Create the first instrument to capture participant information/demographics, like an intake or enrollment form. You do not need to include first/last name, as this will be added when MyCap is enabled. You can hide these fields if you do not need them, but they must be on the instrument. **This first instrument is NOT completed in MyCap by the participant.** Instead, participants complete the form as a survey; the data can be imported into your project; or project staff can complete it for a participant (e.g., during an intake interview).
- ☐ Create your other project instruments.



⊗ *Note: these options are not supported in MyCap: Calculated fields, Piping, Matrix fields, Descriptive texts, Dynamic query (SQL) fields, and Signatures.*

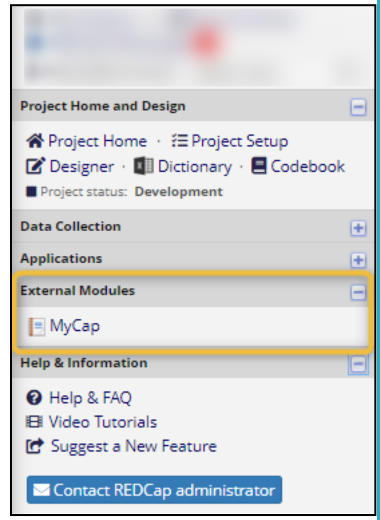
STEP 3

REQUEST TO ENABLE THE MYCAP MODULE ON YOUR PROJECT This process may differ from institution to institution. You may need to email your REDCap administrator to request access, or you may be able to request activation from the REDCap Console under "External Modules", as shown here.



STEP 4

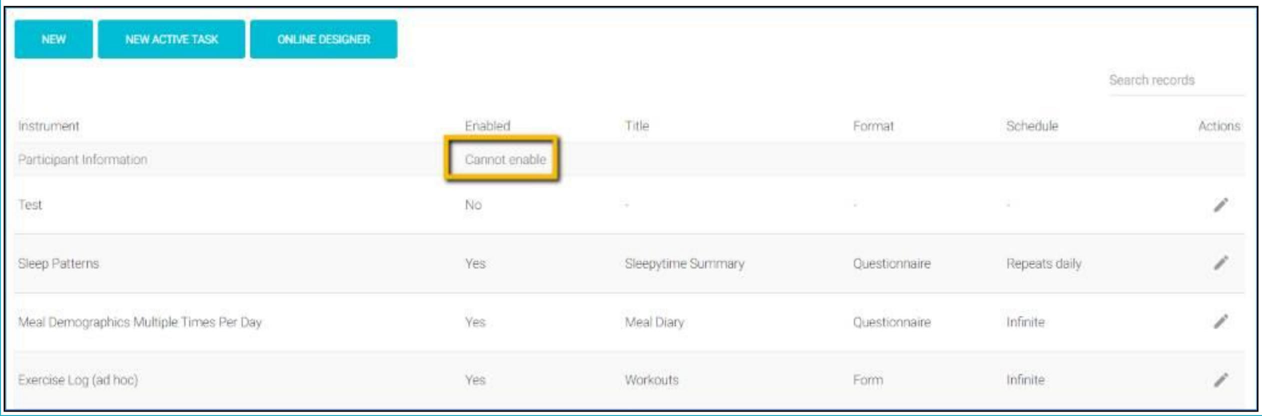
VERIFY MYCAP IS ENABLED



☐ From the REDCap interface, go to the Designer and confirm MyCap action tags (below) are added to the first instrument in the project. These variables ensure participant data are appropriately synced for the life of the project. If your project does not contain these fields, the fields will be added.

- First Name *(@MC-PARTICIPANT-FIRSTNAME)*
- Last Name *(@MC-PARTICIPANT-LASTNAME)*
- Baseline date *(@MC-PARTICIPANT-ZERODATE)*
- Install date *(@MC-PARTICIPANT-JOINDATE @HIDDEN)*
- Code *(@MC-PARTICIPANT-CODE @HIDDEN)*
- Push Notification IDs *(@MC-PARTICIPANT-PUSHNOTIFICATIONIDS @HIDDEN)*

☐ In the MyCap interface, the project instruments will be listed under Configure App – Tasks. The first instrument will have a status of, "cannot enable".

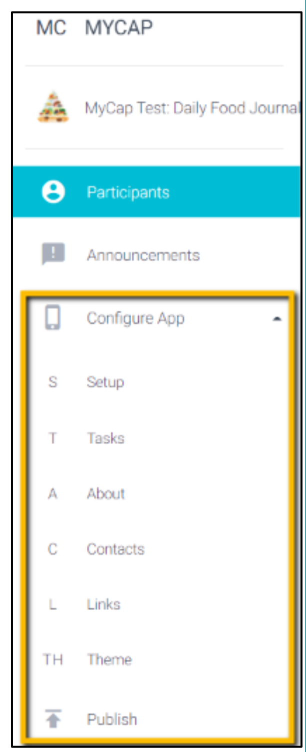


SECTION B

Tailoring MyCap to Your Project

STEP 1

CONFIGURE APP – SETUP: SET SCHEDULE AND ACCESS TRIGGERS



Baseline Date: Indicate whether you want to use a baseline date to schedule tasks for participants. This is important when participants' tasks need to be based on a specific date (e.g., three days after a procedure). *Note: If the baseline date is not entered before a participant joins MyCap, they cannot complete any other tasks until the baseline task is completed in MyCap.*

To set up the baseline date as a task,

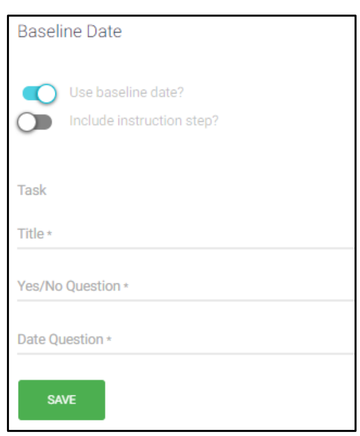
☐ Turn on the toggle.

☐ Indicate if you want to provide instructions, such as when the task should be completed.

☐ Enter a title for the task (e.g., "Shoulder Surgery")

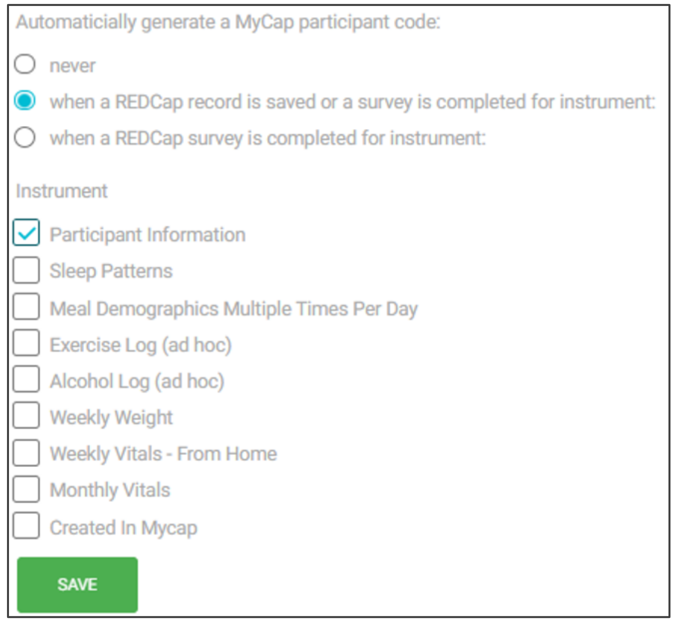
☐ Enter a Yes/No question (e.g., "have you had your shoulder surgery?")

☐ Enter your question about the baseline date, (e.g., "When did you have your surgery?")



Participant Access Information Options: Participants can now join projects via a URL or a dynamic link. You can use either option or both. Dynamic links can be sent via text or email to the participant so they can easily join. QR Codes can be displayed on a screen or printed scanned.

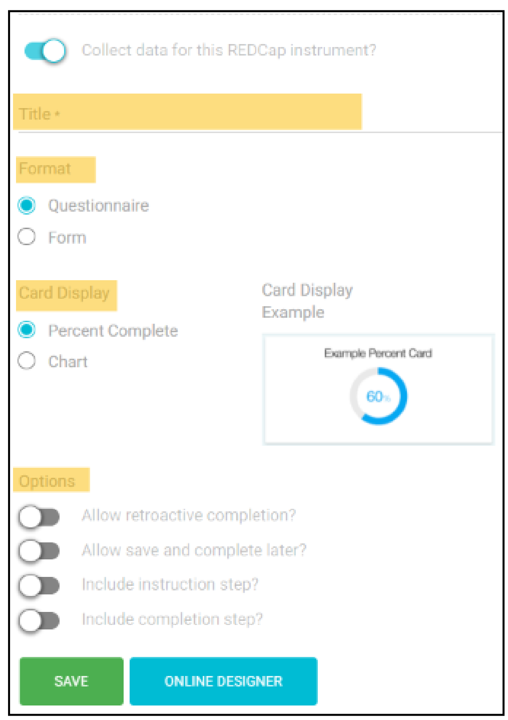
Read more about how to automate QR code distribution in our [MyCap QR Code Quick Guide]() here.



STEP 2

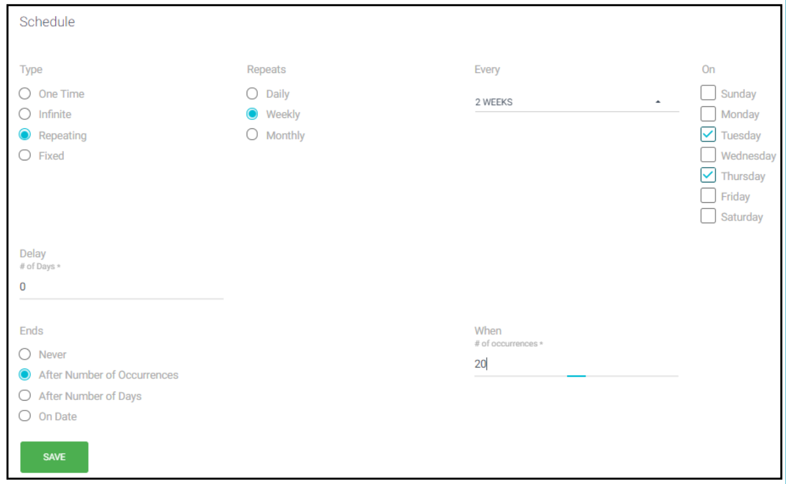
CONFIGURE APP – TASKS: INSTRUMENT SCHEDULING AND QUESTION DISPLAY OPTIONS

- ☐ Select an instrument/task to get started.
- ☐ *Note: you may have to press "**FIX**" the instrument so that the MyCap variables are appropriately appended. You can review the variables added in the REDCap interface. The fields are visible within REDCap, but there is an @HIDDEN annotation that is automatically added to the fields that will hide them in MyCap.*
- ☐ Move the toggle to indicate you will collect data for the instrument.
- ☐ Add a **Title**.
- ☐ Select the **Format** for questions: *Questionnaire* (one question displayed per screen) or *Form* (all questions displayed on one screen).
- ☐ Indicate the **Card Display** format: *Percent complete* (percent of task complete) or *Chart* (values over time)
- ☐ Determine whether to turn on additional Options:
  - *Allow retroactive completion* if participants can complete tasks after they are scheduled. You cannot set an expiration date for tasks; however, the data export includes the date the task was scheduled and when it was completed, which allows you to discard data completed later than desired.
  - *Allow save and complete later* (helpful for long forms)
  - *Include instruction step* (appears before REDCap questions are presented)
  - *Include completion step* (dialogue that appears after all questions have been completed)



- ☐ Set the schedule for the selected instrument/task:
  - **one-time** task with the option to delay the onset relative to the install date or baseline date (if turned on in Configure App / Setup). **Please note that one-time tasks do not have notifications.**

- **infinite** repeating task with the option to delay the start and set the task to end after a certain date or number of occurrences or days. Infinite tasks can be completed multiple times per day, but, for this reason, infinitely repeating tasks do not have automated reminders.
- **repeating** daily, weekly, or monthly tasks with the ability to set a delay and/or specify when to end the task
  - Weekly repeating tasks can be set to occur after a certain number of weeks and on a certain day(s)
  - Monthly repeating tasks can be set to occur in specified months and on a set day(s) of those months



- **fixed** tasks can be set to occur on any number of days after the install or baseline date (if turned on in Configure App / Setup) with or without a delay.

STEP 3

CONFIGURE APP – ABOUT: CREATE INFORMATION SCREENS FOR PARTICIPANTS

As a quick reference for participants, it may be helpful to add "About" pages that describe the project or study. You can create multiple pages to display to participants. To create your "About" page:

- ☐ Click **New** under "About this Project".
- ☐ Add a title that will appear on the screen.
- ☐ Include a brief description under "Content" that will also appear to participants.
- ☐ Add a custom image or use the system defaults.

STEP 4

CONFIGURE APP – CONTACTS: CENTRALIZE STUDY CONTACT INFORMATION

Specify project contacts or websites that will appear if participants click "Get Support" from within their MyCap App.

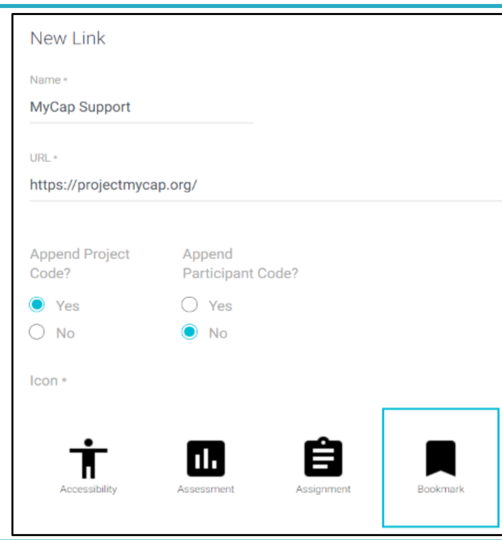
- ☐ Click **New** under "Modify Contacts".
- ☐ Add a section header to describe the contact (Study Lead, IT, etc.) and the respective name and information.
- ☐ Add a hyperlink to a website, if needed.

STEP 5

CONFIGURE APP – LINKS: SHARE CUSTOM URLs WITH PARTICIPANTS

Projects can include custom URLs to be displayed in the MyCap app for participants. For example, projects can share links to custom webpages displaying participant results. To add custom links or specific web resources for all participants:

- ☐ Click **New** under **Links**.
- ☐ Give the link a name and add the URL.
- ☐ Choose an icon and press save.

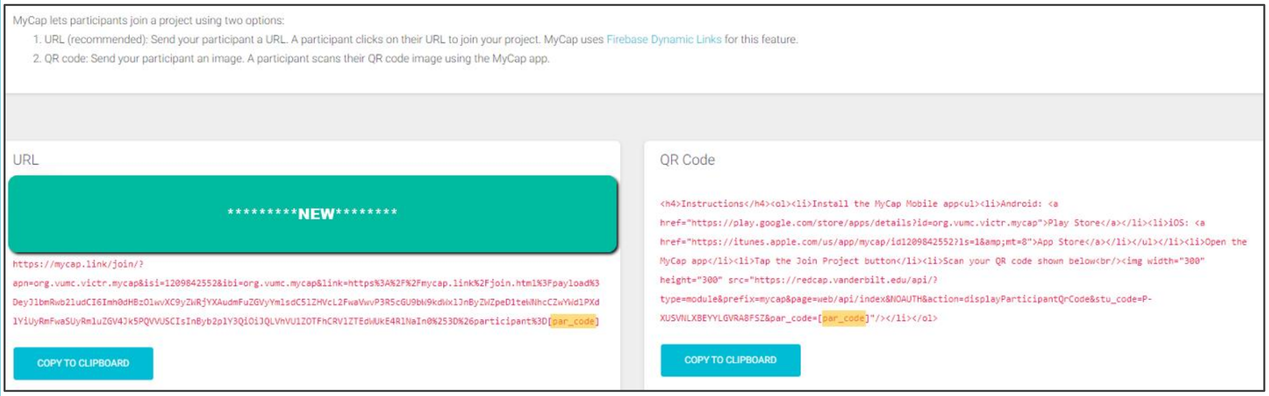


SECTION C — Getting MyCap Setup for Participants

STEP 1 — DETERMINE HOW TO DISTRIBUTE PARTICIPANT ACCESS INFORMATION

MyCap provides pre-formatted HTML that you can copy into REDCap to automatically (1) display at the end of a survey or (2) be sent to participants via Alerts & Notifications.

- ☐ From the MyCap Interface > Participant List, click on the **Participant Access Template** button at the top of the page.
- ☐ ****IMPORTANT** Verify whether the variable name for the Code field piped into the HTML displayed where highlighted yellow below.** If not, you must manually enter the variable name between the brackets when pasting the HTML into REDCap for the URL or QR code to work properly.
- ☐ Press **Copy to Clipboard** for the method you prefer to use (URL is recommended)
- ☐ Go to REDCap and paste the copied HTML into **Online Designer** > **Survey Settings** > **Survey Completion Text** and/or **Alerts & Notifications**. (Check out our [Quick Guide] for more detailed info)



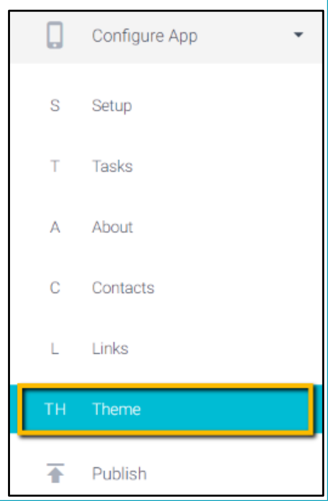
STEP 2 — HELP PARTICIPANTS JOIN YOUR PROJECT

- ☐ Each participant will download the MyCap App to their mobile device of choice from the Apple or Google Play store. **Participants should only use one device rather than multiple**. While participants can technically use the Participant Access Information on multiple devices, the devices can't communicate (e.g., tasks completed on one device may not appear as complete on another).
- ☐ Once the app is downloaded, participants join your project using the access information provided (QR Code or URL).

SECTION D — Using Additional MyCap Features

THEME – CHOOSE YOUR COLOR PREFERENCES

- ☐ Select the color theme that you would like to use for your project. *Note: themes are only currently displayed on iOS devices. Android defaults to the blue scheme.*
- ☐ For additional information, reference the ["How to Customize MyCap for Your Project"] Quick Guide.



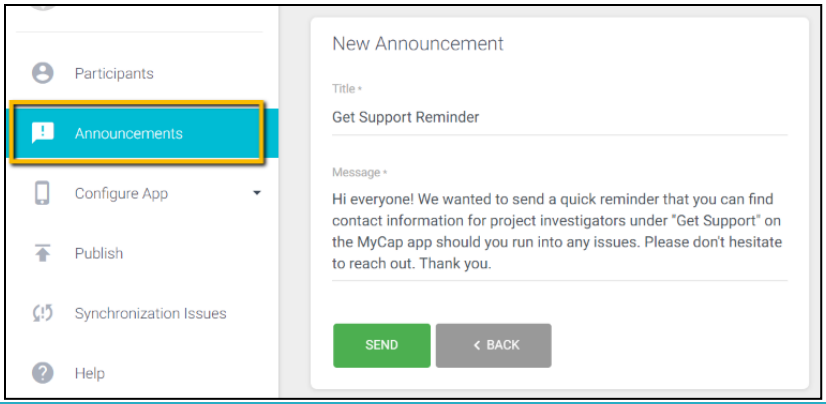
ANNOUNCEMENTS – TO ALL PARTICIPANTS

☐ Click New under Announcements.

☐ Customize the title and body of the message.

☐ Press send. This will go to all participants in your project.

Note: All announcements appear as an app notification on participants' phones titled "You have a secure message waiting" to ensure no PHI or RHI is displayed.

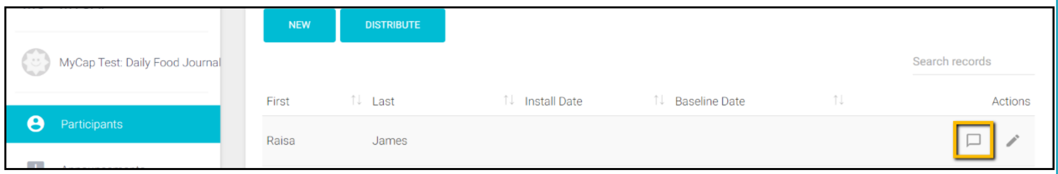


MESSAGES – SEND INDIVIDUAL MESSAGES TO PARTICIPANTS

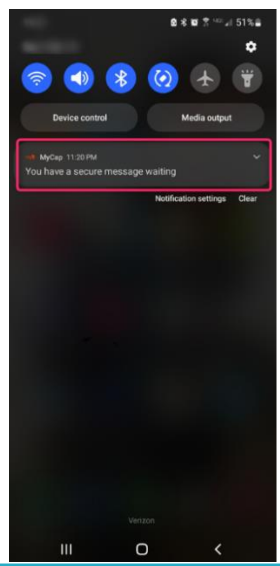
☐ From MyCap, go to the **Participants** page.

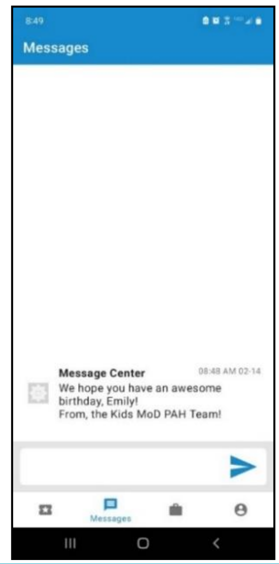
☐ Click on the message icon for the participant you want to message

☐ Compose your message.



When the message is sent, participants will receive a notification that says, "You have received a secure message". Participants can click on the notification to open MyCap. Next, they click on "Messages" to view the message.





Note: for now, project owners are not notified if participants send a message via MyCap. We advise study teams to tell participants not to send messages via the app and to provide other contact methods in the "Contact" section of MyCap. See Section B. STEP 4.

SECTION E — Publishing Changes to MyCap and Project Instruments/Tasks

Project teams should "publish" any changes made to REDCap instruments and after making changes to the MyCap Configure App section. Changes made to your project's instruments in REDCap or in the MyCap interface will not show up in MyCap until they have been published.

☐ Go to the left-hand menu in the MyCap interface and hit **Publish**.

☐ Click **Publish New Version** when prompted on the next screen

Note: You can see the version referenced on which a participant completed an instrument in the REDCap exports.