How Participants Join MyCap Projects

Granting Participants Access to a MyCap Project

Each participant using MyCap must have a record ID in the REDCap project before they can join the project in their MyCap App. **After the participant record is created, participant's access can be granted via a unique QR Code or URL (Dynamic Link).** Use this chart to determine which method is best given the study's onboarding procedure.

Participant Onboarding Procedure	Recommend Method for Joining MyCap	Details
In-person screening completed on study team device (e.g., computer, tablet)	**QR Code** displayed at the end of a survey*	The participant can scan the QR code displayed at the end of the survey and displayed on the study team's device. Participants can scan the QR code using their personal mobile device.
In-person screening using the participant's device (e.g., filling out online intake survey)	**Dynamic Link** displayed at the end of a survey* or sent via email or text**	If only the participant's personal mobile device is available for the intake, it is recommended that the dynamic link be displayed at the end of the survey so the participant can simply click to join the project.
Fully remote	**Dynamic Link** displayed at the end of a survey* or sent via email or text**	The participant may not have separate devices to complete the survey and scan a QR code. If they are using their phone to complete an intake assessment, the dynamic link can appear after the survey is completed. Alternatively, it could be sent to the participant which they can pull up on their phone to join the project.

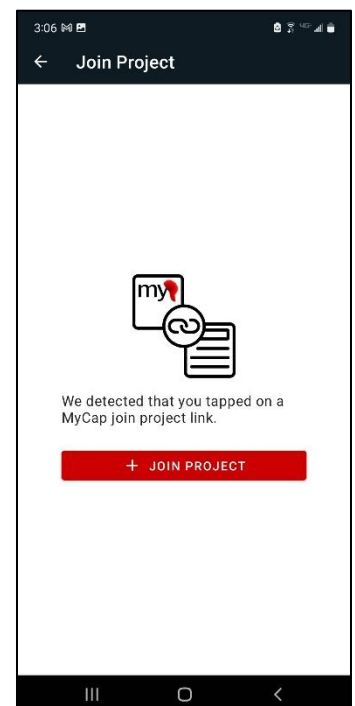** Enter HTML provided into Survey Settings > Survey Completion Text*
** REDCap has the capability to send SMS text messages for Alerts & Notifications by using a third-party web service named Twilio (www.twilio.com). To use this feature, you must have a paid Twilio.com user account since there is a cost for each phone call made and for each SMS message sent.

Granting Access via Dynamic Links

MyCap leverages Google's Firebase Dynamic Links that allow participants to click on a URL to join a MyCap project, even if they do not yet have the MyCap app installed.

This allows participants to join projects without requiring the use of QR codes and helps decrease accessibility barriers to MyCap.

Dynamic links can be sent to participants via email or text if using a third-party service like Twilio (see ** under table above), or a dynamic link can also be set to appear as "Survey Completion Text" after an online survey is completed.
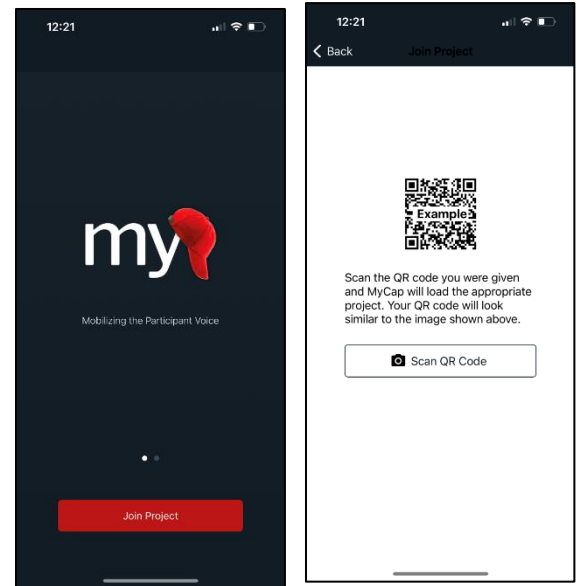
What Happens when Participants Click on a Dynamic Link?

If Participant has not installed MyCap:	If participant has installed MyCap but hasn't joined any projects:	If participant is using MyCap for other projects:
1. Participants are redirected to Google Play or the Apple Store to install the app. 2. Once they have installed the app, they are redirected to the MyCap App home page where they can click "Join project". 3. Participant is redirect to dynamic link page and presses "join project".	1. MyCap is opened once they click the URL and participants press join project. 2. Participant is redirect to dynamic link page and presses "join project".	1. MyCap opens to an existing project. 2. Participants navigate to their profile and click "Join another project". 3. Participant is redirect to dynamic link page and presses "join project".

Granting Access via QR Codes

The MyCap QR code contains three data elements: the participant ID, REDCap project ID, and an institution ID.

After downloading the MyCap App, participants press Join Project to open the QR code scanner from the app. The participant then scans the QR code to join the project.
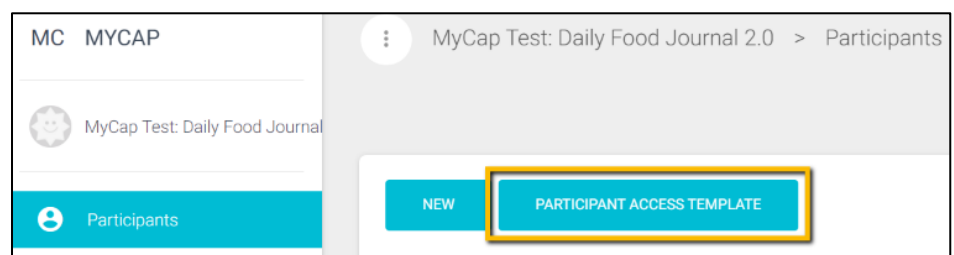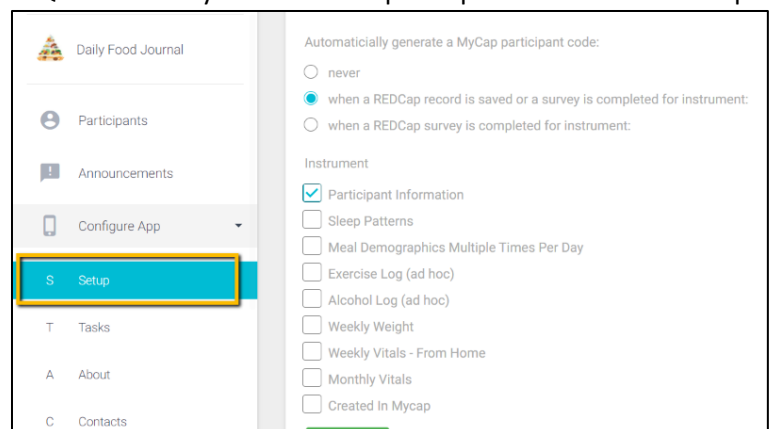
Researcher teams can view each participant's unique QR code in their MyCap online interface on each **Participant's Profile**.

Distributing QR Codes and Dynamic Links to Participants – Alerts & Notifications

Use REDCap Alerts and notifications to automatically email QR codes or dynamic links to participants. Follow these steps:

1. In REDCap, go to the instrument used to create your participant's record and add a text field with validation set to "email".
2. From the MyCap interface, go to the **Configure App** section and click on **Setup.**
3. Indicate when the QR code should be automatically generated under **QR Code Options**. You have now identified the trigger for the participant's access information (QR code or dynamic link). MyCap provides HTML that you can embed in Alerts & Notifications to be emailed to the participant and/or add to Survey Completion Text so that the access information displays after an online survey is completed.
4. Go to the **Participants** step and click **Participant Access Template**.
5. A dialog titled **Embed HTML** will appear. At the bottom of the dialog click **COPY TO CLIPBOARD.**

Distributing the QR code or Dynamic Link via Alerts & Notifications

After configuring when the QR code and/or dynamic link should trigger (see steps 1-4 above) and with the HTML copied to your clipboard, follow these steps to automatically disseminate access information to participants:

1. Return to your project in REDCap and go to **Application > Alerts & Notifications**.
2. Select **Add New Alert** and setup your alert.
3. In **STEP 3: Message Settings**, draft your message and paste the copied HTML directly into the **Message.** You can add to the language provided in the HTLM, just be sure not to break the link at the end that starts with https://redcap.institution.edu/api/...

4. Below are a few additional setup tips for **STEP 3: Message Settings**
    a. You will need to select the field you created to capture emails in the **Email To:** section. See screenshot.
    b. Consider adding the email address of someone on the research team as an **Email BCC:** so you receive a copy of all QR codes that are distributed.

Displaying the QR code or Dynamic Link through Survey Completion Text

1. Go to the **Participants** step and click **Participant Access Template**.
2. A dialog titled **Embed HTML** will appear. At the bottom of the dialog click **COPY TO CLIPBOARD.**
3. In REDCap, go to "Designer" and click "Survey Settings" on your participant intake instrument.

4. Scroll down to the "Survey Completion Text" and paste the embedded HMTL text here. You can make edits to the instructions, just be sure not to break the link at the end that starts with https://redcap.institution.edu/api/...
5. Hit save at the bottom of the screen.

When a participant completes the intake survey their access information will appear on the next screen.