



Mobilizing the Participant Voice

# 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 Dynamic Link (hyperlink).** 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)	<b>QR Code</b> displayed at the end of a survey*	The participant can scan the QR Code displayed at the end of the survey on the study team's device or 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)	<b>Dynamic Link</b> 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 or sent to the participant via email so the participant can simply click the link to join the project.
Fully remote	<b>Dynamic Link</b> 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 emailed to the participant, who can open the email on their device and click the dynamic link to join the project.

\* Enter HTML provided in 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](http://www.twilio.com)). To use this feature, you must have a paid Twilio user account as 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 hyperlink 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 for participants with only one internet-enabled device.

Dynamic links can be sent to participants via email or text (if using a third-party service like Twilio [see \*\* under table above]). The 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?

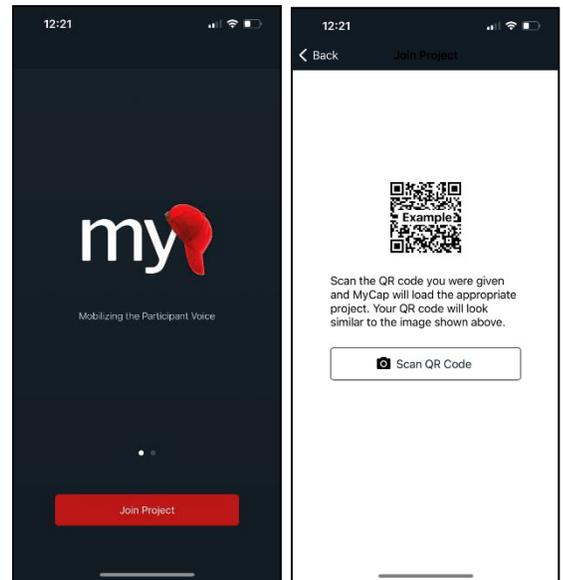
If Participant has not installed MyCap:	If participant has installed MyCap but hasn't joined any projects:	If participant is using MyCap for other projects:
<ol style="list-style-type: none"> <li>Participants are redirected to Google Play or the Apple Store to install the MyCap app.</li> <li>Once they have installed the app, they are redirected to the MyCap App home page where they can click "Join project".</li> </ol>	<ol style="list-style-type: none"> <li>MyCap opens once they click the hyperlink and participants can press join project.</li> <li>Participant is redirected to dynamic link page and can press "join project".</li> </ol>	<ol style="list-style-type: none"> <li>MyCap opens to an existing project.</li> <li>Participants navigate to their Profile and click "Join another project".</li> <li>Participant is redirected to dynamic link page and presses "join project".</li> </ol>

## 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 from the **MyCap Participant Management** page by clicking the "Invite Participant" column in the Participant List.



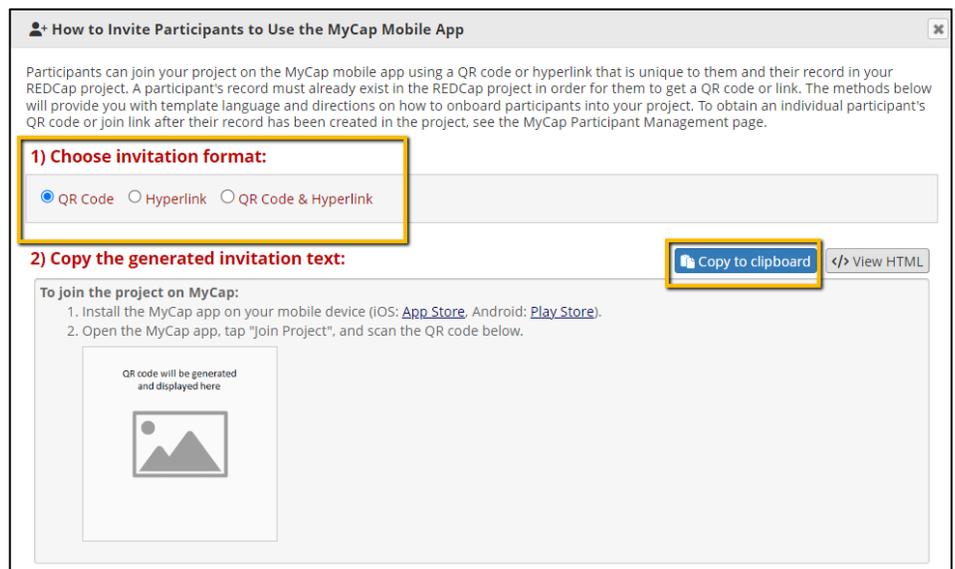
## Automatically Inviting Participants to Join a Project

From the **MyCap Participant Management** page, you can access **Invite Participant** text that can be embedded into **REDCap Alerts & Notifications** and/or added to the **Survey Completion Text** to automate the distribution of this information.

1. Go to the Participant List and click **Invite Participant**.



2. From the dialogue, choose which invitation format you prefer for participants to join (**QR Code, hyperlink, or both**).
3. Copy the generated invitation text using the **Copy to Clipboard** button.
4. Paste the text or HTML into 1) **Survey Completion Text** that displays after a survey is completed and/or 2) an **Alerts & Notifications** message that is sent to the participant after their record is created.
5. Make text edits as needed to the default instructions provided.



When a record is created, the participant will receive their MyCap invitation information to join the project.

## Distributing the Invitation via Alerts & Notifications

If you plan to send participants an email with the MyCap invitation, first go to the REDCap instrument used to create your participant's record and add a text field with validation set to "email" if it doesn't already exist.

From the steps listed above, with the invitation text copied to your clipboard, follow these steps to automatically disseminate access information to participants:

1. In REDCap 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 text provided, if needed.
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.

STEP 3: Message Settings

Alert Type:  Email  SMS Text Message  Voice Call

NOTE: If you wish to send alerts as SMS Messages or Voice Calls, read about enabling the Twilio Telephony Services on the Project Setup page or ask an administrator.

Email From: \* must provide value Display name (optional) emily.serdoz@vumc.org

Email To: \* must provide value select recipients  
+ Show more options

Subject: \* must provide value emily.serdoz@vumc.org

Message: \* must provide value

Prevent piping of data for Identifier Fields

Survey Participant  
-- and/or Project Users --  
emily.serdoz@vumc.org  
jessica.a.eidenmuller.1@vumc.org  
mycap@vumc.org  
-- and/or Email Field Variables --  
[email] "Email"

- 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 Invitation as Survey Completion Text

To display MyCap invitation information at the end of a survey in your project:

1. In REDCap, go to "Designer" and click "Survey Settings" on your participant intake instrument.
2. Scroll down to the "Survey Completion Text" and paste the invitation text. You can make edits to the instructions, as needed.
3. Hit save at the bottom of the screen.

Survey Completion Text  
(Displayed after survey is completed as 'thank you' text or as acknowledgement text)

Paragraph

Use one of the options below to join the project on MyCap:

1. [mycap-participant-link:Click this MyCap link] while on your mobile device, which will prompt you to install MyCap if it's not already installed. After MyCap is open, tap "Join Project". (Note: If you have other MyCap projects, you may need to go to your Profile and click "Join Another Project").
2. To scan the QR Code below, install the MyCap app on your mobile device (iOS: [App Store](#), Android: [Play Store](#)), open the MyCap app, and tap "Join Project".

QR code will be generated and displayed here

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