Using MyCap's Baseline Date Setting

Mobilizing the Participant Voice

By default, all MyCap Task schedules are based on the participant's install date – the date they join a project on their MyCap App. If you need some or all MyCap Tasks to be triggered based on a participant-specific event, such as a surgery date, clinic visit, or discharge date, you can enable the Baseline Date Settings from **Additional Settings** on the **Online Designer**.

Before Enabling the Baseline Date Settings

To enable baseline date settings, ensure the project contains a <u>text field with date validation</u> on an <u>instrument that is not enabled for MyCap</u>. Because the baseline date is used to **inform the MyCap task** schedule for participants, the date cannot be captured on an instrument that is enabled for MyCap.

Consider Who will Enter the Baseline Date

Some study teams prefer to enter participant's baseline dates for them, while others have the participant enter their own baseline date.

If the project team prefers to enter the Baseline Date:

- The project team can enter the baseline date in REDCap when creating the participant's record, such as during intake, consent, discharge, or screening. This ensures accuracy if there's a concern that participants might forget or enter the date incorrectly.
- The baseline date must be filled out for the participant to see the task(s) triggered based on the baseline date. This is something to keep in mind If the project team will enter the baseline date on behalf of a participant(s).

If the participant will enter the Baseline Date:

- In Survey prior to joining MyCap: Participants can enter their baseline date using a public survey before joining the app. If they do this, they won't see the baseline date questions in their MyCap App.
- In MyCap: If the baseline date is not in REDCap when the participant joins the project on MyCap, the participant will see the baseline date as a task in MyCap. To prevent inadvertent completion by someone on the project team, consider using the **@HIDDEN** tag to hide the baseline date field in the data entry form/survey.

Enabling Baseline Date Settings

If project tasks should be scheduled based on a baseline date for participants instead of the default install date, follow these steps:

1. In the Online Designer, click **Additional Settings**.

2. Check "**Use baseline date?**" and designate a baseline date field
Note: For longitudinal projects with multiple arms, you must select a baseline date field for at least one arm.

3. **Required Questions for Baseline Date Completion:**
You are required to configure how the baseline date should be presented to the participant within MyCap by entering three questions. If the baseline date is entered in REDCap before a participant joins the project on the app, the participant will not see these questions in MyCap.

a. Enter a title for the task (e.g., "Discharge Date").

b. Enter a Yes/No question about the baseline (e.g., "Were you discharged from the hospital today?").

c. Enter a question about the baseline date (e.g., "When were you discharged?").

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

Scheduling Tasks Based on the Baseline Date

Once the baseline date option is enabled for a project, any task can be scheduled based on the Install date or Baseline date. Follow these steps to assign tasks to be scheduled based on the baseline date:

1. In the Online Designer, enable an instrument as a MyCap Task.

2. Under Set the Task Schedule, set the task to be relative to the Baseline date.

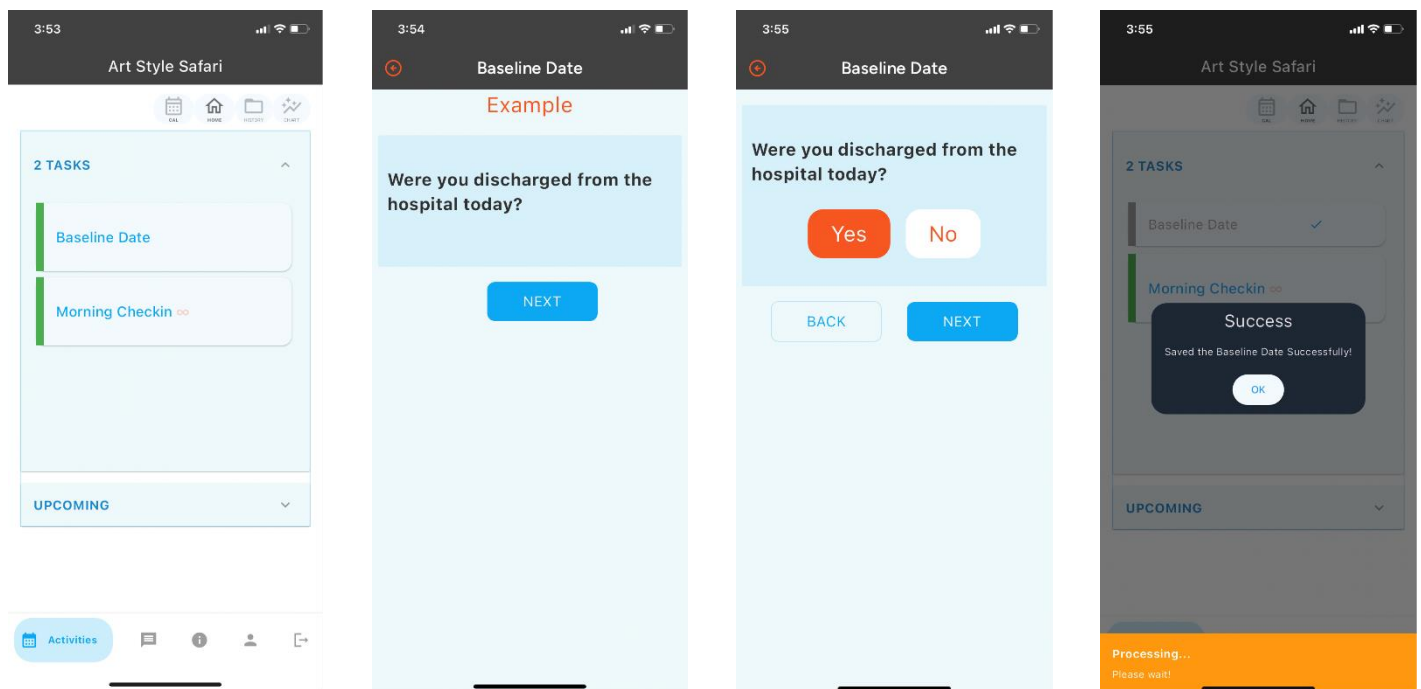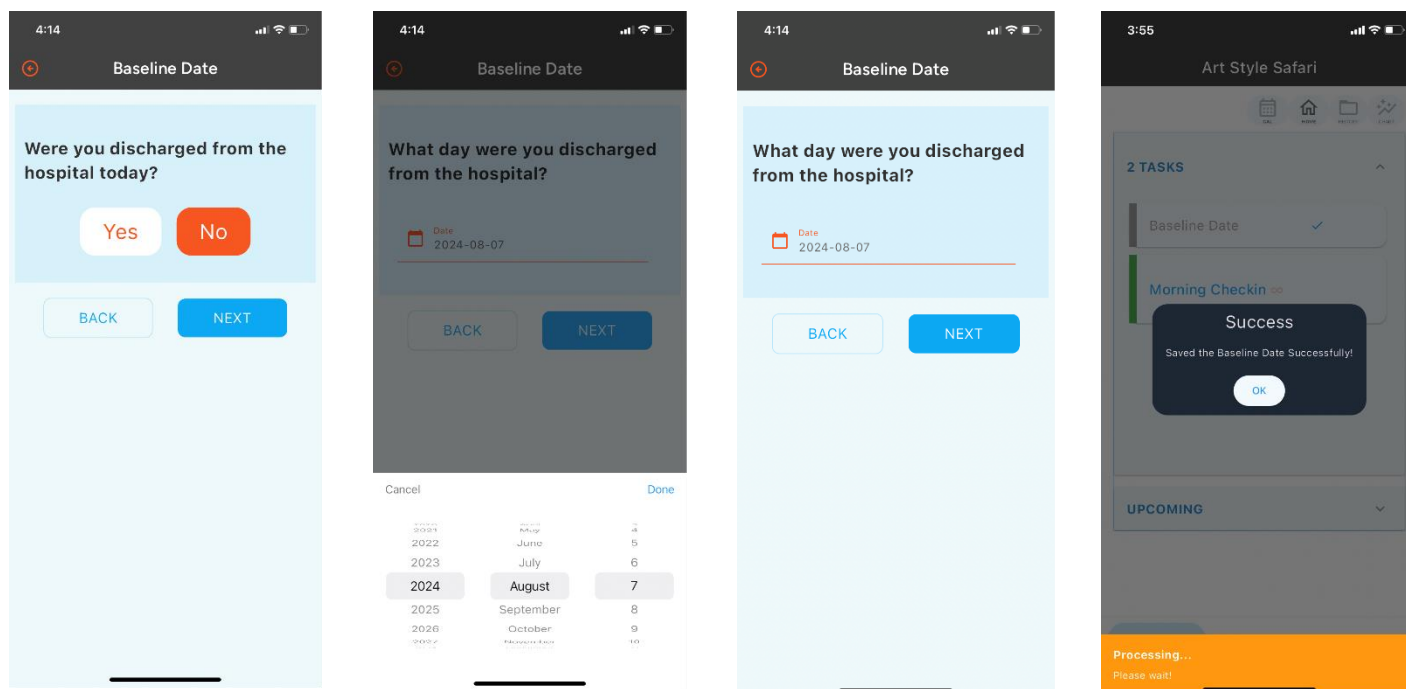# Capturing Participant's Baseline Date

Completing the Baseline Date within MyCap

As soon as participants join your project, they will be prompted to complete the baseline task by:

- Answering the **Yes/No question** about the baseline date (e.g., "Were you discharged from the hospital today?")
- Here are screenshots of what the participant will see if they fill out the baseline date through the MyCap App.

Frequently Asked Questions:

1. **What if I have multiple baseline dates?** MyCap allows study teams to trigger tasks based on two dates: Install and Baseline. If more than two trigger dates are needed, we recommend creating separate MyCap projects to schedule tasks based on the appropriate baseline date.

2. **Can I edit the baseline date after a participant begins or if the participant enters the wrong baseline date?** Yes, you can by editing the record in REDCap. Participants' task schedule will update the next time they open the project on their MyCap App. If the baseline date occurred in the past, consider whether to turn on "Retroactive Data Completion" for any tasks triggered based on the baseline date so participants can see those tasks in OVERDUE. See **Online Designer > MyCap Settings > [Optional Settings]** select the task(s) > turn on the "Retroactive Data Completion" toggle.

3. **Should I enter the baseline date for my participants in the intake survey or have them enter the baseline date on the app after joining the project?** This decision is up to the study team and the needs of the project. Participants can enter their own baseline date if they are likely to remember and know the correct baseline date. However, if your study team is doing the MyCap intake survey process in person or over the phone with a participant, they could manually enter the baseline so that participants immediately see their scheduled tasks, instead of having to complete the baseline date.

4. **What if participants need to complete tasks prior to entering their baseline date?** Tasks triggered based on the install date can be completed prior to a baseline date being entered.

Publishing Changes to MyCap

Project teams need to "publish" any changes made to MyCap Task schedules or the MyCap App Settings. Changes made to instruments (new fields, revised response options) do not require publishing a new version

To publish changes:
1) Go to the Online Designer or the MyCap App Design screen.
2) Click Publish new MyCap version.

Note: The version on which a participant completed an instrument is included in REDCap exports.

🏠 Project Home ⋮☰ Project Setup ✏ Online Designer 📗 Data Dictionary 📖 Codebook   ☁ Publish new MyCap version [?] Current version: **Version 37**

🎞 VIDEO: How to use this page   📷 Create snapshot of instruments   Last snapshot: never [?]

The Online Designer will allow you to make project modifications to fields and data collection instruments very easily using only your web browser.
NOTE: While in development status, all field changes will take effect immediately in real time.

Data Collection Instruments

+ Create a new instrument from scratch
📥 Import a new instrument from the official REDCap Instrument Library
⬆ Upload instrument ZIP file from another project/user or external libraries
+ Import Active Task for MyCap from a library of Active Tasks

Form options:
📷 PDF Snapshots
🔍 Form Display Logic ▾
⬇ PDF (all instruments)
💬 Descriptive Popups

Survey options:
👤 e-Consent   ☰ Survey Queue ▾   ⚙ Auto Invitation options ▾
🔑 Survey Login   🔁 Survey Notifications

MyCap Options:
📱 App Settings   🔍 View Task Details (all)   ⚙ Additional settings

Instrument name	Fields	PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap related options
Form 1	5	📄PDF	📋		Choose action ▽	Survey settings ✅ + Automated Invitations
Phone Screening	23	📄PDF	Enable	Enable	Choose action ▽	