

# 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</u> <u>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.

a new instrument from scratch         Import       a new instrument from the official <u>REDCap Instrument Library</u> Upload       instrument ZIP file from another project/user or <u>external library</u> Import Active Task       for MyCap from a library of Active Tasks	ries	Form options:      PDF Snapshots      Form Display Logic       PDF (all instruments)      Descriptive Popups			Survey options:		
Instrument name	Fields	PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap related options	
Form 1	5	<b>D</b> <sub>Por</sub>	Ê		Choose action 🗢	Survey settings + Automated Invitations	

#### 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.

Baseline Date Settings								
MyCap tasks can Baseline Date bel	be scheduled relative to an Install Date or Baseline Date. If any tasks should be triggered based on a baseline date, check Use low.	Î						
Use baseli	ine date? ?							
	nate a Baseline Date Field							
	existing field from your instruments to be the baseline date for each arm. Please select a field for at least one arm. line date setting option in the task setup will be visible once a baseline date field is selected for the arm.							
The base	inte date setting option in the task setup will be visible once a baseline date neid is selected for the arm.							
Arm 1:	[enrollment_arm_1][baseline_date] "Baseline 🗸							
Arm 2:	[enrollment_arm_2][baseline_date] "Baseline 🗸							
Arm 3:	select a field 🗸							
l	he baseline date cannot be a field on an instrument that is enabled as a MyCap task.							

#### 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?").

Use baseline date? ?	
Designate a Baseline Date Fie Select an existing field from your in	<mark>.ld</mark> nstruments to be the baseline date for the project.
surgery_date "Surgery Date"	~
Note: The baseline date cannot b	e a field on an instrument that is enabled as a MyCap task.
	Surgery Date
Enter a Task Title: e.g., Baseline Date, Discharge Date Enter a Yes/No question about whether the baseline date was "TODAY":	Surgery Date Did you have surgery today?
e.g., Baseline Date, Discharge Date Enter a Yes/No question about whether the	

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

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	Enter a Yes/No question about whether the baseline date was "TODAY": e.g., Were you discharged from the hospital today? Enter a question that asks for the desired date if the date was in the past: e.g., When were you discharged?		Were you discharged from the hospital today? What day were you discharged from the hospital?			
	<ul> <li>Include Instruction You may include instruction</li> <li>Instruction Step: Title:</li> </ul>	ruction steps.				
	* must provide value Content: * must provide value	Example				
			Sa	ave	Cancel	

### 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.

Da	Data Collection Instruments			Form options:		Survey options:			
	Create a new instrument from scratch     a import a new instrument from the official <u>REDCap Instrument Library</u> <b>①</b> Upload instrument ZIP file from another project/user or <u>external libraries</u> + Import Active Task for MyCap from a library of <u>ResearchKit ActiveTasks</u>			MyCap Options: App Design View Task Details (all) Baseline Date Settings					
	Instrument name Fields			Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap related options		
	Intake & Consent 3		POF	۷		Choose action 🗢	Survey settings + Automated Invitations		
	Daily Medication Use	_	2	[ Errorore ]	Enable	Choose action 🗢			

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

Relative to which date task should be scheduled?	O Install Date
	Baseline Date
Schedule it how many times?	○ One Time
	Infinite
	○ Repeating
	C Repeats Monthly V 2 MONTHS V
	On Day(s): 14,24
	○ Fixed
	On Day(s): 1,7
Number of days to delay	0
End this Infinite task	Never
	$^{\bigcirc}$ When any of the below conditions are TRUE:
	After it has been completed times
	After days have elapsed
	At exact date: MM/DD/YYYY 📅 M/D/Y

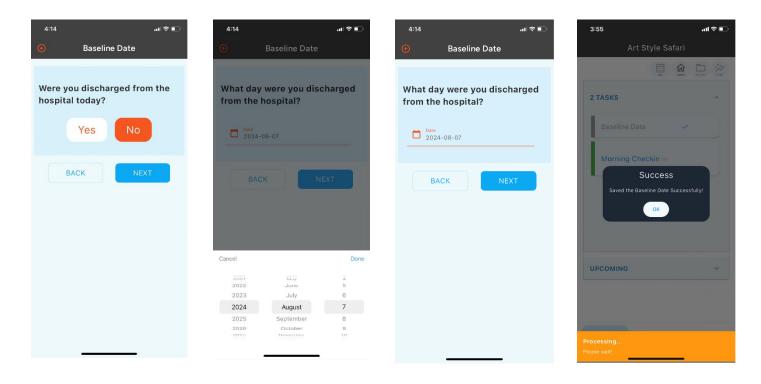
### **Capturing Participant's Baseline Date**

#### 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.

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Art Style Safari	Baseline Date	Baseline Date	Art Style Safari
	Example		
2 TASKS	Were you discharged from the	Were you discharged from the hospital today?	2 TASKS
Baseline Date	hospital today?	Yes No	Baseline-Date 🗸
Morning Checkin 👓	NEXT	BACK	Morning Checkin Co Success Saved the Baseline Date Successfully!
UPCOMING Y			UPCOMING ~
Activities 📮 🕒 📩 [-			Processing Please wait!



### 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.

								A MyCap app	configuration is out o	of date. Consider publish	ning a new version.	
	🕈 Project Home	žΞ Project Setup	C Online Designer	x Data	Dictior	nary 🛢 Co	odebook	📀 Publish nev	v MyCap version ?	Current version: Version	37	
Tł	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 I	nstruments				options:		ey options:				
	<ul> <li>+ Create a new instrument from scratch</li> <li>Import a new instrument from the official <u>REDCap Instrument Library</u></li> <li>Upload instrument ZIP file from another project/user or <u>external libraries</u></li> <li>+ Import Active Task for MyCap from a library of Active Tasks</li> </ul>				🥸 F 🕢 P	DF Snapshots Form Display Li DF (all instrum Descriptive Pop	ogic  P Ients) MyC	e-Consent      E Survey Queue      Survey Login     Survey Notifications				
	Instrument nam	e		Fields	PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap rel	lated options		
	Form 1			5	<b>D</b> ef	Ê		Choose action $\bigtriangledown$	Survey settings + A	utomated Invitations		
	Phone Screening			23	<b>D</b> ef	Enable	Enable	Choose action $\bigtriangledown$				