



Mobilizing the Participant Voice

# Using MyCap's Baseline Date Setting

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

## Before Enabling the Baseline Date Settings

To enable baseline date settings, **the project must contain a text field with date validation on an instrument that is not enabled for MyCap**. The field cannot be on an instrument that is enabled for MyCap (a "MyCap Task") because the baseline date must be completed before Task schedules can be based on that date.

## Considerations for using a Baseline Date

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

- If the project team will enter the baseline date for participants:
  - The baseline date can be entered in REDCap when creating the participant's record. For example, it can be entered during the intake, consent, discharge, or screening process. This is useful if Users worry the participant may not remember or enter the date correctly.
  - If project teams enter the baseline date on behalf of participants (so that they do not have to complete it in MyCap), the participant's baseline date must be entered into REDCap BEFORE a participant joins the project via QR code or hyperlink.
- If participants enter their own baseline date, it can be entered in two ways:
  - The baseline date can be entered into REDCap by the Participant when using a public survey, which means the participant would not see the baseline date questions in their MyCap App.
  - If the baseline date is not entered into REDCap when the participant joins the project on MyCap, the participant will be required to enter their baseline date before any tasks will be generated. Consider using the @HIDDEN tag to hide the baseline date field from the data entry form/survey so it is not completed inadvertently.

## Enabling Baseline Date Settings

If any project tasks should be scheduled based on a baseline date for participants (as opposed to the default install date), follow the steps below:

- In the **Online Designer**, click **Baseline Date Settings**.

The screenshot shows the 'Data Collection Instruments' management interface. On the left, there are buttons for 'Create', 'Import', 'Upload', and 'Import Active Task'. On the right, there are sections for 'Form options', 'Survey options', and 'MyCap Options'. The 'MyCap Options' section includes 'App Design', 'View Task Details (all)', and 'Baseline Date Settings', which is highlighted with a yellow box. Below these options is a table of instruments.

Instrument name	Fields	View PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap related options
Daily Medication Use	0		Enable		Choose action	
Intake & Consent	2		Enable	Enable	Choose action	

- Check **Use baseline date?**
- Designate a baseline date field.

Use baseline date? ?

**Designate a Baseline Date Field**  
 Select an existing field from your instruments to be the baseline date for the project.

surgery\_date "Surgery Date" ▼

**Note:** The baseline date cannot be a field on an instrument that is enabled as a MyCap task.

NOTE: These questions are required to enable the baseline date, but they are only displayed if the participant is completing the baseline date in MyCap.

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

Enter a Task Title:   
e.g., Baseline Date, Discharge Date

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?

- Enter a **Yes/No question** about the baseline (e.g., "Were you discharged from the hospital today?")
- Enter a question about the baseline **date**, (e.g., "When were you discharged?")
- Provide instructions if desired (such as when the task should be completed).

### Scheduling Tasks Based on the Baseline Date

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

- Click to enable an instrument as a MyCap Task.

**Data Collection Instruments**

Form options:  Form Display Logic

Survey options:  Survey Queue  Auto Invitation option  Survey Notifications

MyCap Options:  App Design  View Task Details (all)  Baseline Date Settings

Instrument name	Fields	View PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap
Participant Intake	5		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Choose action	Survey settings
Welcome	18		<input type="checkbox"/>	<input checked="" type="checkbox"/> my	Choose action	MyCap settings

- Under **Set the Task Schedule**, set the Task relative to the **Baseline Date**.

**Set the Task Schedule:**

Relative to which date task should be scheduled?  
 Install Date - Task should be scheduled relative to the date the participant scanned the QR code  
 Baseline Date - Task should be scheduled relative to the participant's baseline date

Schedule it how many times?  
 One Time  
 Infinite  
 Repeating  
 Fixed  
 Repeats:  ▼

On Day(s):

Number of days to delay:

End this Infinite task  
 Never  
 After it has been completed  times  
 After  days have elapsed  
 At exact date:  M/D/Y

## Capturing Participant's Baseline Date

The baseline date can be entered in two ways: 1) it can be entered directly into a REDCap instrument that is not captured in MyCap or 2) participants can enter their baseline date using the MyCap App after joining the project. **Note: If participants enter the baseline date on the App, they cannot complete any other task on the App until the baseline date is entered, even if other tasks are not based on the baseline date.**

### 1) Entering the Baseline Date for Participants:

- Create a record for the participant.
- Go to **Record Status Dashboard** in REDCap and click on the instrument that has the baseline date field for the project for the participant.
- Enter the baseline date.
- Save & exit form.** A baseline task will not appear to the participant in MyCap.

### Participant Information

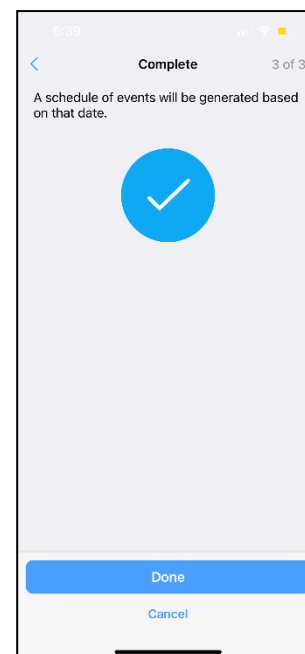
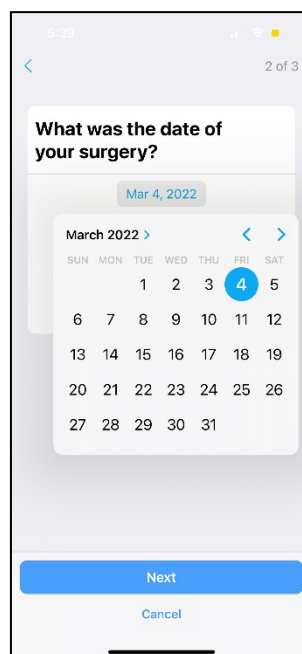
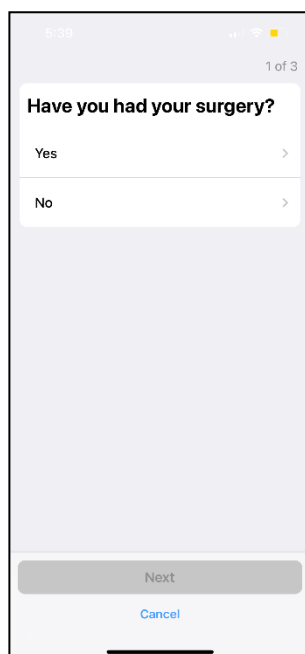
Please complete the survey below.

Thank you!

1) First Name	<input type="text" value="Barran"/>
2) Last Name	<input type="text" value="Magda"/>
3) Baseline Date	<input type="text" value="2022-02-23"/> <input type="button" value="Today"/> Y-M-D
4) Email address	<input type="text" value="bmagda@hotmail.com"/>

### 2) Participants Enter Baseline via MyCap App (screenshots)

- As soon as participants have joined your project they will be prompted to complete the baseline task by answering the **Yes/No question** about the baseline date (e.g., “have you had your shoulder surgery?”) and question about the baseline date, (e.g., “When did you have your surgery?”). *Participants will only be asked to complete this task one time.*
- Participants are then able to view any other tasks scheduled for them on Day 0.

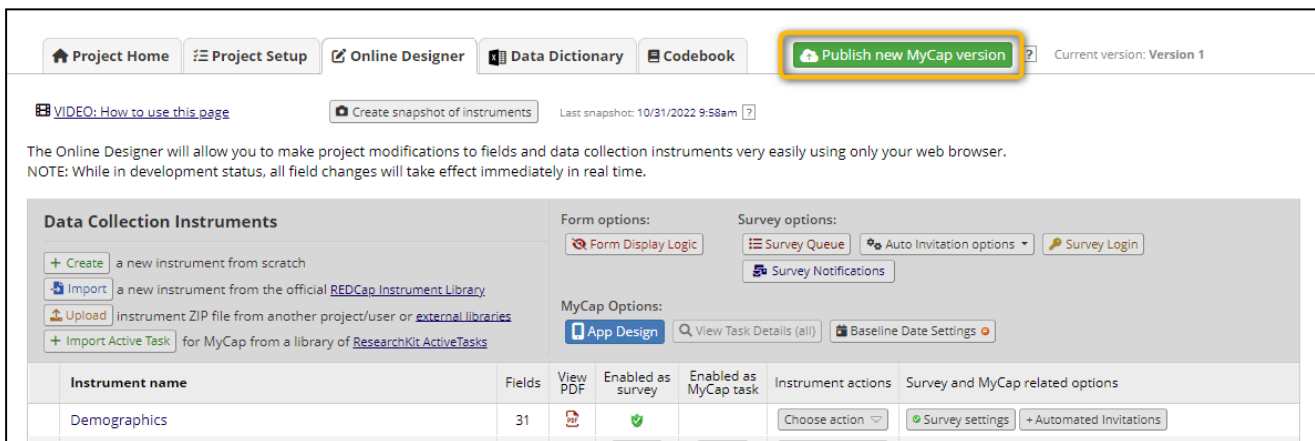


## Frequently Asked Questions:

- 1. What if I have multiple baseline dates?** If tasks have different baseline dates, we'd 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, the record can be edited in REDCap. However, for the participant's task schedule to accurately reflect the updated baseline date in MyCap, they will need to be instructed to delete the project from their phone and rejoin the project using the same invitation they originally used to join. Additionally, "Retroactive Data Completion" must be allowed in the MyCap settings (See **Online Designer** > select the task(s) > turn on the "Retroactive Data Completion" toggle) in order to edit a baseline date to a point in time that has already passed.
- 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 is completely up each study team's preference. Participants can enter their own baseline date if they are likely to remember and know the correct baseline date. However, if a 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 MyCap Tasks when they first login, instead of having to complete the baseline date task.
- 4. What if participants need to complete tasks prior to entering their baseline date?** If the baseline date is enabled on a project, participants are unable to complete any other task on MyCap prior to entering the baseline date. For example, if participants are completing assessments while in the hospital and a study team wants to trigger tasks based on their discharge date (as the baseline), that team will need to set up two projects – one without a baseline enabled and another with the baseline enabled to trigger tasks based on the baseline date.

## Publishing Changes to MyCap and Project Instruments/Tasks

**Project teams should "publish" any changes made to MyCap Tasks, Schedules, or the MyCap App Design.** Changes made to the project's instruments in REDCap or in the MyCap interface will not be reflected in the MyCap App for participants until they have been published. To publish changes:



The screenshot shows the REDCap Online Designer interface. At the top, there is a navigation bar with buttons for 'Project Home', 'Project Setup', 'Online Designer', 'Data Dictionary', and 'Codebook'. A button labeled 'Publish new MyCap version' is highlighted with a yellow box. Below the navigation bar, there is a section for 'Data Collection Instruments' with options to 'Create', 'Import', 'Upload', and 'Import Active Task'. To the right, there are 'Form options', 'Survey options', and 'MyCap Options' sections. At the bottom, there is a table with columns for 'Instrument name', 'Fields', 'View PDF', 'Enabled as survey', 'Enabled as MyCap task', 'Instrument actions', and 'Survey and MyCap related options'. The table contains one row for 'Demographics' with 31 fields and a 'Survey settings' button.

- Go to the **Online Designer** OR the **MyCap App Design** screen.
- Click **Publish new MyCap version**.

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