Getting Started Quick Guide:

Using MyCap on Longitudinally-enabled REDCap Projects

REDCap v14.3.0 or greater

Table of Contents

Complete all steps in each section to ensure comprehensive and successful setup of your project. We recommend completing these steps in the order shown below.

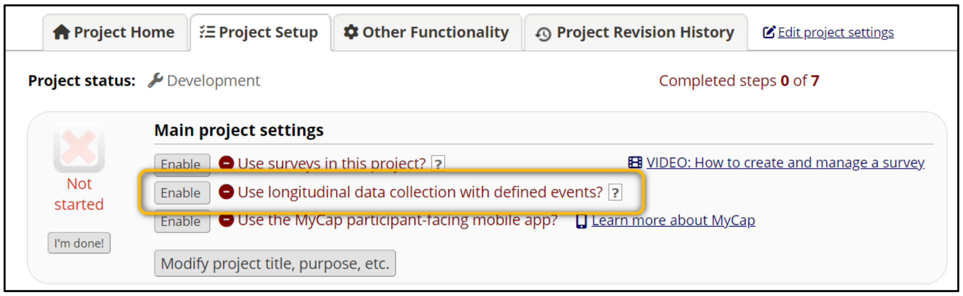
SECTION 1	Preparing Your REDCap Project for Using MyCap

STEP A

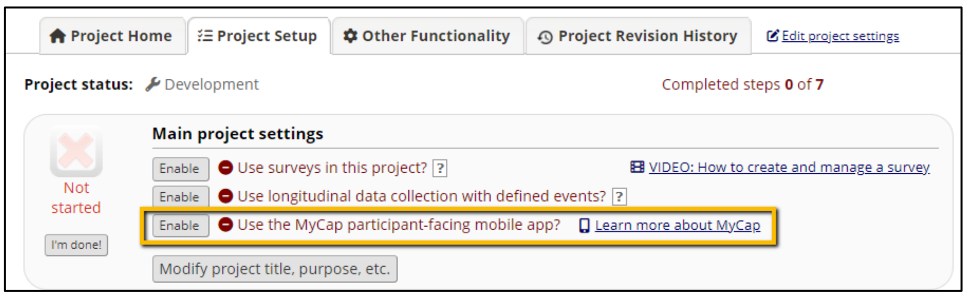
ENABLE PROJECT SETTINGS

From the **Project Setup** page, MyCap can be enabled on existing or new longitudinal projects.

Press **Enable** next to “Use longitudinal data collection with defined events”.

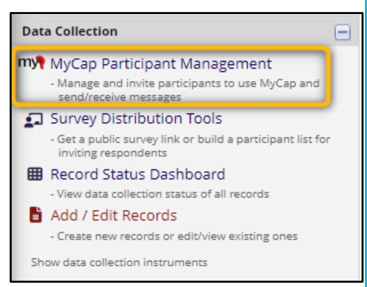


Press **Enable** next to “Use the MyCap Participant-facing Mobile App?”.



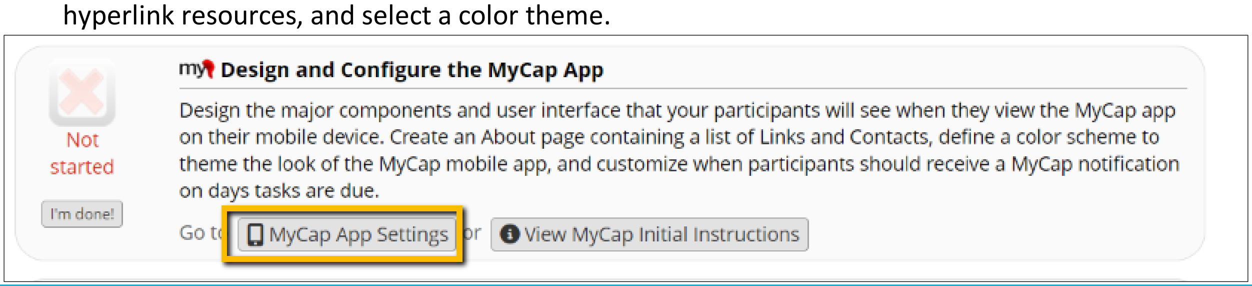
After enabling MyCap, two new fields will be added to the first instrument on your project to capture 1) the date a participant joins your project (field annotation @MC-PARTICIPANT-JOINDATE) and 2) the MyCap Participant Code (field annotation @MC-PARTICIPANT-CODE), which is how MyCap syncs data submitted via the app to the participant’s REDCap record. These fields can be leveraged in reports and exported from REDCap. **PLEASE DO NOT DELETE OR EDIT THESE FIELDS.**

Additionally, after enabling MyCap, two new MyCap sections are available in REDCap that are described in detail later in this guide.



- **MyCap Participant Management** will appear in the REDCap menu under **Data Collection.** Use this page to manage participant access to your project and bi-directional communications with participants.

- **Settings and Configure the MyCap App** is a new step in the Project Setup checklist now that MyCap is enabled on your project. It contains a link to the **MyCap App Settings** page where you can design custom About pages including project descriptions, add contacts, hyperlink resources, and select a color theme.



STEP B

DESIGNING INSTRUMENTS: A FEW TIPS

After enabling MyCap, create the instruments for the project. You can enable some of your instruments for MyCap and have others that are not completed by participants in MyCap. **Any REDCap instrument enabled for MyCap is called a MyCap Task.** Please note:

- **The first instrument in a project cannot be enabled for MyCap** because participants cannot join a project on MyCap unless they have a record in REDCap. The first instrument is where the participants record is created.
- Some REDCap features are NOT supported in MyCap including Calculated Fields, Piping, Matrix fields, Dynamic query (SQL) fields, and Signatures.
- Branching logic works WITHIN a single instrument, but not across instruments.
- Form display logic set up in REDCap does not impact what instruments are displayed in MyCap. If a task is enabled for MyCap, it will appear in the app for participants. If participants need to have different study activities and MyCap tasks, multiple arms can be created in the longitudinal project tasks designated for each arm.

STEP C

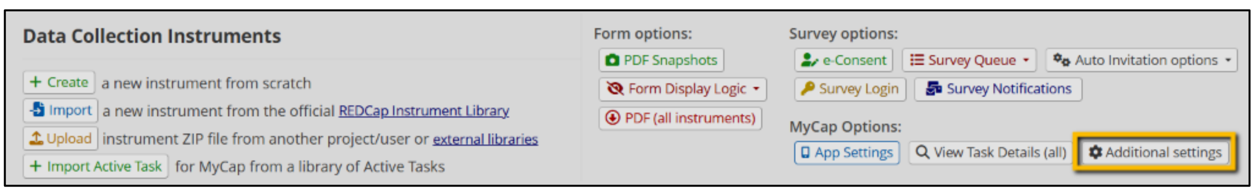
SET A BASELINE DATE (OPTIONAL)

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

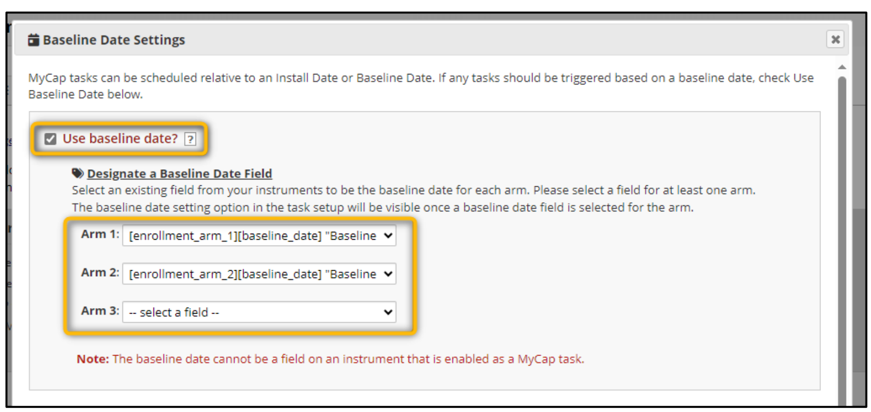
Click here to learn more about using a Baseline Date on your project.

To configure the baseline date settings:

1. First, go into the Online Designer and create a text field with date validation to represent your baseline date in an instrument that is not captured in MyCap (e.g., the first instrument).
2. Next, click **Additional Settings**.

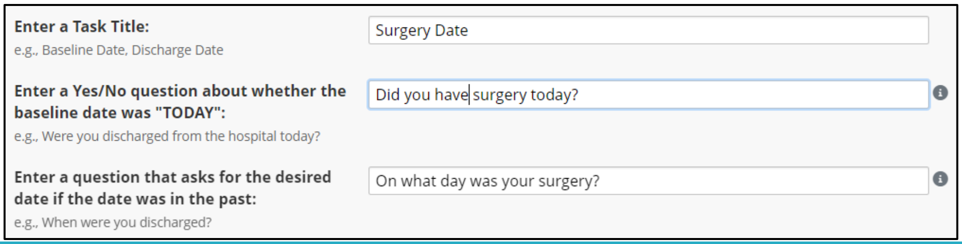


3. Check the box to indicate you will be using a baseline date.
4. Select the baseline date field from the dropdown of available fields with date validation for at least one arm. Note: The baseline date setting option in the task setup will be visible once a baseline date field is selected for the arm.



5. Enter a title for the task as it should appear in MyCap.
6. Enter a Yes/No question that will appear for participants (e.g., "Did you have surgery today "?).
7. Enter a question that prompts the user to insert the date of surgery if it was not "today".

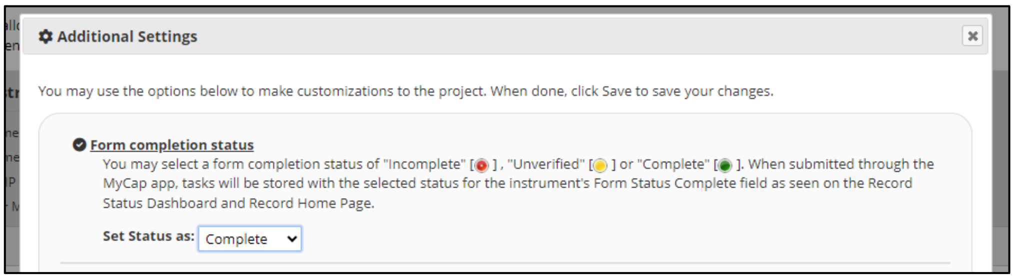
8. Indicate if you want to provide an instruction step before the participant completes the baseline date (e.g., "Do not complete the baseline until AFTER you have had your procedure.")



STEP D

SET FORM COMPLETION STATUS

You may select the completion status to be displayed on the Record Status Dashboard MyCap Tasks (REDCap v14.7.1+). To do this, navigate to **Online Designer > Additional Settings > Form Completion Status**. Here, you can choose a form completion status of "Incomplete" [ ] , "Unverified" [ ] or "Complete" [ ]. By default, this setting is set to "Complete" for newly created projects.



STEP E

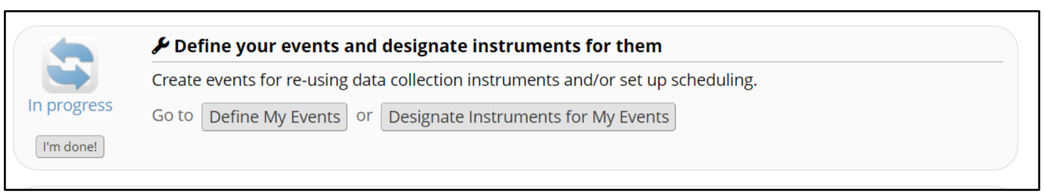
APPEND EVENT ID OR LABEL TO TASK NAME (FOR SCHEDULE TESTING ONLY)

For longitudinal projects, you can include the event label or ID to help confirm the tasks are scheduled correctly. The event ID and label are listed on the **Define My Events** tab in REDCap, and you can indicate you wish to add the event label or ID from the Online Designer> **App Settings.** We recommend removing this label before adding participants.

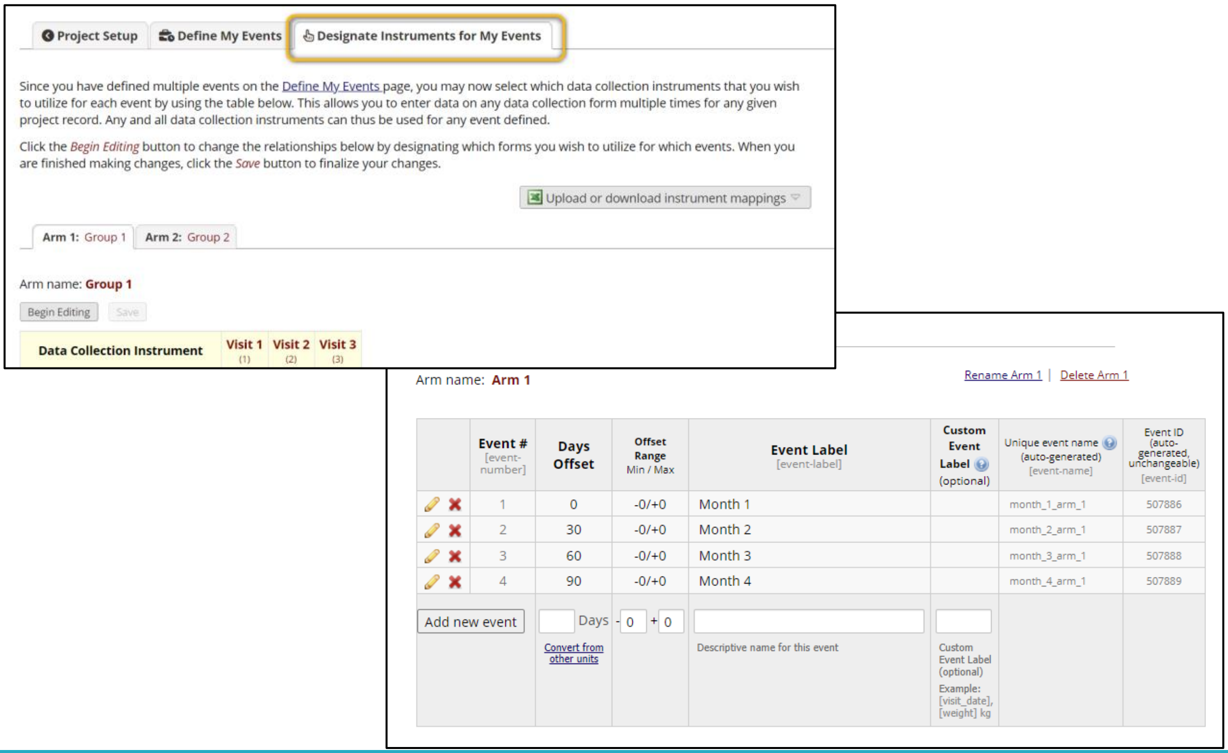
STEP F

DEFINE EVENTS AND SCHEDLUES

In the Project Setup tab, click on Define My Events. Use the instructions provided in REDCap to define the events for your project. Note: The "Days Offset" column **will not** affect MyCap task schedules.



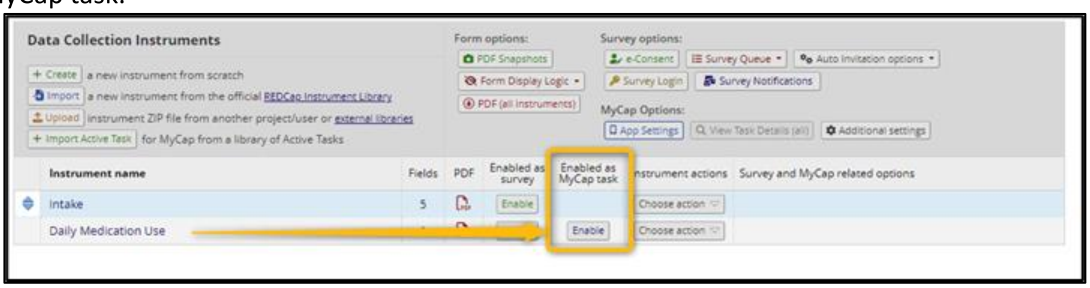
After defining events, follow the instructions provided in REDCap to designate instruments for your events. Instruments cannot be enabled for MyCap until they have been designated for an event.



STEP G

ENABLE INSTRUMENTS FOR MYCAP IN THE ONLINE DESIGNER

After creating your project's instruments from the **Online Designer**, select an instrument to **Enable** as a MyCap task.



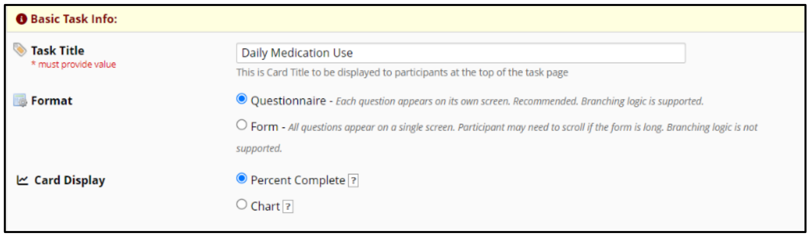
After enabling an instrument to be a MyCap Task, a notice appears at the top of the MyCap Task Settings (below) noting that new, hidden fields will be added to the instrument to capture when tasks are scheduled, started, completed, and provide 'supplemental data' about the device used to complete the task. These fields are not visible to participants but can be pulled into REDCap reports and data exports.

> **NOTICE:** MyCap requires 7 fields (with specific annotations) to be included on instruments enabled for MyCap. These fields capture details such as when tasks are scheduled, started, and completed, as well as stores supplemental data that can be helpful if errors occur while saving data from the app to the REDCap server. Note: These fields are hidden from participants.
> **This instrument is missing the fields with these annotations:** @MC-TASK-UUID, @MC-TASK-STARTDATE, @MC-TASK-ENDDATE, @MC-TASK-SCHEDULEDATE, @MC-TASK-STATUS, @MC-TASK-SUPPLEMENTALDATA, @MC-TASK-SERIALIZEDRESULT

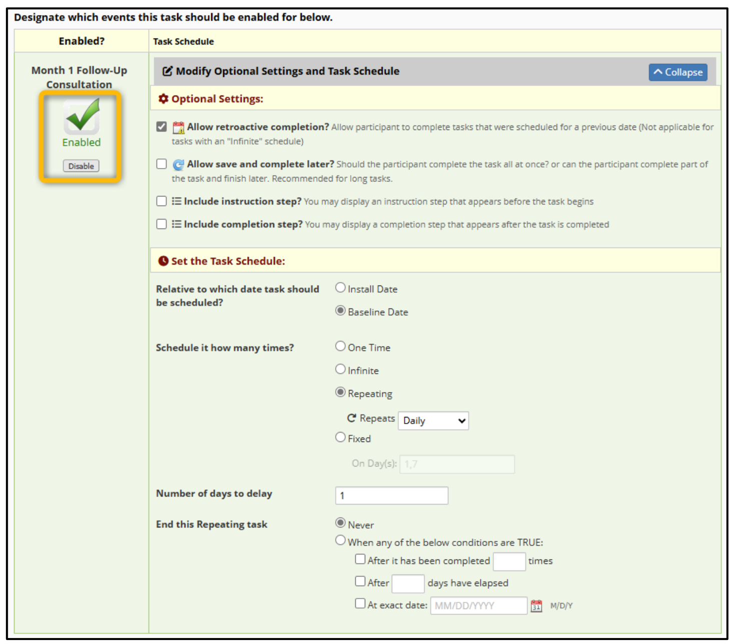
To complete the Task Setup

1. **Change Task Status to Active**
2. Confirm or revise the **Title**, which can differ from the Instrument name.
3. Select the **Format** for questions: *Questionnaire* (one question displayed per screen) or *Form* (all questions displayed on one screen).

4. Indicate the **Card Display** format: *Percent complete* (percent of task complete) or *Chart* (values over time).



5. Designate for which event(s) the task should be enabled.
6. Consider **Optional Settings**:
   - *Allow retroactive completion* (if participants can complete tasks after they are scheduled. While tasks cannot have an expiration date, the data export includes the date the task was scheduled and when it was completed, which allows you to discard data completed later than desired.)
   - *Allow save and complete later* (helpful for long forms).
   - *Include instruction step* (appears before instrument is presented).
   - *Include completion step* (dialogue that appears after all questions have been completed).
7. Set the Task Schedule:
   - Indicate whether a task's schedule will be relative to the install date or baseline date (if enabled).
   - **One-time** tasks appear on the app until the participant completes them, but you can set a "number of days to delay" the task. *Note: one-time tasks send a reminder notification on the day the task is scheduled only.*
   - **Infinite** tasks can be completed multiple times per day with a delayed onset and/or specific stopping logic (end). ***Note: because they do not have a specified schedule, infinite tasks do not send reminder notifications***.



   - **Repeating** daily, weekly, or monthly tasks can be set to begin with a delay and/or an end.
   - **Fixed** tasks can be set to occur on specified dates with or without a delayed onset.

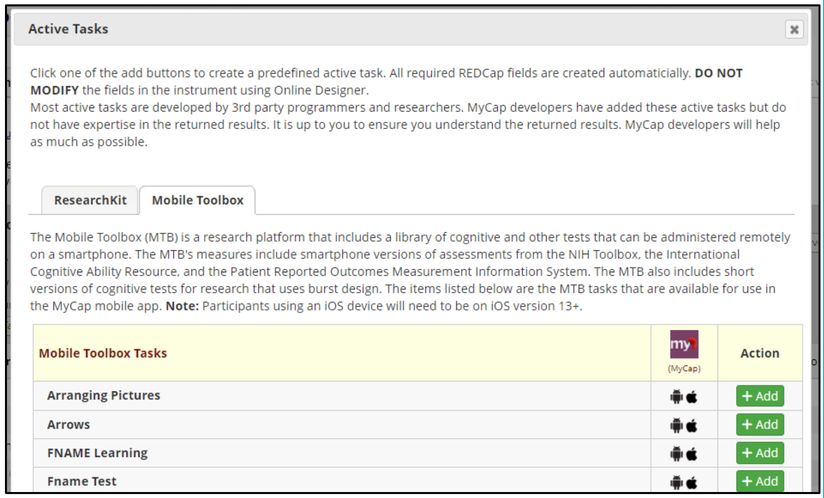
   Indicate Number of days to delay. This will delay the task start date a number of days after the install or baseline date.
   - Indicate when to end this repeating task. Unless "Never" is selected, multiple conditions can be selected (e.g., end task after is completed 1x or 5x).

See information on timing of notifications in Section 2E.

STEP H

MYCAP ACTIVE TASKS

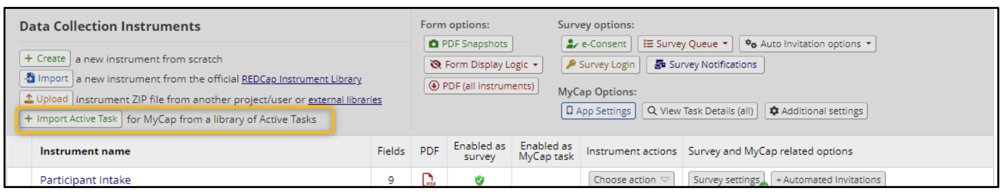
Active Tasks are designed to utilize mobile device sensors, microphones, and/or speakers to capture data from participants.



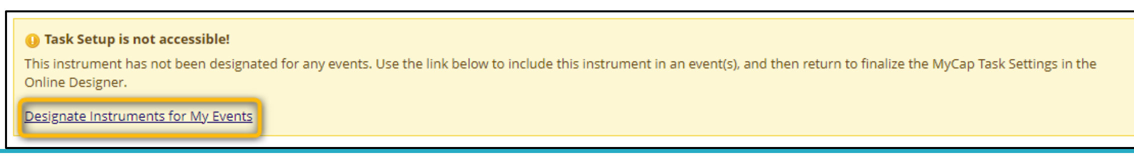
MyCap offers device-sensing Active Tasks that leverage device sensors (microphone, speaker, gyroscope) and **Mobile Toolbox (MTB)*** tasks ([read more]) – NOTE: MTB tasks available on REDCap v14.3.8 or greater) More information about these Active Tasks can be found on the Online Designer > **+Import Active Task**.

To enable an Active Task on your project:

1. Click **Import Active Task**, where you can also learn more about the available Active Tasks.
2. To enable an active task, press **+Add** beside the task.



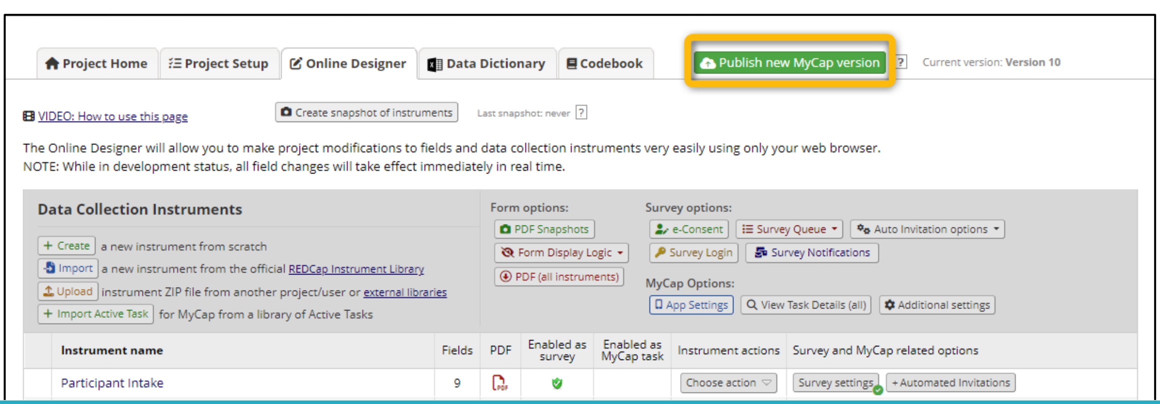
3. Next you will be asked to designate the active task for an event. Click **Designate Instruments for My Events**.
4. After designating the active task for an event, you can return to the online designer to name the task and the task setup.



STEP I

PUBLISH YOUR MYCAP SETTINGS

Once you have finalized initial MyCap Tasks settings, you MUST press **Publish new MyCap version** in order to test your settings and for participants to see tasks. You will want to press **Publish new MyCap version** after making any change to MyCap task schedules or MyCap App settings.



SECTION 2

MyCap App Settings: About Pages, Contacts, Links, App Themes, and Notification Settings

The MyCap App Settings section allows users to create custom pages within the app to display project descriptions and important information as About pages; add project Contacts; insert hyperlinks to project-related resources or information; and select a color them for the project.

STEP A

ABOUT – CREATE INFORMATION SCREENS FOR PARTICIPANTS

The "About" page(s) serve as a quick reference about your project for participants. You can create multiple pages to display to participants. To create your "About" page:

1. Click the "About" tab on the MyCap App Settings screen.
2. Click **Add New About Page**.
3. Add a Title (e.g., study name) that will appear when participants join your project.
4. Include a brief description under Page Content.
5. Add a Custom Image or use the system defaults.
6. Press Save.

STEP B

CONTACTS – CENTRALIZE STUDY CONTACT INFORMATION

Specify project contacts to appear under the project's About menu for participants.

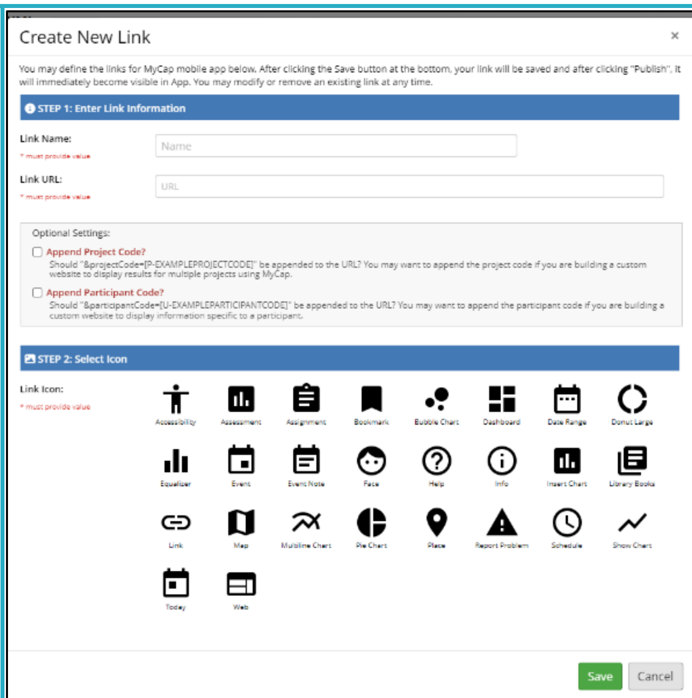
1. Click the **Contacts** tab on the MyCap App Settings screen.
2. Click **Create New Contact**.
3. Add a title for the contact (Study Lead, IT, etc.) and the respective name, phone, email, website, and/or additional information.
4. Press **Save**.

STEP C

LINKS – SHARE CUSTOM URLs WITH PARTICIPANTS

Projects can include custom URLs to be displayed in the MyCap App for all participants. For example, projects can share links to resources, study websites, and/or custom webpages displaying participant results. To add links for all participants:

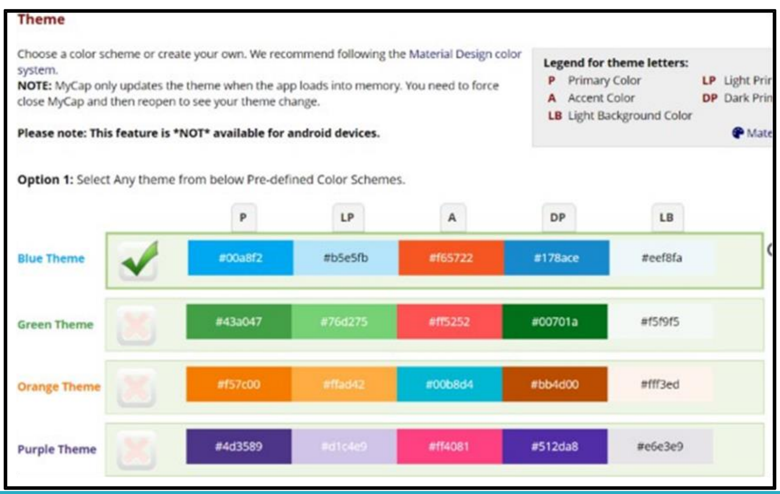
- Click the **Links** tab on the MyCap App Settings screen.
- Click **Create New Link**.
- Give the link a **name** and add the **URL**.
- Select **optional settings**, as needed.
- Choose a **Link Icon.** Press Save.



STEP D

THEME – CHOOSE YOUR COLOR PREFERENCES

- Select the color theme that you would like to use for your project.
- For additional information, reference the [Customize MyCap for Your Project Quick Guide](#).

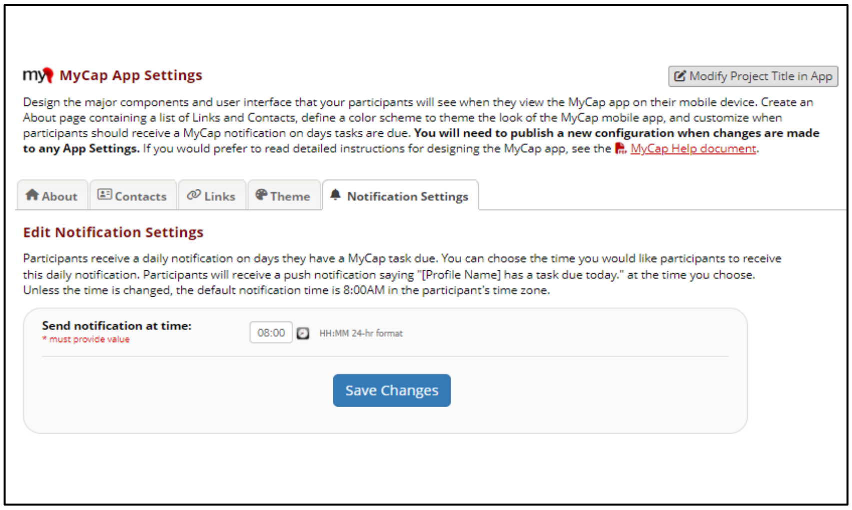


STEP E

NOTIFICATIONS SETTINGS – Choose a Custom Notification Time

Participants receive a daily notification on days they have a MyCap task due. You can choose the time you would like participants to receive this daily notification. Participants will receive a push notification saying "[Profile Name] has a task due today." at the time you choose. Unless the time is changed, the default notification time is 8:00AM in the participant's time zone.

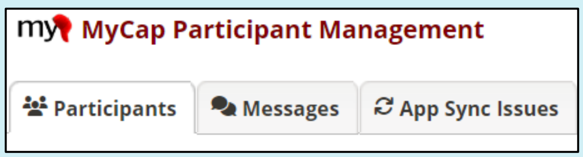
1. From the REDCap interface, navigate to the Online Designer and click App Settings.
2. Click Notification Settings.
3. Input what time you would like participants to receive notifications.
4. Click Save Changes.



SECTION 3

MyCap Participant Management: MyCap Participant List, Messages, and App Sync Issues

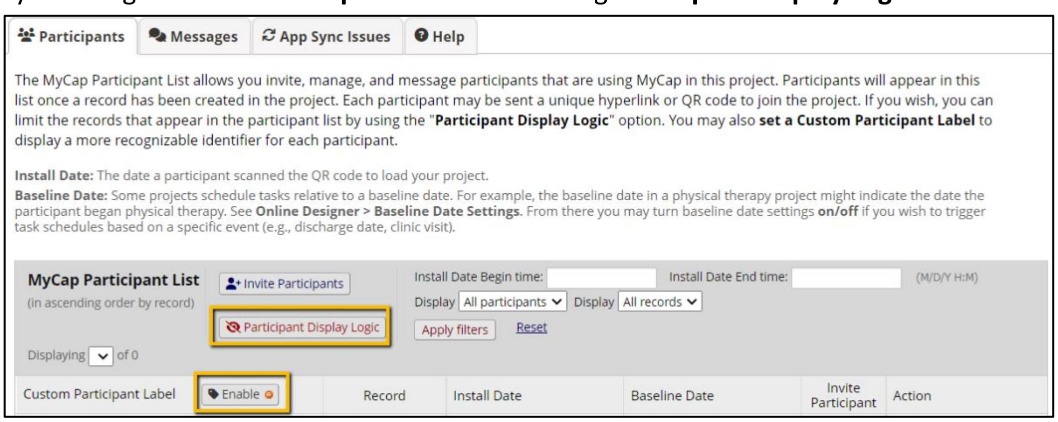
MyCap Participant Management is used to manage and invite participants to use MyCap; manage bi-directional communications with participants and troubleshoot synchronization issues.



STEP A

CUSTOMIZE THE MYCAP PARTICIPANT LIST

From Data Collection>MyCap Participant Management, you can customize the MyCap Participant List by Enabling a **Custom Participant Label** and setting **Participant Display Logic.**



By default, the MyCap Participants List will display all records in your project.

- To Enable a **Custom Participant Label** for the records, select any text field in your project from the drop down (e.g., First Name, Last Name, Medical Record Number, Study ID) or pipe other fields or a combination of fields and click save.
- To set **Participant Display Logic** to only display specific records (e.g., if not all participants are using MyCap), use the logic editor provide to indicate the records that should appear in the MyCap Participant List.

STEP B

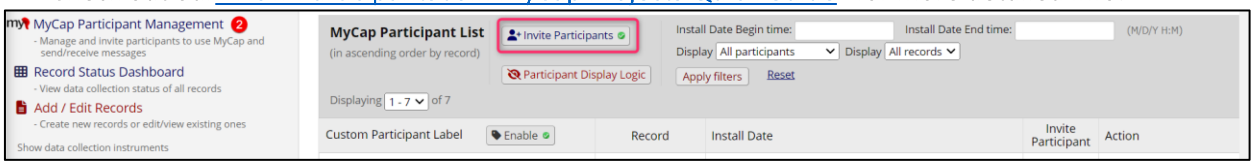
INVITE PARTICIPANTS TO JOIN YOUR MYCAP PROJECT

Participants can join projects by scanning a QR code or clicking on a hyperlink (app link).

- When sending hyperlinks to participants, they can click the link from the mobile device and are then directed to download the app and then join your project.
- When sending QR codes, participants have to first download the MyCap App to their device and then scan the QR code with their device (i.e., it must be displayed on another device or printed).

MyCap provides pre-formatted instructions with the participant's unique QR code/hyperlink that can be automatically displayed or distributed to the participant after their record is saved. These instructions can be inserted into (1) **Online Designer** > **Survey Settings** > **Survey Completion Text** or (2) into REDCap **Alerts & Notifications** that send emails to participants.

- From the Participant List in the MyCap Participant Management screen, click **Invite Participant**.
- Choose which invitation format you prefer (QR Code, Hyperlink, or both) and press **Copy to Clipboard**.
- Check out our "How Participants Join MyCap Projects Quick Guide" for more detailed info.



STEP C

SET PARTICIPANT DISPLAY LOGIC (OPTIONAL)

By default, all records are displayed in the MyCap Participant List; however, you can use conditional logic to limit what records are displayed (e.g., if all participants/records in a project are not using MyCap):

- Click the "Participants" tab on the MyCap Participant Management screen.
- Click **Participant Display Logic**.
- Enter the conditional logic or leave it blank if all records are using MyCap.

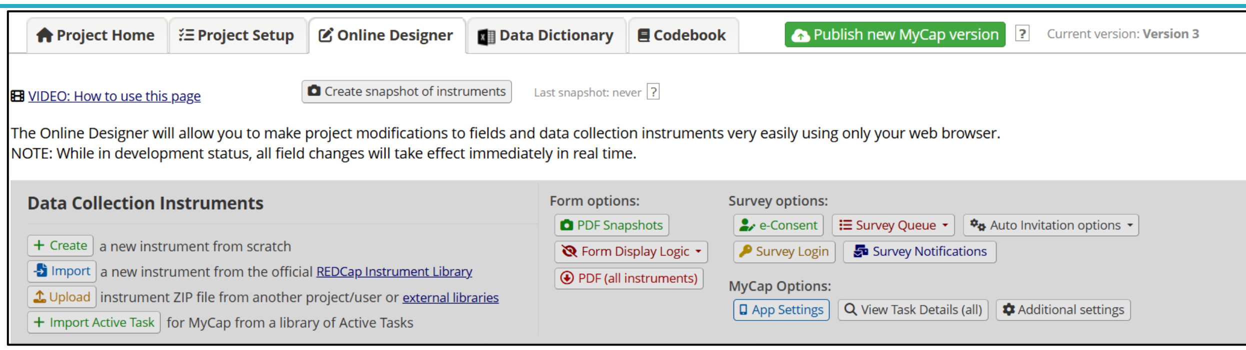
SECTION 4

Getting MyCap Set Up for Participants

STEP A

TEST THE PROJECT THOROUGHLY

- Task Appearance and Behavior: Ensure all MyCap Tasks and information pages (About, Contacts, Links) display and behave as desired (e.g., branching logic, appearance of questions). Note: **we recommend initially setting all schedules to infinite so the Task's display and behavior (e.g., Active Task functionality, branching logic, slider response options) can be tested and reviewed before inviting participants to join the project.**
- Tasks Schedules: After each Task has been thoroughly reviewed, set the schedule as it should be completed and publish an updated version. Tasks that are due on the date you open the app will be visible when viewing the Activities. Upcoming tasks are also displayed.
- If you opted to append the event ID or label to tasks in MyCap to help with testing, be sure to turn this feature off from the Online Designer> **App Settings** after testing, before inviting participants.



- Multiple Devices and Operating Systems: We recommend testing on iOS and Android devices.
- Publishing a Final Version after Testing*:* After finalizing testing, remember to publish an updated version to capture any changes made to the project's MyCap settings. Changes can of course be made at any time and immediately released by publishing an updated version. Participants' apps will load the new changes the next time they open the app.
- Setting Project User Rights for MyCap: Tailor project's user rights as needed under **User Rights** (left-hand menu under Applications). Any user with Project Settings and Setup rights can add or modify MyCap Tasks and schedules. Any user with MyCap Participant Management rights can invite participants to join the project and message participants.
- Moving the Project to Production: Move the project to Production before you begin data collection.

STEP B

HELP PARTICIPANTS JOIN YOUR PROJECT

- Each participant will download the MyCap App to their mobile device from the Apple or Google Play store. **Participants should only use one device**. If participants join your project on multiple devices, tasks completed on one device will not appear as completed on the other.
- Once the app is downloaded, participants join your project using the QR code or hyperlink provided.
- Upon joining your project, participants' notifications are turned on by default, but they are allowed to turn off notifications. This would include task, message, and announcement notifications.

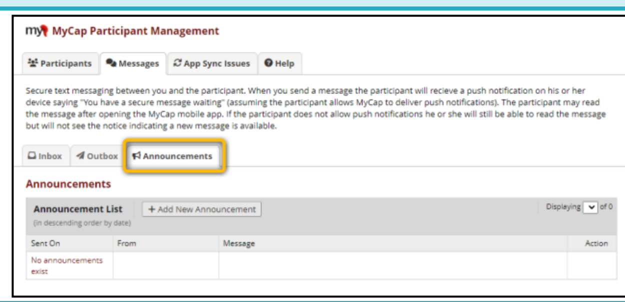
Android Notes:

- Some Android devices do not 'wake' participants' phones when notifications are received. The notification will be visible when the participant opens their device, but a noise may not sound and the phone may not light up.
- Regularly updates, bug fixes, and new features are released to for the MyCap App. The MyCap App will automatically update for participants using an iOS device. However, Android does not allow automatic updates for MyCap. You might consider making an announcement to participants occasionally to ensure they have the most up-to-date app.

SECTION 5 — Using Additional MyCap Features

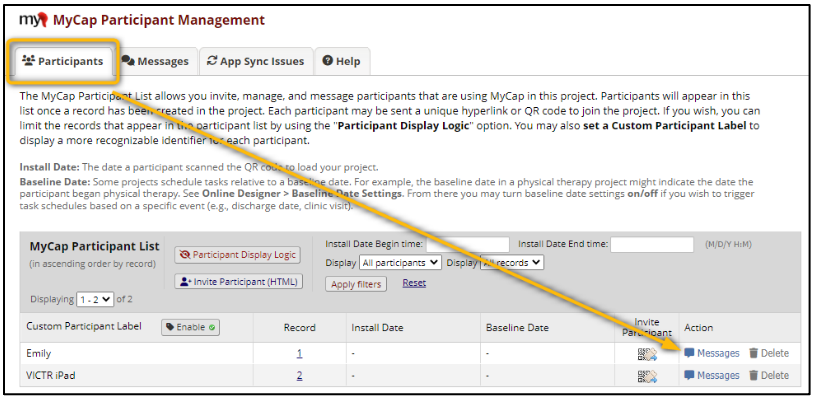
ANNOUNCEMENTS – TO ALL PARTICIPANTS

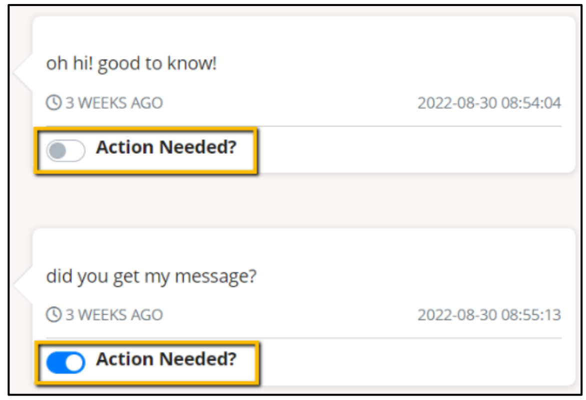
- Click the "Messages" tab on the MyCap Participant Management screen.
- Click the "Announcements" tab.
- Click **Add New Announcement**.
- Customize the body of the message.
- Press **Save**.



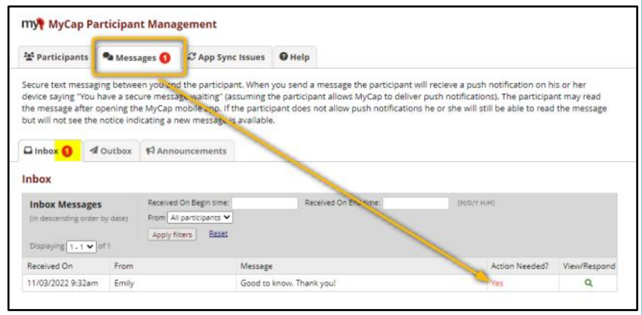
MESSAGES – SEND INDIVIDUAL MESSAGES TO PARTICIPANTS

- From the Participants List, locate the participant and click the “Message” icon under the **Action**.
- Compose your message and click **Send Message** or clicking the icon under **View/Respond** to reply to messages.





- Toggle off **Action Needed?** to remove from the message count. If one REDCap project user toggles off **Action Needed?** it is off for all project users.



Notes:

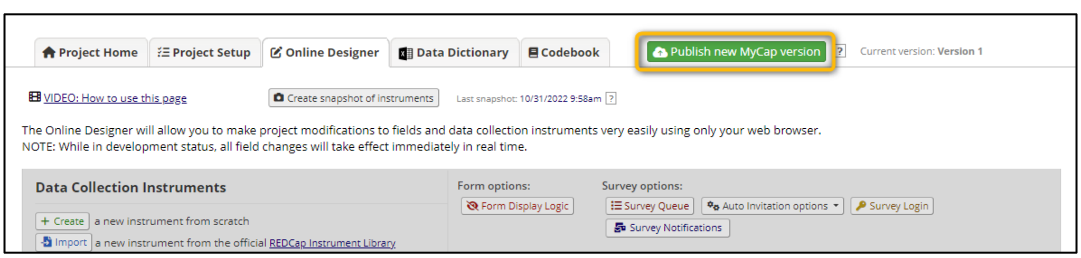
1. When a message is sent, participants will receive a notification that says, “You have received a secure message”. Participants can click on the notification to open MyCap. Next, they click on “Messages” to view the message.
2. The rich text editor can be used to format message text and include clickable links within messages and announcements.
3. For now, project owners are not notified if participants send a message via MyCap.
4. Members of a data access group can only review and send messages and announcements to records within their DAG.

SECTION 6	Publishing Changes to the MyCap Configuration and Project Instruments/Tasks

Project teams should “publish” any changes made to MyCap task schedules and after making changes to the MyCap Mobile App settings.

To publish changes:

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



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