



Switching Participants to the New MyCap App

APP ICONS	
MyCap Classic	New MyCap

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Section 1: Introduction

Participants using MyCap Classic App can switch to the new MyCap App by downloading it from their app store and scanning a QR code or using the dynamic link. Participants that switch from MyCap Classic to the new MyCap App will retain their 'place' in the study schedule.

Study teams can either help participants switch to the new app by walking them through downloading the new MyCap App in person or by emailing participants the joining information. If you want to email participants the information to join the new app, you can do this manually or use the instructions in this guide to trigger an automatic REDCap Alert & Notification. If you do not have participants emails, consider adding an instrument as a MyCap task to collect this information.

Section 2: Transitioning Existing Participants to the New MyCap App on REDCap v13.10+

If your REDCap instance is version 13.10 or greater, participants can transition to the new MyCap App via a **QR Code or Dynamic Link**. To transition participants to the new app, please follow the detailed steps below:

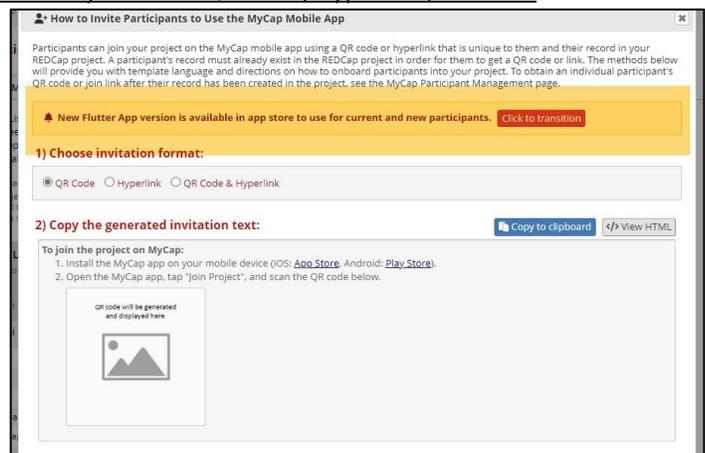
Step 1: Establish an identifier to signify which participants to switch to the new MyCap App.

- In REDCap, add a new Yes/No field to your first data collection instrument to capture whether the participant needs to transition from MyCap Classic to the new MyCap Mobile App. This is an instrument that cannot be enabled for MyCap. E.g., “Is this participant transitioning from MyCap Classic to the new MyCap App?”
- For existing participants, answer Yes for the question above, either by importing a response for all participants or manually entering the answer for each participant. For help, contact your REDCap Administrator, found [here](#).

Step 2: Configure an Alert & Notification (email) with instructions for switching apps.

First, transition the project and select how participants will join – via QR Code, hyperlink, or both.

- Go to MyCap Participant Management > Participant List and click **Invite Participants**.
- Press **Click to transition** to convert to the new app.
- Choose the method(s) by which you would like participants to join your project (QR Code, hyperlink, or both) on the screen above.
- Copy the generated invitation text using the **Copy to Clipboard** button.



Next, create an Alert & Notification in REDCap.

- Go to Applications > Alerts & Notifications
- Click **Add New Alert**.
- Complete Step 1: Trigger the Alert:
 - a. Select “When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic”.
 - b. Enter the variable name for the ‘email’ field in your project and the field added to indicate whether the participant will be transitioning from MyCap Classic to the new app (e.g., [email] and [switch_apps]= ‘1’), as shown below.

- Complete Step 2: Set the Alert Schedule.
 - a. Select “Send immediately”.
 - b. Select “Just once”.
- Complete Step 3: Message Settings.

- a. Select who to Email utilizing the [email] variable from the drop-down menu.
- b. In the Message box, paste the participant invitation text or HTML into the box.
- c. You can add text before or after the copied HTML, just do not edit the links in the HTML.
- d. To avoid confusion, we recommend adding a step 3 instructing participants to delete the original MyCap app if they are not using it for other projects. (e.g., “After you have downloaded the new app and joined the project, you can delete the MyCap Classic App (black background) from your phone.”)
- e. Click **Save**.

STEP 3: Message Settings

Alert Type: Email SMS Text Message Voice Call

Email From:

Email To:

Subject:

Message:

Consider adding into text + Step 3 reminding them to delete the MyCap Classic App

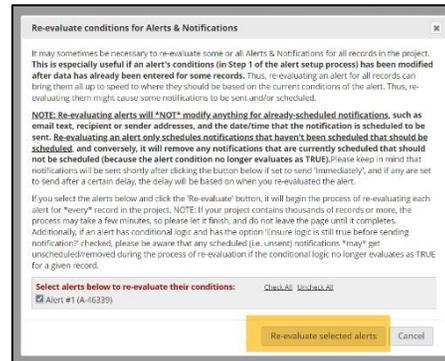
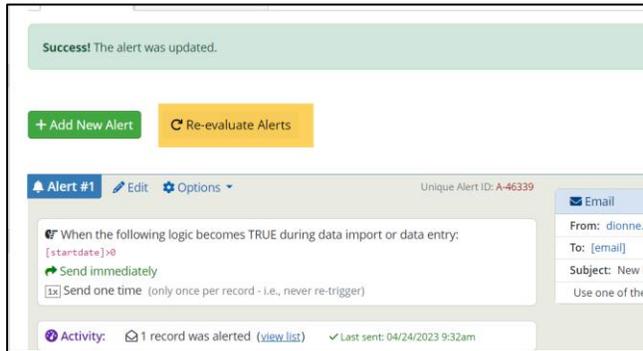
Step 3: Send a MyCap Announcement let participants about the need to switch MyCap Apps Before using the re-evaluate alerts functionality to send the email notification, use MyCap to let participants know they may be asked to switch to a new app. An example announcement is below. However, if you are NOT asking ALL participants to transition to the new app, **be sure to tailor the message to your study so participants know if they should expect an email**. We advise you monitor the MyCap Messages (MyCap Participant Management > Messages) at least daily to see if participants are responding to the announcement with questions.

Example message: “MyCap is improving! If you [condition for transitioning participant (e.g., will be participating on the study through MM/DD/YYYY)], you will receive an email with instructions to re-join the your study in the NEW MyCap App. You will pick up your place in the schedule when you join the new app. If you do not receive an email, you do not need to make any changes.”

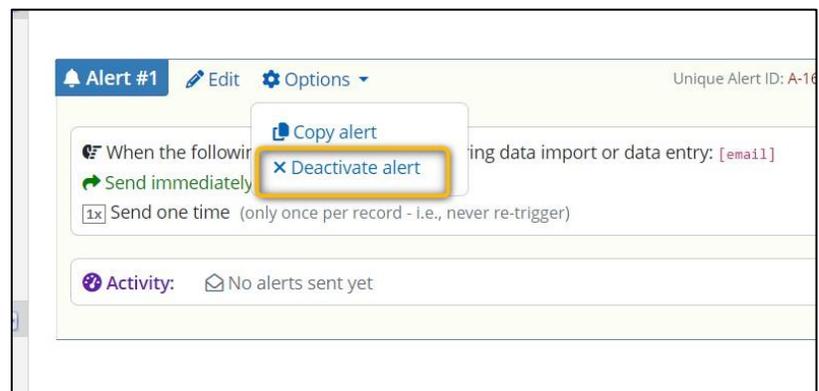
Step 4: Re-evaluate the Alert & Notification to send the email instructions.

- Return to the REDCap Alerts & Notifications page. Click **Re-evaluate Alerts**.

- Select the newly created alert and click **Re-evaluate selected alerts**. This will immediately send an email to all existing participants that contains the information to join the project in the new app.



- Once current participants have been transitioned, this alert can be deactivated. **New** participants can join using the steps found [here](#).



Note: transitioning to the new MyCap app, if you had inserted the invitation text (including dynamic links and QR codes) into Alerts & Notifications or Survey Completion Text, this text will be automatically updated to point **new** participants to the new MyCap app.

Section 3: Transitioning Existing Participants to the New MyCap App on REDCap <13.10

If your project is on REDCap version <13.10, **participants will only be able to join the new MyCap App via QR Code**. The dynamic link will not point them to the new MyCap App. To transition participants to the new app, please follow the detailed steps below:

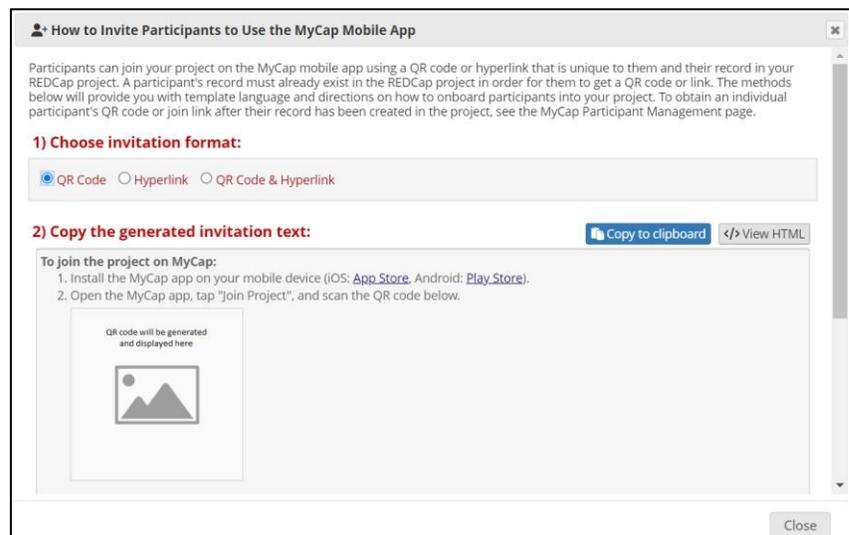
Step 1: Establish an identifier to signify which participants to switch to the new MyCap App.

- In REDCap, add a new Yes/No field to your first data collection instrument to capture whether the participant needs to transition from MyCap Classic to the new MyCap Mobile App. This is an instrument that cannot be enabled for MyCap. E.g., “Is this participant transitioning from MyCap Classic to the new MyCap App?”
- For existing participants, answer Yes for the question above, either by importing a response for all participants or manually entering the answer for each participant. For help, contact your REDCap Administrator, found [here](#).

Step 2: Configure an Alert & Notification (email) with instructions for switching apps.

First, select how participants will join – via QR Code, hyperlink, or both.

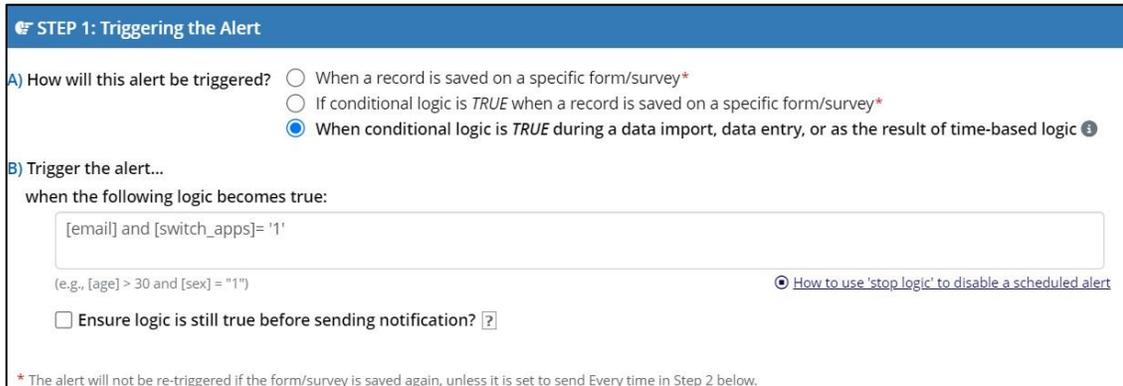
- Go to MyCap Participant Management> Participant List and click **Invite Participants**.
- Choose the QR Code method for participants to join your project.
- Copy the generated invitation text using the **Copy to Clipboard** button.



Next, create an Alert & Notification in REDCap.

- Go to Applications > Alerts & Notifications
- Click **Add New Alert**.
- Complete Step 1: Trigger the Alert:
 - a. Select “When conditional logic is *TRUE* during a data import, data entry, or as the result of time- based logic”.

- b. Enter the variable name for the 'email' field in your project and the field added to indicate whether the participant will be transitioning from MyCap Classic to the new app (e.g., [email] and [switch_apps]= '1'), as shown below



STEP 1: Triggering the Alert

A) How will this alert be triggered?

- When a record is saved on a specific form/survey*
- If conditional logic is *TRUE* when a record is saved on a specific form/survey*
- When conditional logic is *TRUE* during a data import, data entry, or as the result of time-based logic ⓘ

B) Trigger the alert...

when the following logic becomes true:

[email] and [switch_apps]= '1'

(e.g., [age] > 30 and [sex] = "1") [How to use 'stop logic' to disable a scheduled alert](#)

Ensure logic is still true before sending notification? ⓘ

*The alert will not be re-triggered if the form/survey is saved again, unless it is set to send Every time in Step 2 below.

- Complete Step 2: Set the Alert Schedule.
 - a. Select "Send immediately".
 - b. Select "Just once".

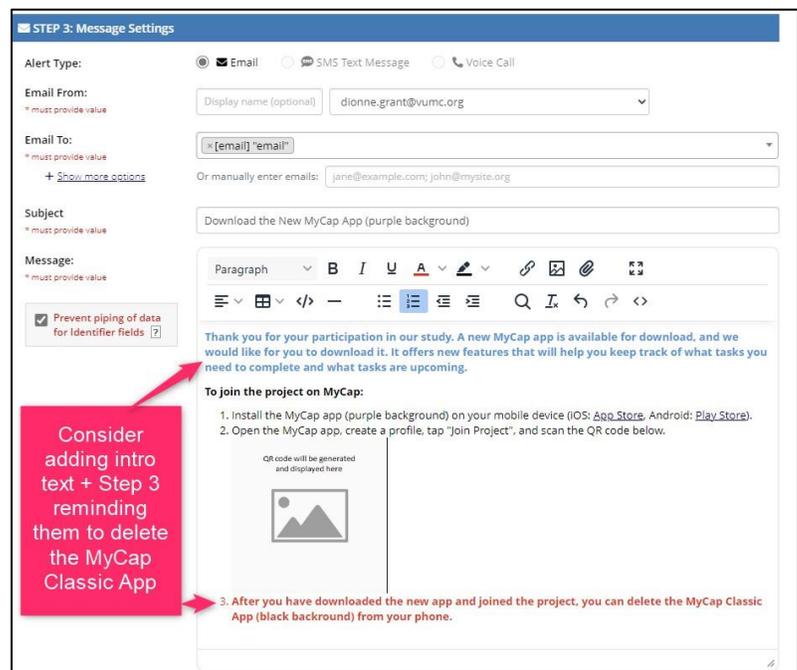
- Complete Step 3: Message Settings.
 - a. In the Message box, paste the participant invitation text or HTML.
 - b. You can add text before or after the copied HTML.
 - c. **IMPORTANT: you must edit the default instructions provided in the Invite Participant HTML to link to the new MyCap App on the Play (Android) and App (iOS) stores.** You can replace the hyperlinks with these:

App Store:

<https://apps.apple.com/app/pacym/id6448734173>

Play Store:

https://play.google.com/store/apps/details?id=org.vumc.mycapplusbeta&hl=en_US&gl=US



STEP 3: Message Settings

Alert Type: Email SMS Text Message Voice Call

Email From: *must provide value Display name (optional): dionne.grant@vumc.org

Email To: *must provide value [email]@email
+ Show more options Or manually enter emails: jane@example.com, john@mysite.org

Subject: *must provide value Download the New MyCap App (purple background)

Message: *must provide value

Prevent piping of data for Identifier fields ⓘ

Consider adding intro text + Step 3 reminding them to delete the MyCap Classic App

Thank you for your participation in our study. A new MyCap app is available for download, and we would like for you to download it. It offers new features that will help you keep track of what tasks you need to complete and what tasks are upcoming.

To join the project on MyCap:

1. Install the MyCap app (purple background) on your mobile device (iOS: [App Store](#), Android: [Play Store](#)).
2. Open the MyCap app, create a profile, tap "Join Project", and scan the QR code below.

QR code will be generated and displayed here

3. After you have downloaded the new app and joined the project, you can delete the MyCap Classic App (black background) from your phone.

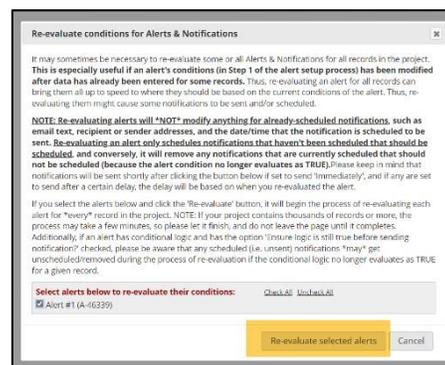
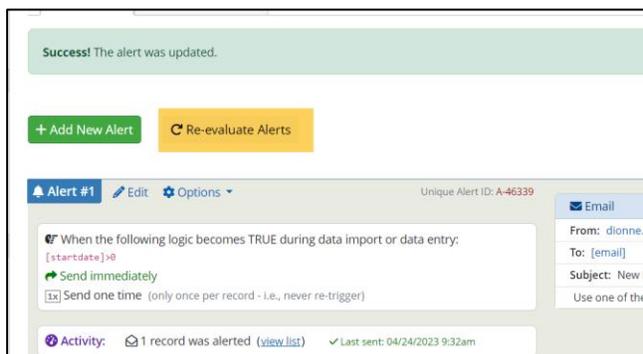
- d. To avoid confusion, we recommend adding a step 3 instructing participants to delete the original MyCap app if they are not using it for other projects. (e.g., "After you have downloaded the new app and joined the project, you can delete the MyCap Classic App (black background) from your phone.")
- e. Click **Save**.

Step 3: Send a MyCap Announcement let participants about the need to switch MyCap Apps
 Before using the re-evaluate alerts functionality to send the email notification, use MyCap to let participants know they may be asked to switch to a new app. An example announcement is below. However, if you are NOT asking ALL participants to transition to the new app, **be sure to tailor the message to your study so participants know if they should expect an email.** We advise you monitor the MyCap Messages (MyCap Participant Management > Messages) at least daily to see if participants are responding to the announcement with questions.

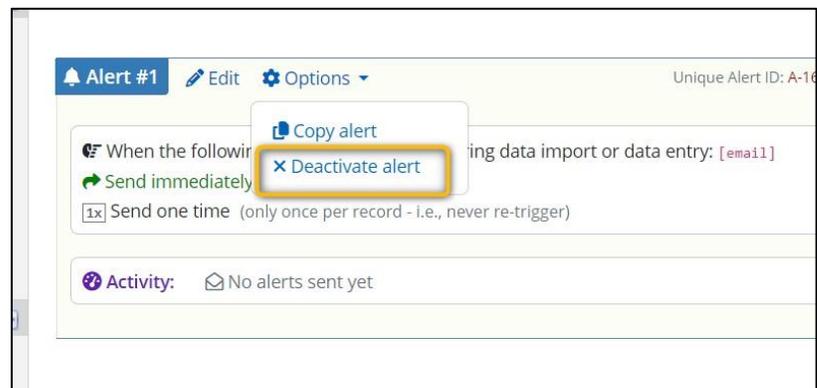
Example message: “MyCap is improving! If you **[condition for transitioning participant (e.g., will be participating on the study through MM/DD/YYYY)]**, you will receive an email with instructions to re-join the your study in the NEW MyCap App. You will pick up your place in the schedule when you join the new app. If you do not receive an email, you do not need to make any changes.”

Step 4: Re-evaluate the Alert & Notification to send the email instructions.

- Return to the REDCap Alerts & Notifications page. Click **Re-evaluate Alerts**.
- Select the newly created alert and click **Re-evaluate selected alerts**. This will immediately send an email to all existing participants that contains the information to join the project in the new app.



- Once current participants have been transitioned, this alert can be deactivated. **New** participants can join using the steps found [here](#).



Section 4: Using the new MyCap App with New Projects on REDCap version <13.10

For projects created on REDCap versions earlier than 13.10 that need features exclusive to the new app, such as parity in active tasks across both iOS and Android platforms or having multiple participants use a single device, you can direct participants to manually install the latest version of the MyCap App instead of the MyCap Classic. Please note, to utilize MyCap for projects with longitudinal data collection, REDCap version 13.10 or higher is required.

Because your project is in REDCap version <13.10, participants will only be able to join the new MyCap App via QR Code. The dynamic links provided in REDCap will not direct them to the new MyCap App.

To invite participants to use the new MyCap app when using REDCap version <13.10, follow these steps:

- Go to the Participant List and click **Invite Participants**.
- Choose the invitation format of QR Code.
- Copy the generated invitation text using the **Copy to Clipboard** button.
- Paste the text or HTML into 1) **Survey Completion Text** that displays after a survey is completed and/or 2) an **Alerts & Notifications** email that is sent to the participant after their record is created.
- IMPORTANT: you must edit the default instructions provided in the Invite Participant HTML to link to the new MyCap App on the Play (Android) and App (iOS) stores. You can replace the hyperlinks with these:
 - App Store: <https://apps.apple.com/app/pacym/id6448734173>
 - Play Store: https://play.google.com/store/apps/details?id=org.vumc.mycapplusbeta&hl=en_US&gl=US
- Click [here](#) for more information on setting up an Alerts & Notifications message or Survey Completion Text.