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Mobilizing the Participant Voice

Switching Participants to the New MyCap App

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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 <u>here</u>.

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.

≗ + How to Invite Participants to Use the MyCap Mobile App	×
Participants can join your project on the MyCap mobile app using a QR code or hyperlink that is unique to them and their record in your REDCap project. A participant's record must already exist in the REDCap project in order for them to get a QR code or in/i. The methods be will provide you with tempiate language and directions on how to onboard participants into your project. To obtain an individual participant QR code or join link after their record has been created in the project, see the MyCap Participant Management page.	low it's
A New Flutter App version is available in app store to use for current and new participants. Cick to transition	
1) Choose invitation format:	
● QR Code O Hyperlink O QR Code & Hyperlink	
2) Copy the generated invitation text:	ИL
To join the project on MyCap: 1. Install the MyCap app noyour mobile device (IOS: <u>Ago Store</u> , Android: <u>Play Store</u>). 2. Open the MyCap app, tap "Join Project", and scan the QR code below.	
Chicode will be generated and during the three the second se	

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 timebased 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.

A) How will this alert be triggered	 When a record is saved on a specifi If conditional logic is <i>TRUE</i> when a r When conditional logic is <i>TRUE</i> due 	c form/survey* ecord is saved on a specific form/survey* ing a data import, data entry, or as the result of time-based logic
B) Trigger the alert		
when the following logic becom	nes true:	
[email] and [switch_apps]=	: '1'	
		How to use 'stop logic' to disable a scheduled aler
(e.g., [age] > 30 and [sex] = "1")		

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

		Re-evaluate conditions for Alerts & Notifications	×
uccess! The alert was updated.		It may sometimes be necessary to newaluate some or all Alerts & Notifications for all recording useful if an alert's conditions (in Step 1 of the alert setup process) that of the alert setup process) that of the alert setup process is thing them all up to speed to where they should be based on the current conditions of the evaluation of the main statement of the same moltifications to be sent and/or steeledule.	rds in the project. has been modified all records can alert. Thus, re-
Add New Alert C Re-evaluate Alerts		NOTE: Re-evaluating alerts will "NOT" modify anything for already-scheduled notifications, such as email text, recipient or sender addresses, and the date/time that the notification is scheduled to be sere. Re-evaluating an alter tool schedules anothications that harves these scheduled that should be scheduled, and conversity, it will remove any notifications that are currently scheduled that should not be scheduled (because the aler condition to longer evaluates as 1800; blass is equip notifications will be sent schedul and the aler condition on holerger evaluates at 1800; blass is equip to send after a certain delay, the delay will be basics on when you re-evaluate the alert.	
Peur Options · Options ·	Email	If you select the alerts below and click the 'Re-evaluate' button, it will begin the process of alert for "every" record in the project, NOTE: If your project contains thousands of records	re-evaluating each s or more, the
When the following logic becomes TPLIE during data import or data entry:	From: dionne.g	process may take a few minutes, so plants in it finds, and do not kave the page until completes. Additionally, if an alert has conditional lags and has the option "innoval regis its III has before sending notification? checked, plants he aware that any scheduled (ii. unwent) notifications: "may" get unscheduled/errenved during the process of re-evaluation if the conditional logic no longer evaluates as TRUE for a given record.	
[startdate]>0	To: [email]		
Send immediately	Subject: New Fl		
Ix Send one time (only once per record - i.e., never re-trigger)	Use one of the	Select alerts below to re-evaluate their conditions: <u>Check All Uncheck All</u> Alert #1 (A-46339)	

 Once current participants have been transitioned, this alert can be deactivated. New participants can join using the steps found <u>here</u>.

Alert #1	& Edit	Options	Unique Alert ID:
	. fallauir	🕒 Copy alert	ing data increat an data anton (
Send immediately		× Deactivate alert	ing data import of data entry: [email]
1x Send on	e time (or	nly once per record - i.e.,	, never re-trigger)

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 <u>here</u>.

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.

How to Invite Participants to Use the MyCap Mobile App	3
articipants can join your project on the MyCap mobile app using a QR code or hyy IEDCap project. A participant's record must already exist in the REDCap project in pelow will provide you with template language and directions on how to onboard p narticipant's QR code or join link after their record has been created in the project. 1) Choose invitation format:	perlink that is unique to them and their record in your order for them to get a QR code or link. The methods participants into your project. To obtain an individual see the MyCap Participant Management page.
● QR Code ○ Hyperlink ○ QR Code & Hyperlink	
?) Copy the generated invitation text:	Copy to clipboard View HTML
To join the project on MyCap: 1. Install the MyCap app on your mobile device (IOS: <u>App Store</u> . Android: <u>Play</u> 2. Open the MyCap app, tap "Join Project", and scan the QR code below. GR code will be generated	Store).
and displayed here	
	Close

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".

 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 <i>TRUE</i> when a record is saved on a specific form/survey* When conditional logic is <i>TRUE</i> during a data import, data entry, or as the result of time-based logic (1)
B) Trigger the alert	
when the following logic becom	es 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 b	efore sending notification? 2
* 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:

aerc type.	🔘 🗷 Email 💦 🗭 SMS Text Message 💦 📞 Voice Call
mail From: must provide value	Display name (optional) dionne.grant@vumc.org
mail To: must provide value	<pre>[×[email] "email")</pre>
+ Show more options	Or manually enter emails: jane@example.com; john@mysite.org
ubject must provide value	Download the New MyCap App (purple background)
lessage: must provide value	
Prevent piping of data for Identifier fields ?	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 y need to complete and what tasks are upcoming. To join the project on MyCap:
Consider adding intro	 Install the MyCap app (purple background) on your mobile device (IOS: <u>App. Store</u>, Android: <u>Play Store</u>). Open the MyCap app, create a profile, tap "Join Project", and scan the QR code below. GR code will be generated

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

- 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.

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- □ 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.

Success! The alert was updated.		It may sometimes be necessary to re-evaluate some or all Alerts & Notifications for all records in th This is especially useful if an alert's conditions (in Step 1 of the alert setup process) has been after data has already been entered for some records. Thus, re-evoluting an alert for all record bring them all up to speed to where they should be based on the current conditions of the alert. The evolution is not all one some ordifications in has set and/or subvolution.	e project. modified is can us, re-	
Add New Alert C Re-evaluate Alerts Alert #1 P Edit Options Unique Alert ID: A4	6339	ensuing ensuing a constraint with "AOT" modify anything for already-scheduled notifications. HOTE: Becalauting alerts with "AOT" modify anything for already-scheduled notifications is email text, recipient or sender addresses, and the data/time that the notification is scheduled scheduled, and conversely, the ulternove any routifications that are currently scheduled that not be scheduled forecass the alert condition no longer evaluates as TRUE,Pinsuk texp in ma notifications will be sum shortly miler circlicity the busched not below for stors may have been been notifications will be sum shortly miler circlicity the busched not stors. TRUE,Pinsuk texp in ma notifications will be sum shortly miler circlicity the busched on when your revaluated the alert. Hyou sate the alerts alorg circle the hyserodule to busch, will be gain the process of re-evaluated to send after a certain deloy, the delay will be based on when your revaluated the alert.	euch as ed to be <u>rould be</u> should nd that ny are set ting each	
ST 110 on the following logic hole was TN IF during data income or data actors	From: dionne.g	aler for "twory" record in the project, NOTE: If your project contains thousands of records or more, the process may take a few minutes, so please let it finish, and do not leave the page until it completes. Additionally, if an airer has conditional log; and has the option "insure log; it is till mue before sending notification" checked, please be aware that any scheduled (i.e. unsert) notifications "may" gas unscheduled: functions and under the norses of revolutions of the renotification temper values as TB		
when the following logic becomes TROE during data import or data entry: [startdate]>0	To: [email]			
Send immediately	Subject: New Fl	for a given record.		
Ix Send one time (only once per record - i.e., never re-trigger)	Use one of the	Select alerts below to re-evaluate their conditions: <u>Check All Uncheck All</u> Alert #1 (A-46339)		

 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 <u>New Projects</u> 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: <u>https://apps.apple.com/app/pacym/id6448734173</u>
 - Play Store: https://play.google.com/store/apps/details?id=org.vumc.mycapplusbeta&hl=en_US&gl=US
- Click <u>here</u> for more information on setting up an Alerts & Notifications message or Survey Completion Text.