

MyCap Project Testing Guide: Step-by-Step SOP

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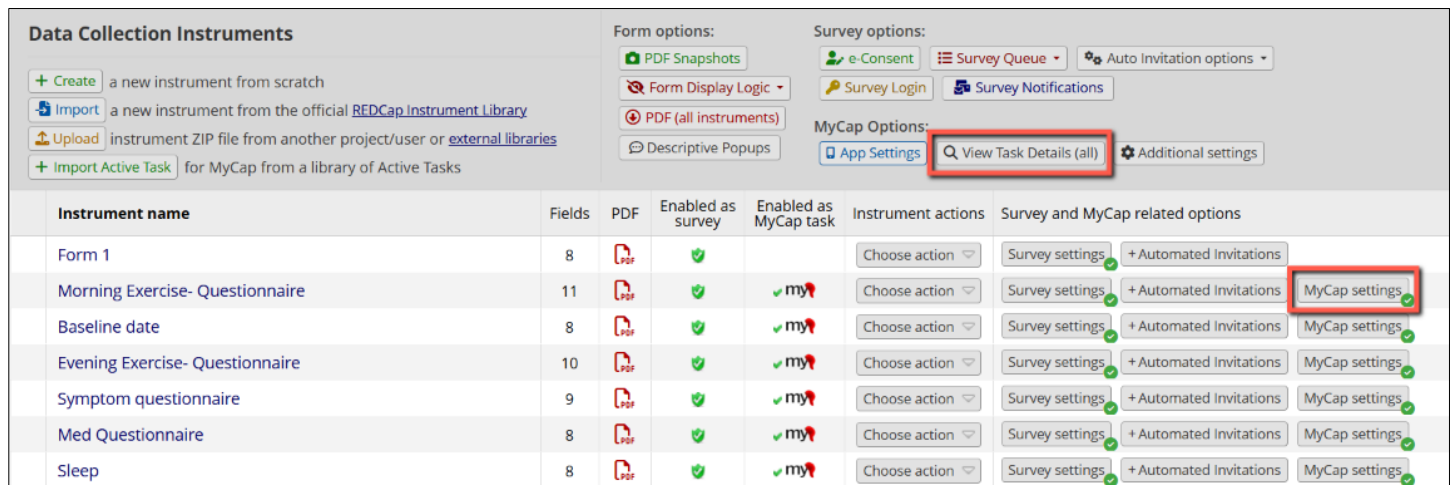
Test Prerequisites

1. Enable MyCap for your REDCap project.
2. Enable instruments as MyCap tasks and add active tasks, as needed, and complete the **Basic Task Info and Optional Settings only**. View our Getting Started Quick Guides ([Traditional](#) or [Longitudinal](#)) for step-by-step instructions for these processes as needed.
 - a. *If you plan to use a Baseline Date to trigger tasks, we recommend not enabling the baseline date until Step 3. You can view the [Baseline Date QG](#) here for more information on this functionality.*
 - b. *For the initial testing, we recommend **using the default, “infinite” schedule with no delays and trigger tasks based on the Install Date** for all tasks or events, if using a longitudinally enabled project. In Step 3, after you have tested completing tasks in MyCap and making any modifications to the instrument or other settings, you can test desired task schedules.*
3. Complete App Settings (About pages, Links, etc.). You can wait to configure notification timing (i.e., keep the default 8AM task notification or set it at a convenient time to prompt your testing).
4. Publish a new MyCap version.

Step 1: Test the Appearance and Functionality of Your Tasks

After configuring your project settings and enabling MyCap tasks, you can begin testing the appearance and functionality of your MyCap tasks. To do this, follow the steps below:

1. If you haven't already, **temporarily set all task schedules to infinite to facilitate thorough testing**. This allows you to evaluate each task without the time constraints of a one-time, fixed, or repeating schedule. Publish a new MyCap version from the **Online Designer**.
2. Confirm that your task settings are configured correctly using the **View Task Details** pop up in the **Online Designer** (e.g., task title, instrument title, format, and task schedule).
3. Next, use the CSV available in the **View Task Detail** pop up to confirm that the detailed settings of your tasks appear as desired (e.g., instruction and completion step, save & return functionality, etc.).
4. Create a new record in REDCap to serve as your test participant and join your project to begin in-app testing.
5. Evaluate task appearance and settings first to ensure everything appears as expected:



Instrument name	Fields	PDF	Enabled as survey	Enabled as MyCap task	Instrument actions	Survey and MyCap related options
Form 1	8				Choose action	Survey settings + Automated Invitations
Morning Exercise- Questionnaire	11			my	Choose action	Survey settings + Automated Invitations MyCap settings
Baseline date	8			my	Choose action	Survey settings + Automated Invitations MyCap settings
Evening Exercise- Questionnaire	10			my	Choose action	Survey settings + Automated Invitations MyCap settings
Symptom questionnaire	9			my	Choose action	Survey settings + Automated Invitations MyCap settings
Med Questionnaire	8			my	Choose action	Survey settings + Automated Invitations MyCap settings
Sleep	8			my	Choose action	Survey settings + Automated Invitations MyCap settings

- Question format- does the task appear as a questionnaire (*each question appears on its own screen*) or form (*all questions appear on a single screen*) as you designated in your MyCap settings for each task?
 - Instruction step- do your instruction steps appear as expected?
 - Completion step- do your completion steps appear as expected?
 - Do you see the option to Save & Return later if you allowed this functionality in REDCap?
6. Test task functionality:
- Test that any branching logic functions properly (branching logic is compatible in questionnaire format only).
 - Test any field validations and required fields.
 - Test all response options used (multiple choice, yes/no, text box, etc.).
 - Complete tasks and ensure data syncs properly to REDCap.
 - If you have any chart tasks, use the Chart icon in the upper right-hand menu to confirm data updates accurately upon completion.
 - Test Active Task appearance and functionality:
 - Confirm that instructions appear as expected.
 - Confirm that Active Tasks can be completed and sync to REDCap as expected.

Note: As you test your instruments, you can make updates to the instruments in REDCap and publish a new version to re-test the look, validations, or task options.

Step 2: Test the Appearance of your Project

After confirming the instrument appearance and behavior function as expected, you can test the App Settings on your project.

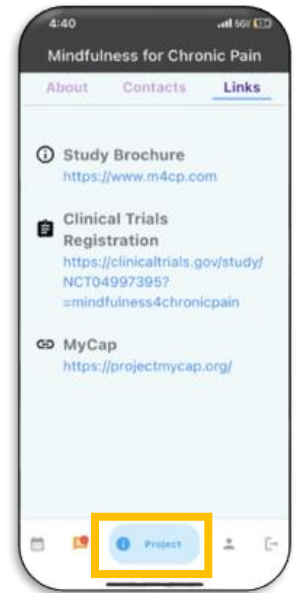
1. Verify the **About** pages you created appear in the app.
2. Confirm the information for your **Contacts** displays correctly.
3. Test that each **Link** works as expected.
4. Confirm you like the App color scheme (theme).

If you make any updates to the **App Settings** in REDCap during this phase of testing, publish a new version and retest by re-opening the project on MyCap.

Step 3: Test Schedule

You are now ready to test your task schedule in MyCap.

1. Update each task or event to have the desired schedule, days delay, and End by settings.
2. For longitudinal projects, append the Event ID or Event Label to tasks by navigating to **Online Designer > Additional Settings > Select Custom Event Label**. This makes it easy to identify which event the task belongs to during testing.
3. Publish a new MyCap version.
4. To ensure all task settings are as desired, first review the Task Details CSV (**Online Designer > View Task Details (All) > Download Detailed Schedules (CSV)**) and the key columns for Scheduling:
 - schedule_relative_to
 - schedule_type
 - schedule_frequency
 - schedule_interval_week
 - schedule_days_of_the_week
 - schedule_interval_month
 - schedule_days_of_the_month
 - schedule_days_fixed
 - schedule_relative_offset
 - schedule_ends
 - schedule_end_count
 - schedule_end_after_days
 - schedule_end_date

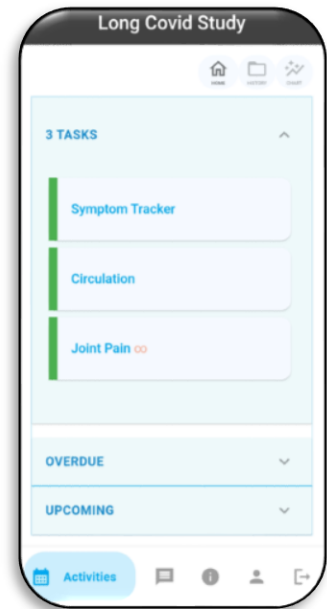


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	form_name	task_title	question_format	card_disp	x_date	fie_x_time	fie_y_numeric	extended	allow_retr	allow_sav	include_ir	include_ci	instruction	instruction	completion	completion	schedule_relative_to	schedule_type	schedule_frequency	schedule
2	patient_morale_questionnaire	Patient M: Questionnaire	.Percent						0	0	0	0					JoinDate	.Fixed		
3	meal_questionnaire_breakfast	Meal Que: Form	.Percent						0	1	0	0					JoinDate	.Repeating	.Daily	
4	meal_questionnaire_lunch	Meal Que: Questionnaire	.Percent						0	1	0	0					JoinDate	.Repeating	.Daily	
5	daily_questionnaire	Daily Que: Questionnaire	.Percent						0	0	0	0					JoinDate	.Fixed		
6	weekly_questionnaire	Weekly Q: Questionnaire	.Percent						0	0	0	0					JoinDate	.Infinite		
7	water_intake	Water Int: Questionnaire	.DateLine	[date]	[time]	[steps]			0	0	0	0					JoinDate	.Infinite		
8																				
9																				
10																				

5. Create a new test record. You will need to delete the previously joined record from your profile in the app or create a new profile to join as this new test participant.
6. If you're using a baseline date to trigger tasks, complete the following steps to ensure this feature is functioning as expected:
 - If you plan to **enter the baseline date in REDCap for participants** (e.g., during intake, consent, discharge, or screening process), prior to joining your project in the app, enter the baseline date in your test record (go to Record Status Dashboard in REDCap and click on the instrument that has the baseline date field for the project for the record. Enter the baseline date. Save & exit form).
 - If you plan to **have participants enter their baseline data through a MyCap task**, join your project in the app using your new test record. Confirm that you are first presented with the baseline date task, and that you

cannot view any other tasks based on the baseline date before completing this one (tasks based on the install date will appear to be completed if scheduled). Complete this task by entering your baseline date.

7. Confirm the following task **settings** function as expected for tasks based on install and baseline (if used). You can do this by looking at the dates of your “Upcoming Tasks” and/or navigating to the calendar icon in the top right menu to review tasks projected for 60 days. Once there, ensure tasks are scheduled on the proper days as designated by your schedule (a dot will appear on the calendar day that a task is due). You can also click on a specific date to view tasks for that day).
 - Days Delay:** Do tasks appear only after the set number of days delayed, and then on any recurring days as expected? (e.g., delay 5 days with a repeating daily schedule thereafter).
 - End by:** Are tasks no longer visible in your upcoming task schedule and calendar icon once you have satisfied the set conditions (e.g., after the task has been completed 5 times, after an exact date, etc.)
 - Repeating:** Do tasks recur on the expected dates as set up in REDCap? (e.g., daily, weekly, etc.).
 - Fixed:** Do tasks appear on the expected fixed dates? (e.g., days 1,7, 14).
 - On the Activities page, confirm any tasks set are set to appear at **0 days from install or baseline** are visible and can be completed.
 - To **test overdue task scheduling**, enter a baseline date in the past in MyCap or REDCap participant record if you are using this feature. This ensures that tasks scheduled before the baseline date are displayed in the Overdue section of the app and can still be completed by participants. Confirm you see appropriate tasks displayed in the “Overdue” section of MyCap.
 - Test **Retroactive Data Completion** in the same participant profile by either:
 - Setting the baseline as a date that has already passed if you are using this functionality. Ensure the task appears in your “Overdue” tasks. Complete the task and confirm that data syncs back to REDCap.
 - Letting the due date pass for a task if you have a longer window for testing, and then confirm it appears in your “Overdue” task section. Complete the task and confirm that data syncs back to REDCap. Keep in mind that the data export in REDCap will show both the scheduled date and the actual completion date.
 - If you are using **multiple arms**, you can join as a participant from each arm on different profiles. Be sure to test joining, completing data, and data syncing as a participant in all arms.
 - If you appended the Event ID or Event Label, be sure to disable this feature after confirming the scheduling is working correctly.
8. Test MLM Settings: If you are utilizing the MLM, complete the following tests to ensure everything is functioning as expected-
 - First confirm that the language you want to use is offered in MyCap. If not, note that the app interface and survey prompts will not appear in that language.
 - Create a new test record. Select the appropriate language when prompted as you join your project. Confirm that all tasks and project information appear in the expected language.
 - Complete a few tasks and ensure that data syncs correctly to REDCap.



Step 4: Test Notifications

Now you are ready to test the behavior of notifications on your MyCap project. Your participants will receive task notifications on the day they have a task scheduled (i.e., for Fixed, Repeating, and one-time tasks) at the time you have selected or the default time of 8 AM.

1. Configure Notification Settings if you haven't already:

- From the Online Designer, navigate to the App Settings tab and select Notification Settings. Ensure the time of day for once-daily notifications is set appropriately based on when you'd like participants to receive them. By default, notifications are set for 8 AM in the participant's time zone.

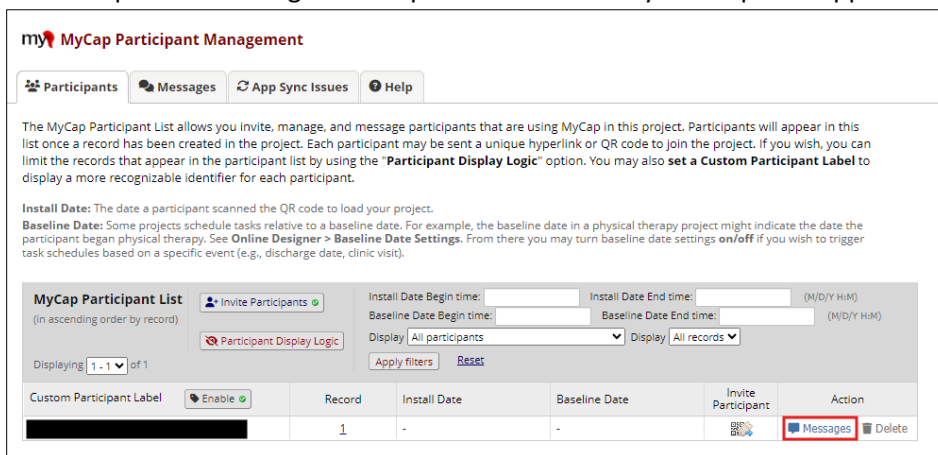
2. To test task notifications:

- Rejoin the project on MyCap by creating a new test record. Make sure the project you're testing is the only one joined under that profile. In-app notifications do not currently distinguish which project a notification is related to, so this will help avoid confusion during testing.
- Confirm you receive a task notification at the appropriate time as designated in REDCap (e.g., default 8 AM or 2 PM). The notification will say, "[profile name has a task due today]". Note: you will only receive one task notification on a given day regardless of how many tasks you have due that day.

Note: Consider the timing of your notification settings and when you join your test project (e.g., if task reminders are set to 9 AM but you joined your test project at 12 PM, you will want to check for your task notification the next day).

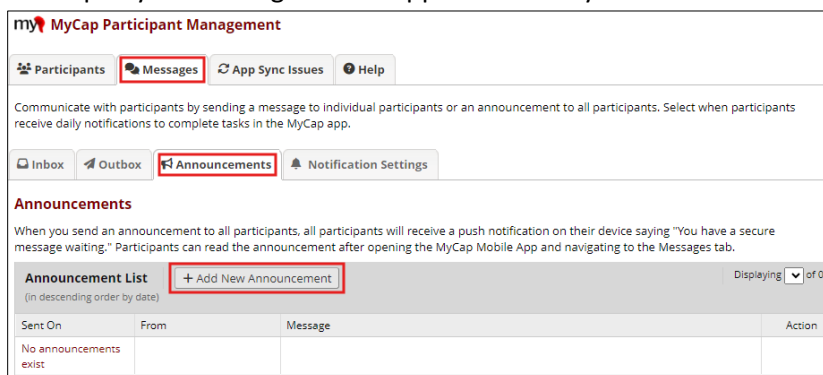
3. To test notifications for messages:

- Go to **MyCap Participant Management** in REDCap and send a message to your test participant.
- Confirm that you receive a notification on your phone that says, "You have a secure message waiting."
- Open the message and respond. Confirm that your response appears in the "Messages" tab in REDCap.



4. To test notifications for announcements:

- Create an announcement in **MyCap Participant Management > Messages > Announcements**.
- Send the announcement and confirm that you receive a notification on your test device.
- Open your messages in the app and review your announcement.

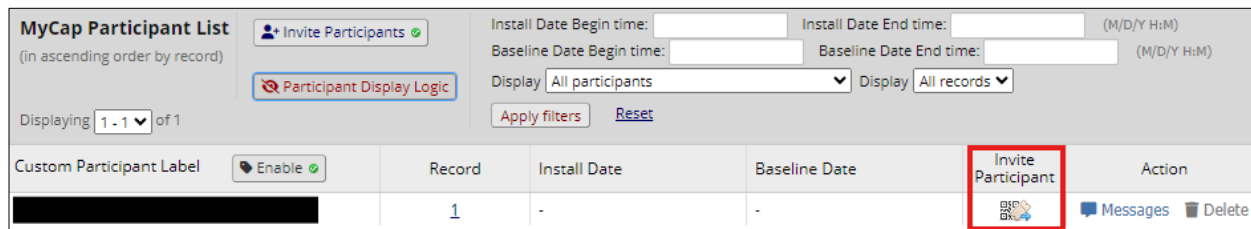


- Note: participants that join a project after an announcement has been sent will have the announcement in their messages when they join the project.

Step 5: Test the method by which your participants will join your project

Now you can test the method by which participants will join your project (via QR code, dynamic link, or both).

1. If you plan to distribute your QR code and/or dynamic link via **Alerts & Notifications**:
Go to Record Status Dashboard in REDCap and select **+Add New Record**. Select the first instrument for which you have set up the alert to send participants their QR code and/or dynamic links. Complete the instrument and confirm you receive the QR code and/or dynamic link in your email.
2. If you plan to distribute your QR code and/or dynamic link via **Survey Completion Text**:
Open the survey for which you have added the project joining information in the survey completion text. Complete the survey and confirm that a QR code and/or dynamic link is displayed once you have completed the survey.
3. For either option above:
 - If you are using a QR code, download MyCap, open a profile, and scan the QR code using your MyCap App.
 - If you are using dynamic links, click on the link. You will be directed to the App Store if you have not yet downloaded MyCap.
 - Additional tests for joining project:
 - If you are joining multiple arms on a longitudinal project, make sure you test joining each arm (you can use one profile in the app and delete the project between arms OR test using multiple profiles).
 - Confirm the invitation text is formatted and worded as desired (you can edit this text in REDCap Alerts & Notifications taking care not to edit the QR code image and dynamic link URL).
4. If you plan to distribute your QR code by sending screenshots:
Go to **MyCap Participant Management** to view your participant list. Click on the QR code icon and take a screenshot. Send it yourself via email and scan it to join your project.



The screenshot shows the 'MyCap Participant List' interface. At the top, there are filters for 'Install Date' and 'Baseline Date', each with 'Begin time' and 'End time' fields. Below these are dropdown menus for 'Display' (set to 'All participants') and 'Display' (set to 'All records'). There are buttons for 'Apply filters' and 'Reset'. A table below shows a single record with columns: 'Custom Participant Label', 'Record', 'Install Date', 'Baseline Date', 'Invite Participant', and 'Action'. The 'Invite Participant' button is highlighted with a red box. The 'Action' column contains 'Messages' and 'Delete' buttons.

Custom Participant Label	Record	Install Date	Baseline Date	Invite Participant	Action
[REDACTED]	1	-	-	[Invite Participant]	Messages Delete

Note: Upon downloading and opening the MyCap App, you will be asked if you want to allow notifications. For testing purposes, please allow MyCap App notifications.

Step 6: Publish an updated version of your project

Once you have tested your project, be sure you publish a final version to include any changes made and you can now begin enrolling participants.