





Mobilizing the Participant Voice

Manually Directing Participants to the New MyCap App

APP ICONS		
MyCap Classic - Android	MyCap Classic - iOS	New MyCap – iOS & Android
		

Instructions differ based on your REDCap version:

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1. Introduction

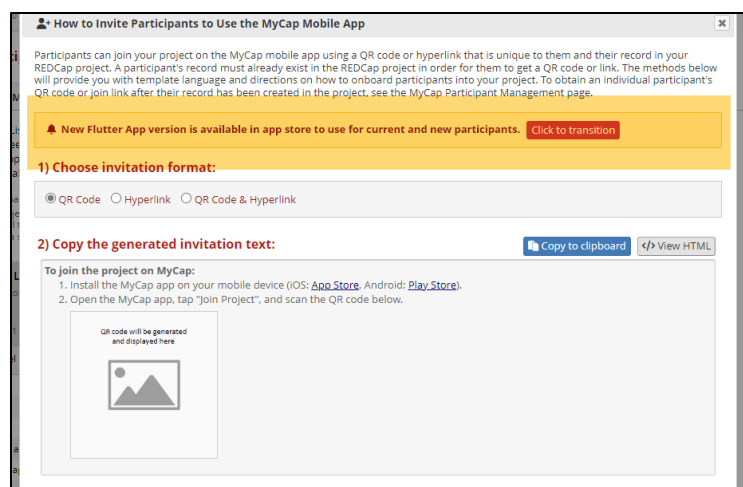
If existing participants are using the MyCap Classic App, they can switch to the new MyCap App by downloading it from their app store and scanning a QR code or using the dynamic link. **Participants that switch from MyCap Classic to the new MyCap App will retain their 'place' in the study schedule.**

Study teams can either help participants switch to the new app by walking them through the process of downloading the new MyCap App in person or by emailing (manually or via a REDCap Alert & Notification) participants the QR Code and/or Dynamic Link, depending on the version of REDCap available. If you did not collect emails from participants when they started using MyCap, consider adding an instrument as a MyCap task to collect this information.

2. Transitioning Existing Participants to the New MyCap App when using 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 email participants their information to join the new app follow the steps below to a) create an identifier for which participants need to switch apps, b) set up an Alert & Notification (email) instructing your participants on how to switch to the new MyCap App, and c) notify participants of the change by sending a MyCap announcement:

1. Add a new Yes/No field to your first data collection instrument to capture whether the participant is transitioning 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?"
2. 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](#).
3. Go to MyCap Participant Management> Participant List and click **Invite Participants**.
4. Press **Click to transition** to convert to the new app.



5. Choose the method(s) by which you would like participants to join your project (QR Code, hyperlink, or both) on the screen above.
6. Copy the generated invitation text using the **Copy to Clipboard** button.
7. Create an Alert & Notification in REDCap.
8. Click **Add New Alert**.
9. 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")

☐ Ensure logic is still true before sending notification? ⓘ

[How to use 'stop logic' to disable a scheduled alert](#)

* 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.

10. Complete Step 2: Set the Alert Schedule.

- Select "Send immediately".
- Select "Just once".

STEP 2: Set the Alert Schedule

When to send the alert?

- ☒ Send immediately
- ☐ Send on next at time
- ☐ Send the alert after
- ☐ Send at exact date/time:

Send it how many times?

- ☒ Just once
- ☐ Multiple times on a recurring basis:
 - ☐ Send every days after initially being sent.
 - ☐ Send up to

This alert will be auto-deactivated at the specified date/time above. Note: This will cause any already-scheduled notifications not to be sent after the expiration time.

11. Complete Step 3: Message Settings.

- In the Message box, paste the participant invitation text or HTML into the box.
- You can add text before or after the copied HTML, just do not edit the links in the HTML.
- 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.**
- Click **Save**.

STEP 3: Message Settings

Alert Type: ☒ Email ☐ SMS Text Message ☐ Voice Call

Email From:

Email To:

Or manually enter emails:

Subject:

Message:

☒ Prevent piping of data for Identifier fields

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

Use one of the options below to join the project on MyCap:

- [mycap-participant-link:Click this MyCap link] while on your mobile device, which will prompt you to install MyCap if it's not already installed. After MyCap is open, tap "Join Project". (Note: If you have other MyCap projects, you may need to go to your Profile and click "Join Another Project").
- To scan the QR Code below, install the MyCap app on your mobile device (iOS: [App Store](#), Android: [Play Store](#)), open the MyCap app, and tap "Join Project".

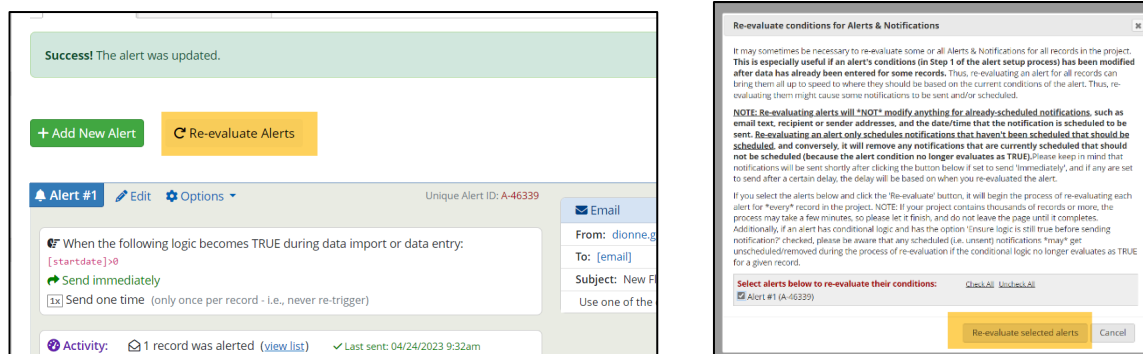
QR code will be generated and displayed here

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

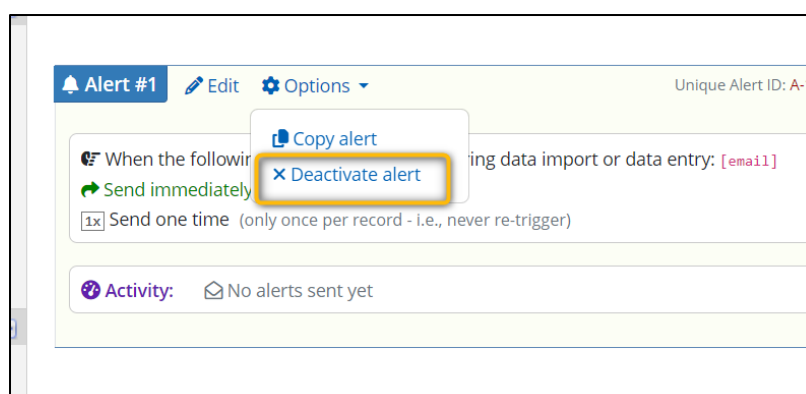
12. **IMPORTANT:** Before using the re-evaluate alerts functionality to send this notification, use MyCap announcements feature to alert existing participants that they will be updating their MyCap app.

Example message: "MyCap is improving! Be on the lookout for an email containing a new QR code/link to join your study in the new MyCap App."

13. Return to the REDCap Alerts & Notifications page. Click **Re-evaluate Alerts**.
14. 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.



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



Note: Upon 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.

3. Transitioning Existing Participants to the New MyCap App when using REDCAP < v13.10

Note: If your project is in 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 email participants their new QR code, follow the steps below to set up an Alert & Notification (email) instructing your participants on how to switch to the new MyCap App and send a MyCap announcement to participants:

1. Add a new field Yes/No field to your first data collection instrument to capture whether the participant is transitioning 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?"
2. 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](#).
3. Go to MyCap Participant Management> Participant List and click **Invite Participants**.
4. Choose the invitation format of QR Code.
5. 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 link. The methods below will provide you with template language and directions on how to onboard participants into your project. To obtain an individual participant's QR code or join link after their record has been created in the project, see the MyCap Participant Management page.

1) Choose invitation format:

☒ QR Code ☐ Hyperlink ☐ QR Code & Hyperlink

2) 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: [App Store](#), Android: [Play Store](#)).
2. Open the MyCap app, tap "Join Project", and scan the QR code below.

QR code will be generated and displayed here

Close

6. Create an Alert & Notification in REDCap.
7. Click **Add New Alert**.
8. 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.

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:

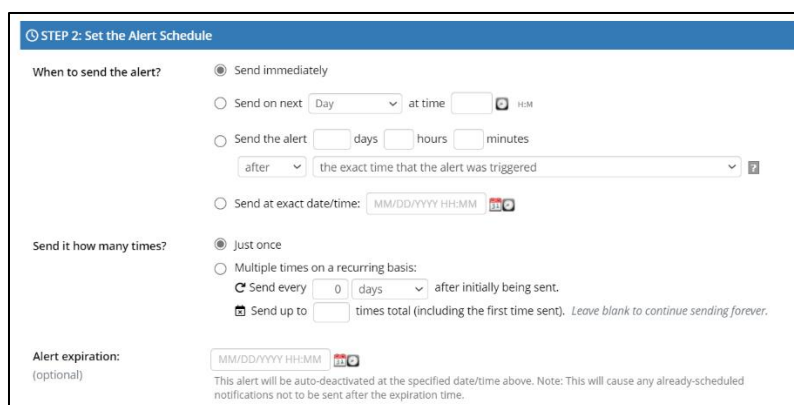
(e.g., [age] > 30 and [sex] = "1") [How to use 'stop logic' to disable a scheduled alert](#)

☐ 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.

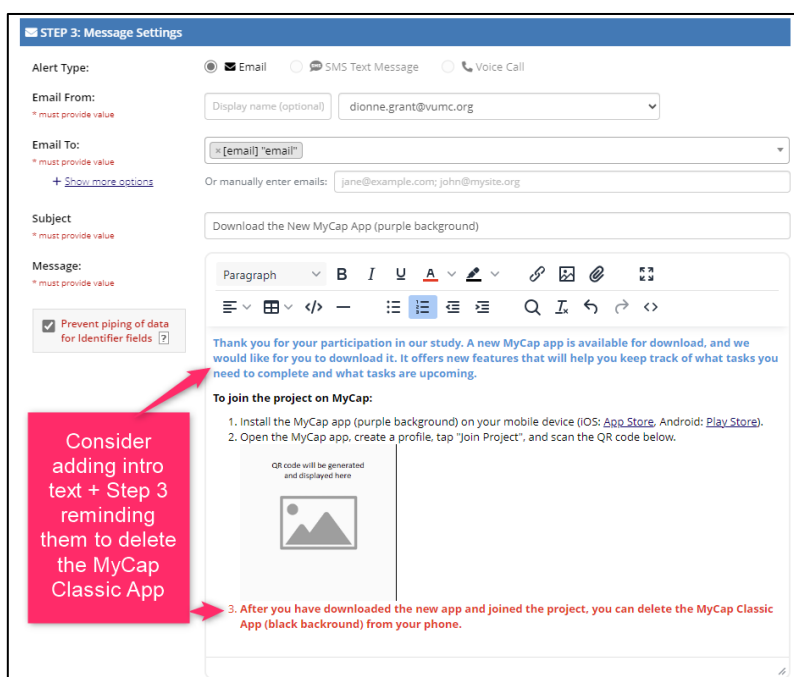
9. Complete Step 2: Set the Alert Schedule.

- Select "Send immediately".
- Select "Just once".



10. Complete Step 3: Message Settings.

- In the Message box, paste the participant invitation text or HTML.
- You can add text before or after the copied HTML.
- 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>

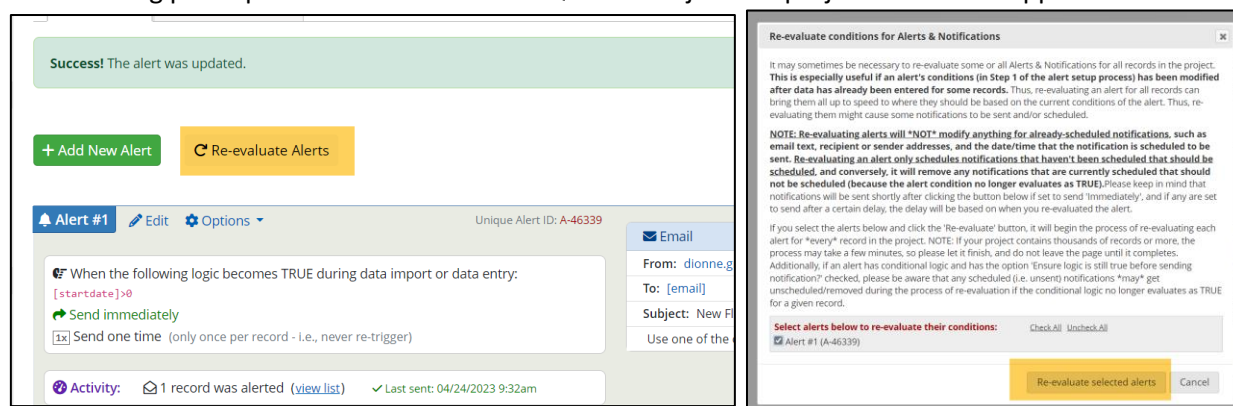
Play Store: https://play.google.com/store/apps/details?id=org.vumc.mycapplusbeta&hl=en_US&gl=US

- 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. Click **Save**.
11. **IMPORTANT:** Before using the re-evaluate alerts functionality to send this notification, use MyCap announcements feature to alert existing participants that they will be updating their MyCap app.

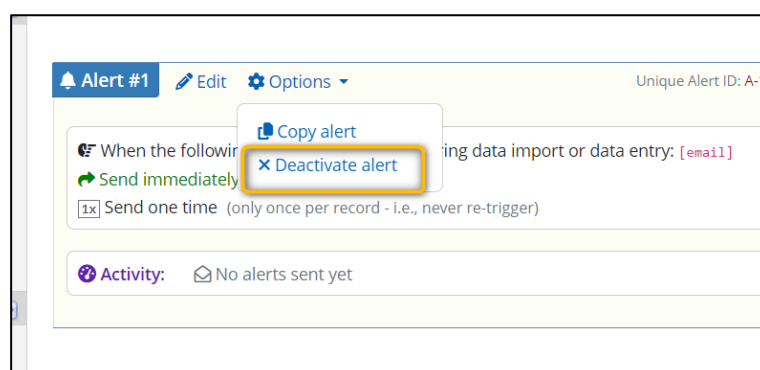
Example message: "MyCap is improving! Be on the lookout for an email containing a new QR code/link to join your study in the new MyCap App."

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

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



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



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

It is possible to create a project on REDCap version <13.10 and ask participants to manually download the newest app, instead of MyCap Classic, if your project requires some of the new features like active task parity across iOS and Android or the ability to use a single device with multiple participants. However, the ability to use MyCap on longitudinally-enabled projects requires REDCap version 13.10+.

Note: If your project is in 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 invite participants to use the new MyCap app when using REDCap version <13.10, follow these steps:

1. Go to the Participant List and click **Invite Participants**.
2. Choose the invitation format of QR Code.
3. Copy the generated invitation text using the **Copy to Clipboard** button.
4. Paste the text or HTML into 1) **Survey Completion Text** that displays after a survey is completed and/or 2) an **Alerts & Notifications** message that is sent to the participant after their record is created.
5. **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
6. Click [here](#) for more information on setting up an Alerts & Notifications message or Survey Completion Text.