Getting started with Zamplo Research

A step-by-step guide

Zamplo RESEARCH

Zamplo Research

Setting up your Zamplo Research Account

The first step to getting started is logging in to Zamplo Research

1. Provide the Zamplo team with your email address

2. Open your email inbox

3. Find an email from "**no-reply@zamplo.org**" with a temporary password; check your spam folder in case you don't see it

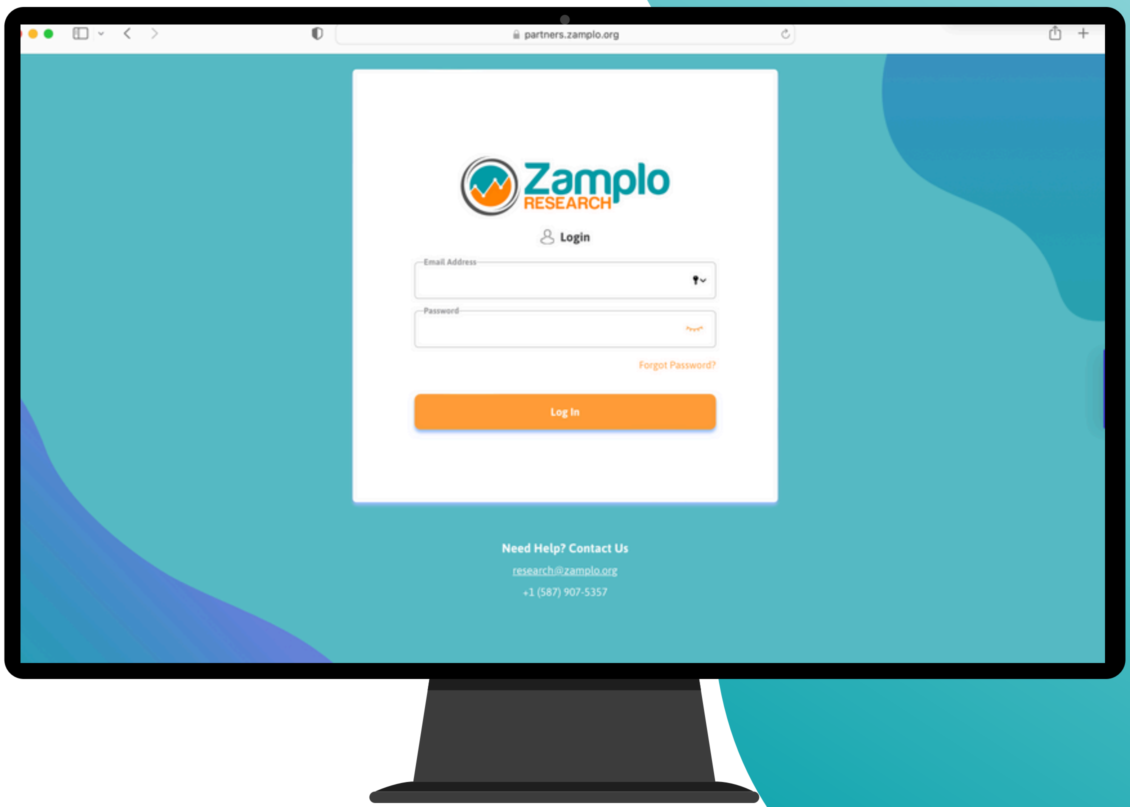
4. Use your email and the temporary password to log in at **https://partners.zamplo.org/login**

5. Log in with the email you provided the Zamplo team and the temporary password

6. You will be prompted to create a new password at first login

7. A 2 step-verification code will be sent to your email inbox

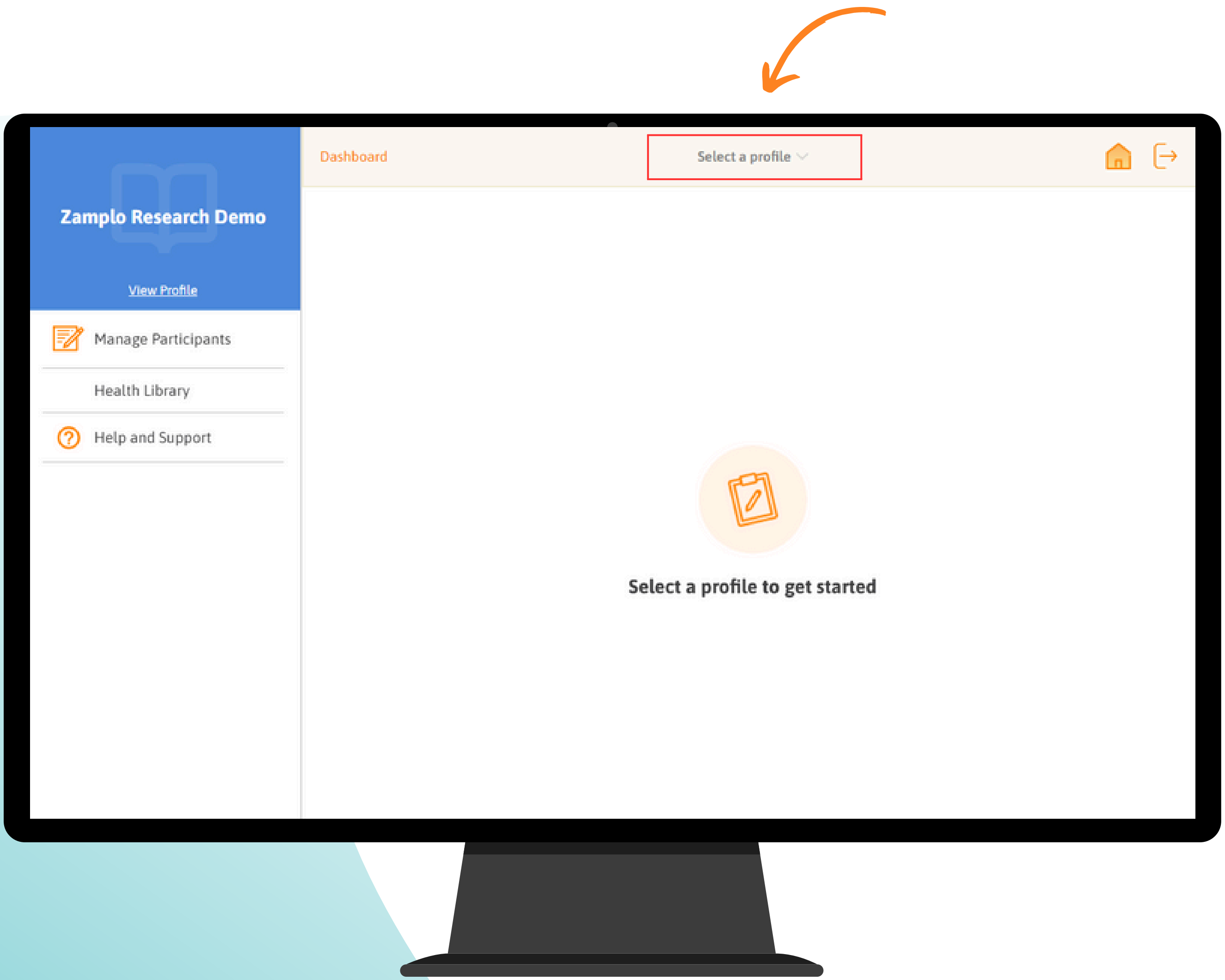
8. Enter that verification code to verify your account



Once you have logged in, created a new password, and verified your account, you will be taken to the **dashboard**.

Study Profile

Adding a **study profile** comes after you have set up your Zamplo Research account. A study profile is needed to use Zamplo Research as it holds your study participants, participant tracking, study setup, and data.



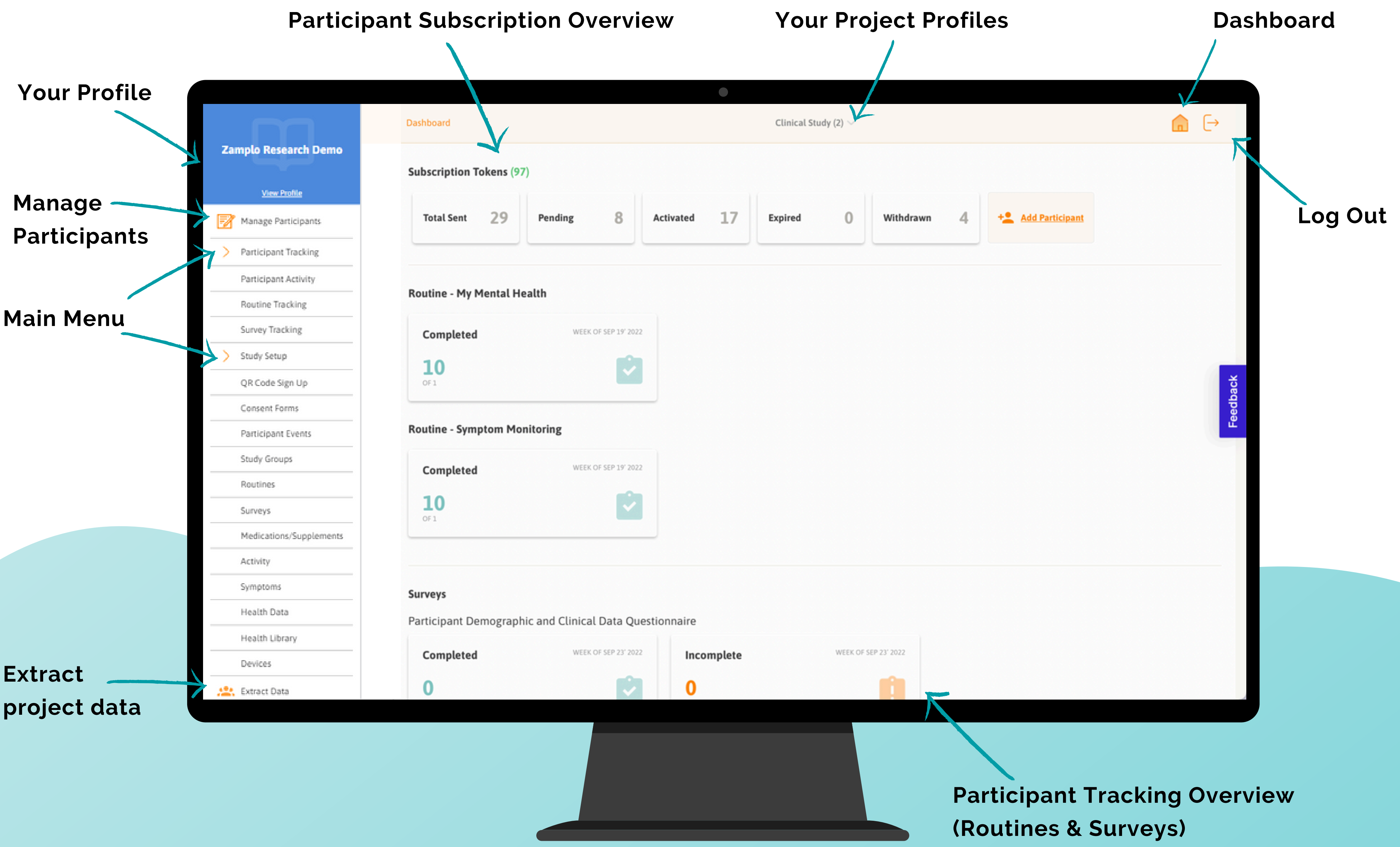
How to create a study profile

1. Click on the **Select Profile** at the top of your screen
2. Give your study a profile name
3. Select **Create Profile**

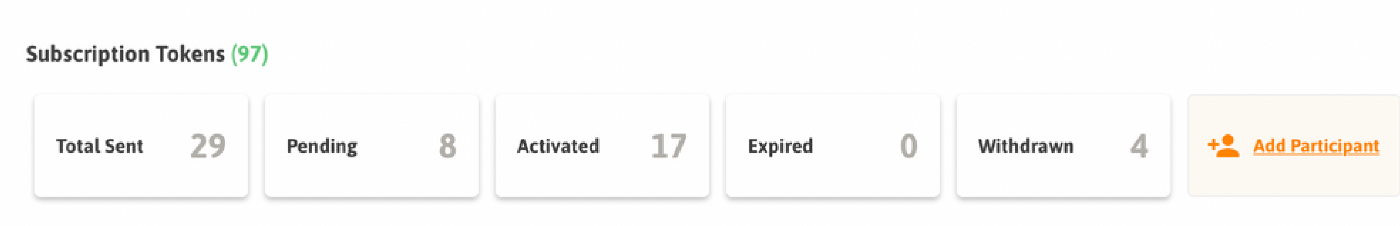
If you are using Zamplo Research for more than one study, you can create multiple study profiles.

Get to know the Dashboard

The **Dashboard** is a quick way for you to see participant status. When you set up Routines and Surveys, the Dashboard also provides an overview of the number of participants that have completed Routines and Surveys.



Dashboard Key Words



Subscription Tokens: The number of participant subscriptions you have purchased. This indicates how many individuals you can invite to take part in your study. One token represents one participant's yearly subscription

- If you have multiple study profiles, the number of subscription tokens you have purchased are shared among your study profiles
- Unused subscription tokens do not expire. Token expiry only occurs one year after a participant registers for your study. If you would like an individual to participate for longer than 365 days, please reach out to the Zamplo team at support@zamplo.org

Total Sent: The number of participants invited to sign up for the Zamplo App

Pending: The number of participant subscriptions that are pending sign up

Activated: The number of participants that have signed up

Expired: The number of participant subscriptions that are no longer valid – meaning that more than one year has passed since a participant signed up for the Zamplo App

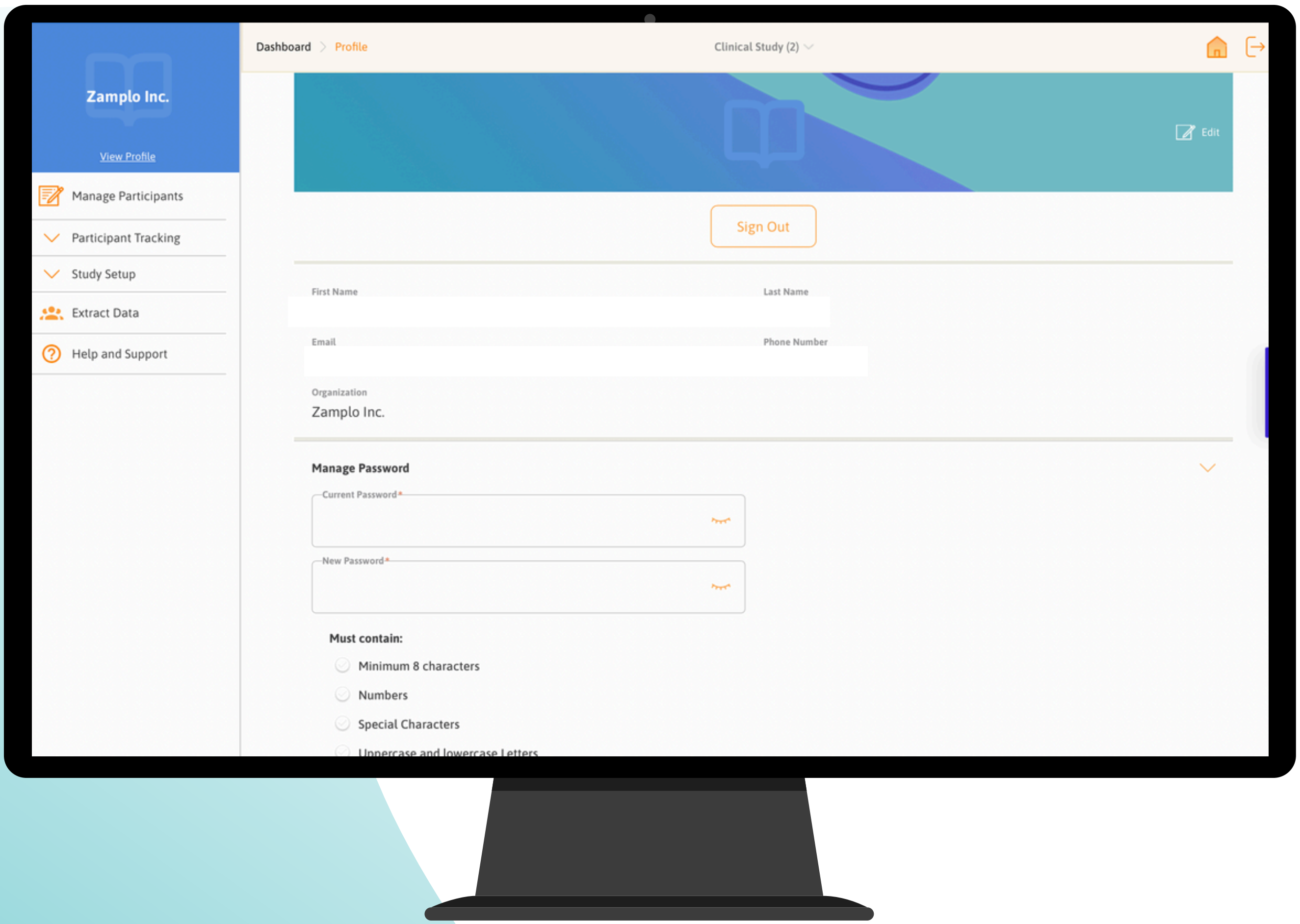
- You can re-activate an expired participant token by visiting the "Manage Participants" tab and clicking on "Extend" beside a participant's information

Withdrawn: The number of participant subscriptions that have been withdrawn

Add Participant: Add a new participant to the study

User Profile

With your profile, you can view your name, email, phone number, and organization that is linked to your Zamplo Research account. You can also edit your name, email address, and manage your password.



How to edit your profile

1. Click on **View Profile** at the top left of the dashboard screen
2. Click on **Edit** on the right side of your profile picture*
3. Edit your picture, name and email as needed
4. When you are done editing, press **Save**

*Note that your profile picture will be displayed to participants

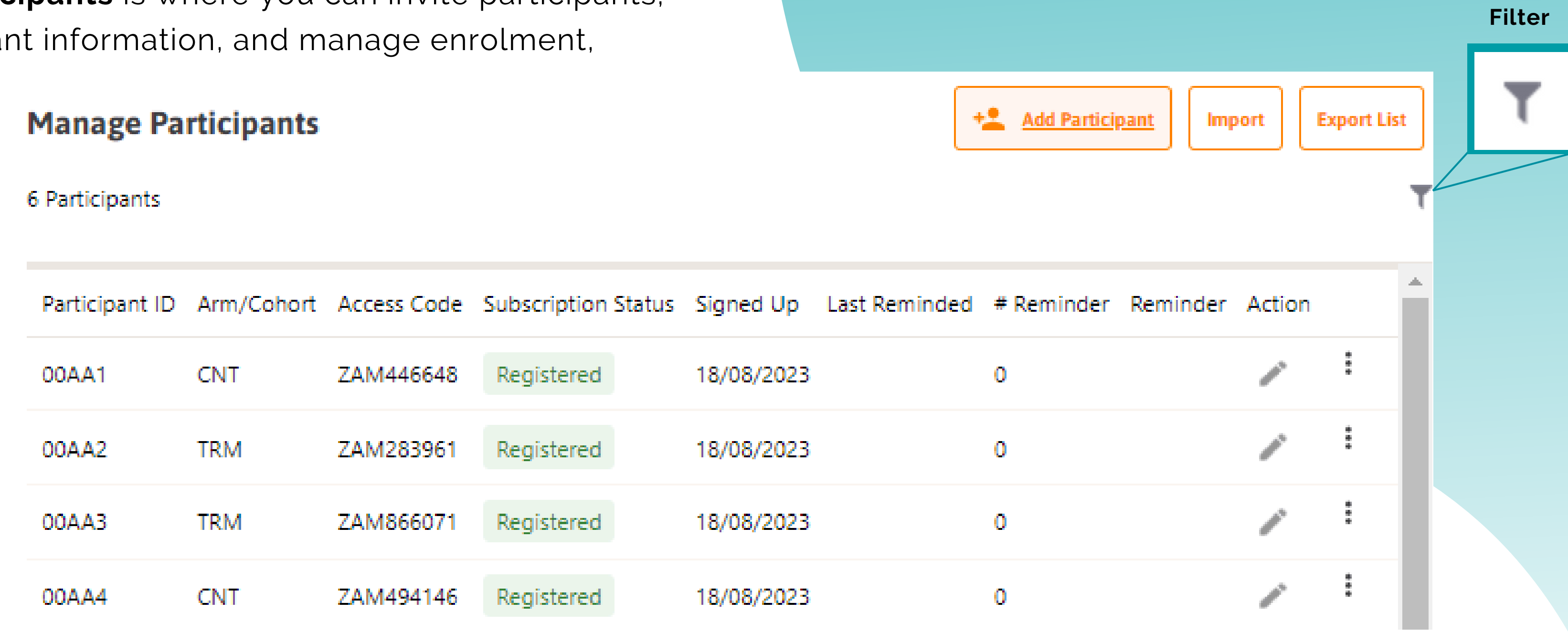
How to manage your password

1. Click on **View Profile** at the top left of the dashboard screen
2. Click on **Manage Password** at the bottom of the page
3. Type in your current password and your new password**
4. Confirm your password
5. Click on **Change Password**

**Note that your password should be a minimum of 8 characters, and include numbers, special characters, upper case and lower case letters

Manage Participants

Manage Participants is where you can invite participants, view participant information, and manage enrolment,



Participant ID	Arm/Cohort	Access Code	Subscription Status	Signed Up	Last Reminded	# Reminder	Reminder	Action
00AA1	CNT	ZAM446648	Registered	18/08/2023		0		
00AA2	TRM	ZAM283961	Registered	18/08/2023		0		
00AA3	TRM	ZAM866071	Registered	18/08/2023		0		
00AA4	CNT	ZAM494146	Registered	18/08/2023		0		

View participant information:

- Name and Email
- Manually assigned Participant ID
- Arm/Cohort (Study Group)
- Access Code
- Status (Registered, Pending, Not Contacted, Withdrawn, Expired)
- Sign up Date
- Last Reminder and # of Reminders

How to filter

You can filter participants by clicking on the filter icon and through a keyword search, by **Subscription Status, Study Group, Signed Up,** or **Last Reminded**

How to withdraw participants

1. **Option 1**
   a. Click on the **three dots** to the right of the screen
   b. Click on **Withdraw**
2. **Option 2**
   a. **Checkmark** a participant
   b. Click the **"minus"** ⊖ button at the top of the screen

How to Export Participants

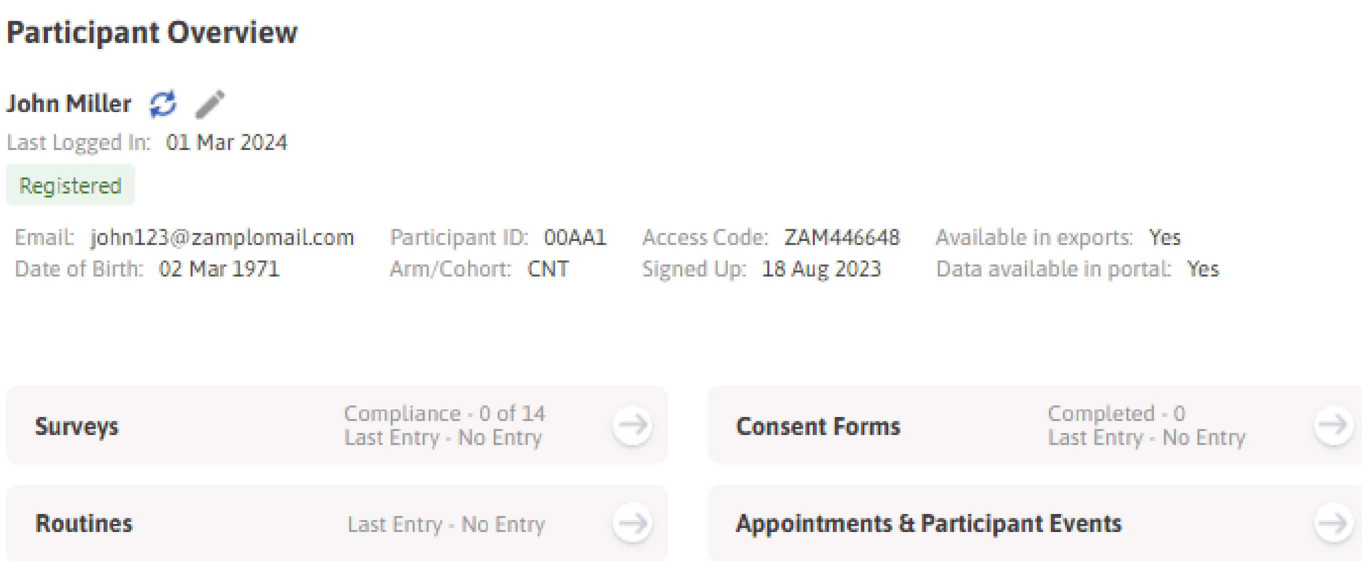
1. Click on **Export List**
2. Give your report a name and click **Export (csv)**

How to send invitation reminders

1. If a participant has been sent an invitation but not joined the study, select the participant
2. Click on the orange email icon

Participant Overview Dashboard

All the participant's information that is also found on the previous "Manage Participants" dashboard, as well as whether the participant's data will show up in exports and is viewable by you through the Zamplo Research portal can be seen on the Participant Overview Dashboard.



How to view Surveys and compliance

1. Click on the **Participant**
2. Click the → next to Surveys

Here you can view Surveys that have been sent and whether they were completed, opened, or expired.

How to view Routines and compliance

1. Click on the **Participant**
2. Click the → next to Routines

Here you can find a history log of every study Routine instance a participant has completed.

How to view Consent Forms history

1. Click on the **Participant**
2. Click the → next to Consent Forms

Here you can view consent forms, the date they were completed, and download a PDF version of the consent form

How to view Appointments & Participant Events

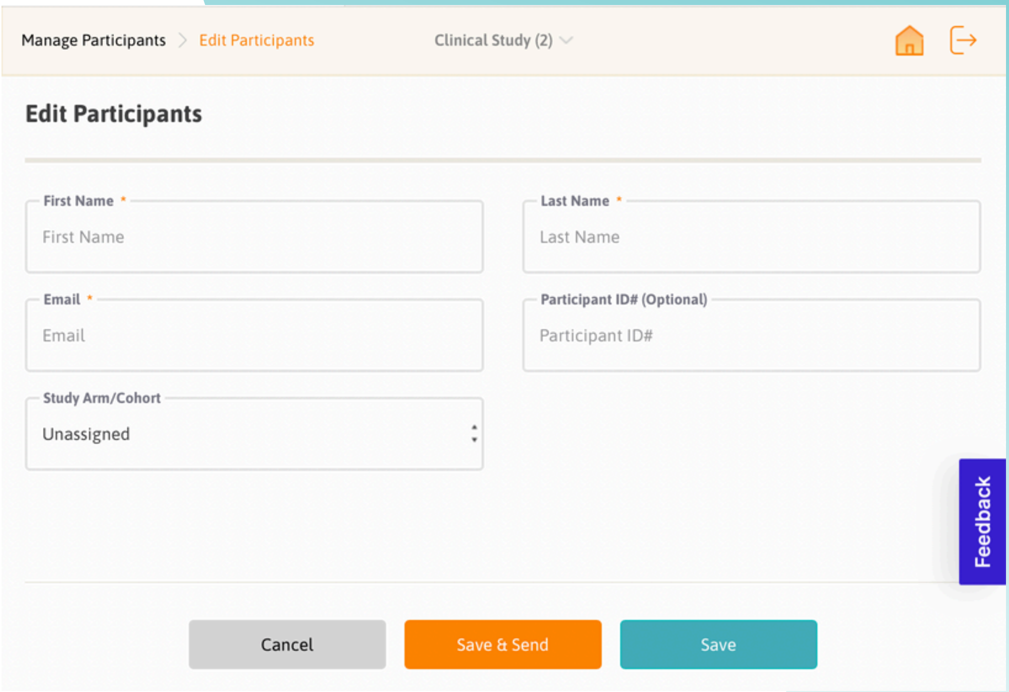
1. Click on the **Participant**
2. Click the → next to Appointments & Participant Events

Here you can view and add Participant Events and see what is within a participants Schedule

Manage Participants - Adding and Inviting Participants

How to add participants

1. **Manually**
   a. Click on **+Add Participants** on the Manage Participants screen
   b. Enter the participant's information
2. **Bulk Upload**
   a. Click on **Import** on the Manage Subscriptions screen
   b. Click on **Download a Sample File**
   c. Enter all of your information and save the .csv file
   d. Upload the file to Zamplo Research
3. **QR Code**
   a. From the left menu, click **QR Code Sign Up**
   b. Click on **+Add New QR Code**
   c. Enter the QR Code information
   d. Save and download the QR code for registration



How to invite participants

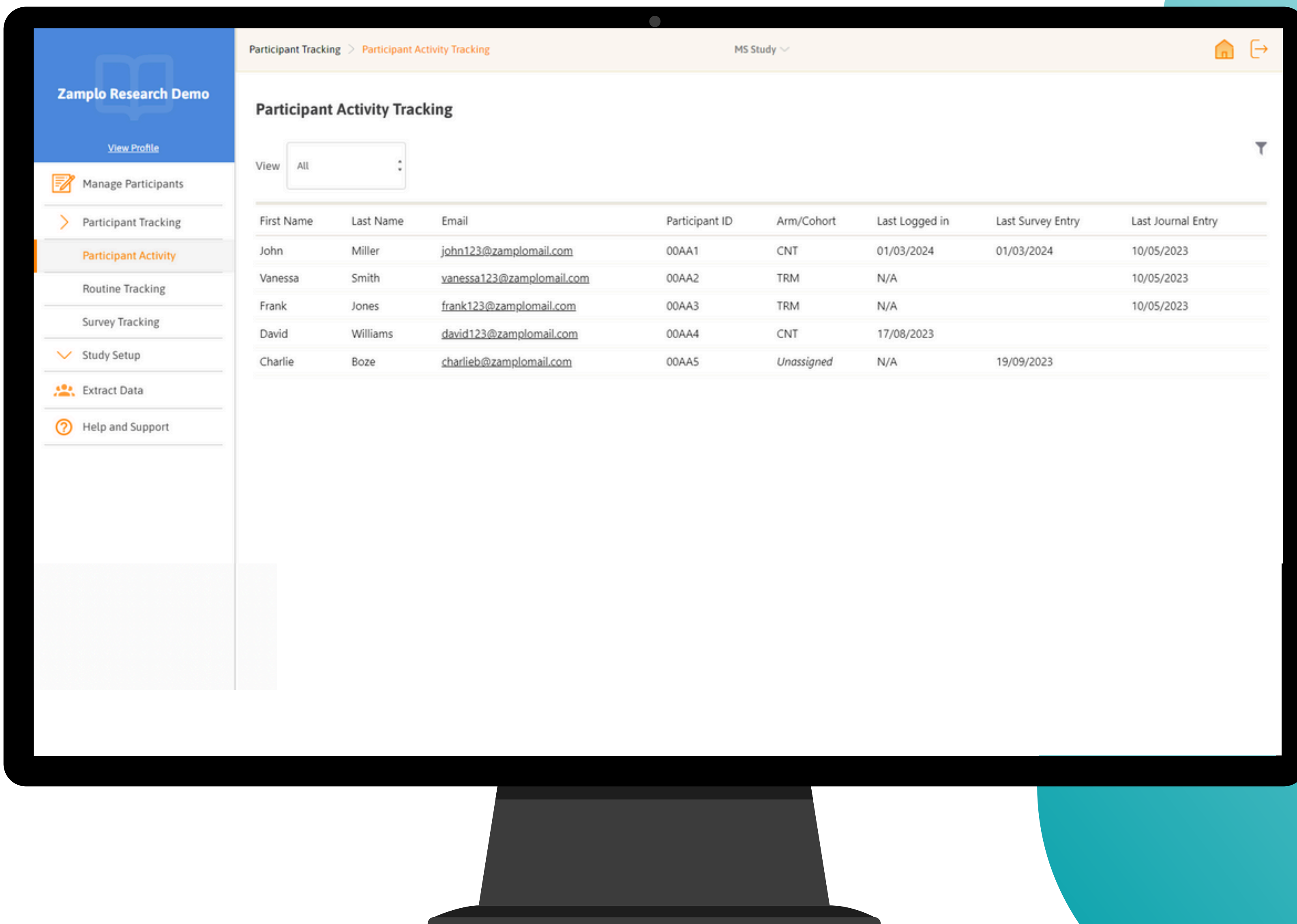
1. **Inviting right away**
   a. You can use the option **Save & Send** when adding a participant
2. **Inviting at a later time**
   a. If you have entered a participant's information, but are not ready to invite them, click **Save**
   b. When you are ready to send an invite, select the **three dots** to the right of participant in **Manage Participants**
   c. Click on **Send**

How does the access code work?

New participants will be sent an invitation email that includes an access code. This access code links participants to **Zamplo Research** and connects them to their data.

Participant Activity Tracking

Participant Activity Tracking allows for viewing a snapshot of participant activity with regards to the latest **Surveys** and **Routines** activity that registered participants are expected to complete.



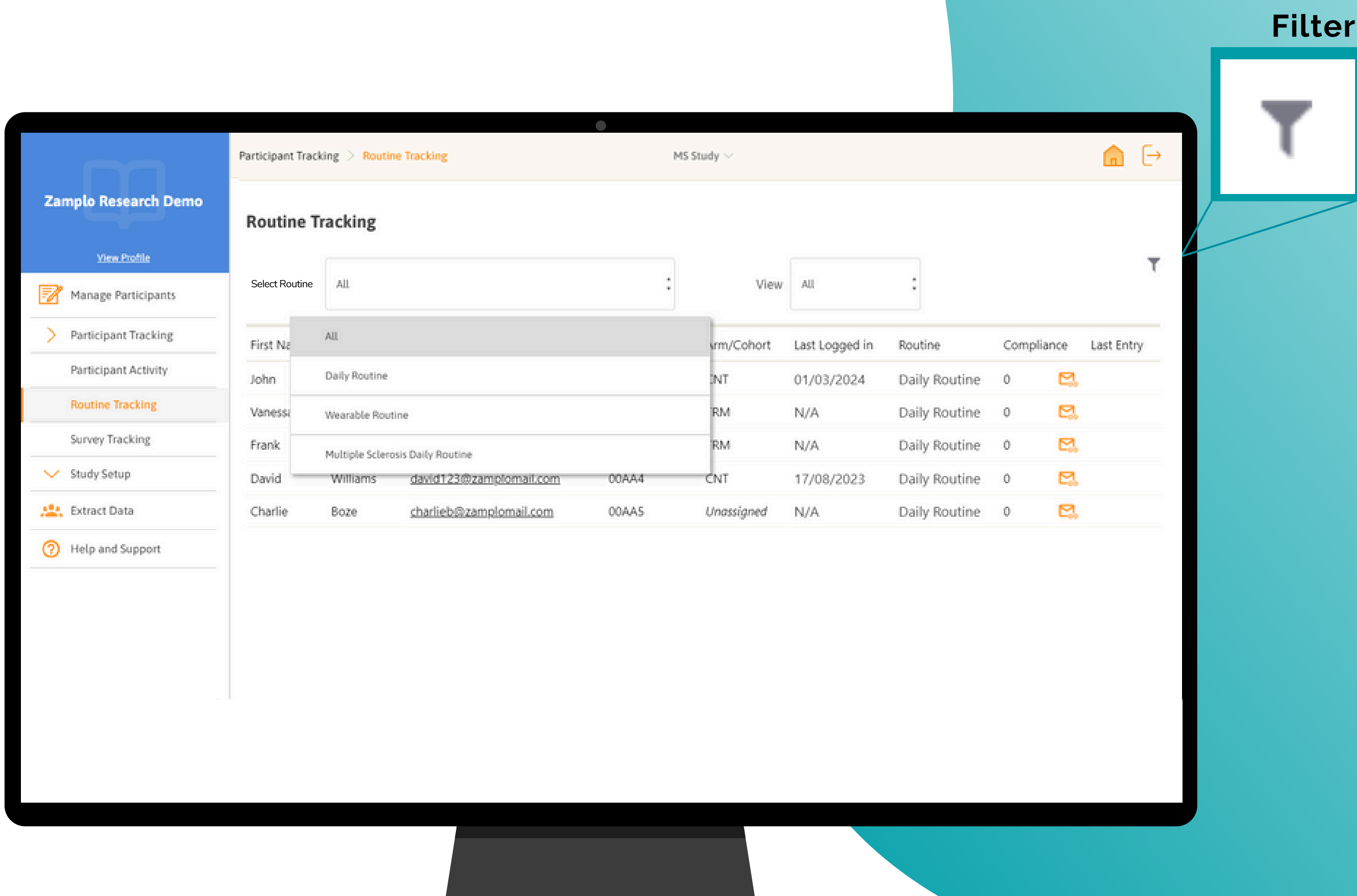
Participant Tracking - Routine Tracking

Participant Routine Tracking allows for monitoring participant **Routines** activity that registered participants are expected to complete and their level of compliance. Compliance count provides an observed/expected score for participant completion.

How to track participant Routines

1. Click on **Participant Tracking**
2. Click on **Routine Tracking**
3. Select the **Routine** and **View** to be tracked
4. First and Last Name, Email, Participant ID, Study Arm/Cohort, Last Logged In Date, Compliance, and Last Entry will be displayed
5. Send participants a **Reminder** to complete a **Routine** by clicking the **orange email button** under **Compliance** to send them an email notification

Note:
Clicking on the **column headers** will sort items by ascending or descending order.

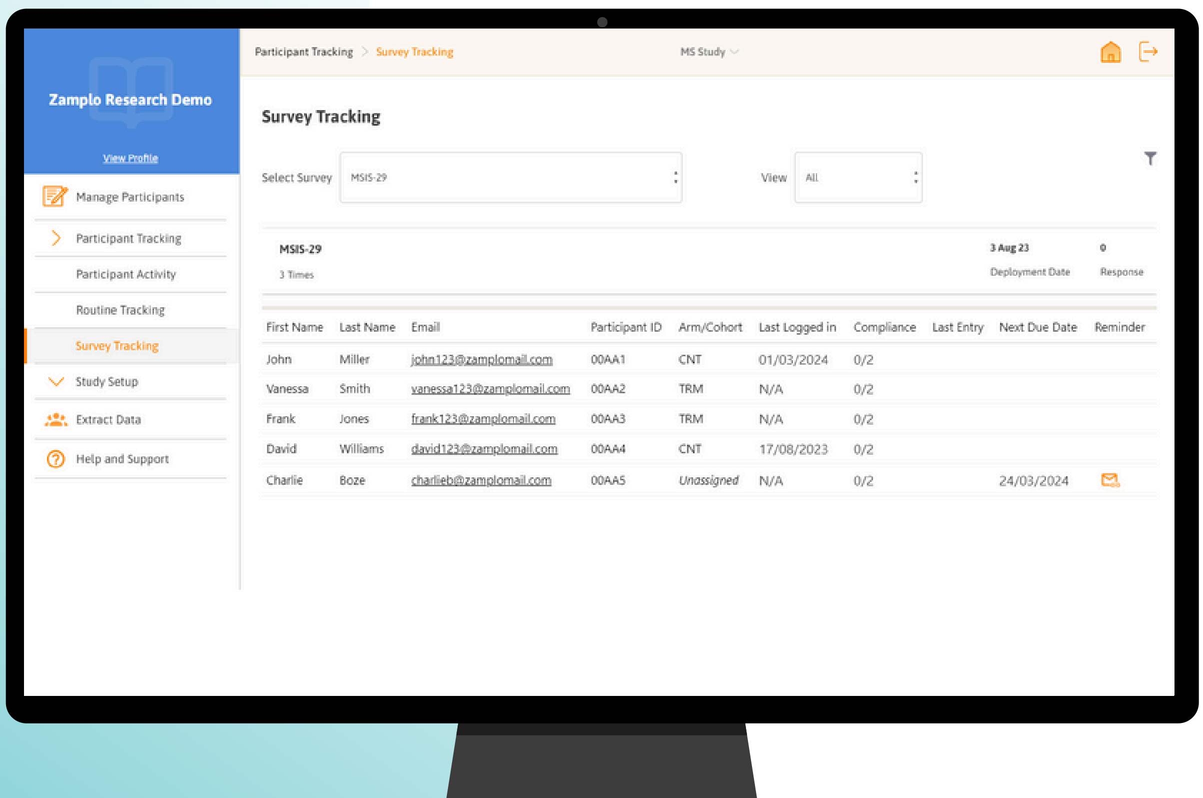


Participant Tracking - Survey Tracking

Participant Survey Tracking allows for monitoring participant **Survey** activity that registered participants are expected to complete and their level of compliance. Compliance count provides an observed/expected score for participant completion.

How to track participants Surveys

1. Click on **Participant Tracking**
2. Click on **Survey Tracking**
3. Select the **Survey** and **View** to be tracked
4. The survey will be displayed with the number of completion Times, Deployment Date, and number of Responses
5. First and Last Name, Email, Participant ID, Study Arm/Cohort, Last Login Date, Compliance, Last Entry, Next Due Date, and Reminder will be displayed
6. Send participants a **Reminder** to complete a **Survey** by clicking the **orange email button** under **Reminder** to send them an email notification



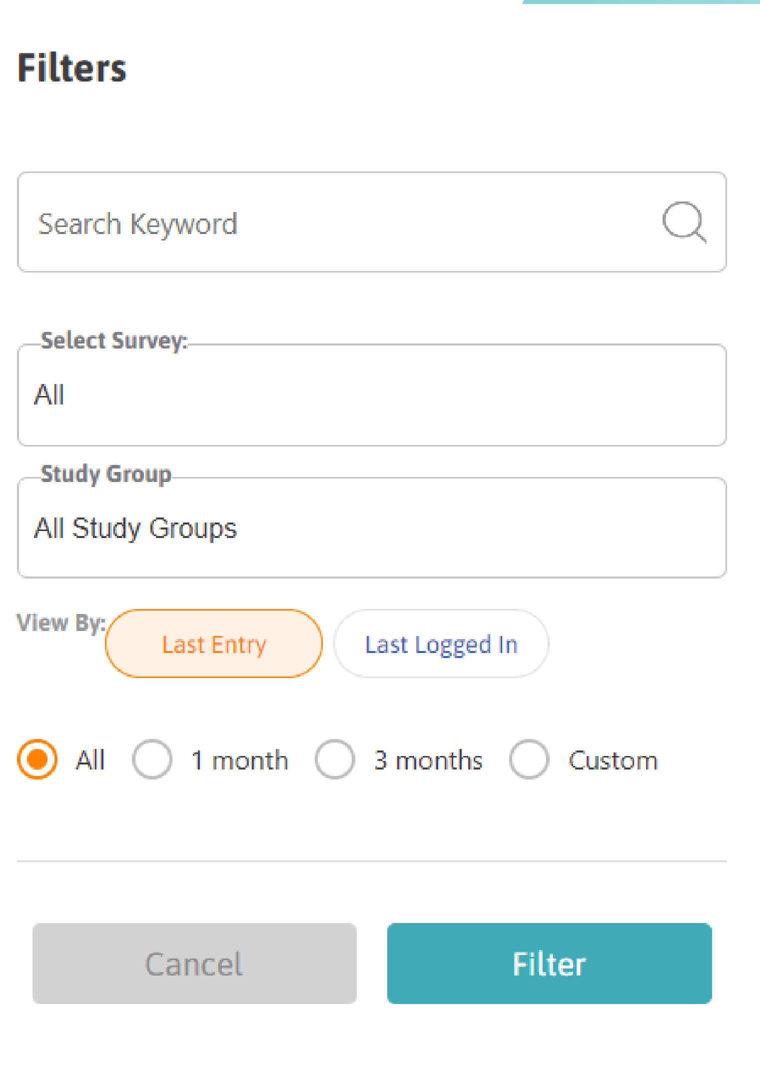
Note:
Clicking on the **column headers** will sort items by ascending or descending order.

Participant Tracking - Filtering

Participant Tracking views can be filtered to support customized searches, allowing for more efficient analysis of participant data.

How to filter Participant Tracking views

1. Click on the **Filter Icon** in the top right of the Participant Activity, Routine Tracking, or Survey Tracking page
2. Type in specific keywords to specify searches
3. Click on the dropdown menu **Select Routine** or **Select Survey** to select a specific routine or survey to filter
4. Click on the dropdown menu **Study Group** to select a specific study group to filter
5. Select a view by clicking on **Last Entry** or **Last Logged In**
    a. Select a time filter from **All**, **1 month**, **3 months**, or **Custom**
6. Click on **Filter**



Participant Events

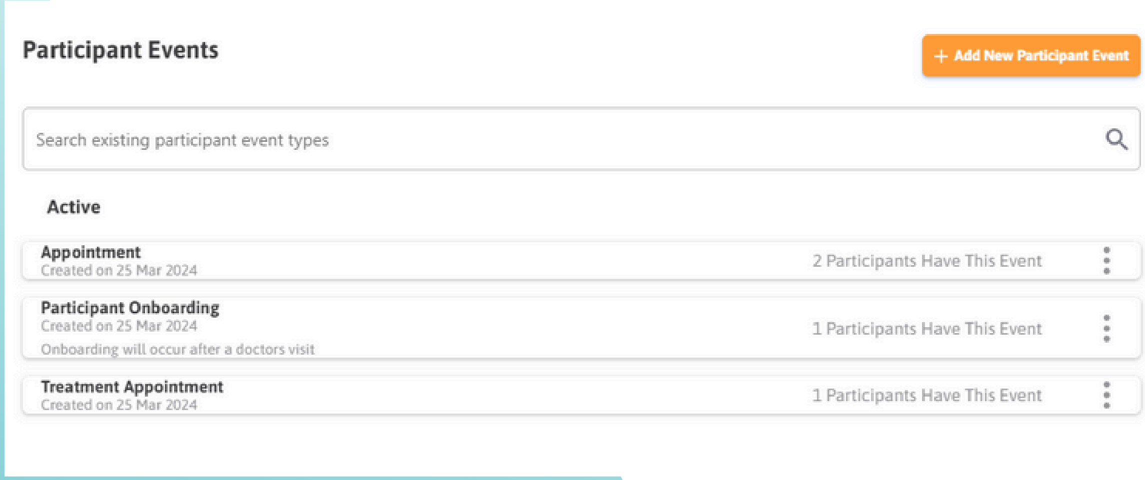
With **Participant Events**, you can schedule **Surveys** with more accurate timing related to events that are relevant to a study, in addition to standard data collection time points. Examples may include a clinical appointment, a new medication being started, or a final treatment session.

To add a Participant Event

1. Navigate to the **Study Setup** drop down and click **Participant Events**
2. Click the **+Add New Participant Event** button
3. Fill out the name, the description, and toggle the enabled button to be **Enabled** for Survey scheduling
4. Click on **Save**

To link a Participant Event to a Survey

1. Navigate to the **Study Setup** drop down and click **Surveys**
2. Select either **Create New Survey** or **Copy Existing Survey** and scroll down to **Survey Schedule**
3. Select an enabled Participant Event from the drop-down under **Schedule Based on Participant Event Type**
4. Set the Start Day Number and Active Days
5. Once you have finalized the details of your Survey, select **Save**



How to add an event to a participant

1. Select the **Manage Participants** tab
2. Find the participant you want to add the event to
3. Scroll to the right and click on the three dots, then select **Participant Events**
4. Select **Add Event**
5. Choose the event by selecting the **Event Type** dropdown
6. Add in the Event Date and any additional notes
7. Once you are done, click **Save**

Study Groups - Set Up and Adding Participants

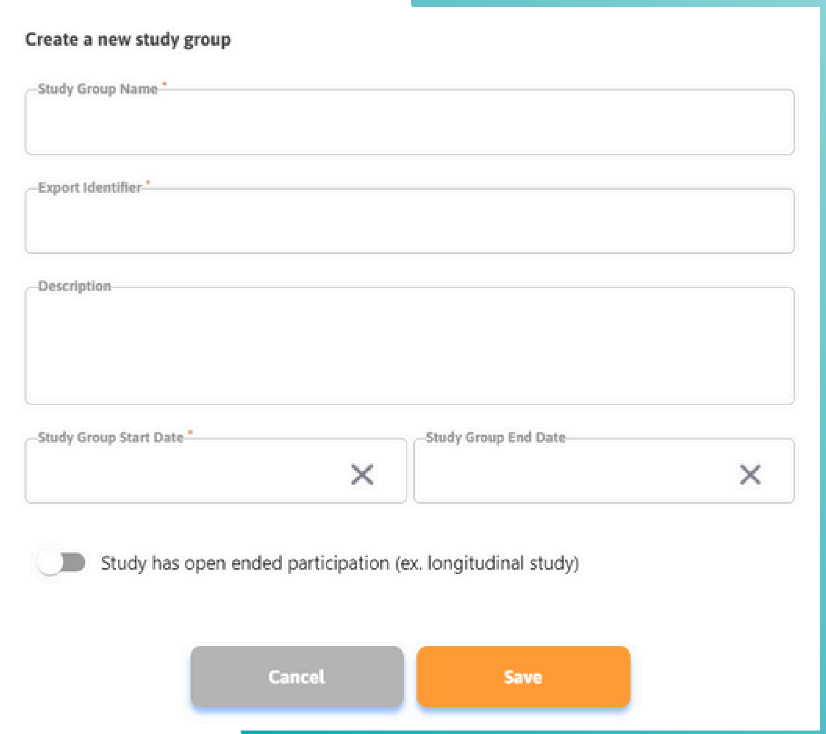
Setting up a **Study Group** will allow you to assign participants to different groups to get more refined comparisons or to send relevant resources to select groups of individuals.

How to setup a Study Group

1. Navigate to the **Study Setup** dropdown and select **Study Groups**
2. Click the **+Add New Study Group** button
3. Fill out the name, description, and export identifier of the group
4. Position the **Study has open ended participation** button and set a Start Date/End Date
5. Click **Save**

How to add participants to a Study Group

1. **Manually add new participants**
    a. From **Manage Participants** click **Add Participant**
    b. Fill out their information and assign them to a Study Group
    c. Click either **Save & Send** or **Save**
2. **Add new participants using a QR code**
    a. Click the **Study Setup** dropdown and **QR Code Sign Up**
    b. Click the **+Add New QR Code** button
    c. Select a Study Group for the QR code. Participants who scan the QR code will be placed in the associated group
3. **Add existing participants**
    a. Navigate to **Manage Participants**
    b. To add one participant: click the contact, select the **edit** icon, select the **Study Group**, and click **Save**
    c. To add multiple participants: select the check box to the left of the participant's names, then select the **Assign to Study Group** icon, choose the Study Group, and click **Save**



Study Groups - Sending Materials to Participants

How to send out Surveys using Study Groups

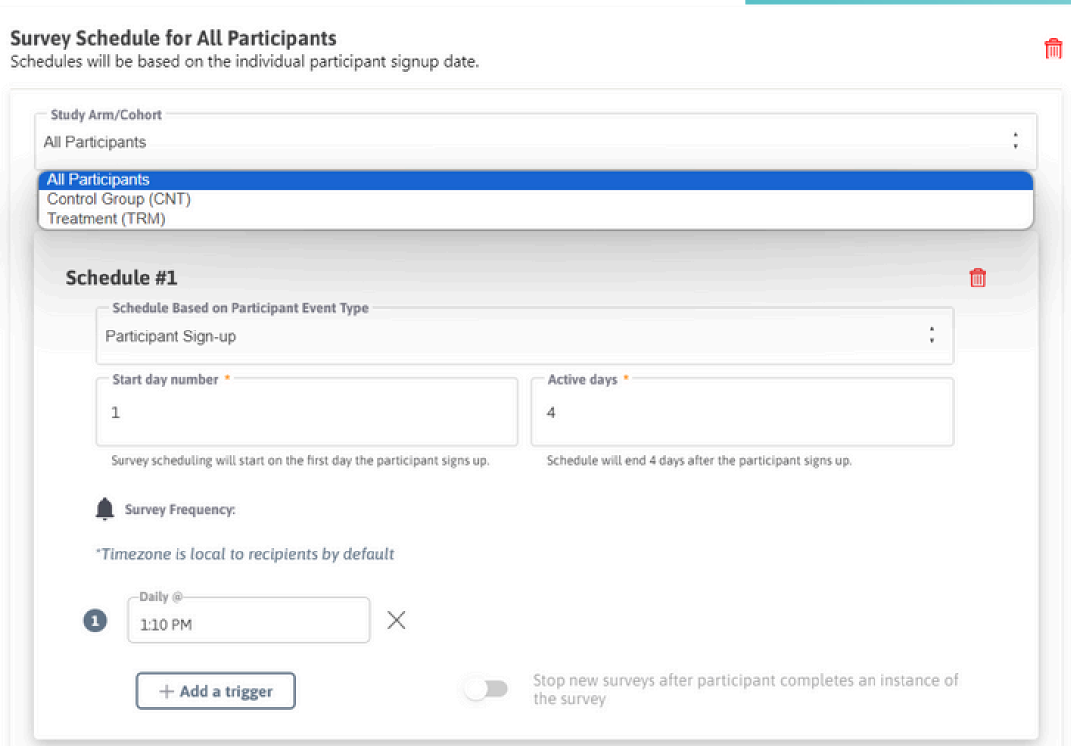
1. Navigate to the **Study Setup** dropdown and click **Surveys**
2. Here you can either create a **New Survey** or **Copy an Existing Survey**
3. Scroll to **Survey Schedule** and select the **Study Arm/Cohort**
4. Complete the Survey Schedule and select **Save**

How to send out Routines using Study Groups

1. Navigate to the **Study Setup** dropdown menu and click **Routines**
2. Click on the **+Add new Routine** button
3. Fill out the information that is relevant for the Routine
4. Scroll down to **Study Groups** and select the corresponding group
5. Click **Save**

How to send out Health Library resources using Study Groups

1. Navigate to the **Study Setup** dropdown menu and click **Health Library**
2. Click the **+Add New Resource** button
3. Fill out the information related to the resource and click **Next**
4. Select the check box next to the Study Group you want to send the resource to
5. Click **Next** and then click **Done**



Consent Forms

Consent Forms facilitate participant consent collection by enabling you to create and distribute consent forms to participants in-app.

Get started creating Consent Forms

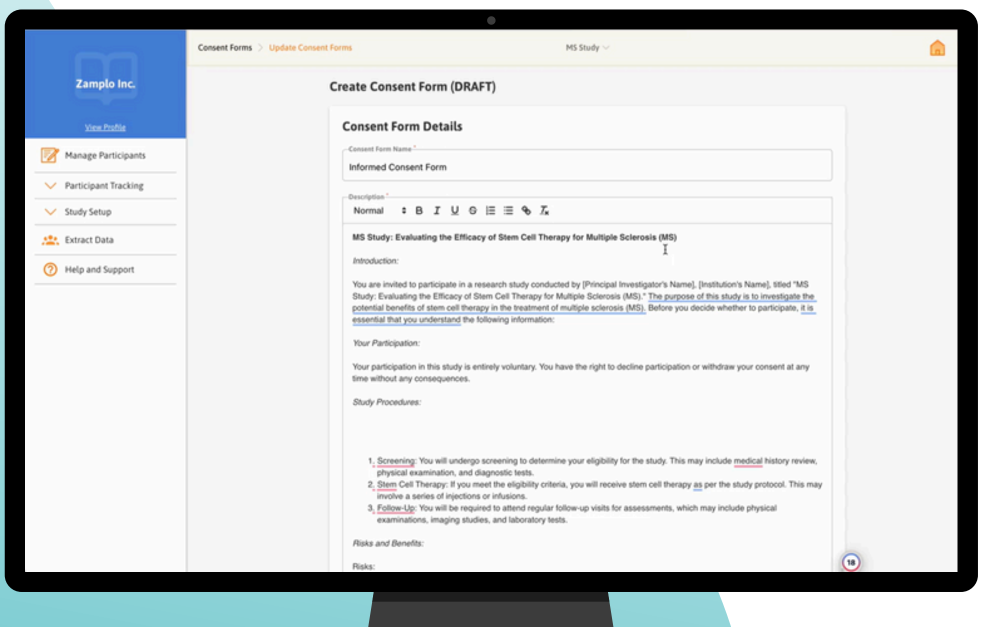
1. Navigate to the **Study Setup** dropdown
2. Select **Consent Forms**

To add a new Consent Form

1. Click on **Add New Consent Form**
2. Add the consent form name, description, and consent prompt
3. Set up the fields under **Consenter Identification/Information**

Additional Consent Form set up

1. Information Sharing: select **Consent is required before inclusion in exports** AND/OR **Consent is required before inclusion in participant overview**
2. **Schedule and Order:**
    a. determine the order for consent forms (lower values will appear first)
    b. Select when to get consent and where the consent form should be shown
3. **Non-Consent Behavior:**
    a. Decide what occurs when a participant does not consent to a form
4. Once you are done, **Save**, or **Save and Publish** the form right away



For consent forms you have drafted, if you click on the three dots you can:

- Edit
- Publish
- Or delete the consent form

For consent forms you have published, if you click on the three dots, you can:

- View
- Or disable a consent form

Consent Forms - Four Common Use Cases

#1 - Informed consent

- **Collecting study consent** through Zamplo Research for your study requires an informed consent form
- Choose to receive informed consent once per participant, or every time a participant proceeds to take a survey
- Schedule and Order: If you select “Once for every user,” the form will only show up once for a participant. If you select "every instance of assigned survey," participants will complete a consent form every survey
- Non-consent Behavior: Declining consent should be set to “Stop Survey” as those participants that do not consent cannot proceed with the survey. It will also stop all future surveys and withdraw participants from the study

#2 - Consent to future contact

- If you wish to **collect consent for contacting a participant** after the study is complete, you should create a consent to future contact form
- Information Sharing: Both check boxes should not be selected
- Schedule and Order: The priority should be set to a higher value than the previous consent form. Select once per user and every survey so participants only get the form once
- Non-consent Behaviour: Declining consent should be set to “Continue survey.” It will have no effect on future surveys or the participant account

#3 - Consent to share data for research

- Used when researchers and clinicians are **using surveys for part of clinical care**, and would like to gather consent to use data for research purposes
- Information Sharing: “Consent is required before inclusion in exports” should be selected
- Non-consent Behaviour: Declining consent should be set to “Continue survey.” It will have no effect on future surveys. However, it will impact the participant account. “Exclude from exports” should be selected

#4 - Consent for specific survey

- If a **survey requires consent in addition to the study consent,** and the survey **results cannot be viewed or exported by clinicians or researchers**, then create a consent for specific survey form
- Schedule and Order: “When to get consent” should be “Every instance of assigned survey” or “Once per user” depending on the decision of the ethics review board. “Where should consent form be shown” should be “Manually assigned surveys”
- Non-consent Behaviour: “How should declining consent impact the current survey” should be "Stop survey"
- “How should declining consent impact the participant account” should be “No effect,” as the consent is only for the survey

Study Setup: Routines vs. Surveys

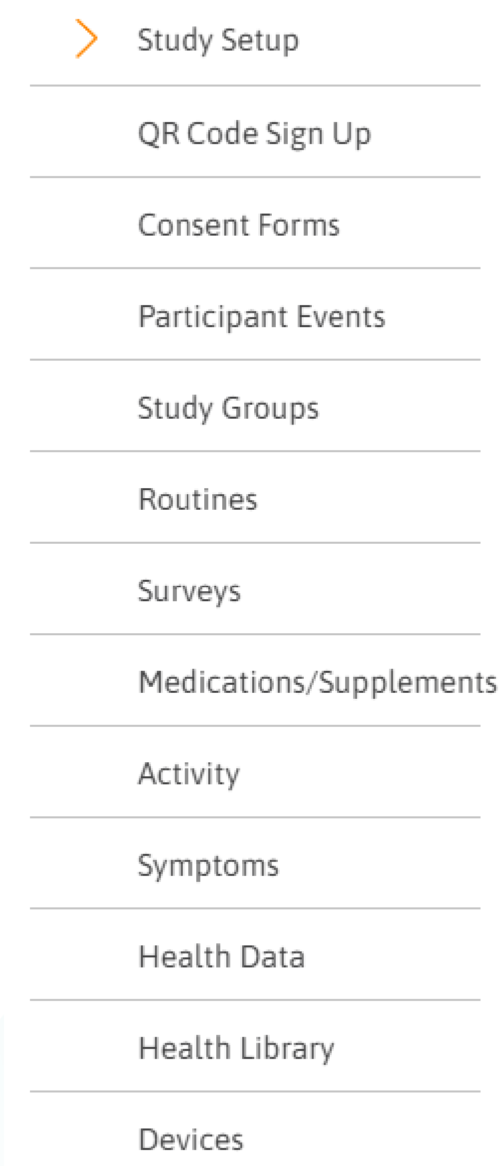
Study Setup is the core **Survey** and **Routine** builder.

Here, the researcher or organization admin designs templates for participants to track their data, either in the form of **Routines** or **Surveys.** Additionally, **Health Library** resources can be added through this drop down menu.

What Is the Difference Between Routines and Surveys?

Routines are beneficial if you want to collect supplementary data that could be used to further inform the study results. Routines can be used to track health behaviours, like exercise, supplement use or other factors that could be considered **covariates**. Routines track Medications/Supplements, Activities, Health Data, and Symptoms.

With **Surveys**, standardized questionnaires are used to measure the precise outcomes established in the aims of the study. They allow you to ask participants **a standardized set of questions**, like experiences with depression or pain. Zamplo Research supports various question formats, including multiple selection, long answer, and descriptive selection.



Why use both Surveys and Routines?

When Survey and Routine data are both collected, Researchers can gain further insights by analyzing a comprehensive overview of each participant's health. The frequency of both Surveys and Routines is customizable and based on the requirements of your study.

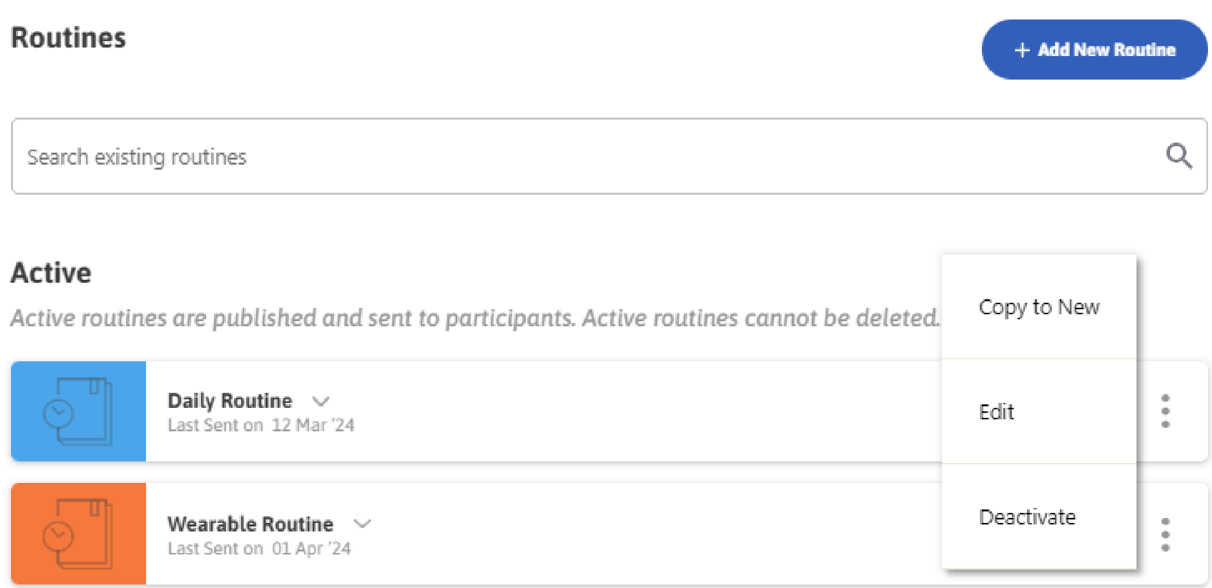
Routines

With **Routines**, you can collect supplementary data that can be considered covariates to further inform study results.

When adding a new Routine, there are four categories to choose from

- Medications/Supplements
- Activity
- Symptoms
- Health Data

This feature allows admins to add more granular information about specific elements inside the **Routines.** Additionally, they can set daily, weekly, or monthly reminders.



How to edit Active Routines:

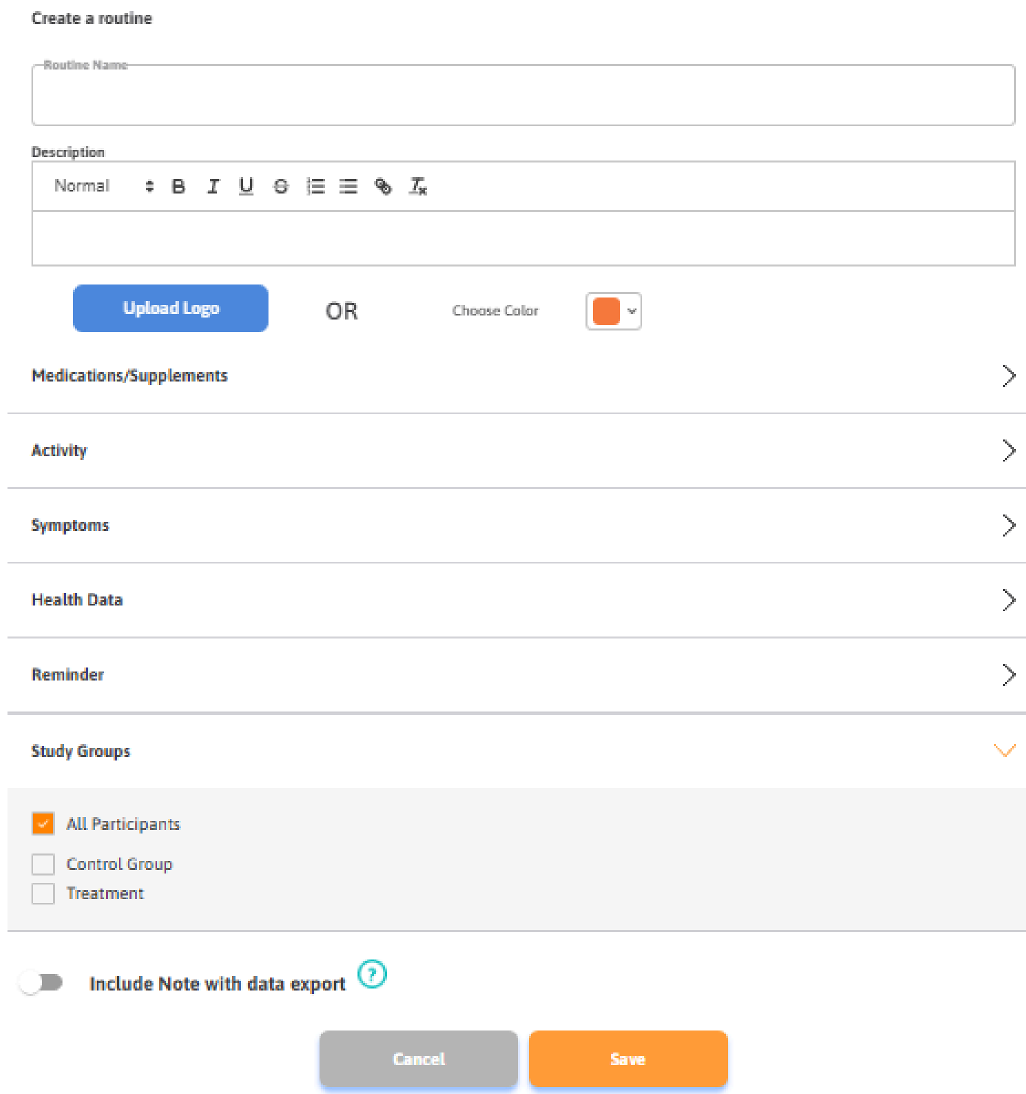
Select the **three dots** to **Copy to New, Edit,** or **Deactivate**

- **Copy to New:** Create a new copy of the same Routine
- **Edit:** Change or add categories
- **Deactivate:** Make an Active Routine Inactive

Routines: Create a new Routine

How to create a new Routine

1. Click the **Study Setup** drop-down menu and select **Routines**
2. Click on the **Add New Routine** button
3. Create a **Routine Name** and add a **Description**
4. Click on **Upload Logo** to add a customized image or choose a colour to associate your routines with
5. Enter the **Data Types** to track, this can include **Medications/Supplements, Activities, Symptoms,** or **Health Data**
    a. To add Data Types, click on the respective drop-down and click **+Add**
    b. Enter the name of the Data type
6. Once **Data Types** have been added, set a **Daily**, **Weekly**, or **Monthly** in-app notification or email **Reminder**
7. Select a **Study Group** to send the **Routine** to
8. Click on **Save**



Note:
Include Note with data export: Toggle this button to gain data insight from participants via notes or written sections. Participants must accept the terms and conditions of the data to be obtained

Different Data Types

Various **types of data** can be collected from participants during projects using Routines.

Symptoms

Symptoms may be physical or mental, such as anxiety, fatigue, insomnia, muscle aches, or stress. You may choose to add symptoms to a routine if you want to monitor what symptoms appear or change due to a treatment plan or how a diagnosis may impact a participant's symptoms. You may also want to assess the impact of symptoms with other health data that's captured during the project.

Medications/Supplements

Medications and supplements may include medications such as Tylenol, seizure medication, or Amoxicillin or supplements such as zinc, magnesium, or vitamin D. You may add medications and supplements to a routine if you want to monitor a participant's medication dose and frequency. You may also want to assess the impact these may have on a participant and any symptoms that arise.

Activities

Activities refer to any physical or psychosocial behavior participants engage in as part of their wellness routine. This could be something physical, like yoga, running, or gardening, or psychosocial, like mindfulness meditation or journaling. You may add an activity to a routine if you want to monitor a participant's activity frequency and duration. You may also want to assess the impact an activity has on a participant and their overall health.

Health Data

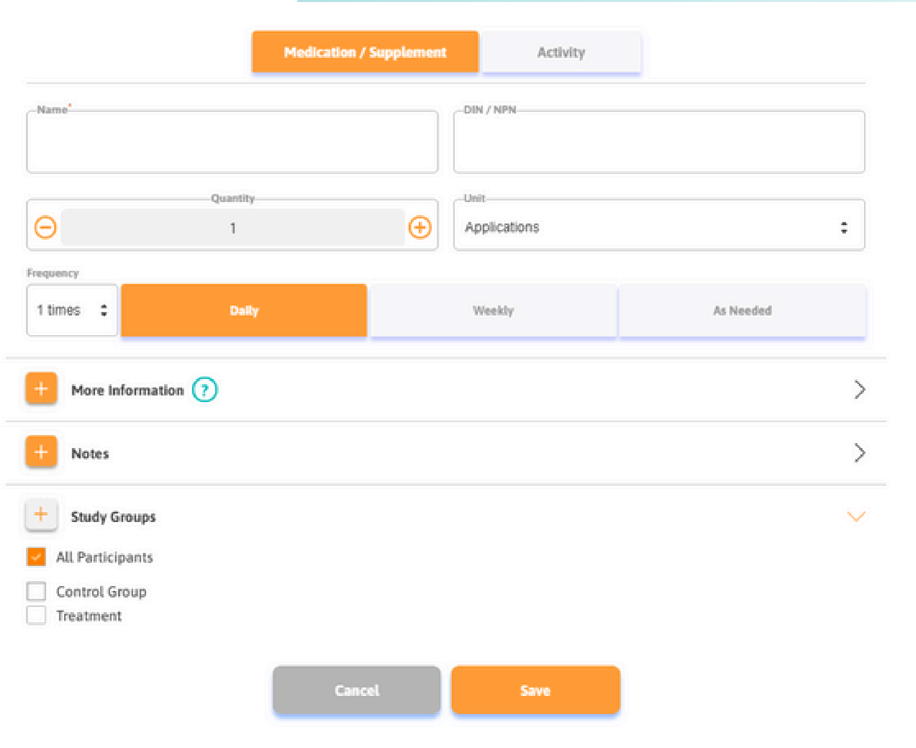
Health data allows tracking for anything not in the other categories. This can include monitoring participants' health-related information such as blood glucose, temperature, water intake, respiratory rate, or O_2 saturation levels. You may add health data to a routine for a flexible way to monitor certain metrics within participants' health that are outside of standard medications, supplements, activities, or symptoms. You might also want to assess the impact these health data metrics have on a participant and their overall health during a project.

Medications and Supplements

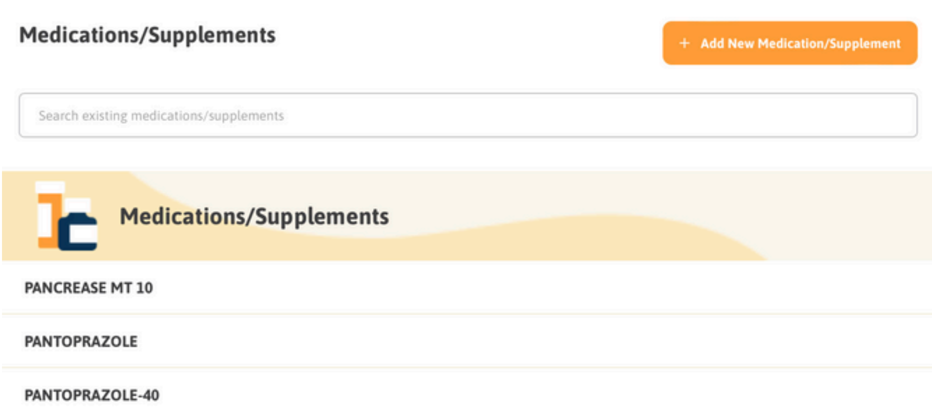
You may add **Medications/Supplements** to a **Routine** if you want to monitor a participant's medication/supplement and frequency.

How to add new Medications/Supplements

1. Navigate to the **Study Setup** dropdown and select **Medications/Supplements**
2. Select the **Add New Medication/Supplement** button
3. Type the name of the medication/supplement
- Note: You can use a preset option that appears, make a custom entry, or insert a DIN/NPN
4. Select the quantity and unit that needs to be taken
5. Select the frequency and time frame that it needs to be taken
6. Add any additional information, such as instructions
7. Add any notes if needed
8. Assign the medication to a **Study Group** or **All Participants**
9. Click **Save**



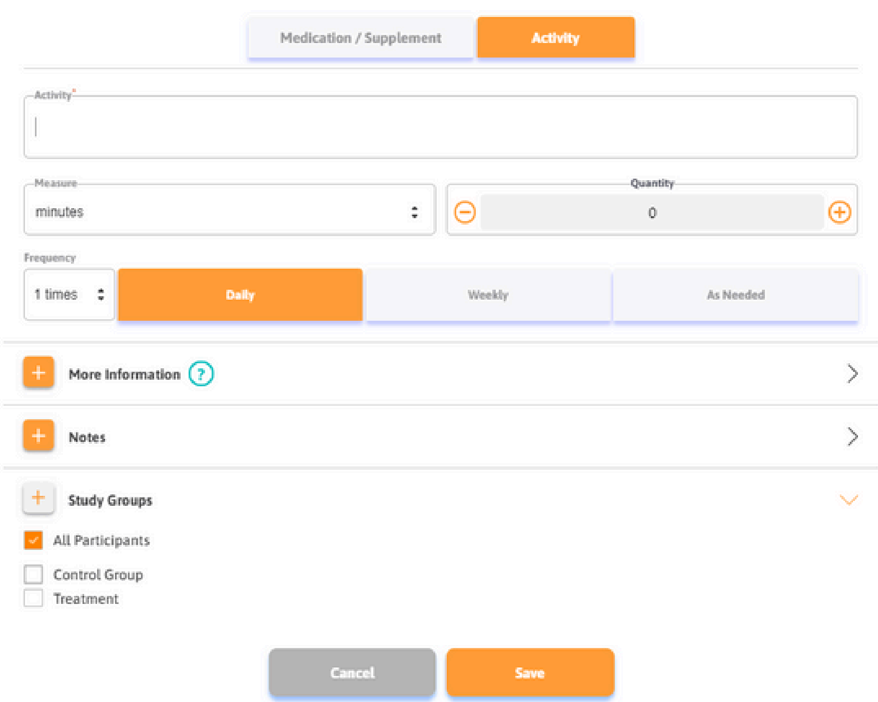
The image below shows the main **Medications and Supplements** page. This is where all medications/supplements added can be seen. To **Edit** or **Delete**, you can select one and click on the three dots in the top right corner



Note: If a Medication/Supplement is set up, but not added to a routine, you will not be able to monitor it

Activities

Activities refer to any physical or psychosocial behavior participants engage in as part of their wellness routine. They could be physical, like yoga, or psychosocial, like mindfulness meditation.

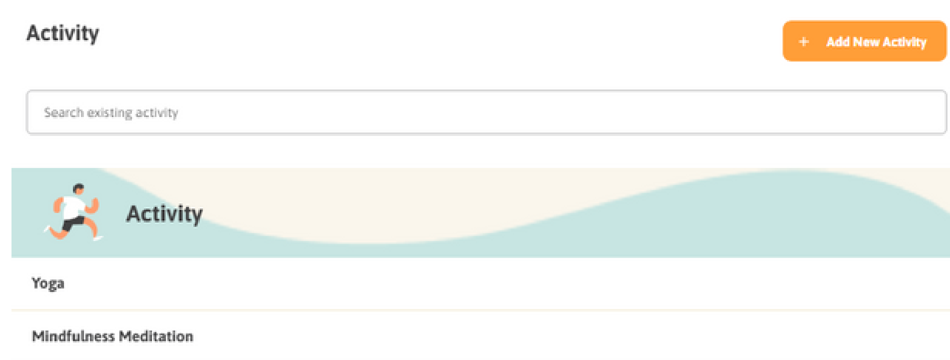


Note: If a Activity is set up, but not added to a routine, you will not be able to monitor it

How to add an Activity

1. Navigate to the **Study Setup** dropdown and select **Activity**
2. Click the **Add New Activity** button
3. Enter the name of the activity to be tracked
- Note: You can use a preset option or make a custom entry
4. Select the measure: minutes, hours, repetitions, or sessions
5. Enter the quantity
6. Set a frequency from **Daily**, **Weekly**, or **As Needed**
7. Add any additional information such as
   a. Health-related data like heartrate or body temperature
   b. Instructions for how the activity should be completed
   c. The duration an activity should be completed within
8. Add any notes if needed
9. Assign the activity to a **Study Group** or **All Participants**
10. Click **Save**

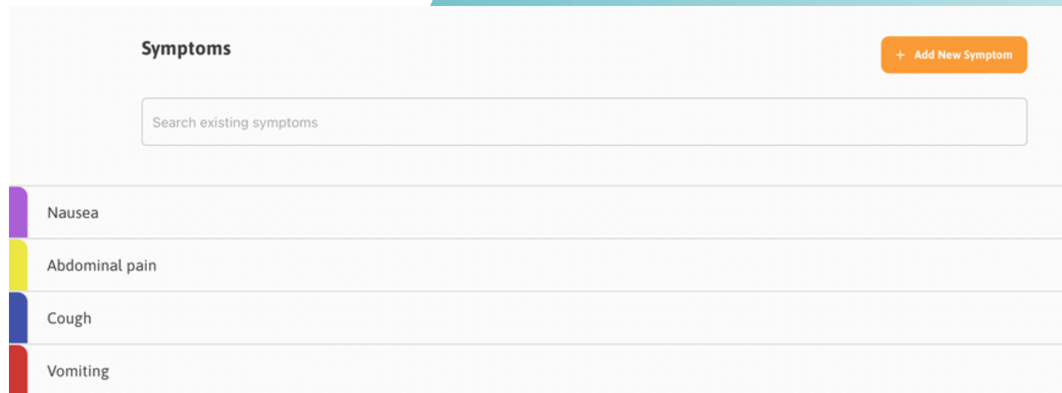
The image below shows the main **Activity** page. This is where all activities that have been added can be seen. To **Edit** or **Delete**, you can select one and click on the three dots in the top right corner



Symptoms

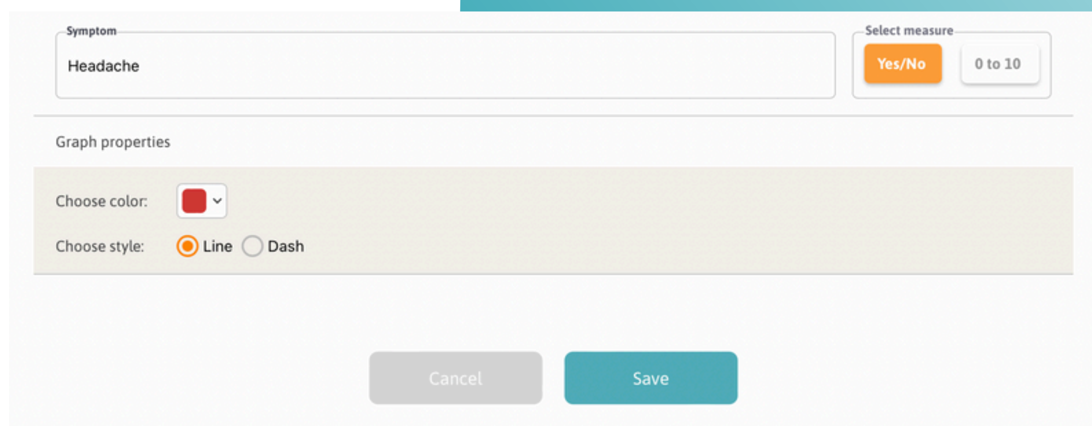
You may add **Symptoms** to a **Routine** if you want to monitor what symptoms appear or change due to a treatment plan or how a diagnosis may impact a participant's symptoms.

The image to the right shows the main **Symptoms** page. This is where all added symptoms are shown. To **Edit** or **Delete**, you can select one and click on the three dots in the top right corner.



How to add Symptoms

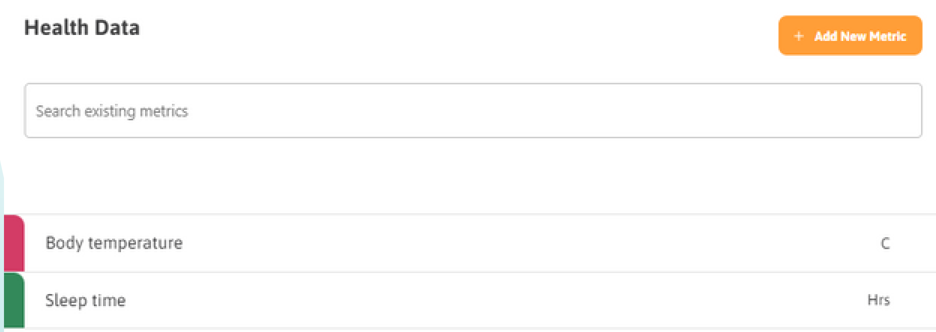
1. Navigate to the **Study Setup** dropdown and select **Symptoms**
2. Click the **Add new Symptom** button
3. Enter the name of the symptom to be tracked
- Note: You can use a preset option that appears or make a custom entry
4. **Select Measure** of **Yes/No** or **0 to 10**
5. Select a Graph colour and style that will correspond to this symptom
6. Click on **Save**

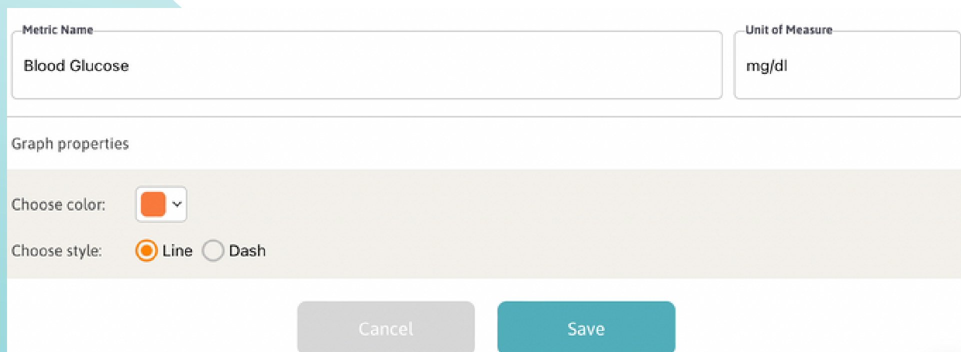


Note: If a Symptom is set up, but not added to a routine, you will not be able to monitor it

Health Data

Health Data refers to metrics within participants' health that are outside of standard medications, supplements, activities, or symptoms. This feature allows you a flexible way to monitor participants' health-related information such as blood glucose, water intake, respiratory rate, or O2 saturation levels.





How to add Health Data

1. Navigate to the **Study Setup** dropdown and select **Health Data**
2. Click **Add New Metric**
3. Enter the **Metric Name**
- Note: You can use a preset option that appears or make a custom entry
4. Select the unit of measurement that corresponds to the health data metric
- Note: You can use any of the various measures when you create a custom metric
5. Choose a **Graph** colour and style
6. Click **Save**

The image to the left shows the main **Health Data** page. This is where all Health Data information can be added. To **Edit** or **Delete**, you can select one and click on the three dots in the top right corner

Note: If Health Data is set up, but not added to a routine, you will not be able to monitor it

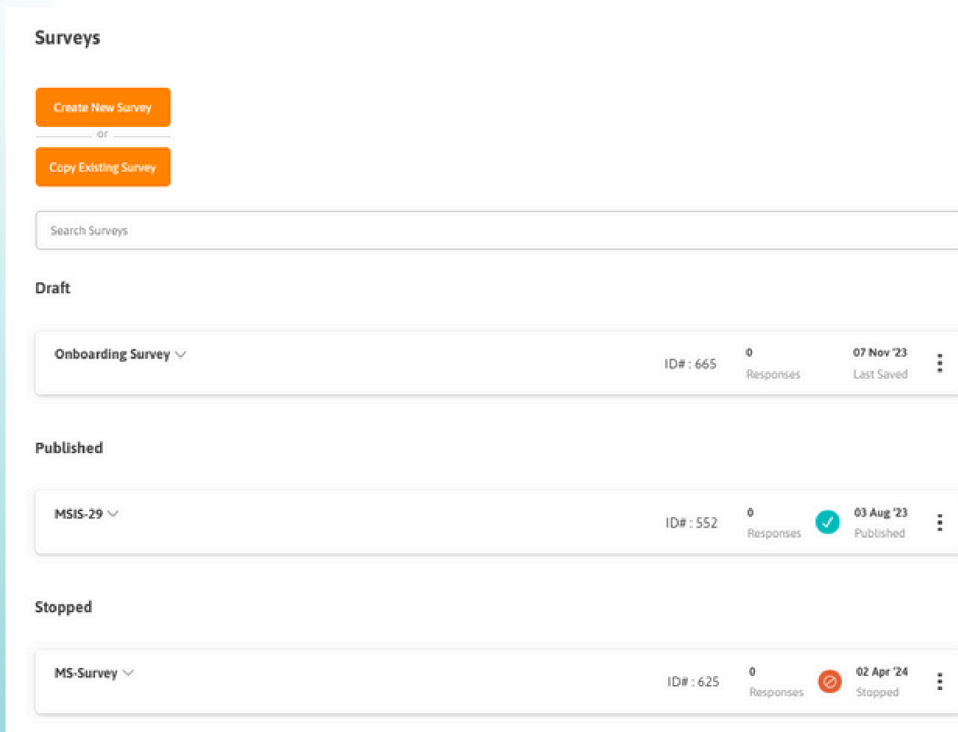
Surveys - Navigate Surveys

Surveys can be created to send standardized questionnaires to participants to measure the precise outcomes established in the protocol of the study**.**

Navigate to Surveys

Surveys: You can create a new **Survey** or edit an existing **Survey** that is not yet published

Reminder: Once a **Survey** is published - it cannot be edited, but you can create a copy of an existing published survey, edit the copy and publish it



Surveys Main Page

Draft Surveys - surveys that have been created but not yet published

Published Surveys - "green checkmark" surveys are available to the participant

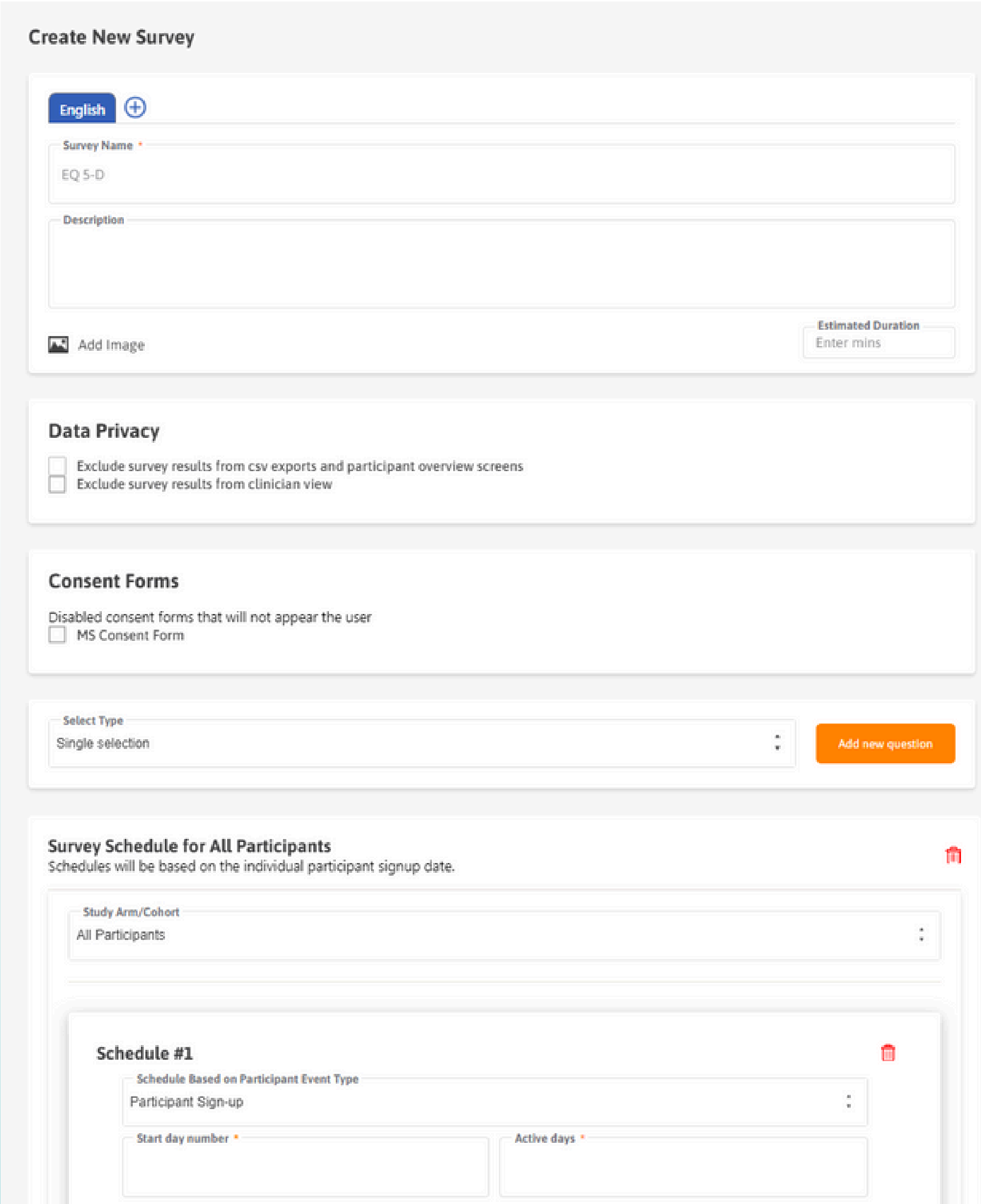
Stopped Surveys - "red circle" means the surveys are no longer available to the participants

How to Publish Surveys:

When Surveys are saved, they are saved as a draft. To make a survey live, select the three dots on the right side and click on **Publish Survey**

Click on a Survey to see a summary of the questions, the number of responses, and the schedule

Surveys - Create a New Survey



How to create a new Survey

1. Navigate to the **Study Setup** drop-down menu and click on **Surveys**
2. Click on the **Create New Survey** button
3. Select the language you want the Survey to be in. You will see **language tabs** at the top of the Survey that you can use to edit the language variations
4. Create a **Survey Name** and add a **Description**
5. You have an option to **Add Image** and enter an **Estimated Duration** time
6. **Data Privacy** allows you to exclude survey results from csv exports and participant overview screens or to exclude results from just the clinician view
7. **Consent forms** allow consent to be collected once per survey, once per survey instance, or once per participant
8. Choose from the **Select type** list and click the **Add new question** button
9. **Schedule** your **Survey**
    a. Select the participants to send the Survey to
    b. Select the event that you want to be the baseline for scheduling
    c. Set the **Start Day Number** and **Active Days.** The Start Day Number is the day you want the Survey to go out based on the event. The Active Days number is how much time you want to give a participant to fill out the Survey
    d. Select a Survey frequency
10. Click on **Save**

Survey Question Types

Single Selection
One of the most popular survey question types is single selection. This question type uses a radio button format. It allows participants to click only one answer. This question type is beneficial for binary questions, questions with ratings, or nominal scales.

Multiple Selection
Multiple selection questions allow a participant to select more than one answer. This uses square check boxes that allow participants to select all that apply. This question type is intuitive, good for quantitative data, and helps produce easy-to-analyze data.

Slider Visual Analog Scale
A slider visual analog scale displays a scale of answer options from a pre-selected range, such as 1 to 10 or 0 to 100. Scales can help determine participant satisfaction with their care team, give treatment plans a rating, or to see how often a participant engages in certain health behaviors such as exercise.

Symptom Slider
A symptom slider displays either a yes/no format or a 0 to 10 scale of options. This question type can help researchers narrow in on the severity or intensity of symptoms a participant may be experiencing. This can aid in seeing the relationship between symptoms and medications or a type of treatment plan.

Long Answer
A long answer question lets participants fill out an answer using a text box rather than selecting pre-determined options. This allows for open-ended answers and can help provide qualitative data. Using long answer questions helps to uncover data that may not have otherwise been known.

Descriptive Section
A descriptive section allows you to add a section with information at the beginning of the survey, in between survey questions, or at the end of the survey. This section can be used to provide the participant with further information or directions.

Survey Table
Survey tables are useful when you have a group of questions that share common response options. This appears in the form of a table with a question column and two or more value columns that participants can select or a long answer column. Using a survey table can help to simplify a large quantity of content into a single question.

Symptom Mapping Image
Symptom mapping image displays an uploaded photo that a participant can add a pin to. This can be useful if you want participants to identify a part of the photo that is relevant to them. This question helps create a visual guide to aid participants in quickly answering a question based on their experience.

Learn more about setting up each individual question type

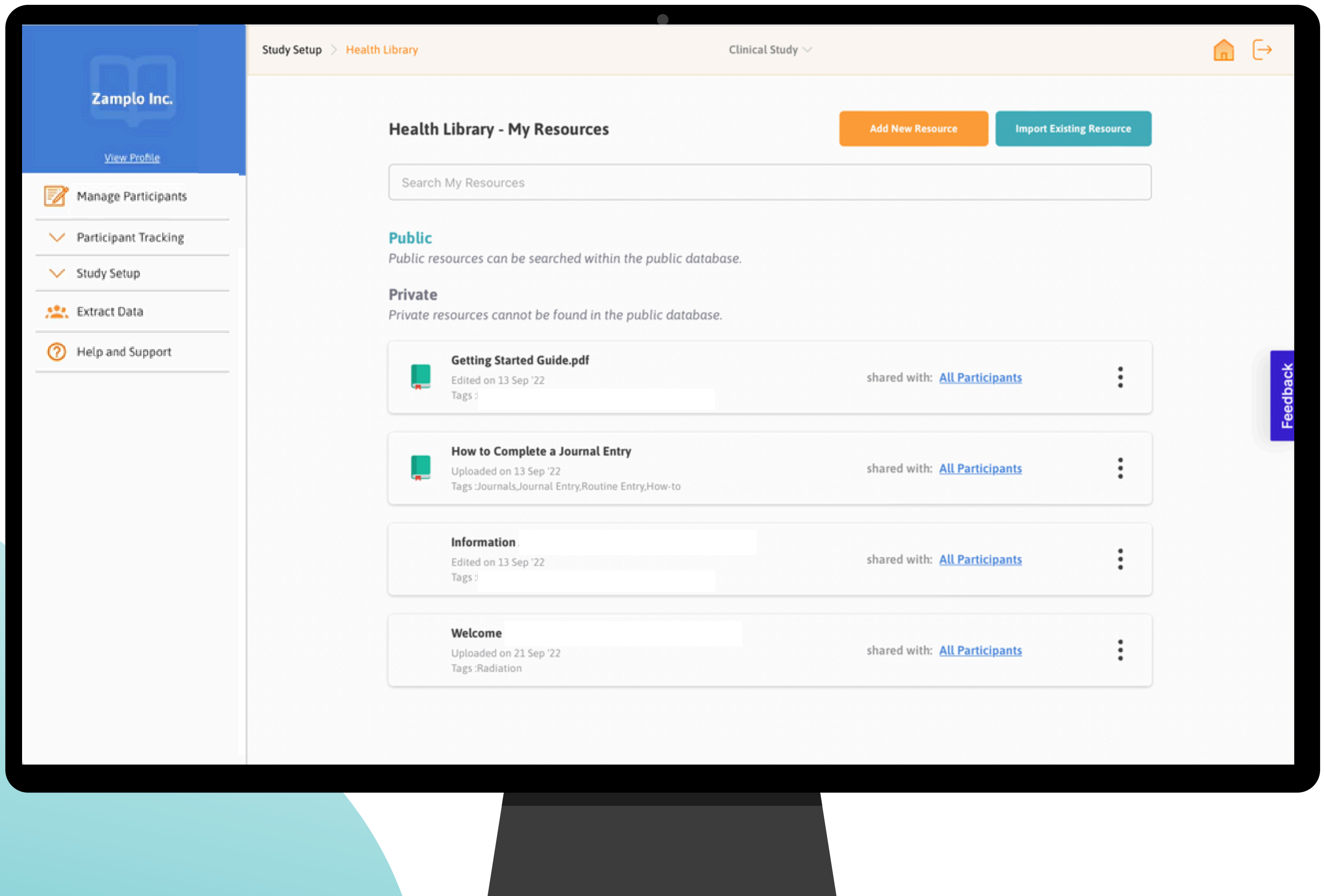
Health Library: Directory

The **Health Library** can be used to share and store resources. The resources stored here can be shared with select participants, all participants, or a group of participants that you've set up using Study Groups.

The **Directory** is where you can view all of your private or public resources, whom you have shared resources with, and where you can add new resources.

Public: Resources published into the public category can be searched for and seen within the public database and by participants in a project. **Please note: once a resource is made public it cannot be made private or deleted.**

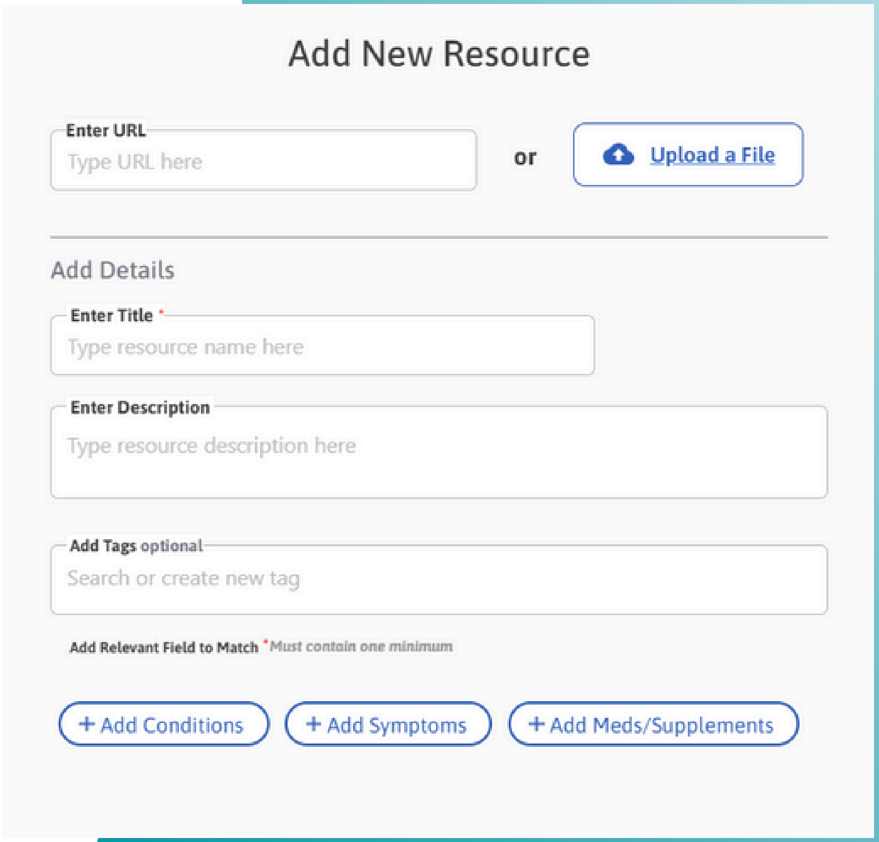
Private: Resources published into the private category are only visible to the participants you have selected to share it with. By default, all resources are private and will have to manually be set to public to share with all Zamplo App users.



Health Library: Add New Resources

How to add new resources into the Health Library

1. Navigate to the **Study Setup** dropdown and select **Health Library**
2. Select **Add New Resource** or **Import Existing Resource**
   a. **For importing a resource from a different study profile**
      i. Select the study profile and resource
      ii. Click **Import**
   b. **For adding a new resource**
      i. Add the URL of the resource, or upload it as a file
      ii. A title will automatically generate, edit if required
      iii. Enter a description
      iv. Add tags to provide further information and to make the resource easier to search for
      v. Select a relevant field to assign the resource to
      vi. Once you are done, select **Next**
      vii. Choose who you want to send the resource to: select participants, all participants, or a group of participants that you've set up using Study Groups
      viii. Click **Next**
      ix. Confirm the details of the resource and select **Done**
      x. To send the resource, make it public by clicking the three dots to the right of the resource and selecting **Make Public**



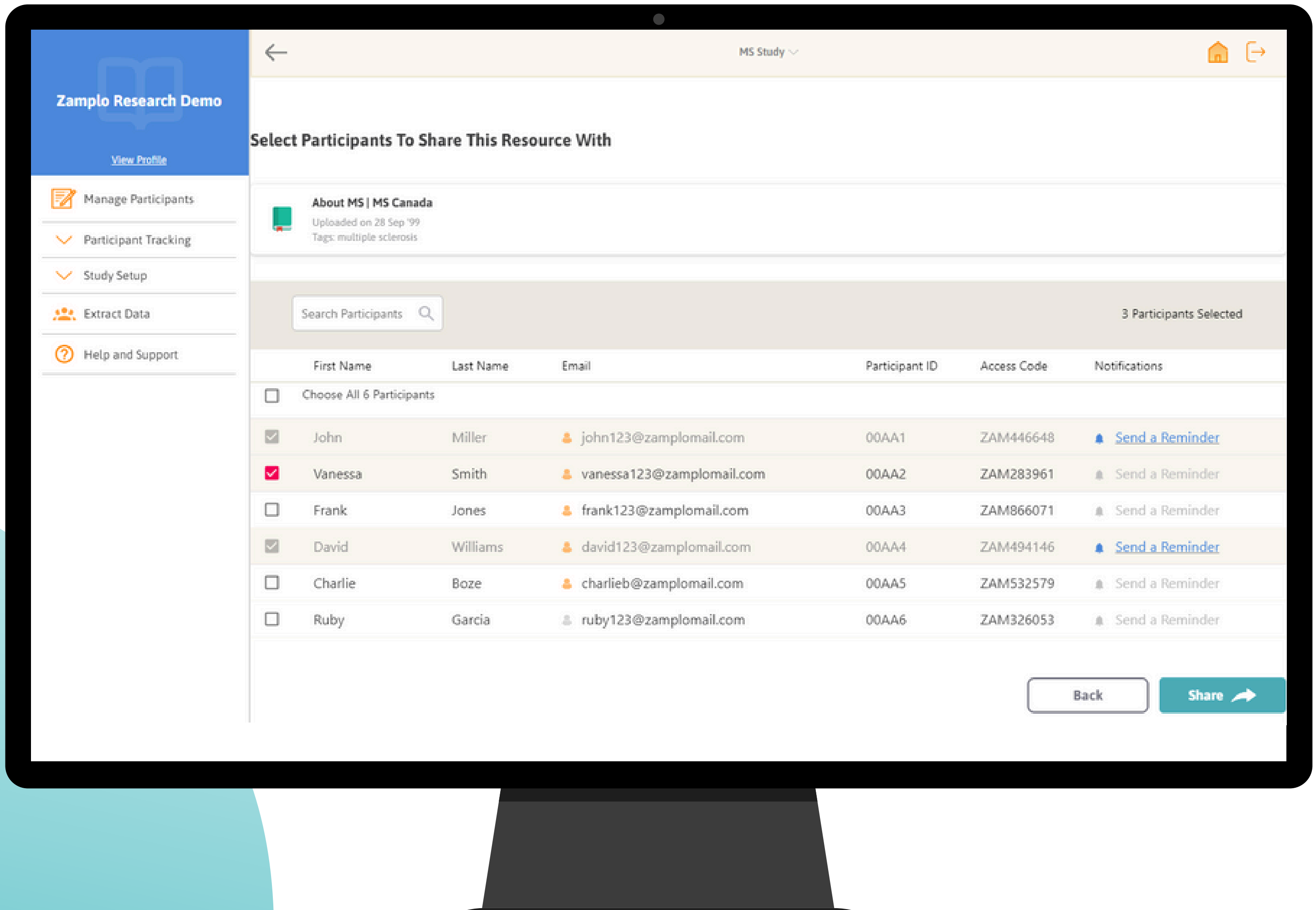
Health Library: Select Participants & Reminders

Select participants to send the resource to

1. If you chose Select Participants when setting up the resource or want to send the resource to additional participants, click on the **blue Select Participants link** to the right of the resource
2. Select individuals by clicking the check box next to their name
3. Click **Share**

Send Reminders

1. On the same screen, click on the **Send a Reminder** button that is on the right side of the screen

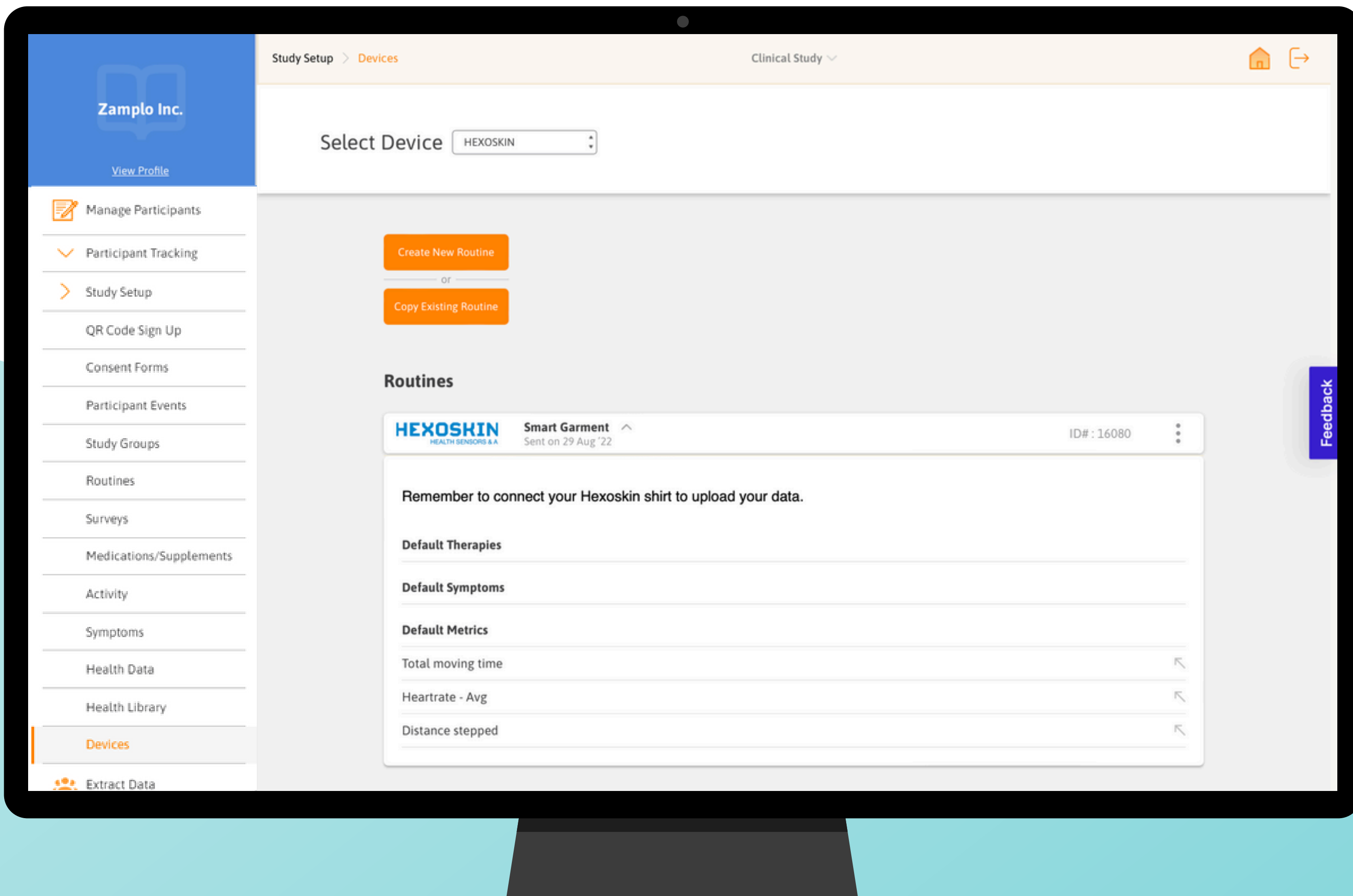


Devices

Use **wearable integration** to aid in tracking participant data. Gather more metrics and health data insights through the use of wearable technology.

How to link a Device to a Routine

1. Navigate to the **Study Setup** dropdown and select **Devices**
2. Select the **Device** you want to use to track
3. From here, either **Copy Existing Routine** or **Create New Routine**
4. Fill out the routine and select the data you want to track
5. Select **Save**

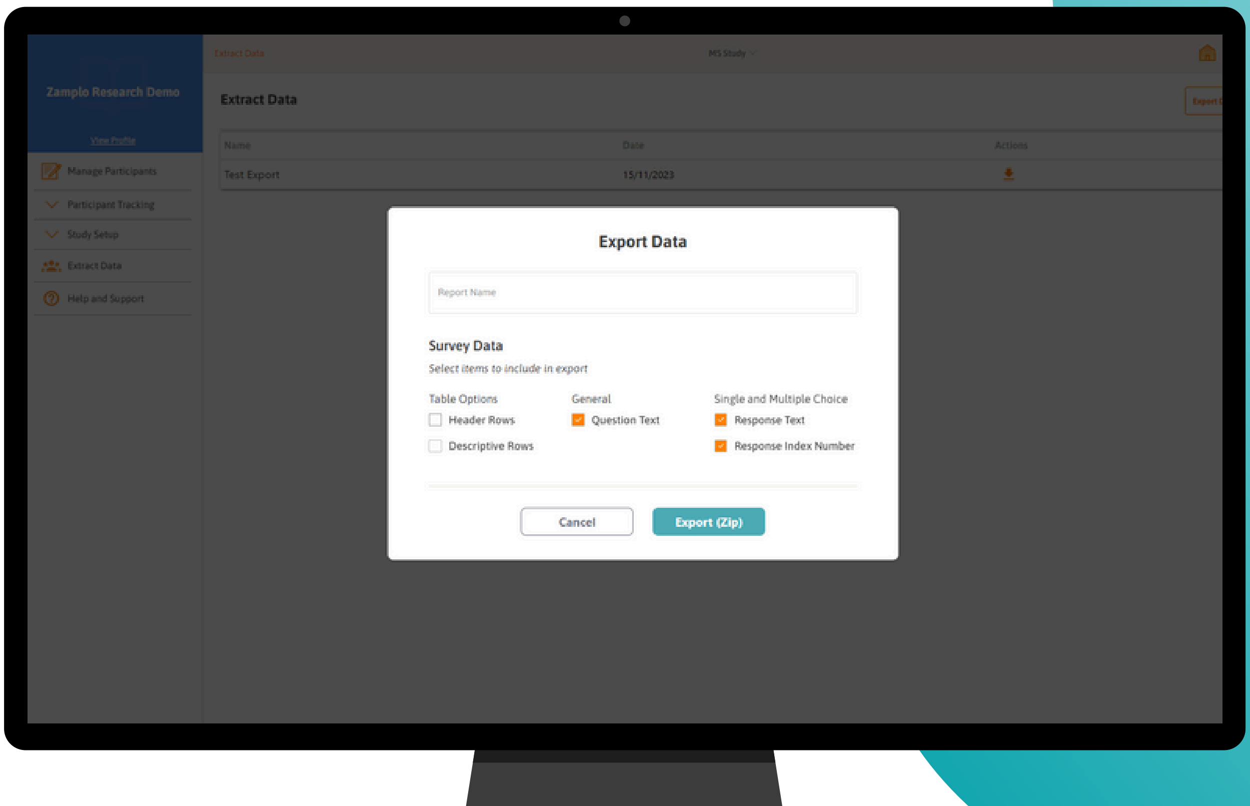


Extract Data

Extract Data provides a secure way to easily extract participant data. Zamplo uses PGP (pretty good privacy) based encryption, a public/private key encryption scheme, to protect your exported files. Please note, if a participant deletes their account you will lose access to any data they have input. For this reason, we recommend you export data periodically.

How to Extract Data

1. Select **Extract Data** from the left menu
2. Click the **Export Data** button
3. Give the file a name and select what you want included in the report
4. Click on **Export (ZIP)**
5. Decrypt the exported file to view your report. The decrypting process will vary depending on if you use [MacOS] or [Windows]



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