Customize and share your workflow’s join page

Learn how to configure self-enrollment, customize the join experience, restrict access when needed, and distribute the correct recruitment link or QR code.

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What the join page does

The workflow join page collects the prospective participant’s name, email address, and (optionally) their phone number. After joining, the participant receives or opens access to the Participant Hub, where available workflow tasks will appear for them to complete.

> The join page is not the screening form. Screening, consent, and other forms must be added as workflow tasks.

1. Choose Participant Hub access timing

In the workflow’s **Deploy** tab, find **Workflow access after self-enrollment** and choose one of:

- **After confirming access to their email (Recommended):** Shows post-join content and sends an access link when a task is available.

- **Immediately after joining:** Routes directly to the Participant Hub and also sends an email link for later access.

Immediate access reduces friction, but it can allow screening or consent forms to be submitted before the email address is verified.

2. Customize pre-join content

Under **Join Page Customization**, use **Pre-join Content** for approved information such as:

- study name and purpose
- who may express interest
- expected next step
- privacy or data-use summary
- study-team contact information.

3. Customize post-join content

You can use **Post-join content** to thank the participant and explain what happens next.

Note that this content won't be shown if **Workflow access after self-enrollment** is set to **Immediately after joining,** because participants will be routed straight to the Participant Hub after they submit the join form.

4. Restrict join-page access

Enable **Restrict join page access** to require a code be entered to access the join page for your workflow.

Use this when recruitment is limited to a defined source while still allowing self-enrollment. Store and distribute the code carefully.

5. Copy the link or QR code

Under **Share Link**:

- Select **Copy** beside **Link** for email, web, or digital recruitment materials.

- Download the **QR Code** for print or in-person recruitment.

6. Test the recruitment experience

Before sharing publicly, make sure to test your workflow thoroughly. Please see the guide: **Test a workflow before enrolling real participants.**