

Create a workflow for a two-arm experimental study

This guide modifies the example protocol from our guide “**Create a workflow for an observational study**” to have two study arms, and will focus mainly on the configuration areas that are unique to creating an experimental workflow: creating participant groups, assigning participants to those groups, and releasing different tasks to each group.

Refer to the observational study guide for help with general setup such as creating a workflow, adding steps and tasks, configuring assessments and outcomes, reviewing post-exclusion behaviour, preparing the participant join experience, testing, and activation.

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Example protocol

After joining, participants complete an eligibility questionnaire and eligible participants provide consent. They then complete a baseline questionnaire. A researcher assigns each participant to either the Intervention group or the Control group using the study's approved allocation procedure. Intervention participants receive an intervention activity, while Control participants receive a control activity. Thirty days after being assigned to their group, participants in both groups complete the same follow-up questionnaire. A researcher then sends and records a gift card.

The workflow will assume this structure based on the protocol. See our guide **“Turn a research protocol into a StudyFlow workflow”** to learn how your protocol can be converted into StudyFlow workflow steps and tasks.

Step	Tasks	Completed by	Available when
Screening	Eligibility questionnaire	Participant	The participant joins the workflow
	Consent form	Participant	The eligibility questionnaire produces a passing result
Baseline	Baseline questionnaire	Participant	The consent task is completed after review
Allocation	Assign study arm	Researcher	The baseline questionnaire is completed
Study activities	Intervention activity	Participant	The participant was assigned to the Intervention group
	Control activity	Participant	The participant was assigned to the Control group
Follow-up	30-day follow-up questionnaire	Participant	30 days have passed since study-arm assignment

Step	Tasks	Completed by	Available when
	Send and record gift card	Researcher	The follow-up questionnaire is completed

Create the common workflow structure

Follow the observational study workflow guide to learn how to create the workflow and add the **Screening and Baseline** steps with their respective tasks.

The remaining sections describe the additional structure required to have two study arms.

Create the participant groups

In StudyFlow, participant groups represent the study arms. For this example, create one group for each arm:

1. Select the workflow's **Setup** tab.

← Edit Workflow / Two-arm Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Intake Sources

If this workflow is a continuation of one or more other workflows, you can define them as sources here. Participants will automatically join this workflow when they complete a source workflow.

No sources selected.
Participants can still join directly via link, QR code, or manual add

Manage Sources

Participant Groups

Groups are how you can organize participants within this workflow.

Groups can:

- Control which participants are involved in each step
- Be used as sources for other workflows

Group Name	Description
All	All Participants in this workflow

Create New Group 2

2. Scroll to **Participant Groups** section and select **Create New Group**.
3. Enter **Intervention** as the group name and optionally add a description.

4. Select **Create**.

5. Repeat these steps to create the **Control** group.

The group names and the assignment to those groups will never be shown to participants by default. Participants will only learn their assignment if you choose to inform them through participant-facing content.

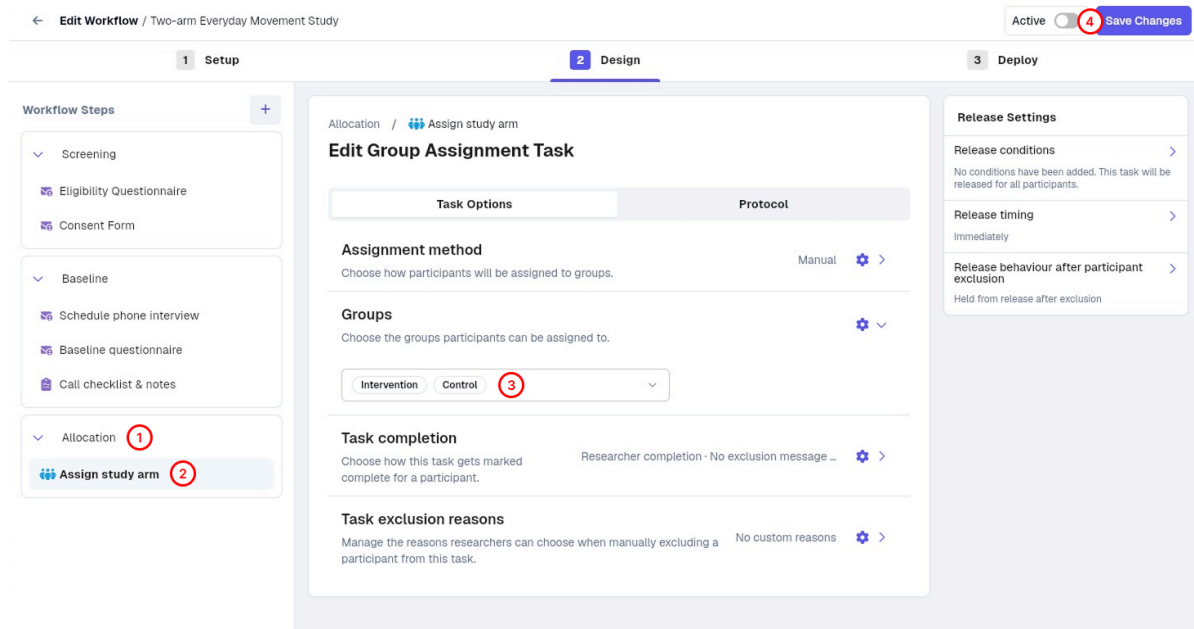


We recommend naming the groups to clearly match the arms defined in your protocol. For blinded studies, review participant-facing form display names, instructions, and content to ensure they do not unintentionally reveal the participant's assignment.

Add the Group Assignment task

The Group Assignment task will be used to perform the action of recording the participant's study arm, and the result can be used for downstream task release conditions.

1. Add a step named **Allocation** after the Baseline step.



2. Add a task inside it and select **Group Assignment** as the task type. Name the task **Assign study arm**.
3. Select **Intervention** and **Control** as the groups that can be assigned through the task.
4. **Save the workflow.** This will make the new group assignment task a selectable option when configuring release conditions.

Release the Allocation step after the Baseline step

To the **Allocation** step, add the release condition **Completed task: Baseline Questionnaire**.

← Edit Workflow / Two-arm Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps +

- Screening
 - Eligibility Questionnaire
 - Consent Form
- Baseline
 - Schedule phone interview
 - Baseline questionnaire
 - Call checklist & notes
- Allocation
 - Assign study arm

Step: Allocation

Assign study arm

+ Add a task

Release Settings

Release conditions

This step is released if

All conditions are met

+ Add a condition

Completed task: Baseline questionnaire

Release timing

Immediately when conditions are met

When the allocation step is released for a participant, the researcher can use the study's approved allocation procedure to determine which group to assign them to, and select it in the **Assign study arm** task. Marking the **Assign study arm** task complete will assign the participant to the selected group and allow downstream group-specific release conditions to be evaluated.

Add the arm-specific tasks

1. Add a **step** named **Study activities** after the **Allocation** step.

← Edit Workflow / Two-arm Everyday Movement Study

Active ☐ 4 Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps

- > Screening
- > Baseline
- > Allocation
- Study activities 1
 - Intervention activity 2
 - Control activity 3

Study activities / Control activity

Edit Participant Form Task

Form Setup Protocol

Form respondent Participant >
Who will be completing this form.

Form Control activity >

Assessment No assessment >
Choose whether this form should produce a pass/fail assessment result in addition to collecting responses.

Submission allowance and task outcome behavior One-time submission Automatic outcome >
Configure submission allowance and task outcome behavior. No exclusion message will be shown to participants. One submission is allowed independently; when no outcome exists, that submission automatically completes.

Task exclusion reasons No custom reasons >
Manage the reasons researchers can choose when manually excluding a participant from this task.

Release Settings

Release conditions >
No conditions have been added. This task will be released for all participants.

Release timing >
Immediately

Release behaviour after participant exclusion >
Held from release after exclusion

2. Within the new step, add a **Form** task named **Intervention activity** and configure it as follows:
 - **Respondent:** Participant
 - **Form:** Select the form containing the intervention activity
 - **Assessment:** Do not include assessment
 - **Submission allowance:** One-time submission
 - **Task outcome behaviour:** Determine outcome automatically
3. Add another **Form** task named **Control activity**. Apply the same settings, but select the form containing the control activity.
4. Save the workflow.

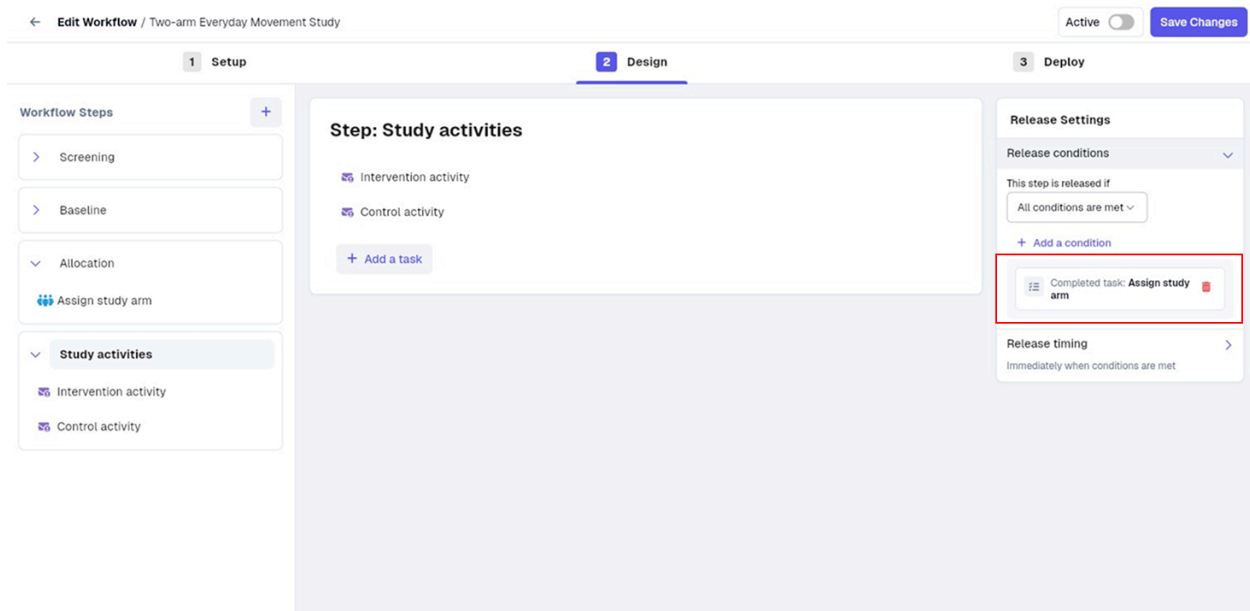


If an arm contains many tasks, you can create a separate step for each arm and apply the group condition to the step instead. Every task inside that step will inherit the condition. Use task-level conditions when a shared step contains activities for different groups, as we have done for our simplified protocol example.

Release the Study activities after participants are assigned to groups

We don't want the **Study activities** step to release until the group assignment task has been **completed**.

To the **Study activities** step, add the release condition **Completed task: Assign study arm**.



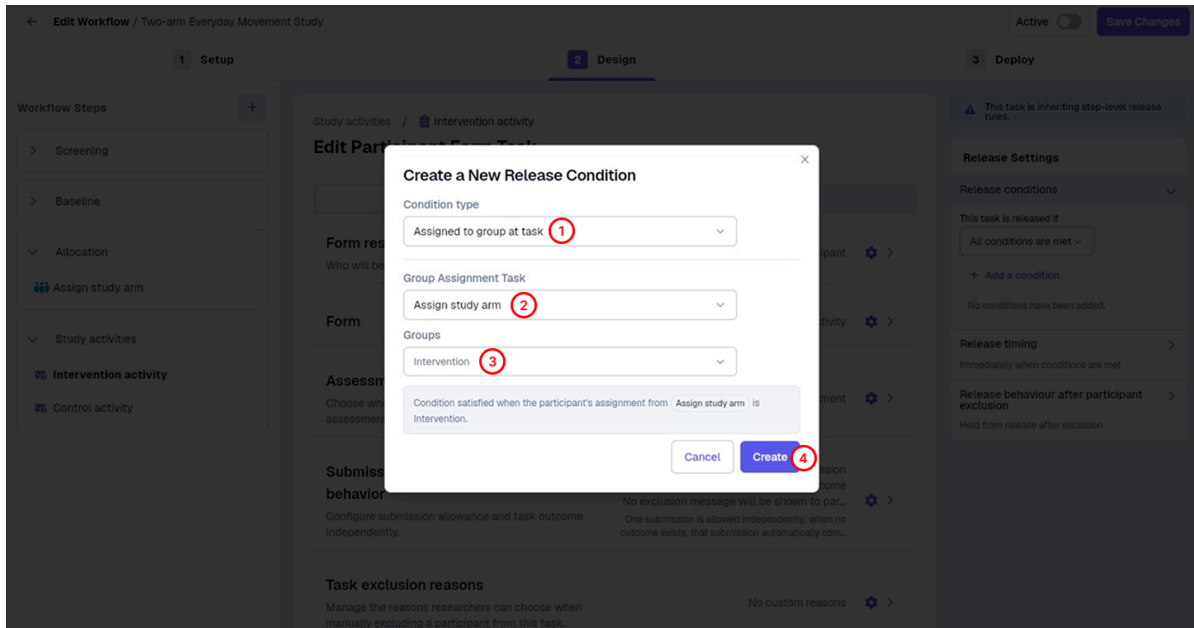
This shared step condition controls when the stage begins. The task-level conditions we will configure next determine which activity each participant receives.

Release tasks to a specific group only

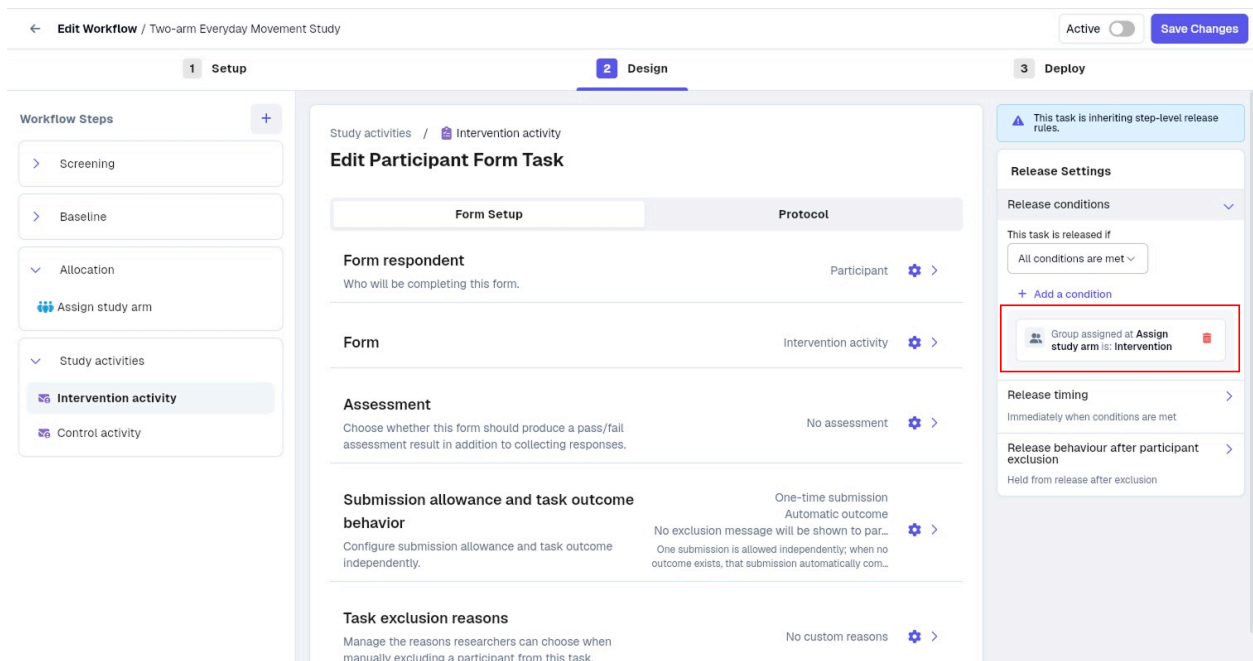
Use the release condition **Assigned to group at task** when a task should only release to participants that were assigned to a specific group at a specific Group Assignment task. This keeps the release rule tied to the protocol's allocation event.

Release the Intervention activity

1. In the **Intervention activity** task, add a release condition. Select the **Assigned to group at task** condition.



2. Select **Assign study arm** as the Group Assignment task.
3. Select **Intervention** as the required group.
4. Select **Create**.



Release the Control activity

Repeat the same process for **Control activity**, but select **Control** as the required group.

Once a group is recorded for the group assignment task and it is marked completed, only the task matching that result will be released to the participant. The other arm's task will remain unreleased.

How to choose the appropriate group-based release condition

When configuring release conditions within workflows with participant groups, you will have 3 different group-based release conditions to choose from. These conditions answer different questions about a participant's group assignment history:

Condition type	Use it when	Example
Assigned to group at task	The group assigned at a specific Group Assignment task matters. This is useful when a workflow contains multiple assignment tasks or participants may be reassigned.	To release a task only to participants who moved from Group A to Group B, you could configure the release settings to require both Assigned to Group A at Initial assignment and Assigned to Group B at Reassignment
Current group is	Only the participant's most recently assigned group matters, regardless of their previous assignments.	Release the current Group B instructions to everyone now assigned to Group B, whether they started in Group A or Group B.
Has ever been in group	Any previous assignment to the group matters, even if the participant has since moved to another group.	Release an experience questionnaire to everyone who has ever been in Group A, including participants who are now in Group B.

Add the shared follow-up tasks

Create a **Follow-up** step containing:

1. A **Form** task named **30-day follow-up questionnaire**, with **Participant** as the respondent.
2. A **Form** task named **Send and record gift card**, with **Researcher** as the respondent.

Our follow-up questionnaire will be common to both arms, so we do not need to add group-based release conditions.

Release the Follow-up step 30 days after group assignment

1. Select the **Follow-up** step
2. Add the release condition **Completed task: Assign study arm**.
3. Under **Release timing**, select **A duration after release conditions are met**.
4. Set the **Delay duration** to **30 days**.

The countdown begins when the researcher marks the **Assign study arm** task complete. Because this timing is configured on the step, both tasks inherit it.

Release the gift-card task

1. Select the **Send and record gift card** task
2. Add the release condition **Completed task: 30-day follow-up questionnaire**.

The task becomes available to the researcher after the participant submits the common follow-up questionnaire.

Prepare the workflow for launch

Configure the participant self-join experience

Configure the workflow's deployment settings and customize its **Join Page** before testing. This allows you to test the same entry experience participants will use during recruitment.

For instructions, see our guide "**Customize and share a workflow join page**".

Test the workflow

See our guide **"Test a workflow before enrolling real participants"** for details on how to conduct thorough testing of your workflow.

For our two-arm example protocol, during our testing we would want to confirm the various paths we configured within the workflow are functioning correctly:

Test path	Confirm
Ineligible	The participant is excluded and does not receive consent or downstream tasks.
Consent not approved	The researcher can exclude the participant during review, and Baseline remains unreleased.
Intervention	The assigned group is recorded as Intervention; only Intervention activity is released.
Control	The assigned group is recorded as Control; only Control activity is released.
Shared follow-up	Participants from both groups receive the follow-up questionnaire after the configured delay.
Gift card	Completing the follow-up questionnaire releases the researcher-facing gift card task for both groups.

We would also want to verify that the participant's assigned group appears correctly in the participant table, and that no arm-specific task is released before assignment.

Activate the workflow

Activate the workflow only after all forms, rules, entry settings, and test paths have been approved.

1. Click the **Active** switch in the workflow header.
2. You will see an **Activate Workflow?** confirmation popup. Select **Activate**.
3. Open the join link in a private browser window and confirm the live entry experience is functioning.
4. Share the link or QR code only through approved recruitment materials and channels.

Once active, participants can enroll and progress through released tasks. Pause or deactivate the workflow before making changes that could affect participant progress, then repeat the relevant tests before resuming.