Turn a research protocol into a StudyFlow workflow

Learn how to identify the milestones, tasks, and release rules within your research protocol and map them to StudyFlow concepts.

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Example protocol

> After joining, participants complete an eligibility questionnaire. Eligible participants read and sign the consent form before scheduling a baseline phone interview. During the call, the participant completes a baseline questionnaire while the researcher confirms selected responses and records additional information. Thirty days later, the participant completes a follow-up questionnaire. A researcher then sends the participant a gift card and records its value and the date sent.

Before you start

Gather the approved materials that describe what participants and researchers must do. This could include:

- the research protocol and schedule of events

- eligibility criteria
- consent materials
- questionnaires, interview guides, and checklists
- participant communication and scheduling instructions
- procedures for incentives, exclusions, and other exception paths

Plan your workflow

Before building in StudyFlow, you will need to turn your protocol into an operational plan.

1. Identify all protocol activities

For each and every **activity** throughout your protocol (for both participants and researchers), identify:

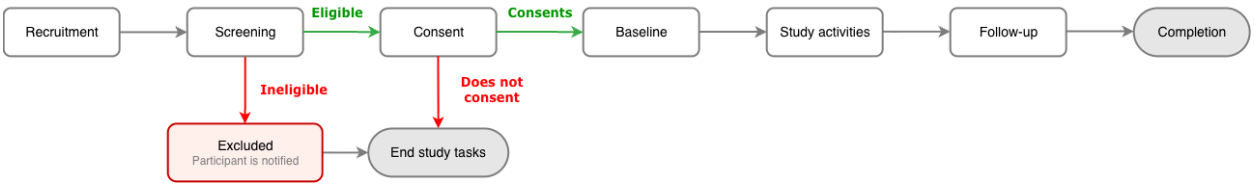
- The **major stage/milestone** it belongs to
- **Who** is completing it— participant or researcher
- Any **conditions** that need to be met for it to be “available” (e.g. passed a screening, assigned to a specific arm, or completed a previous activity)

Some examples of **activities** may be:

- taking a survey
- filling out a form
- recording notes and data
- assigning participant to an arm

2. Map the participant journey

Map out the major stages or milestones of your protocol in order. Add any decision points that can change the participant’s path, such as a screening result or study-arm assignment.



3. Plan the steps and tasks

In StudyFlow, a **task** is a specific activity completed by a participant or researcher. A **step** groups related tasks within the same stage, milestone, visit, etc.

Now identify all the activities involved in your protocol throughout the entire participant journey, for both participants and researchers. Some examples of activities are:

- taking a survey
- filling out a form
- scheduling a meeting
- recording notes and data
- assigning participant to an arm

Each of the activities will be a **task**, and the major stages or milestones in the participant journey are a good starting point for grouping the tasks into steps.

The example protocol could be turned into the following set of steps and tasks:

Step	Tasks	Completed by	Available when
Screening	**Eligibility questionnaire**	Participant	The participant joins the workflow
	Consent form	Participant	The eligibility questionnaire is completed with a passing result
Baseline	**Schedule phone interview**	Participant	The consent form is completed

Step	Tasks	Completed by	Available when
	Baseline questionnaire	Participant	The interview is scheduled and the call has begun
	Call checklist and notes	Researcher	The interview is scheduled and the call has begun
Follow-up	**30-day follow-up questionnaire**	Participant	30 days have passed since the baseline interview was completed
	Send and record gift card	Researcher	The follow-up questionnaire is completed

💡 Although **Screening** and **Consent** were originally separate stages in the participant journey, we have grouped both activities within one **Screening** step because the consent form is released immediately after a participant passes the eligibility questionnaire, creating one connected experience.
Organize your steps and tasks in the way that best fits your protocol.

Next: Build the workflow

With a plan now in place, we will continue with the same example protocol in the next guide, **“How to build a workflow for an observational study“.**