

Create a workflow for an observational study

This guide continues from the guide **“Turn a research protocol into a participant workflow”**, where we mapped an example protocol into a participant journey and planned the StudyFlow steps, tasks, and release conditions.

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The planned workflow

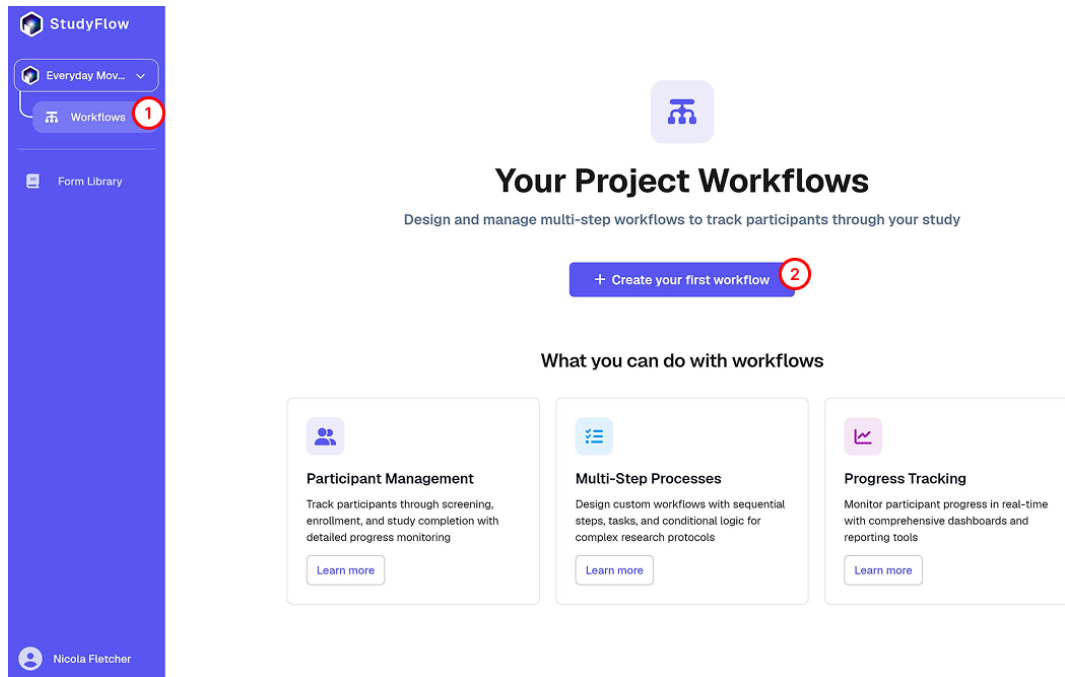
We produced the following set of steps and tasks from the example protocol:

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
	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

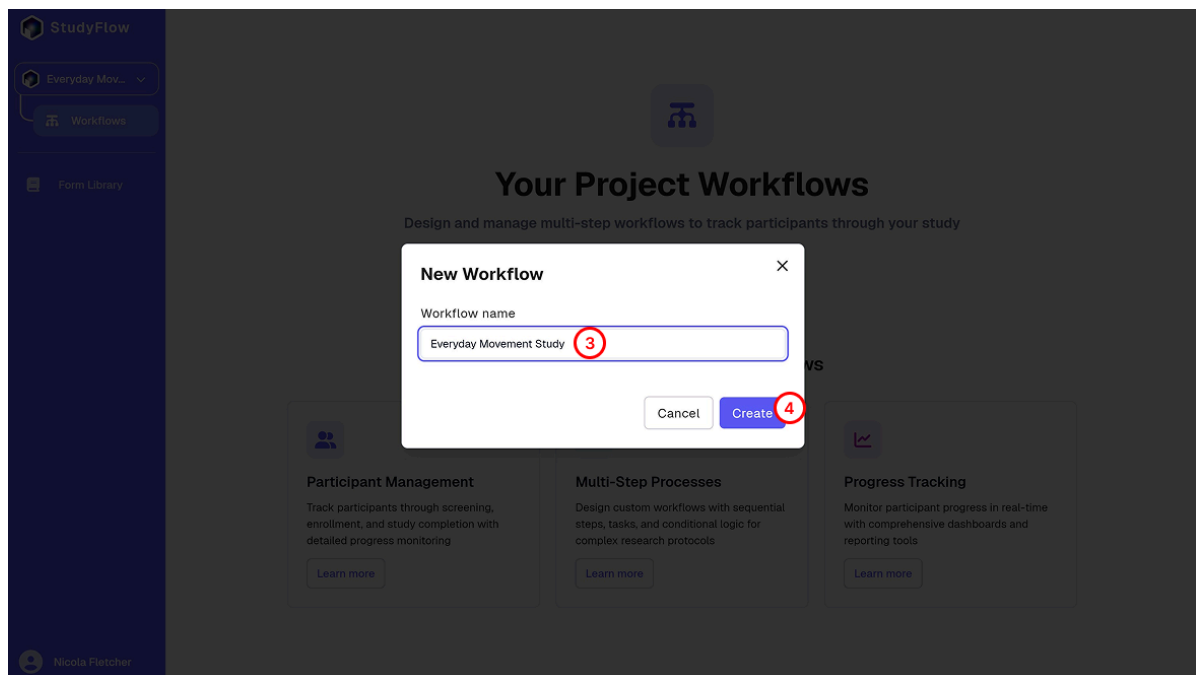
We will now show how to build out the workflow in StudyFlow.

Create a new workflow

1. Go to your project's **workflows** page.



2. If your project has no workflows yet, select **Create your first workflow**. Otherwise, select **Create Workflow** at the top right of the screen.
3. Enter a name for your workflow.



4. Select **Create**.

Add steps and tasks to a workflow

- Select the **Design** tab

← Edit Workflow / Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Details

Workflow Name

Everyday Movement Study

Workflow Description (optional)

This description will not be visible to candidates, but can be used to provide additional context within your team.

Enter a description for your workflow

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

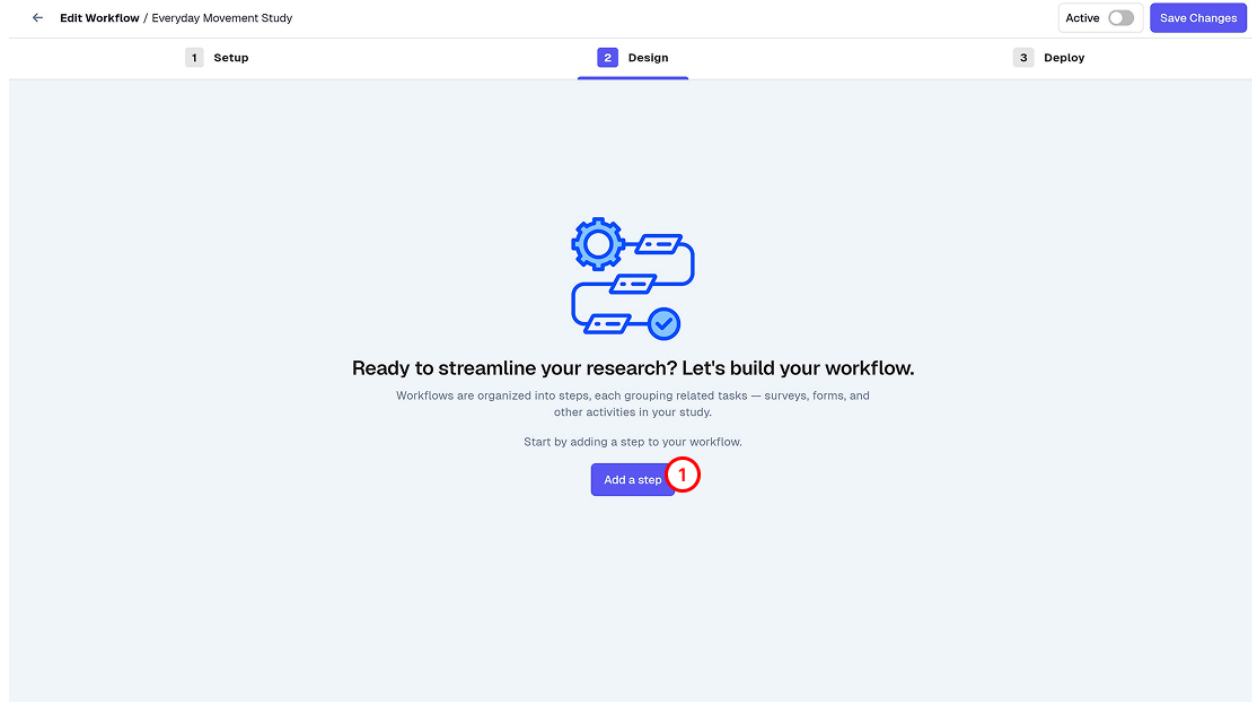
Participant Groups

Groups are how you can organize participants within this workflow.

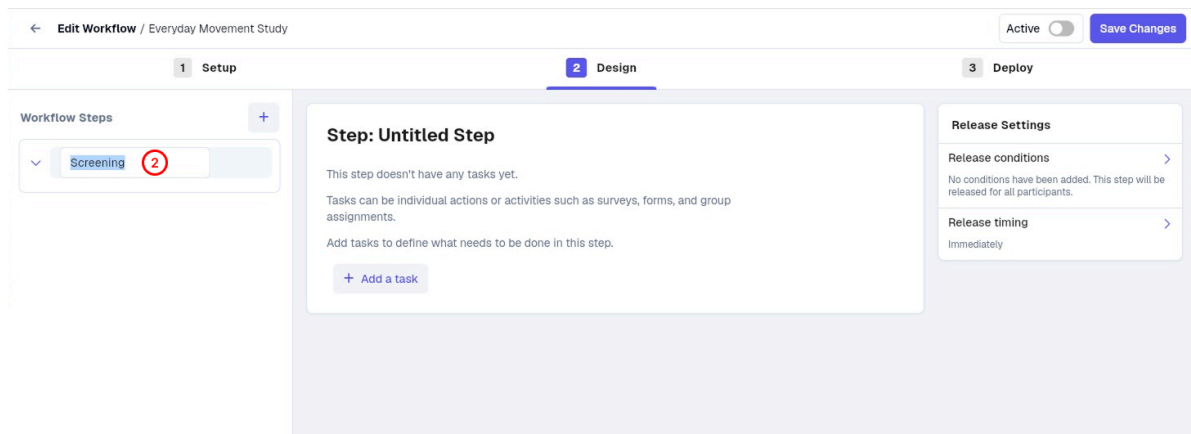
Create a step - Screening

This step will contain two tasks— the eligibility questionnaire and the consent form.

1. Select **Add a step**.



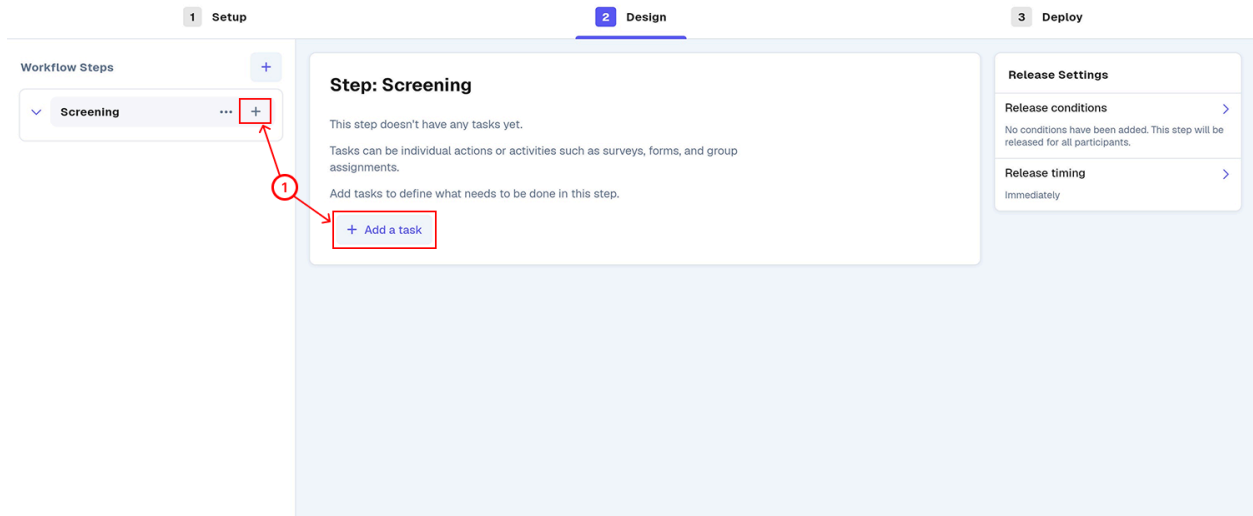
2. Provide a name for the step and press 'Enter' on your keyboard.



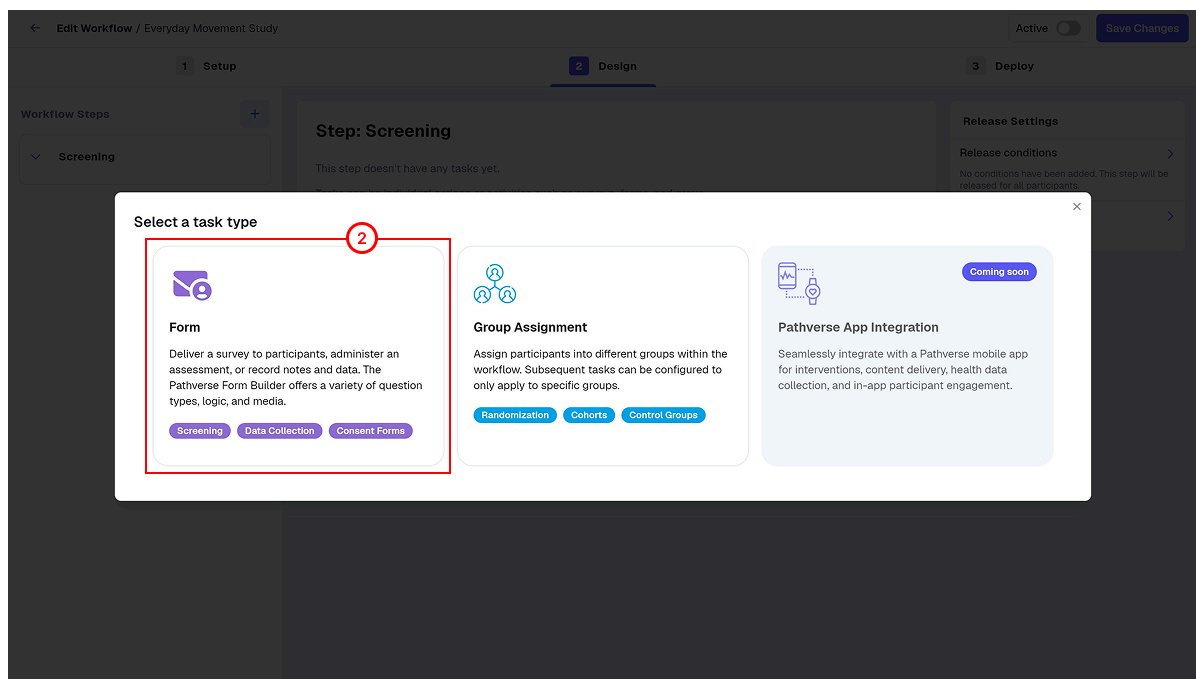
Create a task inside a step - Eligibility questionnaire

We will demonstrate the entire creation process for this first task.

1. Select **Add a task** from within the step while it is selected. You can also use the **+** button that appears when you hover your cursor over the step's tile.



2. In the **Select a task type** popup, select **Form**.



3. Provide a name for the task and press 'Enter' on your keyboard.

← Edit Workflow / Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps

- Screening
- Eligibility Questionnaire **3**

Screening / Eligibility Questionnaire

Edit Participant Form Task

Form Setup Protocol

Form respondent **4** Participant

Who will be completing this form.

Form No form selected

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

Configure submission allowance and task outcome independently.

One-time submission
Researcher-determined outcome
No exclusion message will be shown to par...
One submission is allowed, and a researcher independently determines the task outcome.

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

4. Within the **Form Setup** tab, click to expand the **Form respondent** section.
5. Make sure **Participant** is selected by default. We want the participants to receive an access link to take the eligibility questionnaire on their own device.

← Edit Workflow / Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps

- Screening
- Eligibility Questionnaire

Screening / Eligibility Questionnaire

Edit Participant Form Task

Form Setup Protocol

Form respondent

Who will be completing this form.

☒ **Participant** **5**

Participant completes the form using their own access link. Best for remote or independent completion when the participant should open, complete, and submit the form themselves.

☐ **Researcher**

Researcher completes the form from the management view. Best for internal notes, tracking, or guided sessions when the researcher should enter responses directly in the system.

Form **6** No form selected

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

Configure submission allowance and task outcome independently.

One-time submission
Researcher-determined outcome
No exclusion message will be shown to par...
One submission is allowed, and a researcher independently determines the task outcome.

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

6. Expand the **Form** section.

7. If you have already created the form, select it from the dropdown to link it to the task. If you don't have the form yet, you can select **Create Form** to open the **Form Builder** directly.



When you access the Form Builder from within the Workflow Editor, we recommend first **saving the workflow**. This way if the browser is closed or your session times out while in the Form Builder, your workflow changes won't also be lost.

8. You can enter a **display name** if the selected form's name is not participant-friendly. Participants will see the display name instead of the form's real name. When left blank, participants will see the real name.

Now that we have created the first step and task, we will add the remaining steps and tasks for our protocol using that same basic setup. Once the underlying workflow structure is in place, we will return to each task to configure assessments, release conditions, and the other settings that connect the workflow.

Complete the workflow structure

Using the same process demonstrated above we will create the remaining steps and tasks for the protocol. At this point we will still only configure the basic details for each task: name, who the respondent is, and the linked form.

Finish the Screening step

Add another **Form** task named **Consent Form**, with **Participant** as the respondent.

Create the Baseline step

Create a step named **Baseline**, then add:

1. A **Form** task named **Schedule phone interview**, with **Participant** as the respondent
2. A **Form** task named **Baseline questionnaire**, with **Participant** as the respondent
3. A **Form** task named **Call checklist and notes**, with **Researcher** as the respondent



Scheduling workaround

StudyFlow does not yet support built-in scheduling between participants and researchers, although this functionality is planned. Until it is available, we recommend using a participant-completed **Form** task that includes:

- Instructions for booking the interview
- A link to a third-party scheduling service
- A required field confirming that an appointment was booked
- Instructions to submit the form after booking

The submitted form will provide a trackable record in StudyFlow that the participant has booked an appointment.

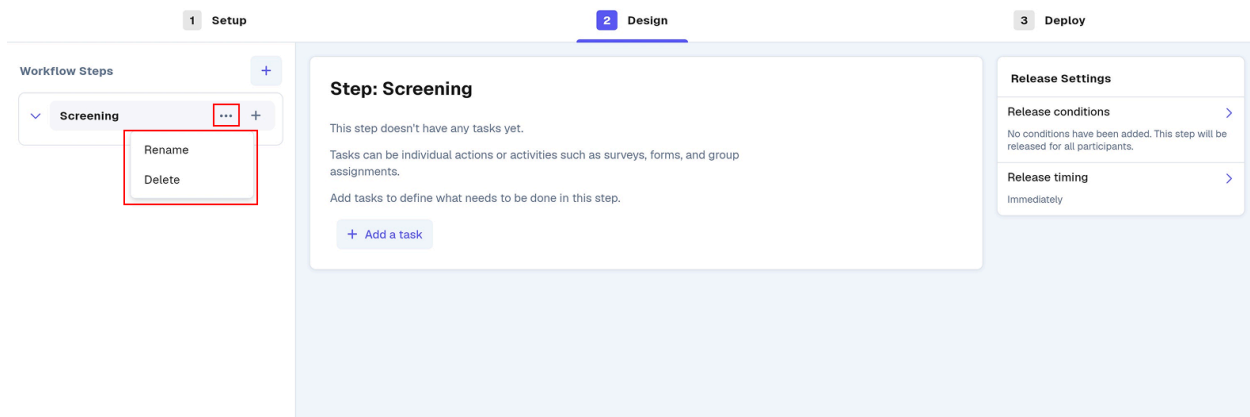
Create the Follow-up step

Create a step named **Follow-up**, then add:

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

Rename or delete steps and tasks

The options to **rename** or **delete** steps and tasks can be found by selecting the '...' button that appears when hovering your cursor over their tiles.



Deleting a step will also delete any tasks inside, so be careful! If there are tasks you don't want to lose, you can drag and drop their tiles inside another step to preserve them.

Check the structure and save

1. Confirm that the steps and tasks are in the correct positions. You can drag a step or task tile to reorder. You can also drag a task from one step to another.

← Edit Workflow / Everyday Movement Study Active ☐ 2 Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps

- Screening
 - Eligibility Questionnaire**
 - Consent Form
- Baseline
 - Schedule phone interview
 - Baseline questionnaire
 - Call checklist & notes
- Follow-up
 - 30-day follow-up questionnaire
 - Send and record gift card

Screening / Eligibility Questionnaire

Edit Participant Form Task

Form Setup Protocol

Form respondent
Who will be completing this form. Participant >

Form
Eligibility Questionnaire - good copy >

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

Submission allowance and task outcome behavior
Configure submission allowance and task outcome independently. One-time submission Researcher-determined outcome No exclusion message will be shown to par... >

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

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. Select **Save Changes** at the top right of the screen.



A task needs to have been saved at least once after its creation to appear as an option when configuring release conditions.

In the next sections, we will configure the assessments, outcomes, release of tasks, and other settings that connect these tasks.

Configure assessments, submission allowances, and task outcome behaviours

Each form task requires decisions about assessment, submission allowance, and task outcome behaviour. We will walk through these settings in full using the **Eligibility questionnaire** task, which demonstrates how a submission can produce an assessment result and determine whether a participant continues in the study. We will then apply the same process to the remaining tasks.

Configure an assessment

When a form task uses a form containing at least one field with correctness or point-based scoring evaluation, you can configure an assessment for the task. When the form is submitted, the response is evaluated using the assessment rules you define and assigned a **Pass** or **Fail** result within the task. This result can be used to automate eligibility decisions or support the task's manual review process.

1. Select **Eligibility questionnaire**.

← Edit Workflow / Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps +

- Screening
 - Eligibility Questionnaire 1
 - Consent Form
- Baseline
 - Schedule phone interview
 - Baseline questionnaire
 - Call checklist & notes
- Follow-up
 - 30-day follow-up questionnaire
 - Send and record gift card

Screening / Eligibility Questionnaire

Edit Participant Form Task

Form Setup Protocol

Form respondent
Who will be completing this form. Participant

Form
Eligibility Questionnaire - good copy

Assessment
Choose whether this form should produce a pass/fail assessment result in addition to collecting responses. No assessment 2

Submission allowance and task outcome behavior
Configure submission allowance and task outcome independently. One-time submission
Researcher-determined outcome
No exclusion message will be shown to par...
One submission is allowed, and a researcher independently determines the task outcome.

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

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. In **Form Setup**, expand the **Assessment** section.

3. Select **Include assessment**.

← Edit Workflow / 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
- Follow-up
 - 30-day follow-up questionnaire
 - Send and record gift card

Screening / Eligibility Questionnaire

Edit Participant Form Task

Form Setup **Protocol**

Form respondent Participant >
Who will be completing this form.

Form Eligibility Questionnaire - good copy >

Assessment >
Choose whether this form should produce a pass/fail assessment result in addition to collecting responses.

☐ **No assessment**
Collect responses for review, records, or analysis. No pass/fail result is produced.

☒ **Include assessment** 3
Evaluate responses with assessment rules to produce a pass/fail result.

Assessment rules
How responses should be evaluated to provide a pass/fail result for this task.

Only fields with correctness or scoring enabled can be used in assessment rules.

Generate assessment rules 4

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

4. Select **Generate assessment rules**. There will be a rule generated for each correctness or point-based scoring method configured in the form. These rules will determine how submitted responses produce the task's assessment result.
5. Review the generated rules and choose the effect on assessment for each evaluation method:
 - For **correctness** evaluation of a field, the options are **Critical requirement** or **No effect on assessment**. When a field is a critical requirement, it must be answered correctly for the participant to pass, regardless of their overall score.
 - For **point-based scoring** evaluation of a field, the options are **Contributes to assessment score** or **No effect on assessment**. When a field contributes to the score, the points earned for the response are included in the participant's total.



Fields with both correctness and scoring evaluation

When a field has both correctness and point-based scoring enabled, two individual assessment rules will be available for that field. For example, you can set correctness to **No effect on assessment** while

allowing the field's points to **Contribute to the assessment score**. This means the field is not a critical requirement, but the participant's response still affects their overall score. A field can also be configured as both a critical requirement and a contributor to the assessment score.

For this example, we are configuring each eligibility criterion as a **Critical requirement**. The participant passes only when every required criterion is met.

The screenshot shows the 'Edit Workflow' interface for 'Everyday Movement Study'. The interface is divided into three main sections: 'Setup', 'Design', and 'Deploy'. The 'Design' section is currently active, showing 'Assessment rules' and 'Assessment Rules by Form Field'.

Assessment rules

How responses should be evaluated to provide a pass/fail result for this task.

Only fields with correctness or scoring enabled can be used in assessment rules.

Regenerate assessment rules

Assessment Rules by Form Field

Field	Evaluation Meth...	Effect on assessment
Are you 18 or older?	Correctness	Critical requirement - Fail if response is incorrect
Which province or territory do you liv...	Correctness	Critical requirement - Fail if response is incorrect

Assessment Score Requirement

The assessment score is calculated by summing the points from all fields that have the "Points contribute to Assessment Score Requirement" effect. The assessment result is fail if the total awarded score does not meet the minimum score requirement set below.

Maximum possible score based on current rules: 0 points

Minimum required score (decimal values allowed): 0.00 points

- If any fields are contributing to the assessment score, the **Maximum possible score based on current rules** will show the total number of points available from those fields. Since this form doesn't use scoring, the value is 0.
- If any fields are contributing to the assessment score and you want the score awarded to be a factor in the pass/fail result, you can enter a **Minimum required score**. To receive a **Pass** result, the participant will need to earn at least this score and also satisfy every critical requirement. Since this form doesn't use scoring, we are leaving this value at 0 as well.



To calculate and display an assessment score without using it to determine the pass/fail result, simply leave the minimum required score at **0**. Contributing fields will still produce a score, but that score will not cause the participant to fail. Any critical requirements will continue to apply.



Important — when the connected form is changed: If a form task already has an assessment ruleset generated and you connect a different form to the task, the assessment ruleset will be out of sync. Once you are satisfied with the connected form, you will need to click the **Regenerate assessment rules** button. After doing so, review all regenerated rules and retest each assessment path before continuing with recruitment.

Configure the submission allowance and task outcome behaviour

Next we will configure two independent settings: how often the form can be submitted and how the task outcome is recorded. Both settings are available whether or not the task includes an assessment.

Submission allowance determines whether the participant can submit the form once or update and resubmit their response.

Option	Use it when	What happens
One-time submission	The response should be collected once and remain unchanged after submission.	After submitting, the response cannot be updated and resubmitted again.
Allow resubmission	The response may need to be corrected or updated after submission.	The response is able to be updated and resubmitted after the initial submission.

A **task outcome** records how the task was resolved: either **Complete task** or **Exclude participant**.

Option	Use it when	What happens
Determine outcome automatically	The task should be resolved immediately after submission without researcher review.	If an assessment is configured, Pass completes the task and Fail excludes the participant. Without an assessment, submission completes the task. An outcome is recorded only if one does not already exist.
Require review to determine outcome	A researcher must verify the response, resolve uncertainty, or make the final decision.	The task is marked for review. A researcher reviews the response and any available assessment result, then manually selects Complete task or Exclude participant .



Once recorded, a task outcome remains unchanged by later resubmissions—even if a resubmission has produced a different assessment result. A researcher will need to manually change a task outcome if it is no longer correct.

1. For the **Submission allowance** we are selecting **One-time submission**. Each participant should provide one questionnaire response that cannot be changed after submission.

← Edit Workflow / 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
- Follow-up
 - 30-day follow-up questionnaire
 - Send and record gift card

Assessment

Choose whether this form should produce a pass/fail assessment result in addition to collecting responses. Include assessment  >

Submission allowance and task outcome behavior  v

Configure submission allowance and task outcome independently.

Submission allowance

Choose whether the form can be submitted once or continually updated and resubmitted. This setting is not affected by the task outcome.

☒ **One-time submission** 1
 The form can be submitted once.

☐ **Allow resubmission**
 The response can still be updated and resubmitted after an initial submission.

Task outcome behavior

Choose whether the task outcome is determined automatically upon submission or by a researcher after review. The outcome affects progress and conditional release, but does not change submission allowance.

☒ **Determine outcome automatically** 2
 If a task outcome has not already been recorded, the first submission's pass/fail result determines whether the task is completed or the participant is excluded. Submission availability follows the separate submission allowance.

☐ **Require review to determine outcome**
 A researcher reviews the submission, can adjust the pass/fail result, and then chooses whether to complete the task or exclude the participant. This does not change submission availability.

Default exclusion reason

Choose the default reason you want for exclusions from this task. If the task outcome is determined automatically, this reason will be used to exclude the participant. If the task outcome is determined through review, this will be the default reason selected, but the reviewer can select a different reason at the time of review.

- For the **Task outcome behaviour** we are selecting **Determine outcome automatically**. The configured assessment rules produce an unambiguous **Pass** or **Fail** result, so researcher review is not required before recording the outcome. A **Pass** completes the task, while a **Fail** excludes the participant.
- Choose a **Default exclusion reason** for the task. Because the task outcome is being determined automatically from the assessment result, this will be the reason assigned to every participant automatically excluded upon submission of the questionnaire.

← Edit Workflow / 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
- Follow-up
 - 30-day follow-up questionnaire
 - Send and record gift card

Default exclusion reason
Choose the default reason you want for exclusions from this task. If the task outcome is determined automatically, this reason will be used to exclude the participant. If the task outcome is determined through review, this will be the default reason selected, but the reviewer can select a different reason at the time of review.

Not meeting inclusion criteria 3 [Manage custom reasons](#)

Exclusion message

4 ☒ Show participants a message when they are excluded at this task

How participants see this message depends on how they are excluded:

- Automatic exclusion: The message opens in a bottom sheet immediately after the participant submits the task.
- Manual exclusion: The participant receives a general email with a direct link that opens the message in the same participant-hub sheet.

Exclusion does not always end a participant's workflow. They may still receive tasks that remain available after exclusion or that are specifically configured for excluded participants.

5 **Message title**

An update about your participation 34 / 120

Exclusion message
Explain what the exclusion means and provide any appropriate next steps or contact information. Participants may still receive other tasks after exclusion.

Thank you for your interest. Based on the information provided, you are not eligible to participate in this study.

- Choose whether to **automatically notify participants** when they are excluded. We have enabled this.
- If exclusion notification is enabled, optionally enter a custom **title** and **message body** for the message that will be displayed to the participant.

Configure the remaining tasks

This table below shows how we will configure the assessment, submission allowance, and outcome behaviour for each remaining task. Release settings will be configured separately after.

Task	Assessment	Submission allowance	Task outcome behaviour	Exclusion settings
Consent Form	Include assessment: ruleset containing an "I consent to participate" field set as a critical requirement	One-time submission	Require review to determine outcome	Default reason: Declined to participate

Task	Assessment	Submission allowance	Task outcome behaviour	Exclusion settings
Schedule phone interview	Do not include assessment	Allow resubmission	Require review to determine outcome	N/A
Baseline questionnaire	Do not include assessment	One-time submission	Determine outcome automatically	N/A
Call checklist & notes	Do not include assessment	Allow resubmission	Determine outcome automatically	N/A
30-day follow-up questionnaire	Do not include assessment	One-time submission	Determine outcome automatically	N/A
Send and record gift card	Do not include assessment	Allow resubmission	Require review to determine outcome	N/A

Configure release settings

Release settings determine **whether** and **when** a step or task becomes available. Release conditions define what must happen first, while release timing controls whether availability begins immediately or after a delay.



Settings applied to a step are inherited by every task within it. Tasks can have additional release conditions, but they cannot become available before their step.

Steps and tasks without any release conditions or timing configured will become available as soon as the participant joins. This is what we want for the eligibility questionnaire, so we will leave it alone.

Configure the Consent Form task release

We want the consent form to only be released to participants who pass the eligibility assessment.

1. Select the **Consent Form** task and expand the **Release conditions** section in the Release Settings panel.

The screenshot shows the 'Edit Participant Form Task' interface in the 'Design' tab. The interface is divided into three main sections: Workflow Steps, Task Configuration, and Release Settings.

Workflow Steps: A list of steps including Screening, Eligibility Questionnaire, Consent Form (selected), Baseline, and Follow-up.

Task Configuration: A form titled 'Edit Participant Form Task' with tabs for 'Form Setup' and 'Protocol'. The 'Form Setup' tab is active, showing fields for 'Form respondent' (Participant), 'Form' (Consent Form), 'Assessment' (No assessment), 'Submission allowance and task outcome behavior' (One-time submission, Researcher-determined outcome, No exclusion message will be shown to par..., One submission is allowed, and a researcher independently determines the task outcome.), and 'Task exclusion reasons' (No custom reasons).

Release Settings: A panel on the right with sections for 'Release conditions', 'Release timing', and 'Release behaviour after participant exclusion'. The 'Release conditions' section is expanded, showing a dropdown menu with 'All conditions are met' and a button to 'Add a condition' (highlighted with a red circle 2). The 'Release timing' section is set to 'Immediately'. The 'Release behaviour after participant exclusion' section is set to 'Held from release after exclusion'.

2. Under **Release conditions**, select **Add a condition**.

Screening / Consent Form

Edit Participant Form Task

Create a New Release Condition

Condition type

Form task assessment result 3

Task

Eligibility Questionnaire 4

Result

Pass 5

Condition satisfied when Eligibility Questionnaire is complete and its assessment result is Pass. Eligibility Questionnaire completes automatically when submitted, so this condition may be met immediately after submission.

Cancel Create 6

3. Select **Form task assessment result** as the condition type.
4. Select **Eligibility Questionnaire** as the task.
5. Select **Pass** as the result.
6. Select **Create**.

You will now see the new condition visible within the Release conditions section. With this configuration, the consent form is released immediately after a passing result on the eligibility questionnaire. A failing result excludes the participant, and the consent form remains unreleased.

← Edit Workflow / Everyday Movement Study

Active ☐ Save Changes

1 Setup 2 Design 3 Deploy

Workflow Steps

- Screening
 - Eligibility Questionnaire
 - Consent Form
- Baseline
- Follow-up

Screening / Consent Form

Edit Participant Form Task

Form Setup Protocol

Form respondent
Who will be completing this form. Participant >

Form
Consent Form >

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

Submission allowance and task outcome behavior
Configure submission allowance and task outcome independently. One-time submission
Researcher-determined outcome
No exclusion message will be shown to par... >
One submission is allowed, and a researcher independently determines the task outcome.

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

Release Settings

Release conditions

This task is released if
All conditions are met

+ Add a condition

Form task assessment result: Eligibility Questionnaire is Pass

Release timing

Immediately when conditions are met

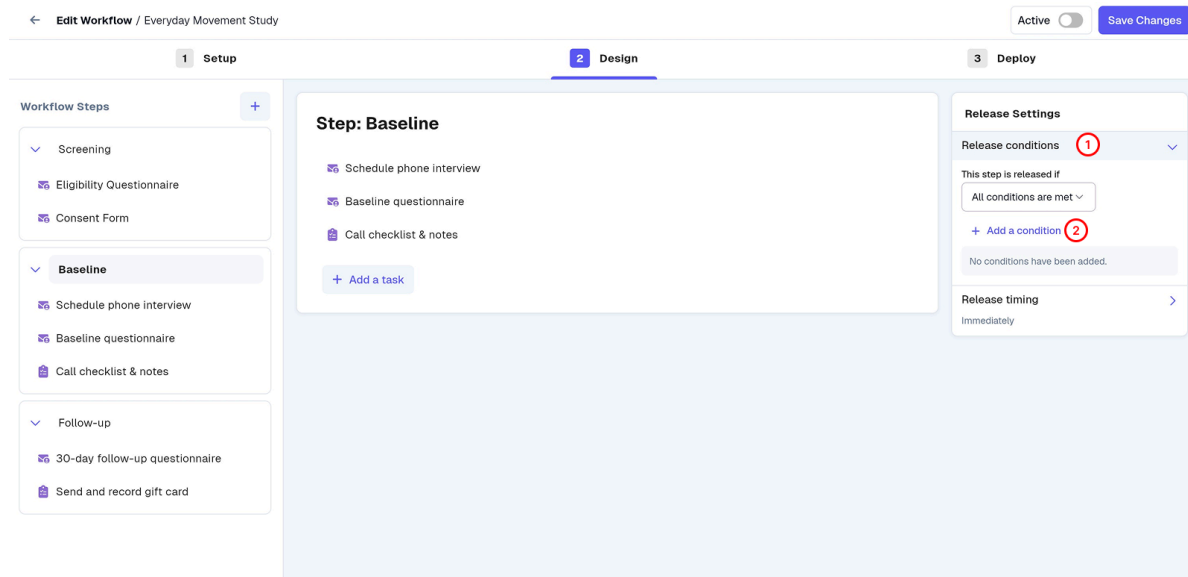
Release behaviour after participant exclusion

Held from release after exclusion

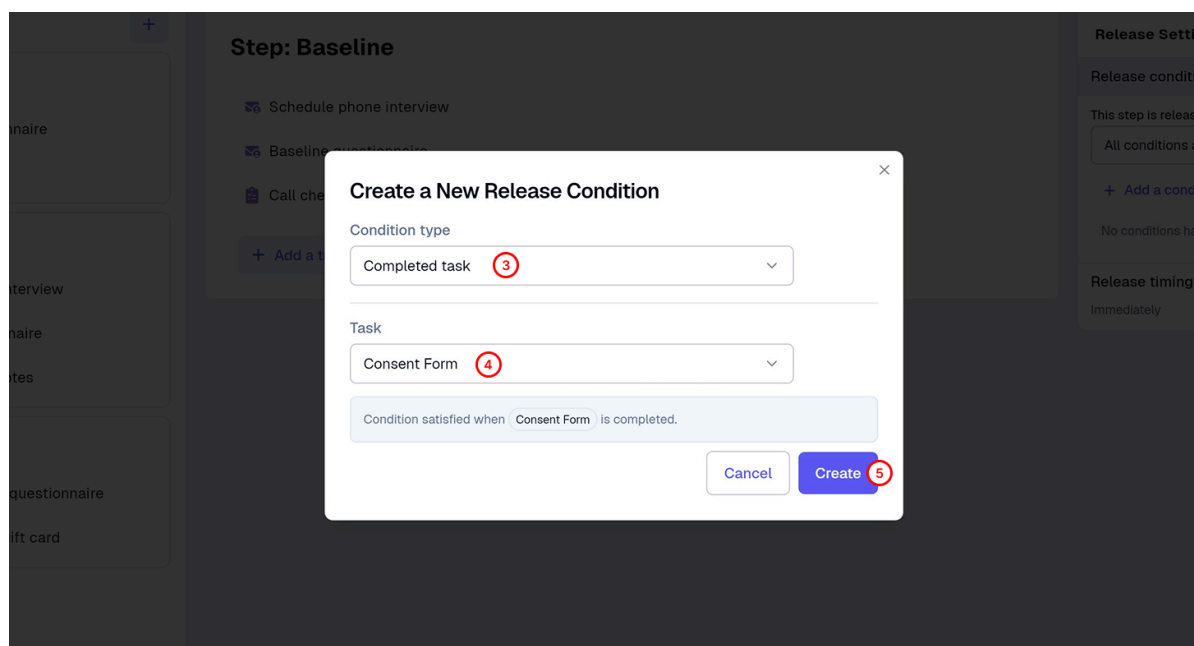
Configure the Baseline step release

All the tasks within the baseline step are only relevant if a participant has signed the consent form, so we are going to put a release condition at the step level.

1. Select the **Baseline** step and expand the **Release conditions** section in the Release Settings panel.



2. Select **Add a condition**
3. Select **Completed task** as the condition type.



4. Select **Consent Form** as the task.
5. Select **Create**.



We are using the **Completed task** condition rather than **Assessment result is Pass** condition in this case because the consent task assessment does not actually determine the task outcome. A passing result confirms that the participant selected **I consent**, but the task is configured to still require manual review after submission. The researcher verifies that the form is signed and dated before choosing whether to complete the task. Releasing the Baseline step only when the consent task is completed ensures that it follows the researcher's final decision.

All three tasks in the Baseline step will now inherit this release condition like so:

Configure the Baseline questionnaire task release

We want the baseline questionnaire to be released when the phone interview begins, rather than as soon as it is scheduled. To control this timing, the **Schedule phone interview** task has been configured to require researcher review. The researcher can simply leave the task awaiting review until the call begins, then select **Complete task** to release the questionnaire.

We just need to add the following release condition:

1. Select the **Baseline questionnaire** step and expand the **Release conditions** section.
2. Select **Add a condition**.
3. Select **Completed task** as the condition type.
4. Select **Schedule phone interview** as the task.
5. Select **Create**.

With this condition, selecting **Complete task** for **Schedule phone interview** will immediately release the baseline questionnaire.

Configure the Baseline phone interview checklist and notes task release

This task doesn't need to be accessed until the phone interview has begun, so we can add the same release condition as the Baseline questionnaire above. It will be released for the researcher at the same time the baseline questionnaire is sent to the participant; both triggered by marking the scheduling task complete.

Configure the Follow-up step release

We want the Follow-up step to be released 30 days after the baseline interview. We will use completion of the **Baseline questionnaire** as the condition, and configure release timing dependent on that condition being met.

We will need to configure a release condition and release timing for this behaviour:

1. Select the **Follow-up** step and expand the **Release conditions** section.
2. Under **Release conditions**, add a **Completed task** condition. Select **Baseline questionnaire** as the task.
3. Expand **Release timing**.
4. Select **A duration after release conditions are met**.
5. Set **Delay duration** to **30** days.

The 30-day countdown will begin when the baseline questionnaire is completed. Both tasks in the Follow-up step inherit this condition and delay.

Configure the Send and record gift card task release

We want the **Send and record gift card** task to only be released for the researcher once the participant has completed the **30-day follow-up questionnaire**.

1. Select **Send and record gift card** and expand the **Release conditions** section.
2. Add a **Completed task** condition for **Complete 30-day follow-up questionnaire**.
3. Leave the task-level release timing set to **Use inherited release timing**.

The gift card task is released to the researcher only after the participant submits the follow-up questionnaire. The researcher completes the task after sending the gift card and recording its value and sent date.

Review post-exclusion release behaviour

For each task after the Eligibility questionnaire:

1. Select the task and
2. Expand the **Release behaviour after participant exclusion** section in the **Release Settings**..
3. Make sure **Hold back release** is selected, unless your protocol requires the task to release to excluded participants as well. This is the default option.



With **Hold back release** selected, a task will not become available to a participant after they have been excluded—even if its other conditions or release timing would otherwise allow it.

This setting only prevents future release; it does not withdraw a task that was already released before the exclusion.



Tasks for excluded participants: If a task should remain available for release after exclusion—for example, a debrief or follow-up task—select

Release according to the configured criteria instead. You can also release a task *only* to excluded participants by adding an exclusion-based release condition.

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 the 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.

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.