Test a workflow before enrolling real participants

Learn how to test workflow structure, task behaviour, participant access, release settings, and researcher operations from end to end.

What’s in this guide

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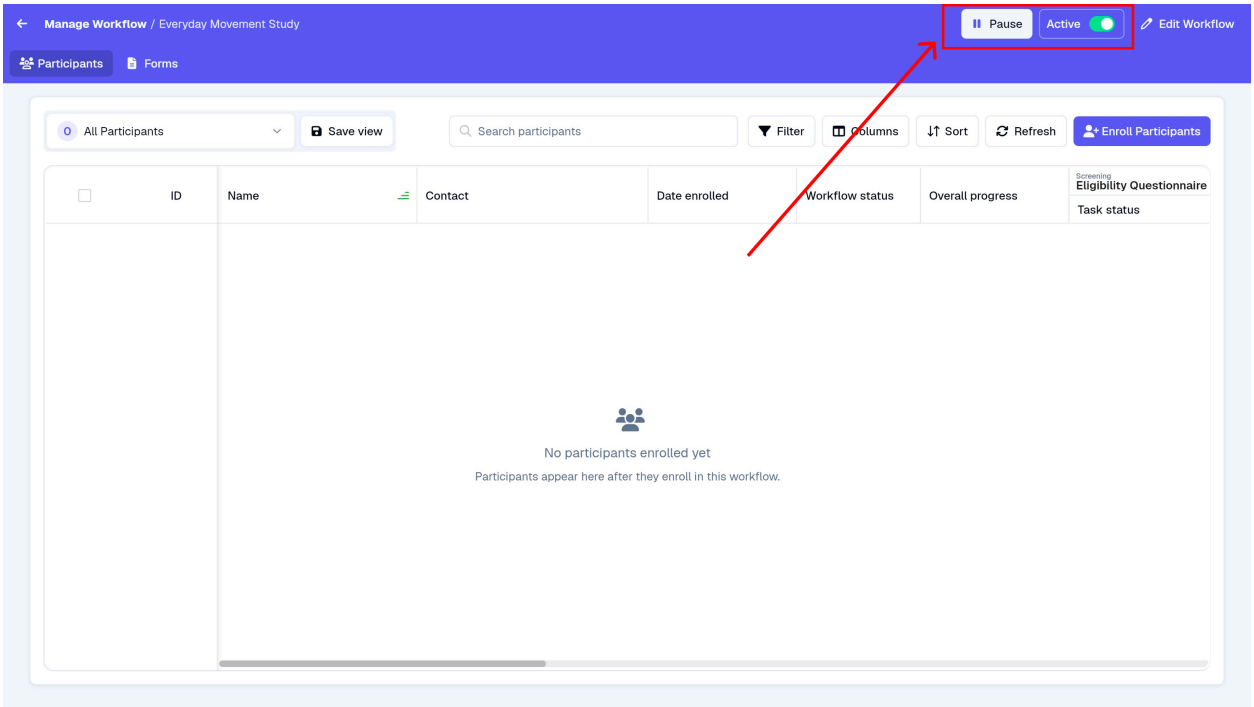
1. Review the workflow configuration

Before participant testing, inspect:

- workflow name, description, and groups
- step and task order
- form respondent and selected form versions
- assessments, submission allowances, and outcome behaviours
- release conditions and timing;
- exclusion messages and reasons;
- join-page content and access settings

2. Make sure the workflow is Active, and isn’t paused



3. Prepare controlled test participants

Create test participants using email addresses you can access. This allows you to receive participant access links and notifications while testing the full participant experience. Clearly label test records so they cannot be confused with real participants, and decide how they will be handled after testing.

Use the enrollment method that matches the path you want to test:

- Use the workflow **Share Link** to test participant self-enrollment.
- Select **Enroll Participants**, then **Manual Enrollment**, to test staff-managed enrollment.

Create multiple test participants with one email address
If your email provider supports plus addressing, add `+` followed by a unique label before the `@`. Each alias will be treated as a different email address in StudyFlow, while messages are delivered to the same inbox. For example:

- `johndoe+eligible@gmail.com`

- `johndoe+ineligible@gmail.com`
- `johndoe+review@gmail.com`

This can help make your testing organized and more efficient. Confirm that your email provider supports plus addressing before using this method.

4. Test participant access

1. **Email access:** Confirm that the participant receives the email and its link opens the Participant Hub.
2. **Immediate access:** If participants are to be taken directly to the Participant Hub after joining, confirm that the immediate navigation is working and that only the appropriate tasks are available upon arrival.
3. **Access code:** If the Join Page requires an access code, test that it is permitting access when the correct code is entered, and preventing access when an incorrect code is entered.
4. **Mobile experience:** Complete the join and screening process on a phone-sized screen. Check the form layout, submission experience, notifications, and access to the next task.

5. Test the participant experience

For every test participant:

1. Join the workflow through either self-enrollment or manual enrollment by a researcher.
2. Open the Participant Hub using the delivered link.
3. Confirm that only the intended tasks are visible.
4. Complete forms across all pages and logic branches.
5. Verify submission and next-task behaviour.
6. Test the Participant Hub and all form content on both desktop and mobile layouts.

7. Record screenshots or timestamps as evidence.

6. Test researcher actions

Verify that the study team can:

- find the participant in the **Participants table**
- open task details and submissions
- manually complete or exclude at a task that requires review
- select and change exclusion reasons
- reopen a task for review when appropriate
- identify participants who need attention

7. Test exceptions and boundaries

Include (where applicable to your protocol):

- Pass, Fail, Needs review
- exactly-at-threshold scores
- All versus Any release conditions
- immediate, delayed, enrollment-relative, and date-based timing
- exclusion before a downstream task releases
- invalid access code and duplicate join attempt
- missing required form responses
- form resubmission settings
- paused workflow behaviour