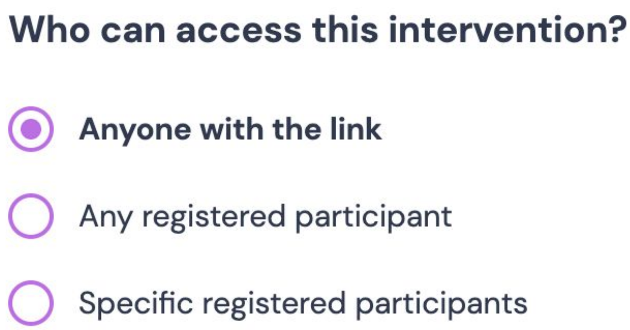
Participant Access & Invitations

Participant Access Settings

CIAS allows you to set participant access permissions for each intervention. There are **three options** for access settings (described below) which define whether a participant must have a CIAS account, both have an account and be specified by the intervention team, or can remain anonymous.

These settings must be selected **before an intervention is published,** and are intervention-wide, meaning each session of an intervention will have the same setting. They can be found on the overview page for each intervention, to the right of the session tiles.



Anyone with the link

Participants do not need to have a CIAS account to access intervention sessions.
This setting allows participants to remain anonymous*

Any registered participant

Participants are required to log in or create a CIAS account before accessing the intervention sessions.

Specific registered participants

Participants are required to log in or create a CIAS account before accessing the intervention sessions **AND** must be granted access (by having their email address entered into a list) by the intervention team.

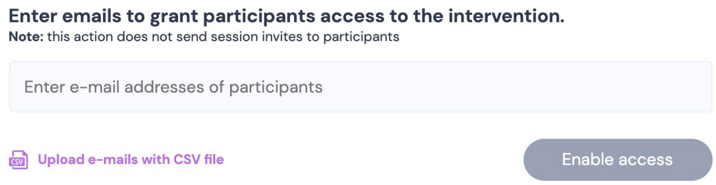
> ***When Anyone with the link** is selected, the CIAS system has no way of linking a person with their data. Therefore, participant data is still collected but cannot be connected **across** sessions. This means that certain features like tailored session scheduling and branching between sessions are not available when this option is selected.

Allowing a participant to access an intervention is actually a two step process. To interact with an intervention, a participant must both a) meet the access criteria (outlined on the previous page) and b) have a way to access the intervention. Just because a participant is **allowed to** access an intervention, does not mean they are **able to,** they will need an invitation or link to do so.

Step 1: Setting Access Permissions

Participant access settings must be selected *prior* to publishing an intervention.
To set permissions, simply click the access setting that best meets your needs:

1) **Anyone with the link**
2) **Any registered participant**
3) **Specific registered participants**
   If this option is selected, an additional text box will appear under the Access options



Here, you can enter the email addresses of your intended participants by uploading a CSV file, or manually typing in the emails (make sure to add a comma or hit the enter key between each one!)
*You can enable access to specific participants at any time, before or after an intervention has been published.

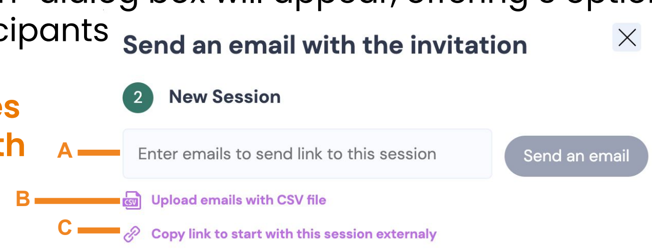
When you are ready, publish the intervention and move on to Step 2

Step 2: Sending Invitations

After access permissions have been set and an intervention is published, you are able to invite participants to complete a session.

1. **Click "Invite Participants" (this can be found on a session tile, to the right of the name)**

This will prompt the "send invitation" dialog box will appear, offering 3 options for sharing the intervention with participants



A) Manually enter email addresses
B) Upload a CSV file populated with email addresses
C) Copy a link to share the intervention externally

Step 2: Sending Invitations (Continued)

2. **Use one or more of the sending options to share the intervention session(s) with participants:**

   A) Manually entering email addresses
   This will prompt CIAS to generate and send individual emails to each participant entered. The emails will include a link to the session.

   B) Uploading a CSV file populated with email addresses
   This will prompt CIAS to generate and send individual emails to each participant entered. The emails will include a link to the session.

   C) Copying a link to share the intervention externally
   This will provide a link that you can share with participants in whatever way you see fit!

What will this look like for participants?

- If **Anyone with the link** is selected, participants click a link and are launched directly into a session
- If **Any registered participant** or **Specific registered participants** are selected:
  - If the user has an account, they will be prompted to log in [and launched into the session]
  - If the user does not have an account, they will be prompted to register an account [and launched into the session]

Tips and Tricks

- You can still build in questions to identify participants (ID number, name, etc) when using the **Anyone with the link** access setting if you want to be able to connect data to a specific participant.
- Requiring participants to be registered can be helpful for long-term interventions that branch between sessions or tailor session schedules for participants, while allowing participants to remain anonymous may be more useful for very sensitive topics or short-term studies