



# Participant Access & Invitations

## Predefined Participants

CIAS allows researchers to generate a participant-specific intervention link that provides direct access to sessions or the participant dashboard—no CIAS account required. Each link is unique to the participant and will automatically open the next available session, or take participants to their dashboard. All activity completed through the link is saved to a single row in the intervention's data export.

When creating a link, researchers may optionally associate participant identifiers such as a cell phone number, name, study ID, or email address. While these fields are not required individually, an email or phone number must be provided to create the participant.

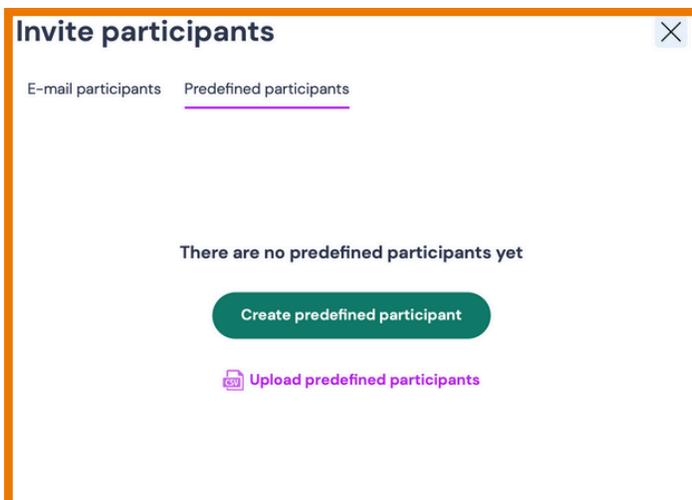
### Step 1: Create a predefined participant

Invite Participants 

Generate CSV

Close Intervention

- 1) **Select “invite Participants” near the top of the session page of your published intervention.**
- 2) **Select the Predefined participants tab in the pop-up window**
- 3) **Select “Create predefined participant” and provide the desired participant Information**
- 4) **Click “Create predefined participant”**



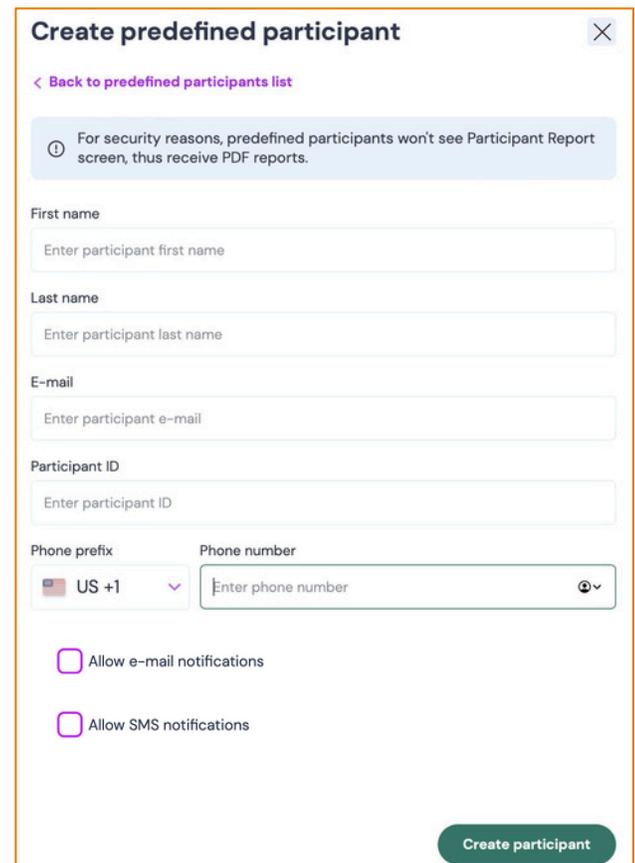
**Invite participants** ✕

E-mail participants Predefined participants

There are no predefined participants yet

[Create predefined participant](#)

[Upload predefined participants](#)



**Create predefined participant** ✕

[< Back to predefined participants list](#)

**ⓘ** For security reasons, predefined participants won't see Participant Report screen, thus receive PDF reports.

First name

Last name

E-mail

Participant ID

Phone prefix  Phone number

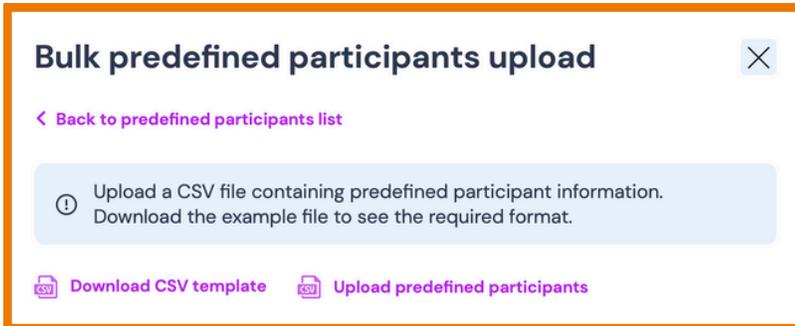
Allow e-mail notifications

Allow SMS notifications

[Create participant](#)

## Or, Upload Predefined Participants

Use the CSV template to upload participants all at once instead of inviting them one-by-one. Important: set **phoneCountryCode** to Text format and include the “+” country code (e.g., +1).

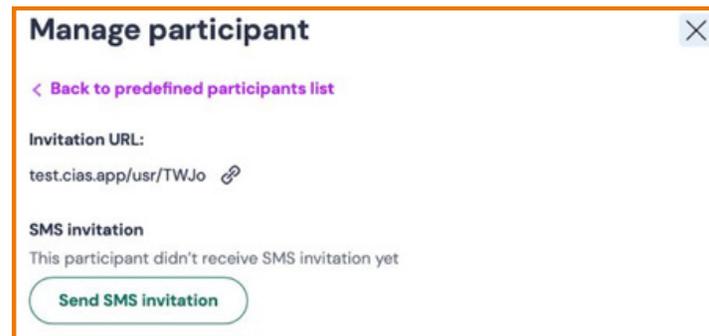


phoneCountryCode	phoneNumber
+1	5551234560
+1	5551234561
+1	5551234562

## Step 2: Invite a predefined participant

Use one or more of these sending options to share the intervention with participants:

- A) Copy and paste the unique link**  
Copy the unique invitation URL and share it with the participant
- B) Send the SMS invitation through CIAS**  
This will prompt CIAS to generate and send an SMS to the participant with the unique invitation URL.



### What will this look like for participants?

Send generic, hard-coded, reminders of available sessions containing participants' unique link, or customize them with SMS.

For more information about sending PDP links in a text campaign, sign up for office hours.

