**Enrollment Testing Checklist- MUST be completed prior to study launch**

Need help with the finer details of testing? For instructions and visual guides, see [https://atlas.waytohealth.upenn.edu/confluence/display/WTHST/1.+Enrollment+Testing](https://atlas.waytohealth.upenn.edu/confluence/display/WTHST/1.%2BEnrollment%2BTesting)

1. Confirmed that there are no spelling or grammatical errors in:
	1. [ ]  Informed Consent
	2. [ ]  Surveys
	3. [ ]  Content added to messaging
	4. [ ] Content added to dashboard on before and after step screens
2. Pre-requisites
	1. [ ]  Confirmed that pre-reqs are designated on enrollment steps
3. Informed Consent
	1. [ ]  Tested that consent is screening out for an answer of ‘no, I don’t want to participate’
	2. [ ]  Confirmed that there is *no* PHI is asked in the Informed Consent
	3. [ ]  N/A – my study is collecting informed consent off of the platform
4. Screening survey
	1. [ ]  Tested screening scenarios and confirmed that survey is screening out where necessary
	2. [ ]  Confirmed that there is *no* PHI is asked in the screening survey
	3. [ ]  N/A – my study is pre-screening participants prior to Way to Health enrollment
5. W9
	1. [ ]  Added W9 step, if paying participants via Wells Fargo checks
	2. [ ]  Checked that W9 collection is *after* informed consent and screening steps
	3. [ ]  N/A
6. Access Groups
	1. [ ]  Confirmed that Access Groups are designated in an enrollment survey’s logic
	2. [ ]  N/A
7. Device authorization (for studies using pedometer devices),
	1. [ ]  Confirmed that device authorization is linking participant’s device account to WTH
	2. [ ]  Confirmed that the platform has received data
	3. [ ]  N/A – My study is not using pedometer devices
8. Baseline Run-in period
	1. [ ]  Confirmed that data is coming over and attaching to run-in events
	2. Enrollment run-in target generator
		1. [ ]  Tested that baseline step counts are being calculated correctly per defined criteria in target set up
	3. [ ]  N/A
9. Goal selection survey
	1. If using with Enrollment run-in target generator,
		1. [ ]  Confirmed that correct value from baseline displays in survey
	2. [ ]  Confirmed that defined goal options are displaying
	3. [ ]  Tested that you can’t select below minimum allowed goal or above maximum allowed goal
	4. [ ]  N/A
10. Clinstream Discharge Finder
	1. [ ]  Tested that adding MRN to participant profile moves test participant to next enrollment step following discharge
	2. [ ]  N/A
11. Randomization
	1. [ ]  Confirmed that correct randomization scheme is configured
	2. [ ]  Tested that participants are distributed equally across arms according to block sizes and arm weights
	3. If using block with stratification scheme,
		1. [ ]  Confirmed that strata are configured in an enrollment survey’s logic
	4. If using a survey to assign participants to an arm,
		1. [ ]  Confirmed that arm assignment are configured on survey logic page
		2. [ ]  Tested that participants are assigned to the correct arm following survey completion
		3. For team enrollment,
			1. [ ]  Captains are being assigned a new cohort
			2. [ ]  Teammates can be assigned to the cohort
	5. [ ]  N/A- My study only has one arm
12. Study start
	1. [ ]  Confirmed that correct study start method is configured on Study Arms
13. Tested enrolling a participant via
	1. [ ]  The admin portal
	2. [ ]  The participant enrollment dashboard
		1. [x]  N/A –Participants will not be enrolled via the participant facing dashboard

**Testing was completed by:**

**Testing was completed on:** (mm/dd/yyyy)