**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>

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. N/A –Participants will not be enrolled via the participant facing dashboard

**Testing was completed by:**

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