**Intervention Arm 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/3.+Study+Arms+Testing> and the Way to Health Testing Template.

Not sure *how* to test something? Reach out to your project’s Implementation Lead, we are here to help!

1. Confirmed that there are no spelling or grammatical errors in:
   1. Messaging to participants, partners, or teammates
   2. Surveys
   3. Participant dashboard content and PDFs
2. Settings
   1. Confirmed the study’s Twilio number is listed
   2. Added study fund number
   3. Added study email address and phone number
   4. Confirmed that staff permissions by Access Group and roles are correct
   5. If you are running a UPHS clinical project, be sure ‘*Delete record of all text messages from Twilio servers?*’ in study settings is checked
3. Advanced Settings
   1. Customized Manage Participant filters
   2. Set up Adherence Snapshot
   3. Customized email subject line
4. Survey Setup
   1. Confirm that there are no surveys with questions requesting Personal Health Information (PHI) in any Qualtrics surveys. Please refer to [PMACS statement on use of Qualtrics](https://www.med.upenn.edu/pmacswebteam/qualtrics.html).
   2. Confirm that there are no duplicate export tags for survey responses across all surveys (viewable on Survey Preview or Qualtrics Data Dictionary Report)
5. Device Setup
   1. Review advanced configuration for all devices to ensure desired processing is accomplished (e.g. what data point attaches to the event?)
6. Message Events and Message Logic
   1. Confirmed that study name, email address, phone number have been updated
   2. Confirmed that any placeholder text has been removed
   3. Confirmed that the correct recipient (participant, partner, PM, RC, provider, etc.) is designated
   4. Confirmed that variables are substituting properly
   5. Reviewed start day and time and repeats
7. Collect Data Events
   1. Confirmed that device data is coming over and attaching to events
   2. Confirmed that targets or goals are evaluated properly
   3. Reviewed start day, start and end times, and repeats
   4. N/A - not collecting device data
8. Bi-directional Text Messaging Events (SMS or MMS)
   1. Confirmed that SMS/MMS data is coming over and attaching to bi-directional text events
   2. Tested each valid response and confirmed correct logic and feedback
   3. Set up incorrect response auto-reply and re-open event
   4. Reviewed start day, texting window, and repeats
   5. If using Blood Pressure SMS Receiver, ‘*Delete record of all text messages from Twilio servers?*’ in study settings is checked
      1. N/A- not using BP SMS Receiver device
   6. N/A - not administering bi-directional SMS questions
9. Survey Events
   1. Confirmed that survey completion feedback and/or payments generated
   2. Confirmed that staff-only surveys are configured as such
   3. Reviewed start day, survey window, and repeats
   4. N/A - not administering surveys
10. Survey Reminder Events
    1. Confirmed that logic is configured to send reminder only to those who have not completed the survey
    2. Reviewed start day and time and repeats
    3. N/A - not administering surveys
11. Lottery Events
    1. Tested all 4 lottery scenarios based on eligibility and winning number
    2. Confirmed lottery messaging and variables match eligibility and winning criteria
    3. Configured prizes for matching variables and expected values
    4. Reviewed lottery run time (typically day *after* dependent events end)
    5. Reviewed start day and time and repeats
    6. N/A - not running lotteries
12. Gamification Features (includes points, levels, and incentive points)
    1. Tested that points and levels are evaluating based on met or unmet goals (e.g. losing points when don’t meet step goal)
    2. Confirmed that point and level resets are built in at defined intervals and are resetting properly
       1. Tested reset timing- after last reduction or gain, but before the next phase starts
    3. For incentive points,
       1. Crediting participants at defined time points

OR

* + 1. Built alert notifications to study staff to pay out participants if not paying through Wells Fargo integration (usually Clincard) at defined time points
  1. N/A - not using gamification features

1. Targets
   1. Configured a Study Arm, Survey Based, or Enrollment Run-In Target for *all* arms with targets
   2. Tested that target is functioning as defined in the target criteria
   3. Built in and tested target resets or re-evaluations in event logic
   4. Tested that TARGET variable is replaced with value in messaging
   5. N/A – not using targets

**Testing was completed by:**

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