**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](https://atlas.waytohealth.upenn.edu/confluence/display/WTHST/3.%2BStudy%2BArms%2BTesting) 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)