# **Intervention Arm Testing Checklist**

## Please complete the following form and submit it to your Implementation Lead once you have finished testing your Way to Health intervention. This form MUST be completed prior to study launch.

1. Messaging Content:
   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 email address and phone number
   3. Confirmed that staff permissions by Access Group and roles are correct
3. Advanced Settings:
   1. Customized Manage Participant filters
   2. Set up Adherence Snapshot
   3. Customized email subject line
4. Enrollment:
   1. Reviewed enrollment steps and settings for account creation
   2. Tested contact verification step
   3. Reviewed device authorization process
   4. Reviewed arm specific enrollment steps
   5. Reviewed participant start settings (e.g. automatic or scheduled)
5. Randomization:
   1. Reviewed randomization configuration
   2. Confirmed the correct randomization weights are set on each study arm
   3. If using block randomization,
      1. Confirmed the correct block sizes are configured
   4. If using strata,
      1. Reviewed strata settings
6. Pennchart Integration (UPENN ONLY)
   1. Reviewed Pennchart integration for Way to Health enrollment and management
   2. Reviewed Pennchart flowsheet integration by testing that data is correctly appearing in the flowsheet
   3. N/A - not using EPIC integration
7. Survey Setup:
   1. Confirmed that all of the correct display logic is added and saved
   2. Reviewed each survey and ensure they consist of all of the questions you built
   3. Reviewed coding for questions and answers to ensure they are adequate for analyzing the data (e.g. item 1= good)
8. Device Setup:
   1. Reviewed advanced configuration for all devices to ensure desired processing is accomplished (e.g. what data point attaches to the event?)
9. Message Events and Message Logic:
   1. Confirmed that any placeholder text has been removed
   2. Confirmed that the correct recipient (participant, partner, PM, RC, provider, etc.) is designated
   3. Confirmed that variables are substituting properly
   4. Reviewed start day and time and repeats
10. 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
11. 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. N/A - not administering bi-directional SMS questions
12. 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
13. Add Logic Events:
    1. Confirmed all logic is configured correctly (including IF, THEN, and OTHERWISE criteria)
    2. Reviewed start day and time and repeats
    3. N/A - not using add logic events
14. 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
15. 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. Built alert notifications to study staff to pay out participants if not paying through Wells Fargo integration (usually ClinCard) at defined time points
    4. N/A - not using gamification features
16. 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. For ramp up targets,
       1. Tested the target increases by the correct amount at each ramp up event
    6. N/A – not using targets

## By completing and submitting this form to your Implementation Lead, you are confirming that you have fully tested your study’s intervention on Way to Health.

## **Testing was completed by:**

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