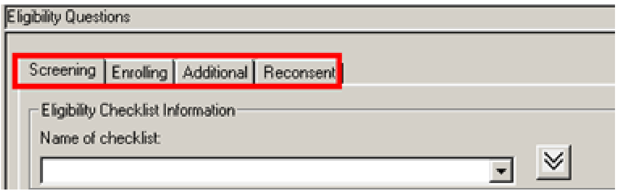
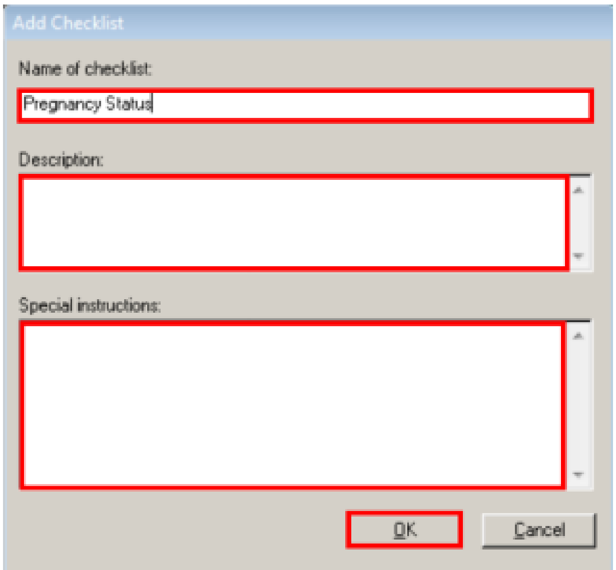
PowerTrials - Checklist

Checklists are created through *Protocol Office Manager (POM)* and are used within various stages of patient interaction (e.g. Pre-Screening Checklist can be used to see if potentially eligible patients meet any inclusion/exclusion criteria for the study).

1. With your protocol selected, click the *Eligibility Checklist Builder*  icon from the toolbar.
2. Click the appropriate tab in the *Eligibility Questions* pane to correspond with what stage the checklist will be used for (e.g. S*creening*, *Enrolling*, *Additional* or *Reconsent*.



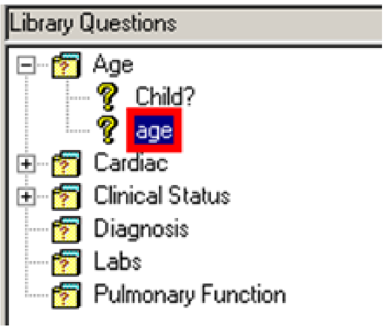
3. Click the *New Checklist*  icon from the toolbar.
4. *Name* the Checklist.

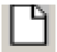


5. If required – enter a *Description* and *Special instructions*.
6. Click *OK*.
7. Select the newly added checklist from the drop-down menu.

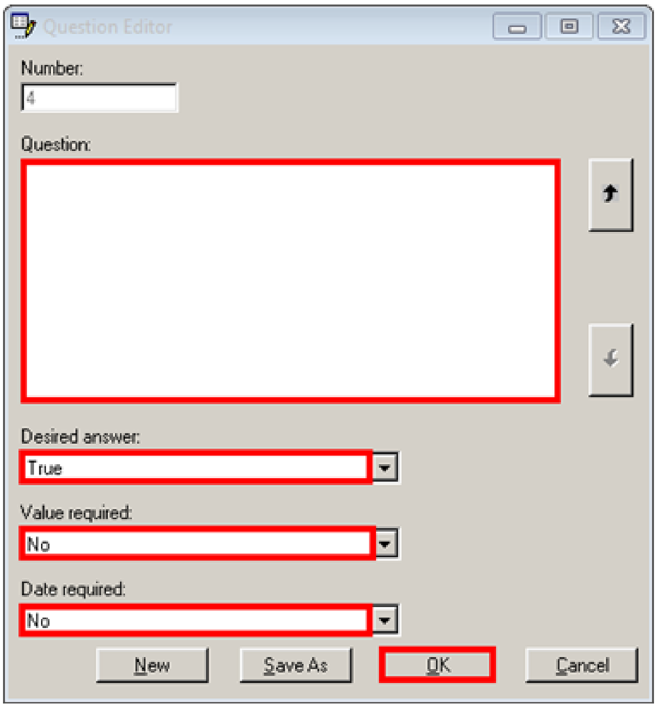
PowerTrials - Checklist

8. If relevant, add questions from the list of *Library Questions* on the left by double clicking.



9. Click the *New Question*  icon from the toolbar.

10. Type the question into the free-text field.



11. Select the *Desired Answer* from the drop-down menu.

12. Select the *Value Required* from the drop-down menu.

> *Desired Answer* is the response the system is searching for:
>
> - *True* – we wish for the patient to answer 'Yes' to the question
> - *False* – we wish for the patient to answer 'No' to the question

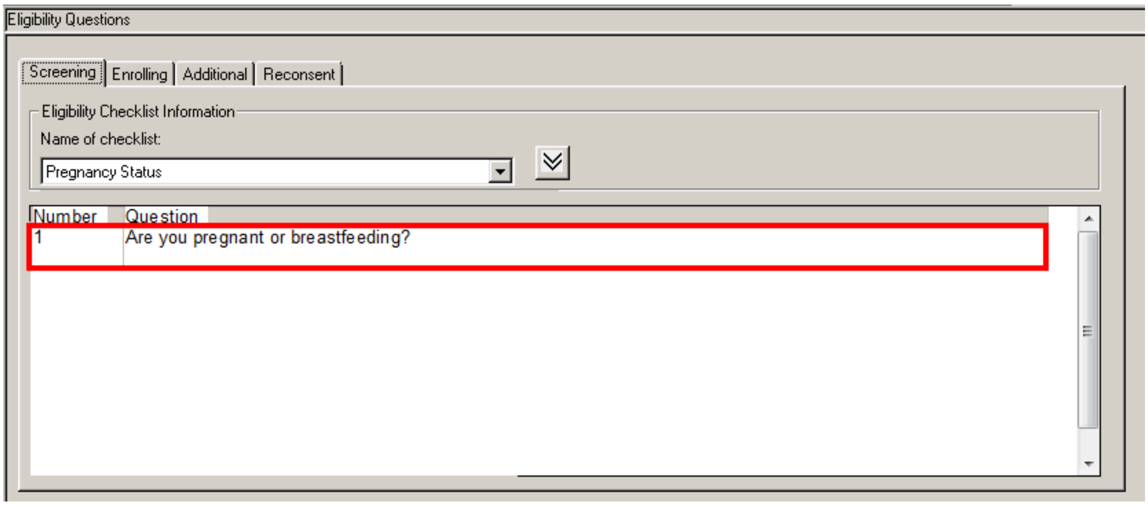
Value Required is used to identify if the question is optional or mandatory:

- *No* – means the question is optional
- *Yes* – means the question is mandatory

13. Select if the question must be answered by a particular date in the *Date Required* drop-down menu.

14. Click *OK* to save the question.

15. The question now displays in the *Eligibility Questions* page.



16. If required, repeat Steps 10-14 to continue adding questions to the newly added checklist.

17. Click *Save*.