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| **Test Environment** | | | | | |
| **REDCap Version** |  | **Server Environment** | **Test** | **Staging** | **Production** |

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| **Test Users** | | | |
| **ID** | **User Name** | **Browser** | **Operating System** |
|  |  | **Name Version** | **Name Version** |

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| **Prerequisites** | | |
| **ID** | **Description** | **Pass / Fail** |
|  | Test Project exists: Baseline Testing Project | **Pass** |
|  | Data exists in the first record (Record ID: 1) | **Pass** |

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| **Test Summary** |
| **Test Purpose:** The purpose of this test is to verify that ensure that the system still meets the client needs and to verify that existing data is not adversely affected by the change and data can be entered through data entry forms and surveys and data can be exported.    **Test Method:** The following script will test the below functions:   * Verify data through the data entry form * Add record through a survey and verify survey delivery. * Add record in a data entry form * Export data * Verify de-identified data export with first and last record. |

| **Step** | **Test Step** | **Expected Result** | **Pass / Fail** | **Reference** | **Exceptions** |
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| 1. | Log into the REDCap application and open the Baseline Testing Project. | Baseline Testing Project opens to the Project Setup Page | **Pass**  **Fail** |  |  |
| 2. | Select Add/Edit Records and choose Record #1.  Verify that the Pre-Screening Survey has a green checkmark and select it.  Verify that the data is as listed in the Expected Results | Record #1 exists and has a green checkmark in the Pre-Screening Survey column.  Verify the following data:  **Record ID:** x  **First Name**: xxx  **Last Name**: xxx  **Gender**: xx  **Height**: xx  **Date of Birth**: xx  **E-mail**: xxx  **Type 2 Diabetes**: xx  **Consent question**: xx | **Pass**  **Fail** |  |  |
|  | Navigate to the Manage Survey Participants and select Open public survey button. | The Pre-Screening Survey is open and ready for data entry. | **Pass**  **Fail** |  |  |
|  | Enter the following data:  **First Name**: <your first name>  **Last Name**: <your last name>  **Gender**: <your gender>  **Height**: <integer between 130 and 215>  **Date of Birth**: <any date in the past>  **E-mail:** <your email address>  **Type 2 Diabetes**: <choose True or False>  **Consent question**: checked | Data was entered.  REDCap is displays the Manage Survey Participants | **Pass**  **Fail** | Submitted survey time: \_\_\_\_\_\_\_\_\_\_\_\_  First Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Last Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Gender: Male / Female  Height: \_\_\_\_\_\_\_\_\_  Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Type 2 Diabetes: True / False |  |
|  | Click Submit  Click Close Survey | Data was submitted and the REDCap webpage displays the Manage Survey Participants | **Pass**  **Fail** |  |  |
|  | Navigate to Manage Participants then click on the Survey Invitation Log tab.  Verify that the Patient Morale Questionnaire Week 1 is scheduled to be sent 5 minutes after the above submitted time. | Patient Morale Questionnaire Week 1 is listed with your email.  In 5 minutes, verify that you have received an email for the Patient Morale Questionnaire Week 1. | **Pass**  **Fail** | Invitation Send Time: \_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | Navigate to the Data Collection Pane and select Add/Edit Records.  Choose the last Record ID submitted in Step 4.  Select the Completion Data form from the grid. | Completion Data form is available for data entry.  Verify that <your name> has been piped to the first question. | **Pass**  **Fail** |  |  |
|  | Enter data in the record as follows:  **Completed study**: No  **Withdrawn date**: <today>  **Withdrawn reason**: <choose any option>  **Date of Last Visit**: <any date in the past>  **Date of hospital discharge**: <today>  **Discharge summary in binder**? <Yes or No>  **Comments**: REDCap <current version number on footer of webpage>  **Form Status**: Complete  Record values in the Reference column  Save Record. | Verify that the Withdrew date and reason fields displayed.  The record has been successfully saved and the form status field displays a green icon. | **Pass**  **Fail** | Withdrawn date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Withdrawn reason: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date of last visit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date of Hospital discharge:  \_\_\_\_\_\_\_\_\_\_\_\_\_  Discharge summary in binder?  Yes / No  Comments: REDCap Version\_\_\_\_\_\_\_ |  |
|  | Click on the green icon for the Completion Data form. | Verify that the following data exists:  **Completed study**: No  **Withdrawn date**: <see Ref step 8>  **Withdrawn reason**: <see Ref step 8>  **Date of Last Visit**: <see Ref step 8>  **Date of hospital discharge:** <see Ref step 8>  **Discharge summary in binder?** <see Ref step 8>  **Comments:** <see Ref step 8>  **Form Status**: Complete | **Pass**  **Fail** |  |  |
|  | Navigate to the Data Export Tool in the Applications pane.  Select “Display advanced options” in the Advanced Data Export function.  Select “Select All” for “Every field in the project”  For the De-identification Options, check:   * Remove all known identifiers * Hash the Participant ID * Remove unvalidated Text fields * Remove Notes/Essay box fields * Shift All dates by value between 0 and 364 days.   Click Submit  Click OK for the Citation Notice  Select Excel CSV Raw  Click Open | The data has been exported into an Excel CSV file and is opened. | **Pass**  **Fail** |  |  |
|  | Verify the first record data with values in the de-identified Excel CSV export. | **Participant\_id:** <hashed ID>  **Redcap\_event\_name**: initial\_data\_arm\_1  **sex**: 0  **Height**: 150  **Has\_diabetes**: 0  **Consent\_\_\_1**: 1  **PreScreening\_survey\_complete**: 2 | **Pass**  **Fail** |  |  |
|  | Verify the last record data with values in the de-identified Excel CSV export | **Participant\_id:** <hashed ID >  **Redcap\_event\_name**: initial\_data\_arm\_1  **sex**: <your gender (0-F, 1-M)>  **Height**: <see Ref step 8>  **Has\_diabetes**: <see Ref step 8>  **Consent\_\_\_1**: <see Ref step 8>  **Prescreening\_survey\_complete**: 2  **Redcap\_event\_name**: final\_data\_arm\_1  **Complete\_study**: 0  **Withdrawn\_date**: verify date is NOT equal to entered value in Ref step 8, due to shifting  **Withdrawn\_reason**: <see Ref step 8>  **Discharge\_summary\_4**: <see Ref step 8>  **Completion\_data\_complete**: 2 | **Pass**  **Fail** |  |  |

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| **Conclusion** | | | | |
| **Comments/Additional Information:** | | | | |
| Did the Actual Results for each test step match the Expected Results listed? | | Yes | | No |
| **Completed By** | **Print Here Sign Here** | **Date:** | **YYYY MM DD** | |
| **Reviewed By** | **Print Here Sign Here** | **Date:** | **YYYY MM DD** | |