

PowerTrials: POM – create a checklist

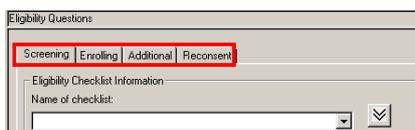
Quick reference guide

Checklists are created through *POM* and are used within various stages of patient interaction; for instance a Pre-Screening Checklist can be used to see if a potentially eligible patient meets any exclusion criteria for the study.

1. With your protocol or relevant amendment selected from within the *Initiating Service* folder, click the *Eligibility Checklist Builder* icon from the toolbar.

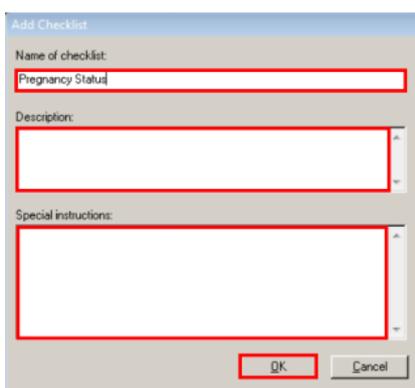
The *Eligibility Checklist Builder* window will open.

2. Click the appropriate tab in the *Eligibility Questions* pane to correspond with what stage the checklist will be used for: *Screening, Enrolling, Additional* or *Reconsent*.



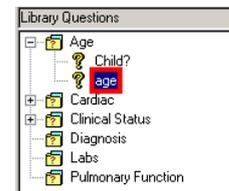
3. Click the *New Checklist* icon from the toolbar.

The *Add Checklist* window will open.



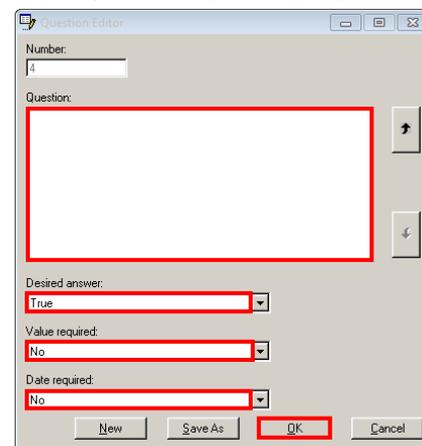
4. Name the checklist.
5. Complete a description, if required.
6. Input special instructions, if required.
7. Click *OK*.

8. Select the newly added checklist from the dropdown menu.
9. Add questions from the list of *Library Questions* on the left, if relevant, by double clicking on it.



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

The *Question Editor* window will open.



11. Type the question into the free-text field.
12. Select the *Desired Answer* from the dropdown menu.

Note: Desired answer is the response the system is searching for:

- *True* means we wish for the patient to answer 'Yes' to the question
- *False* means we wish for the patient to answer 'No' to the question

13. Select the *Value Required* from the dropdown menu.

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

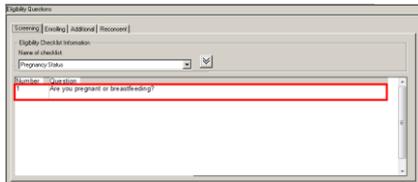
- *No* means the question is optional
- *Yes* means the question is mandatory



14. Select if the question must be answered by a particular date in the *Date Required* dropdown menu.

15. Click *OK* to save the question.

The question now displays in the *Eligibility Questions* pane.



16. Repeat Steps 10-15 to continue adding questions to the newly added checklist, if required.

17. Click *Save*.

