# Checklist for building a study in SMART-TRIAL

## Before starting the setup

Define your forms using the SMART-TRIAL eCRF [template](https://help.smart-trial.com/smart-trial-ecrf/form-template)*.* This will ease the setup and make it simple to communicate with colleagues/external stakeholders what the aim is. It will also ease the later validation process, as there is a direct comparison.

Consider if each question should be mandatory

Consider if ‘Number’ questions should be decimal or integer

Add validation rules where appropriate

Ensure the forms are as re-useable as possible

Define export labels together with statistician(s) and/or data management. *There is a column for export labels in the eCRF template. Involving the ones responsible for analysis is important, as they can start programming the analysis beforehand, and it ensures they can import the labels into their software (they can easily become too long).*

Define **WHO** should enter the [data](https://help.smart-trial.com/smart-trial-products). *Site personnel? Subjects?*

Decide what [add-ons](https://help.smart-trial.com/addon-modules-in-smart-trial) you need. *AE Module if you are collecting Adverse Events, SMS events if you want to send SMS.*

### Create the study and forms

Create a new study and select the appropriate product based on who should enter data

Add the desired add-ons. *They can also be added at a later time*

Add the relevant subject attributes. *If you want to send email, select email as mandatory.*

Define which subject id automation the study should use, if any.

Create the first form as per the eCRF template

Create the rest of the forms as per the eCRF template

### Create the process & rules

Create and name the process

Create the first data event

Select the appropriate data event type

Consider the activation type. *For visit events, ‘manual’ is recommended for flexibility.*

Add the relevant forms for the data event

IF SUBJECT EVENT: Decide on either “Free form fill out” or “Force fill-out order”

IF SUBJECT EVENT: Define email subject. *What subjects will see in their inbox*

IF SUBJECT EVENT: Define email body. *The email text sent to subjects*

IF SMS EVENT: Define the SMS text subjects should receive.

Create the rest of the data events

Create the required process SHOW rules.

Create the required process VALIDATION rules. *Be careful with ‘BLOCK’.*