KORU CHECKLIST

HIPAA-Safe Usability Testing Checklist

Use this checklist to ensure your usability testing sessions are compliant, ethical, and effective—without compromising patient data or care.

Pre-Session: Compliance and Privacy

- [ ] Use anonymized or dummy data only (no real patient records).
- [ ] Obtain signed informed consent from all participants.
- [ ] Review data-sharing agreements with any third-party platforms.
- [ ] Check if Institutional Review Board (IRB) approval is required.
- [ ] Ensure all recordings are stored securely and de-identified.

Recruitment

- [ ] Screen participants by role (clinician, admin, patient, caregiver).
- [ ] Avoid collecting personal health information (PHI).
- [ ] Use role-based or scenario-driven testing to simulate real use cases.
- [ ] Provide participants with clear session expectations and opt-out options.

During the Test

- [ ] Use sandbox environments or test servers only.
- [ ] Assign a neutral moderator—not the product designer.
- [ ] Avoid identifying details in screen recordings or notes.
- [ ] Monitor and document participant comfort with test pacing and language.
- [ ] Observe but don't interfere—avoid leading the participant.

Post-Session

- [ ] Redact or anonymize session transcripts and recordings.
- [ ] Store signed consent forms securely (if required).
- [ ] Share findings with internal teams using de-identified data.
- [ ] Re-confirm data deletion policies with test platforms/tools.