# Screening

In **Screening,** you select which studies to include in your nest and which should be excluded (with reasons).



Video

## Steps to Screen a Nest:

### 1. Configure Screening

Before screening individual studies, you must Configure Screening. To Configure exclusion reasons, list all reasons that a record would be excluded from your nest.

### 2. Select Screening Mode

There are several Screening Modes that you can select to alter the flow of records through your nest. Each option can be toggled on the Admin page for your nest:

**Nest Home**
Dashboard
Settings

**Literature Search** `3 / 3`
Other Sources
Duplicate Review
Search Exploration

**Screening** `98 / 146`
Configure Screening

**Tagging** `17 / 21`
Configure Tagging

**Extraction** `16 / 21`
Configure Extraction

**Study Inspector**

**Synthesis**
Manuscript Editor
Abstract Editor
Export

## Screening

In Standard Screening, one user screens each record. Inclusion sends the record forward for gathering, such as tagging, extraction, and Risk of Bias assessment. Exclusion does not queue the record for gathering.

In Dual Screening, two users independently screen each record, and then all screening determinations are reviewed by an administrator. The administrator adjudicates any disagreement between the original screeners to set the final determination for each record.

In Two Pass Screening, all records are first rapidly screened using only title and abstract. Records may be advanced from title/abstract screening to more intensive full text screening, where final inclusion is determined.

In Dual Two Pass Screening, two users rapidly screen all records using only title/abstract and these determinations are reviewed and advanced by an administrator. Two users then screen all full texts and final inclusion is determined by the administrator.

**Choose Mode:**
- ● Standard
- ○ Two Pass

**Choose number of reviewers:**
- ● Single
- ○ Dual

## Screening Model

Screening models predict the probability of individual records being included (Standard Screening) or abstract advanced (Two Pass Screening), using your past screening determinations. These probabilities help AutoLit determine which records to show first during screening and may be viewed and filtered in Inspector. They are also leveraged by Robot Screener in dual screening modes, if enabled.

The model may be trained manually or automatically (recommended). If the screening model is set to automatic, the model will be retrained after every 10 newly screened records. Otherwise, the model may be retrained manually throughout screening.

**Choose mode:**
◯ Automatic Training
[View Screening Model]

## Hiding the Model

Probabilities predicted by the model may be displayed during screening to speed up work or hidden if you wish to minimize bias. Records will still be ordered by inclusion probability, even when hidden. To completely remove probabilities and ordering, delete the existing screening model and turn off automatic training.

**Choose:**
◯ Hide Probabilities

## Import

Import existing screening decisions for any record already in your nest by uploading a spreadsheet.

**Upload data:**
[Begin]

## Screening Modes:

- **Standard Screening:** Each record must be Included or Excluded by a single user, with the option of marking Full Text Review.
- **Dual Screening:** Each record must be Included or Excluded by two independent users, and then an Admin must adjudicate all disagreements. Each user and Admin has the option of marking Full Text Review.
- **Robot Screening:** Robot Screener is *type* of Dual Screening where one of the traditionally human reviewers is replaced by an automated substitute. This only works when enough records are screened to train the Inclusion Probability Model with enough accuracy, so each record must be Included or Excluded by one reviewer, and then one 'robot.' Then, the Admin (human) must adjudicate all disagreements. Each user and Admin has the option of marking Full Text Review.
- **Two-Pass Screening:** Each record must be Advanced or Excluded at the Abstract level by one user, and Included or Excluded based on a second Full Text Review step.
- **Dual Two-Pass Screening:** Each record must be Advanced or Excluded at the Abstract level by *two* users, and Included or Excluded based on *two* users' designations during a second Full Text Review step. All disagreements at each step must be adjudicated by an Admin.

The best practice is to **choose a Screening Mode before you begin Screening.** While you can switch between Screening Modes at any point, and final Inclusion/Exclusion decisions can be carried over, switching modes after beginning Screening **can result in lost data.**

## 3. Configure Your Keywords

To aid users in screening, you can configure keywords either in the Configure Screening page or on the Abstract view of any study in your nest. These User Keywords will be underlined in all abstracts.

These are different from the P, I, and O highlighting in that the highlighting is automatically generated by our RoboPICO software based on the abstract's contents, while Your Keywords are custom-added

as described here.

# 4a. Include and Exclude Records

The core activity of Screening is Including and Excluding records. In this process, you review the abstracts of records and exclude any that meet your Exclusion Reasons. For any article that is includable (as in, no Exclusion Reason applies), select "Include" and (optionally) upload the full text. There is also an option to "unscreen" a study. You can do this on individual studies or across many studies in a bulk action.

**Uploading Full Texts**

Generally, you should complete Full Text PDF Upload for any record that you Include, so that it is available to Tag during the next stage.

The exception: If you set up the **Two-Pass Screening Mode** (see above), you should upload full texts for all studies that are Advanced to Full Text Review.

# 4b. Related reports

While screening, it isn't unusual to find the same data reported across multiple papers, and you will most likely include both the primary papers and all the secondary analyses. For the non-primary papers with data from the same trial, you can mark them as related reports to keep track of them and to have the PRISMA adjusted to reflect the difference in the number of studies versus the number of reports.

# 5. When are you finished Screening?

You are finished Screening when all records in your nest are either Included or Excluded, as indicated by the Screening progress bar. At this point, you should move on to Tagging and extraction (optional) for the included records!

**Additional Tools**

- Screening Model: How to use the built-in AI-assisted Screening Model to assist in ordering records and informing your screening.
- Add Exclusion Reasons On the Fly: How to add Exclusion Reasons while you are screening without leaving the page.
- Exclusion Reason Sets: How to import Organizational Templates containing pre-configured Sets of Exclusion Reasons.

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