

Configuring Screening



Video

The first step in the Screening process is configuring the Exclusion reasons. The steps for adding and editing exclusion reasons will be covered here.

Optionally, you can also add and edit [User Keywords](#) here as well.

Steps for Configuring Exclusion Reasons:

1. Navigate to Configure Screening

Once you are in a nest, hover over the Nest menu and click on the gears icon next to Screening menu (red box below)

If someone has already set up Exclusion Reasons for the nest, they will appear here.



2. Add Exclusion Reasons

Click “Add” (red outline) and type your Exclusion Reason in the free text field. The software does not restrict what reasons you create, but you should ensure that these Exclusion Reasons reflect the inclusion and exclusion criteria for your study design.

Add

Exclusion Reasons

Your Keywords

PRISMA settings

Import Set

Reason	Excluded Records		
<div><div></div><div>Published since 2015</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Study not performed on living humans</div></div>	0	<div></div>	<div></div>
<div><div></div><div>In vivo study</div></div>	0	<div></div>	<div></div>
<div><div></div><div>In vitro study</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Non-experimental study</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Correspondence</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Editorial</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Protocol or methods article</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Guidelines article</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Secondary analysis</div></div>	0	<div></div>	<div></div>
<div><div></div><div>News or update</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Case report or <5 patients</div></div>	0	<div></div>	<div></div>
<div><div></div><div>Systematic review or meta-analysis</div></div>	0	<div></div>	<div></div>

Import an Exclusion Reason Set

If your Organization has created templated Exclusion Reason Sets, you can import them using the “Import Set” button (black outline above).

This will open a modal where you can choose from your Organization's existing templated sets. Importing a Set will add all the Exclusion Reasons in the Set and add them on top of your existing reasons. For more information, see [Organizational Templates](#).

3. Editing, Ordering and Deleting Exclusion Reasons

To edit an Exclusion Reason, click on the pencil icon. If you edit the text of an exclusion reason, your edits will also be reflected on studies to which that reason has already been applied.

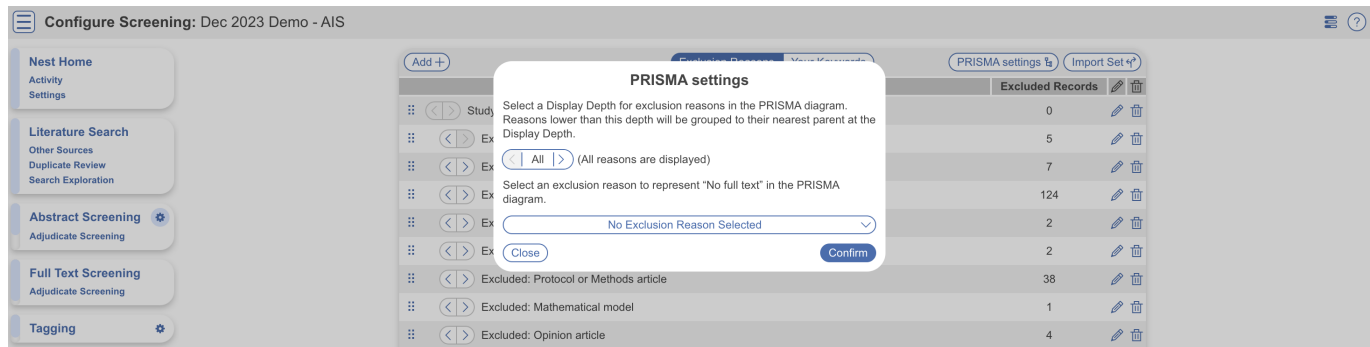
To order your list of exclusion reasons and determine how they are displayed in Screening, click the 6 dots icon (blue outline in screenshot above) and drag and drop in your desired order. To order your exclusion reasons in a hierarchical fashion, use the arrows to indent reasons beneath others. In the above example, “In vivo study” and “In vitro study” are beneath “Study not performed on living humans.” You can customize this according to your study design and exclusion criteria. The format will be displayed the same in the screening workflow.

To delete an Exclusion reason, click the trash icon. **Deleting an exclusion reason will permanently remove it from the system and will also remove it from studies to which it has been applied. These studies will be returned to the screening queue and will need to be screened again.**

PRISMA Settings

By selecting PRISMA Settings (in green) you can:

1. Group exclusion reasons shown in the auto-generated PRISMA diagram. If you have created hierarchical exclusion reasons, you can choose to display all reasons (i.e. both specific and root/parent reasons) or root reasons (the first set of grouping), and so on.
2. Assign an existing exclusion reason to represent “No Full Text Available” and will be reflected as such in the auto-generated PRISMA diagram.



Steps to add User Keywords

To learn how to add User Keywords from the Configure Screening page, click [here](#).

Related Information

Add Exclusion Reasons on the Fly

You can add Exclusions Reasons as you screen. To do so, in the Screening module, begin typing in an Exclusion Reason. If the reason of interest has not yet been configured, you will be presented with the ability to “Add Option.” Select this option, and write out your full Exclusion Reason. Once you have added it, it will be added to the Exclusion Reason drop-down and the Configure Exclusion Reasons page, and will be automatically applied to the study you are currently screening. To confirm that the new reason should be applied, select “Exclude”.

Signaling "No Full Text"

View this switch on the Configure Exclusion Reasons page. You can designate one exclusion reason as indicating that the full text was not available for a given reference. This information will be reflected in your [PRISMA flow diagram](#).

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