Configuring Screening

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

Steps for Configuring Exclusion Reasons:

1. Navigate to Configure Exclusion Reasons

Once you are in a nest, hover over the Nest menu and click on "Configure Exclusion Reasons" under Screening (red box below)

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

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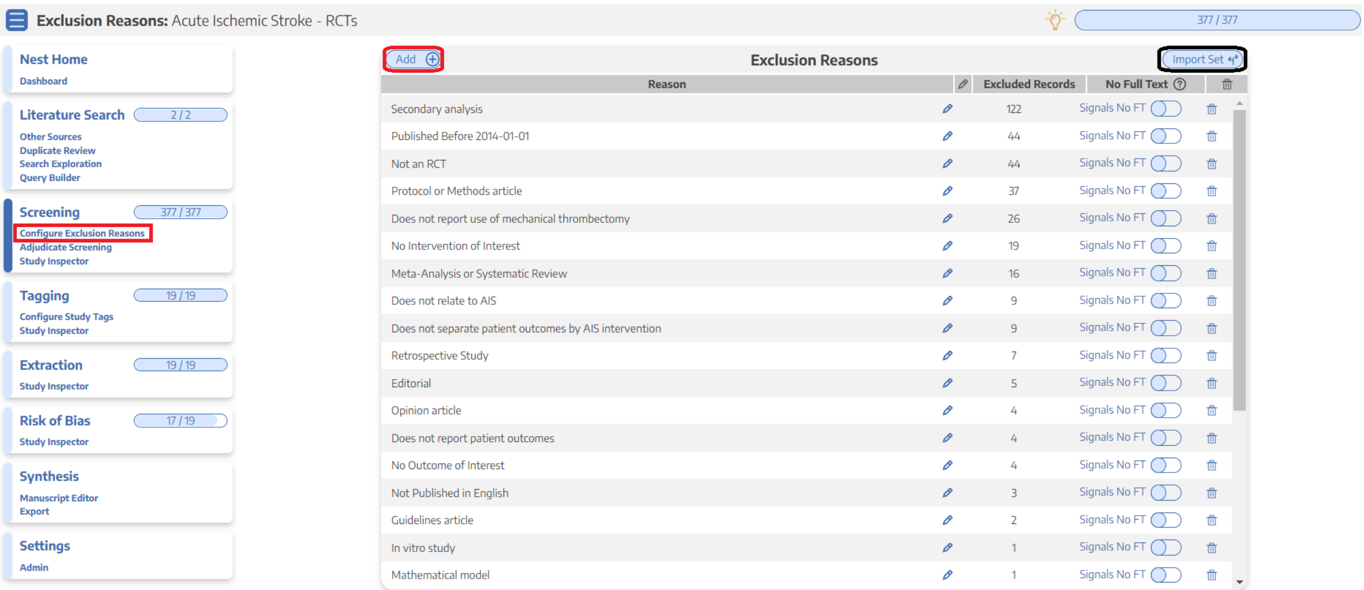
2. Add Exclusion Reasons

Click "Add Reason" (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.



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 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 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.***

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 pop up in the Exclusion Reason drop-down and will be added to your Configure Exclusion Reasons page.

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.