

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.

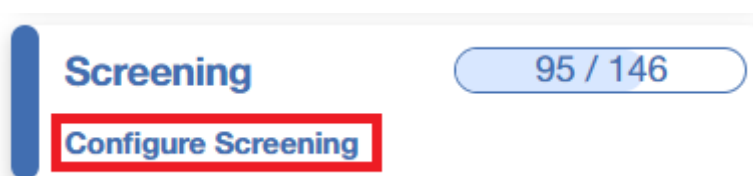
Optionally, you can also add and edit [User Keywords](#) here as well.

Steps for Configuring Exclusion Reasons:

1. Navigate to Configure Screening

Once you are in a nest, hover over the Nest menu and click on “Configure Screening” under Screening (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.

A screenshot of the 'Configure Screening' interface for a nest titled 'Heart Failure - NK version'. The left sidebar shows a navigation menu with 'Screening' selected and 'Configure Screening' highlighted with a red box. The main area displays the 'Exclusion Reasons' table with an 'Add' button (red outline) at the top left. The table has columns for Reason, Excluded Records, and No Full Text. Below the table is a 'Your Keywords' section with an 'Add' button and a list of keywords: renal, reduced ejection fraction, heart failure, and mortality.

Reason	Excluded Records	No Full Text
Systematic Review/Metanalysis	221	Signals No FT
Does not report patients with heart failure with r...	163	Signals No FT
secondary analysis	120	Signals No FT
Retrospective study	77	Signals No FT
Does not report therapies of interest	54	Signals No FT
Sub-analysis of RCT	42	Signals No FT
Potential bias in patient population	41	Signals No FT
Protocol	38	Signals No FT
Methods article	29	Signals No FT
Cohort Study	25	Signals No FT

Your Keywords

Keyword
renal
reduced ejection fraction
heart failure
mortality

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.***

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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