

# 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 ReasonsYour Keywords

Import Set

Reason	Excluded Records		No Full Text	
Not an RCT of a drug of interest	29		Signals No FT	
Protocol or Methods article	16		Signals No FT	
Systematic Review or Meta-analysis	7		Signals No FT	
Editorial, comment, or opinion article	6		Signals No FT	
Not related to COVID-19	5		Signals No FT	
Update or guidelines article	5		Signals No FT	
Qualitative review of existing research	4		Signals No FT	
Published Before 2019-11-01	1		Signals No FT	
In vitro, in silico, or in vivo study	1		Signals No FT	
Prophylaxis Not Treatment	1		Signals No FT	
Biased Subpopulation	1		Signals No FT	
Not Published in English	0		Signals No FT	
Technical note	0		Signals No FT	
Correspondence or Letter to the Editor	0		Signals No FT	
Case Study	0		Signals No FT	
Full Text Unavailable	0		Signals No FT	
Not an antiviral	0		Signals No FT	
secondary analysis	0		Signals No FT	
Suspected COVID	0		Signals No FT	
Retracted	0		Signals No FT	

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 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 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](#).

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## 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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