

Two-Pass Screening

Two-Pass Screening is a sequential screening process where users first review only the title and abstract and then complete a more in-depth, full-text review on any record that is advanced after the title and abstract review. Note, this is different than [dual screening](#) where two users screen the same articles. You can, however, perform [dual two-pass](#) screening in our software.

Configure Exclusion Reasons

You will need to [Configure Exclusion Reasons](#) before screening underlying studies.

Configure Two-Pass Screening

To configure Two-Pass Screening in a nest, click on the “Setting” link in the Nest Home menu. Once here, scroll down to the Screening section. Then, click on the “Two-Pass” option.

Nest Home

Activity

Settings

Literature Search

Other Sources

Duplicate Review

Search Exploration

Abstract Screening

Adjudicate Screening

Full Text Screening

Adjudicate Screening

Tagging

Study Inspector

Screening

In Standard Screening, one user screens each record. Inclusion sends the record forward for gathering, such as tagging, meta-analytical extraction, and critical appraisal. 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

Once this is complete, modules for “Abstract Screening” and “Full Text Screening” will appear in the Nest Menu.



Note: Toggling back from Two-Pass Screening to Standard Screening (or switching to Dual Screening) will **ONLY** save final screening decisions, so all records that are Advanced from Abstract to Full Text Screening, but that do not have a final Inclusion/Exclusion decision will be reverted to Unscreened and **all data associated with individual users' decisions will be lost!**

Two-Pass Screening Steps

1. Screen each study by title and abstract

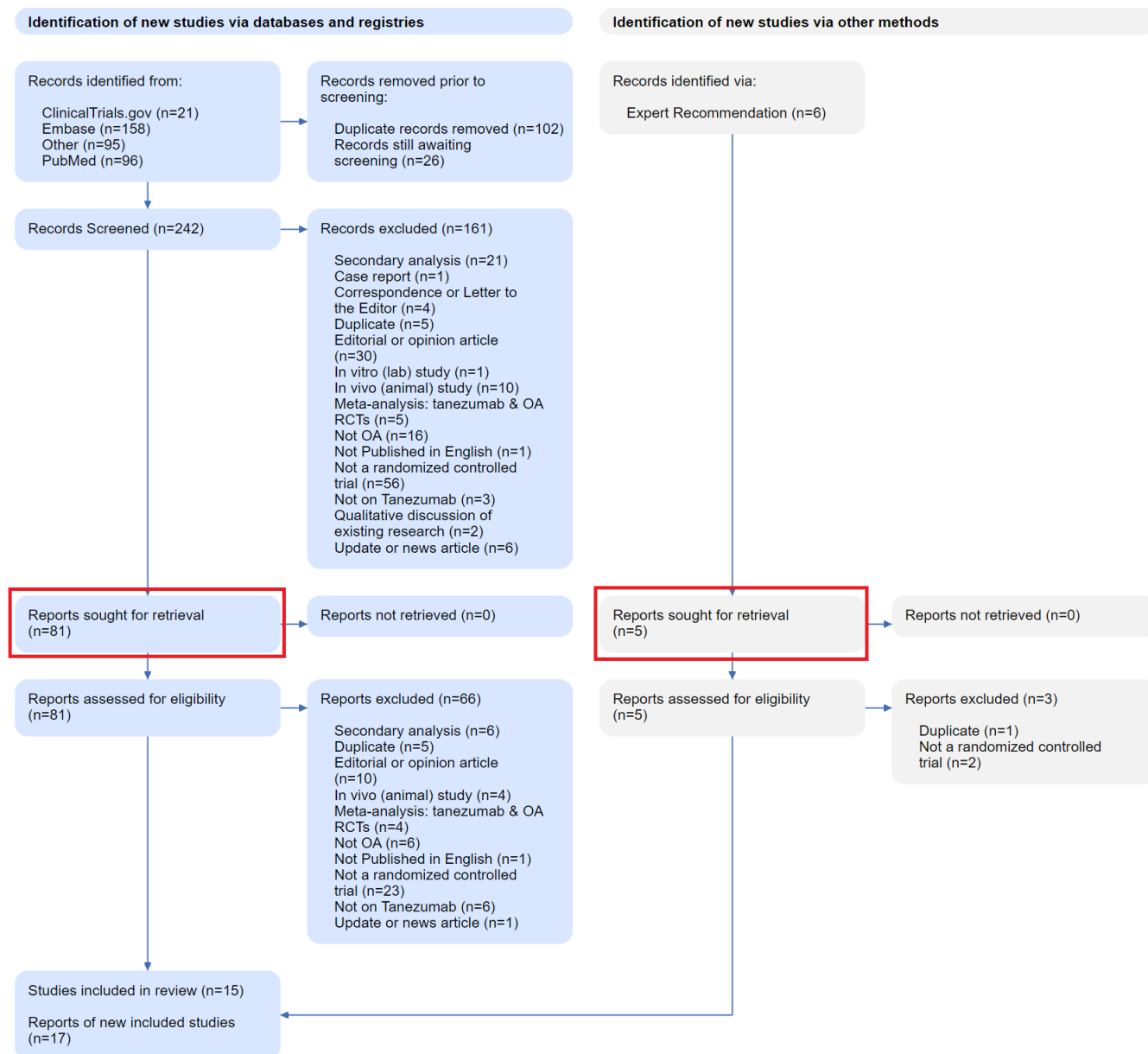
Before Full Text Screening can take place, a user will need to [screen](#) each underlying study using the same approach as Standard Screening Mode.

Advance vs. Include

The only major difference in this process will be that, instead of choosing to Include or Exclude, users select to either Advance or Exclude a study. All Excluded studies are treated the same way as in Standard Screening; however, studies that are Advanced are not Included but instead queued for Full Text Screening.

The screenshot displays the 'Abstract Screening' interface. On the left is a sidebar with navigation options: Nest Home, Activity, Settings, Literature Search, Other Sources, Duplicate Review, Search Exploration, Abstract Screening (selected), Adjudicate Screening, Full Text Screening, Adjudicate Screening, Tagging, Study Inspector, Synthesis, Dashboard Editor, Abstract Editor, and Export. The main content area shows a study abstract titled 'The GLP-1 receptor agonist liraglutide reduces pathology-specific tau phosphorylation and improves motor function in a transgenic hTauP301L mouse model of tauopathy.' Below the abstract is a filter bar with 'Population/Problem', 'Intervention', 'Outcome', and 'Your Keywords' tabs. At the bottom of the abstract area are 'Keywords' and 'Bibliographic fields' input fields. On the right is a 'Navigation' panel with 'Back' and 'Skip' buttons, followed by 'Abstract Screening' (selected), 'Full Text Review', 'Exclude:' (with a search bar), 'Select Reason' (with a list of reasons), 'Advance:' (with a red box around the 'Advance' button), 'Tagging', 'Abstract Tag Recs', and 'History'.

Studies that are Advanced will be automatically queued under the Full Text Screening tab. Note that altering Screening Mode will revert studies that have been Advanced to “Unscreened”, and that while a study is Advanced but not yet Included or Excluded, it will remain at the “Reports sought for retrieval” stage of your [PRISMA Diagram](#):



Upload Full Text

When a study is Advanced, a Full Text should be uploaded. To learn how, see [here](#).

If a full text cannot be retrieved, ensure that you mark the record using a “No Full Text” reason, as explained [here](#). Any record marked with this reason will be reflected under “Reports not retrieved” (see image above).

2. Screen each study by Full Text

Select the “Full Text Screening” option from the menu.

All studies that have undergone title/abstract screening and that were Advanced will be queued here, and the full text PDF of each should have been uploaded as part of the previous step.

Examine the full text of the study under review, and choose whether to Include or Exclude (with an

appropriate Exclusion Reason). Each study that is Included will be sent forward to Tagging, and each study that is Excluded will be reflected in the second (lower) "Reports Excluded" section of PRISMA.

The screenshot shows the 'Full Text' tab of a study modal. The main content area displays the title 'Rationale and Study Design of a Randomized Clinical Trial of Metformin to Prevent Frailty in Older Adults With Prediabetes' and the authors 'Sara E. Espinoza, MD, MSc, Nicolas Musi, MD, Chen-pin Wang, PhD, et al.'. The right sidebar shows the 'Full Text Screening' panel with the 'Include' button highlighted.

Screening from Inspector

If you are Screening from [Inspector](#), once you have opened the Study Modal, you can toggle between Abstract and Final (full text-based) Screening Decisions in the Screening panel.

The screenshot shows the 'Full Text' tab of a study modal. The main content area displays the title 'Rationale and Study Design of a Randomized Clinical Trial of Metformin to Prevent Frailty in Older Adults With Prediabetes' and the authors 'Sara E. Espinoza, MD, MSc, Nicolas Musi, MD, Chen-pin Wang, PhD, et al.'. The right sidebar shows the 'Full Text Screening' panel with the 'Include' button highlighted.

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