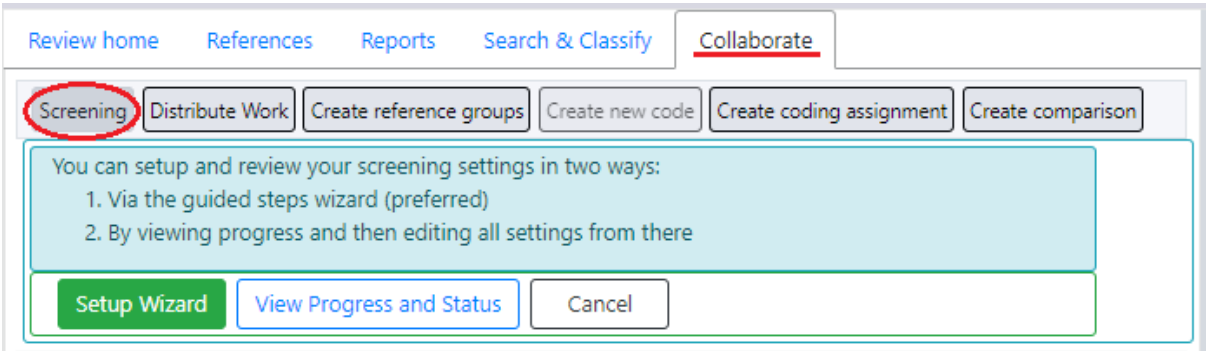
Priority Screening

Enabling Priority Screening

The first step in using ***Priority Screening*** is to enable it in your review. This can be done via the ***Account Manager*** at https://eppi.ioe.ac.uk/cms/Default.aspx?tabid=2935. Alternatively, we are happy to do this for you; just let us know the review ID number or name.

Under the ***Reviews*** tab, click the ***Edit*** link next to the review, select the ***On*** option for Priority Screening, then click the ***Save*** button.

Once Priority Screening [***PS***] has been enabled, you will see the ***Screening*** button in your review, under the ***Collaborate*** tab.



There are two options available to start using the ***PS*** system –:

1. via a ***Setup Wizard*** which asks simple questions in English and then sets the parameters for you automatically, or

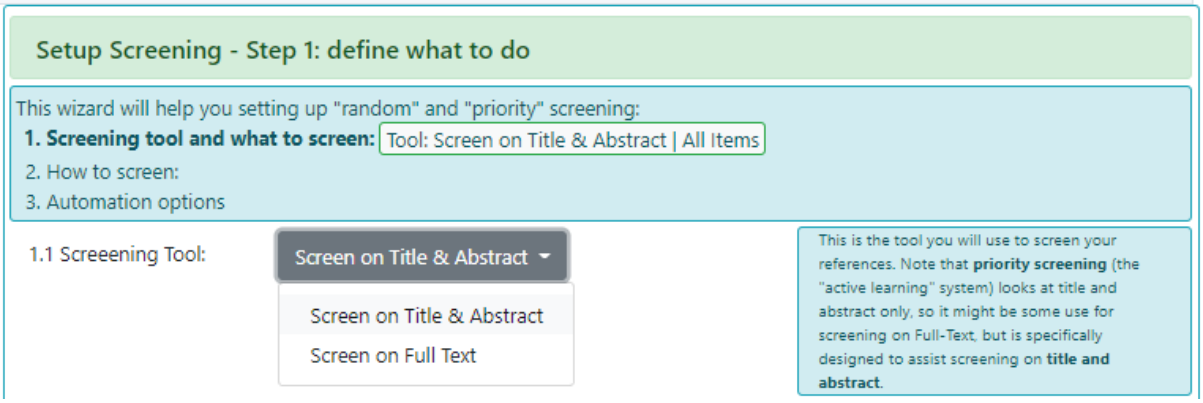
2. manually via the ***View Progress and Status*** button, which shows you all settings – allowing you to change them – and current progress.

Set up Wizard

1.1 Codeset

First select the codeset you wish to use to record your screening results. This needs to be a *screening-type* codeset.

(Note that the PS system "learns" by looking at references' titles and abstracts only. It may be of some use for screening on Full-Text, but is specifically designed to assist screening on title and abstract.)

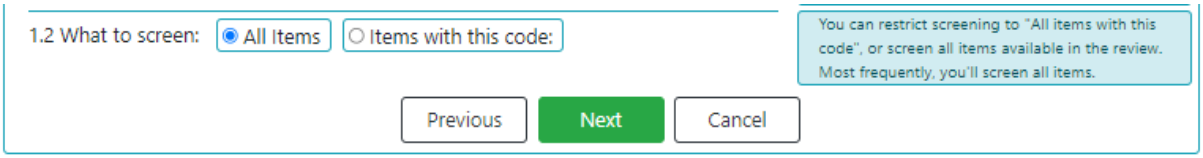


1.2 Items

Then confirm which items you will be screening.

a. You can screen all the items in your review (the most common choice, as you will generally be screening all the items in your review after importing your search results), or

b. You can screen items with a specific code, perhaps after importing a new batch of items or after grouping your items via a text search.



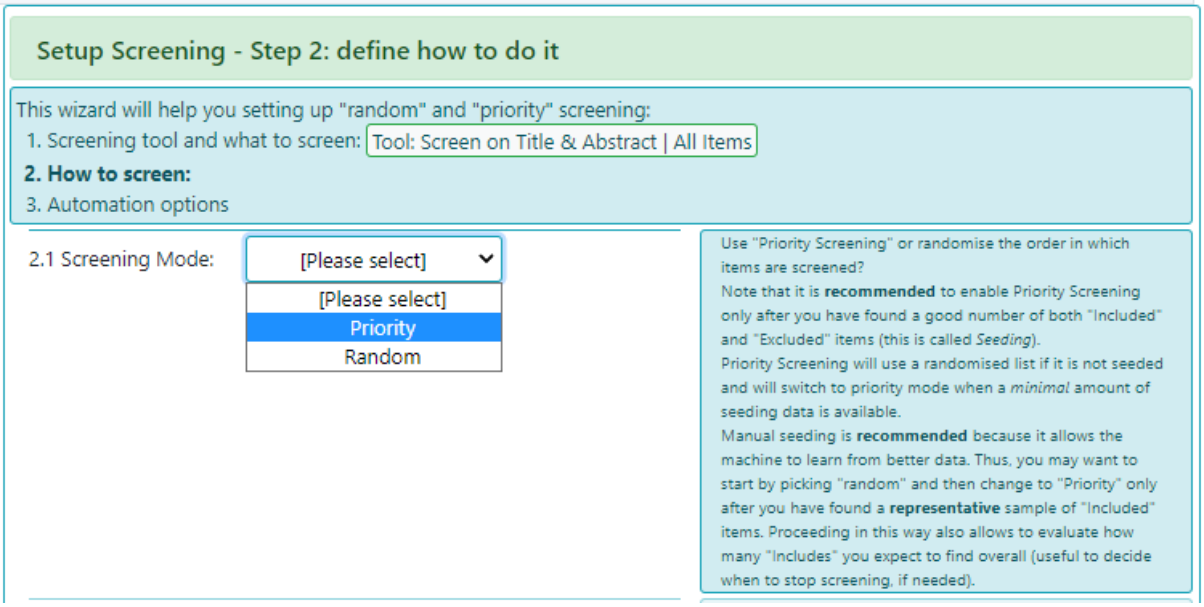
Press the ***Next*** button to continue.

2.1 Screening Mode

Choose the PS system mode – either ***Random*** or ***Priority***.

Generally, you will want to start in ***Random*** mode, so the system learns what you are looking for from a random selection of items.

Once "trained" in this way (after you have screened a representative sample of items), you can then alter your setting to ***Priority***, whereby the system will present the items it deems most relevant to you first.



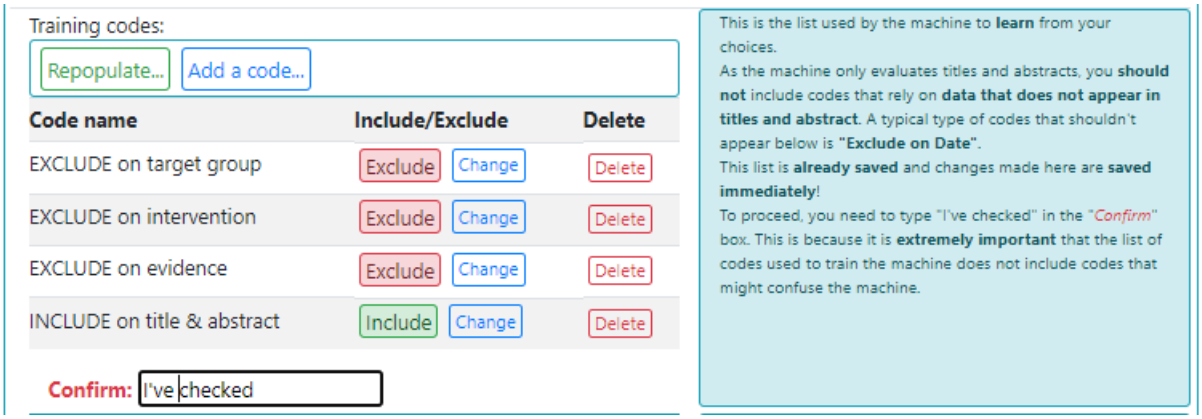
Training Codes

The PS system only looks at the title and abstract of references. Here you can select relevant training codes that the system will learn from. (All your include and exclude codes will be shown initially.)

Information which does not show up in the title or abstract will not prove effective training codes, so – for example – *Exclude on year of publication* would not be an effective choice as this information does not generally appear in the title or abstract.

Once you have checked the codes listed (deleting those you don't want the system to use and adding any further codes you do want), enter "I've checked" in the textbox.

You can "reset" the chosen codes via the ***Repopulate*** button, which will show all your screening codes again.

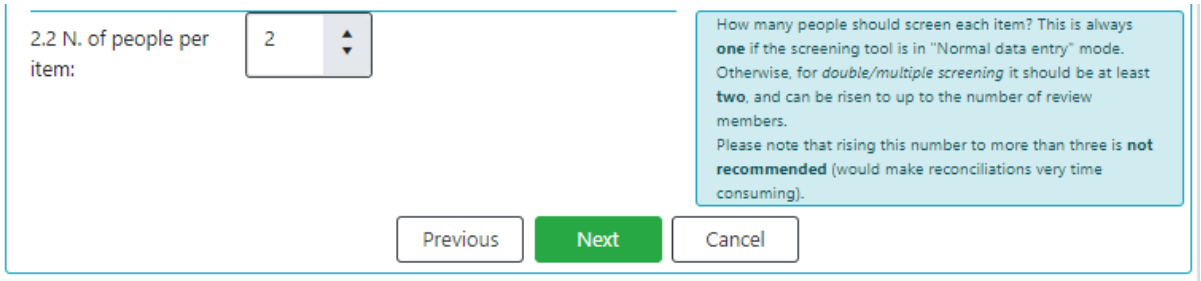


2.2 Number of people screening each reference

Here you are simply selecting the number of people screening each item. You may want one person to screen each reference, or 2 or more.

The system will track how many times each item has been screened, presenting each item to each reviewer as necessary.

Then press the ***Next*** button.

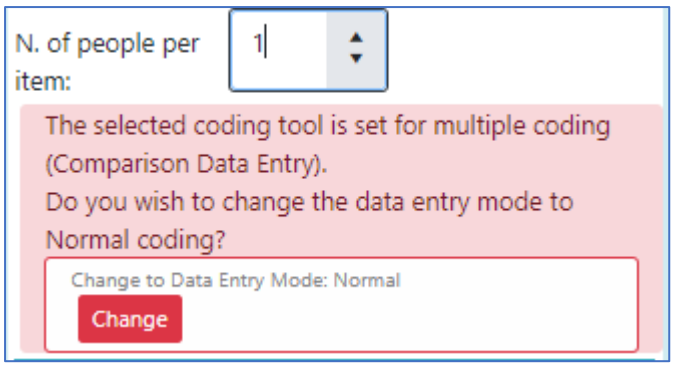


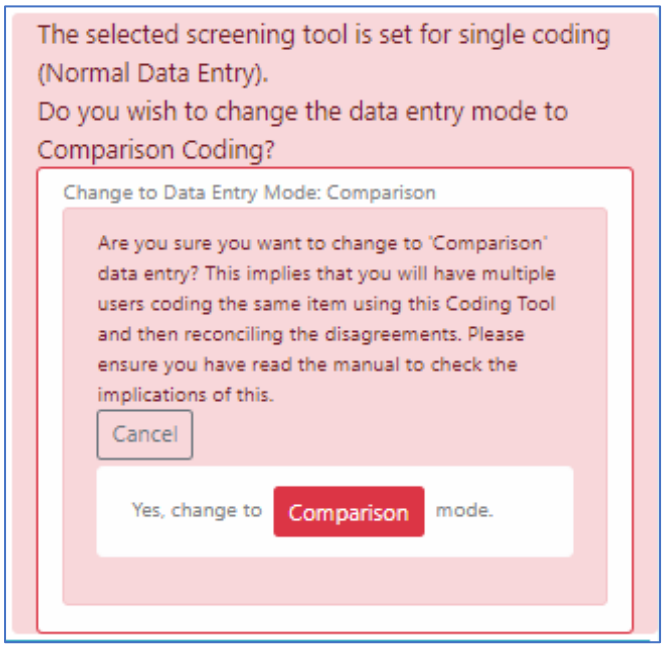
NOTE: Accordingly, the screening codeset should be in the relevant mode.

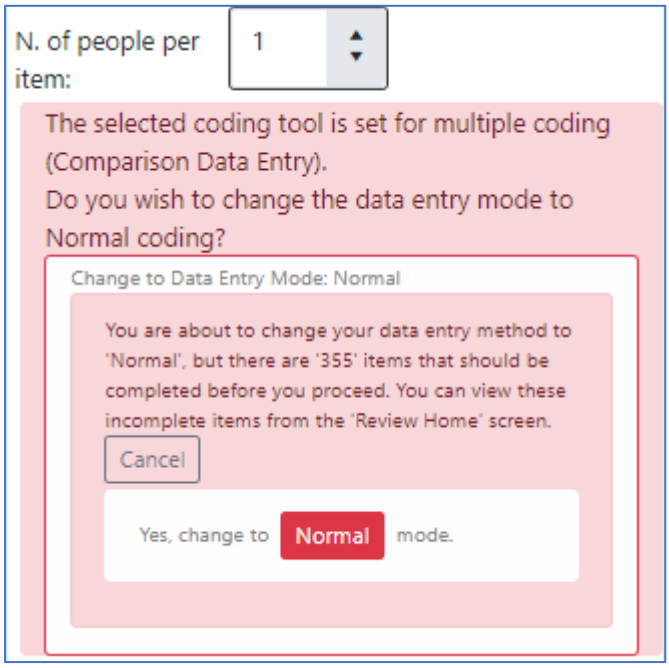
If you have chosen just one person to screen each item, the screening codeset should be in ***Normal*** mode.

If you have chosen 2 or more people to screen each item, the screening codeset should be in ***Comparison*** mode.

If the codeset is not in the appropriate mode, you will be given the chance to change this.


N. of people per item:
1
The selected coding tool is set for multiple coding (Comparison Data Entry).
Do you wish to change the data entry mode to Normal coding?
Change to Data Entry Mode: Normal
Change


The selected screening tool is set for single coding (Normal Data Entry).
Do you wish to change the data entry mode to Comparison Coding?
Change to Data Entry Mode: Comparison
Are you sure you want to change to 'Comparison' data entry? This implies that you will have multiple users coding the same item using this Coding Tool and then reconciling the disagreements. Please ensure you have read the manual to check the implications of this.
Cancel
Yes, change to Comparison mode.

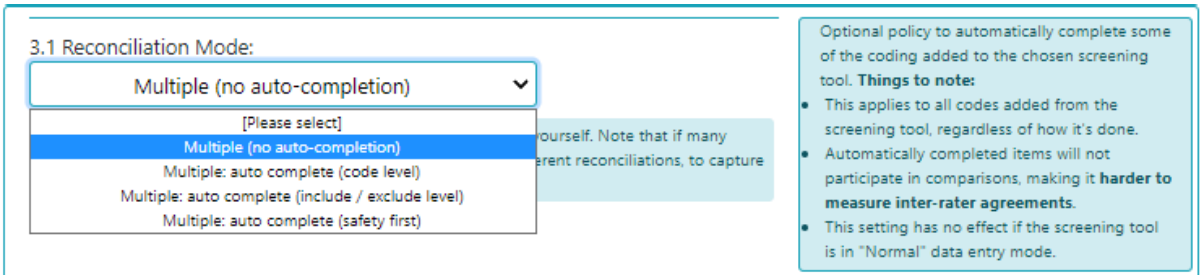

N. of people per item:
1
The selected coding tool is set for multiple coding (Comparison Data Entry).
Do you wish to change the data entry mode to Normal coding?
Change to Data Entry Mode: Normal
You are about to change your data entry method to 'Normal', but there are '355' items that should be completed before you proceed. You can view these incomplete items from the 'Review Home' screen.
Cancel
Yes, change to Normal mode.

3.1 Reconciliation Mode

If more than one reviewer is screening each item, you can select the reconciliation mode – where the screening codes chosen by each reviewer for an item are looked at and a final answer is chosen. (The setting has no effect if the screening tool is in "Normal" data entry mode.)

There are four options –:

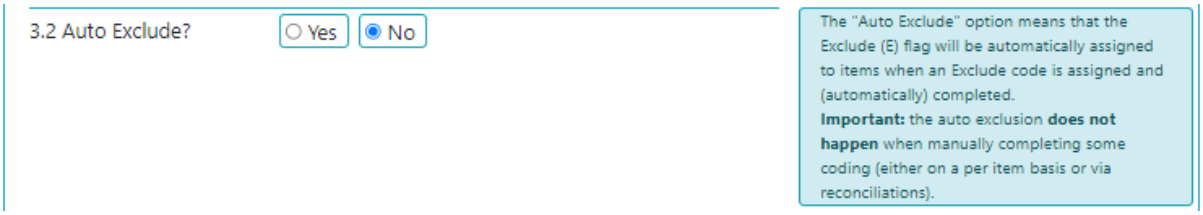
- no auto-completion
- auto-complete at an individual code level (where reviewers have chosen the same specific code)
- auto-complete at an include / exclude level (where reviewers have agreed to include or exclude an item, though the particular include or exclude code chosen may have differed)
- auto-complete – safety first (an item is shown as included if any reviewer has given it an include code, ensuring nothing is excluded if someone considered it to be relevant)



NOTE: Automatically completed items will not participate in comparisons, making it harder to measure inter-rater agreements. Otherwise, you can still run comparisons as normal and compare statistics for number of agreements and disagreements between sets of reviewers or produce comparison reports showing what each reviewer has chosen for a particular item.

3.2 Auto-exclude

Here you can choose to automatically give items the Exclude ***FLAG***, if an item is given an exclude code via auto-completion.



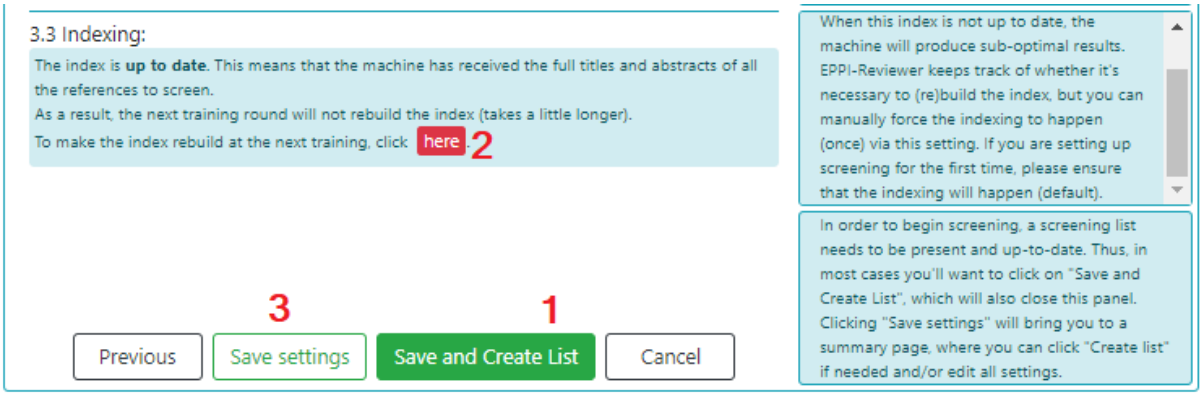
Unless you are specifically using Flags and understand their usage (and difference from Exclude codes), we suggest you do not select this option.

3.3 Indexing

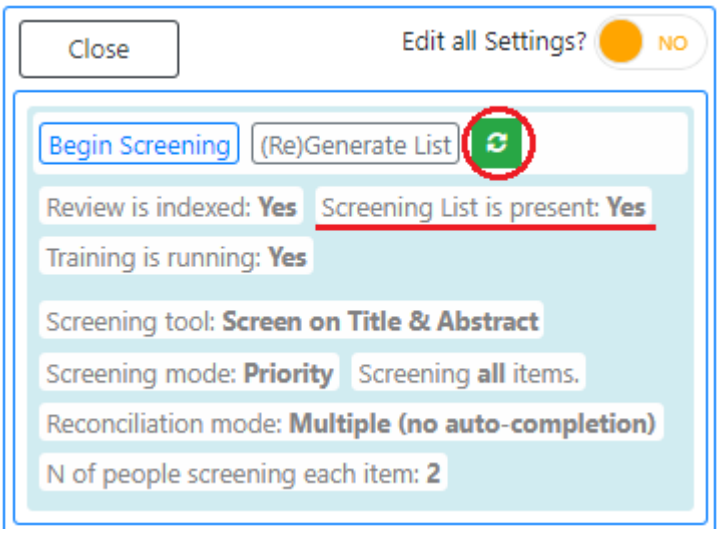
The PS system will need to look at your items' titles and abstracts and sort them accordingly. When you first set it up and save your settings, the system will create its list of items (**1**).

(If you change your screening criteria or import new items, you may wish to have the system recreate its index of items. You can do this by clicking the relevant button (**2**).

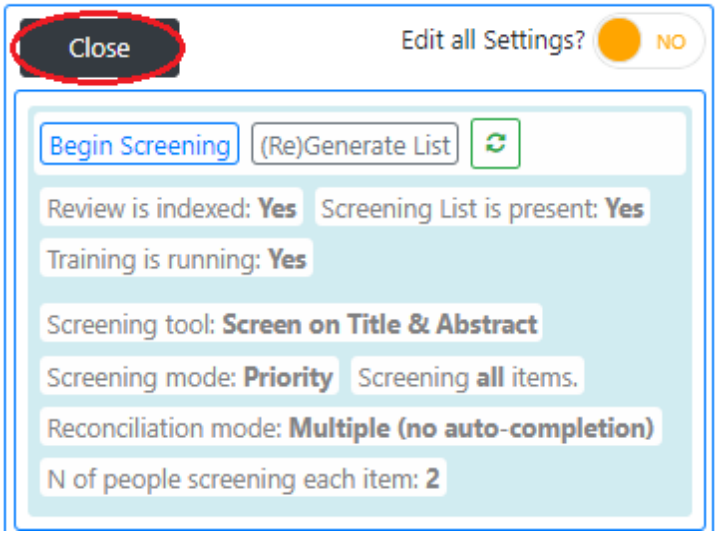
(If you are just adjusting your settings and do not wish to reindex your items, just click the ***Save settings*** button.)



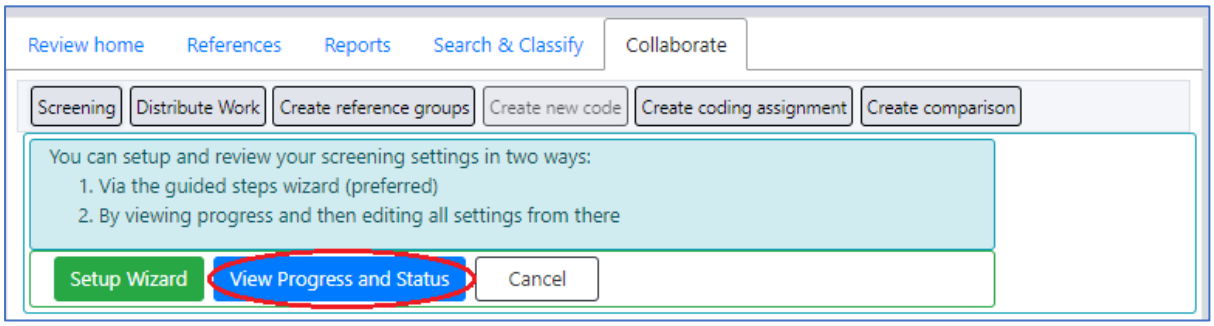
NOTE: The list can take some time to create. You will see when the list is ready via the settings pane. It will tell you whether the screening list is present or not. (You can refresh this pane via the ***Refresh*** button.)



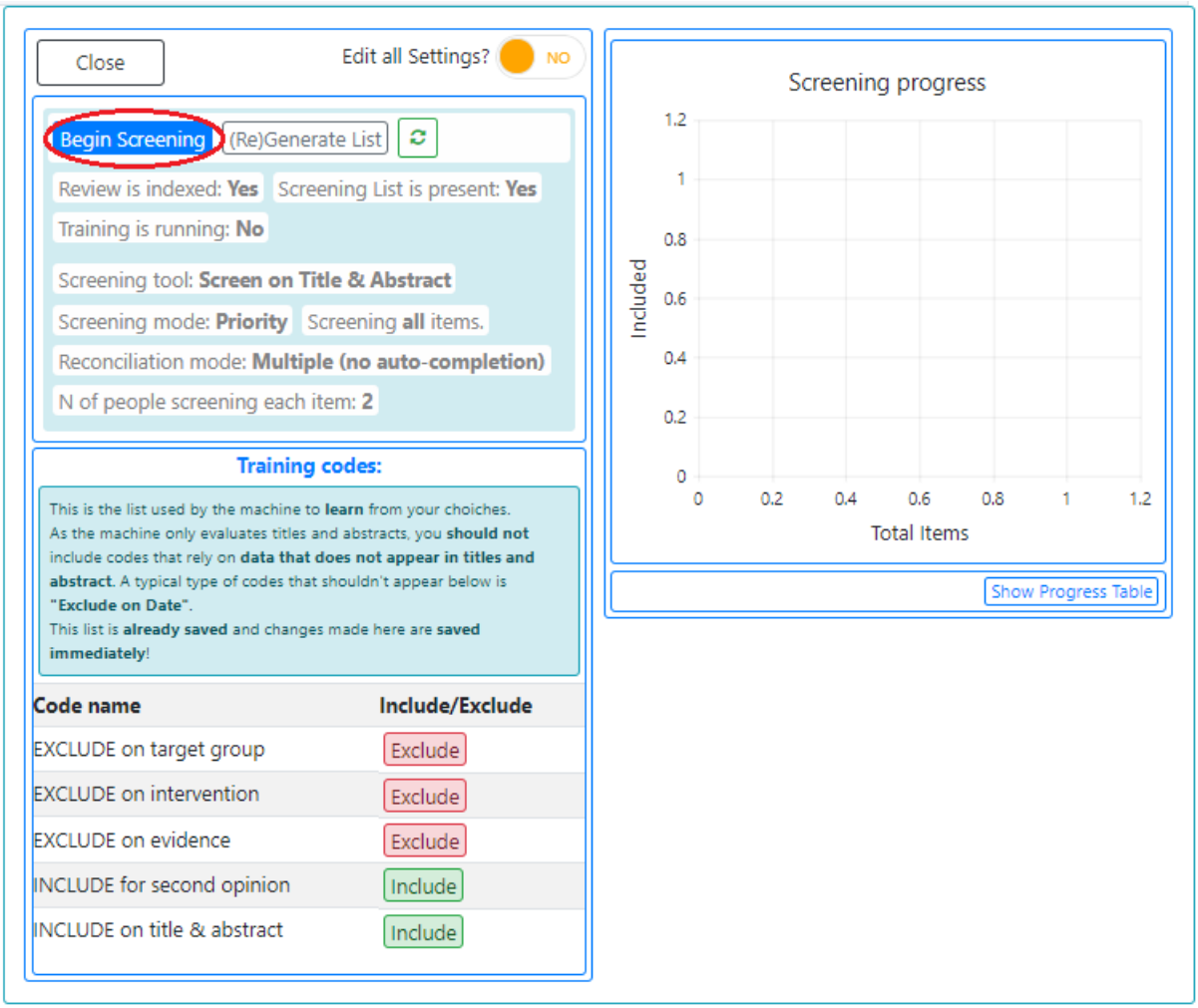
Once the list is ready, you can ***Close*** the settings window, which will take you back to the ***Collaborate*** tab.



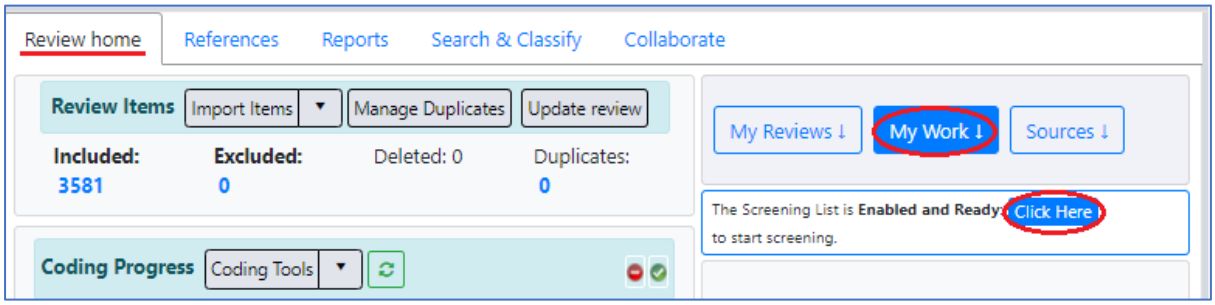
You can return to the ***PS*** page from the ***Collaborate*** tab, by clicking the ***View Progress and Status*** button.



You can also ***Begin Screening*** from this page. However, make sure that other reviewers know that they should NOT click the ***Regenerate List*** button or otherwise edit settings if they are just screening. They simply need to click the ***Begin Screening*** button.

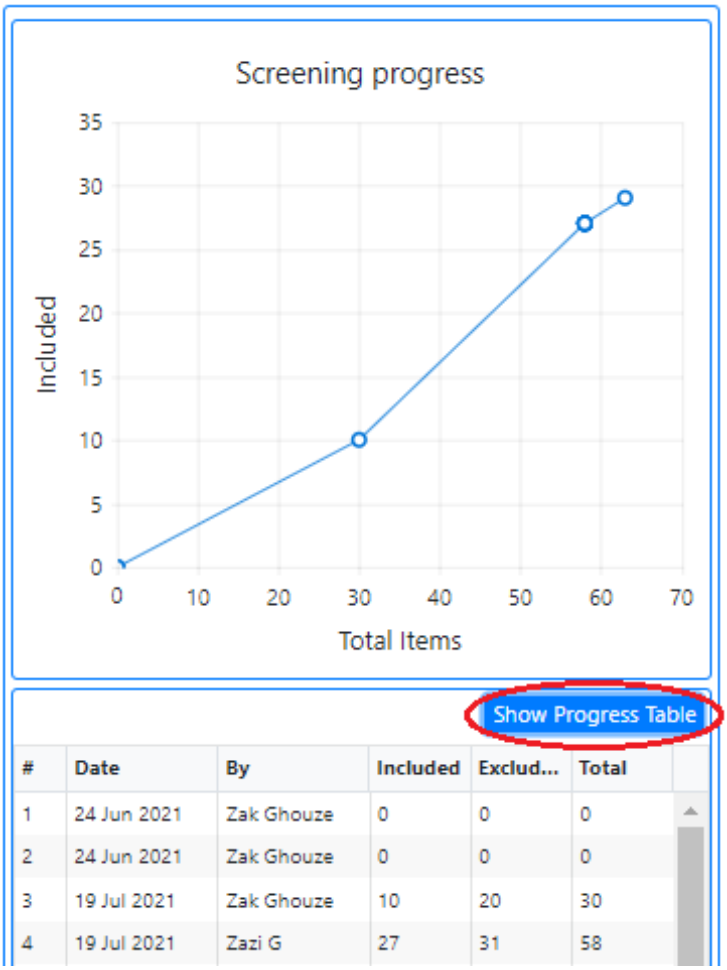


We recommend reviewers access screening via the ***My Work*** panel on the ***Review Home*** tab. This avoids them clicking anything on the PS settings page by accident.



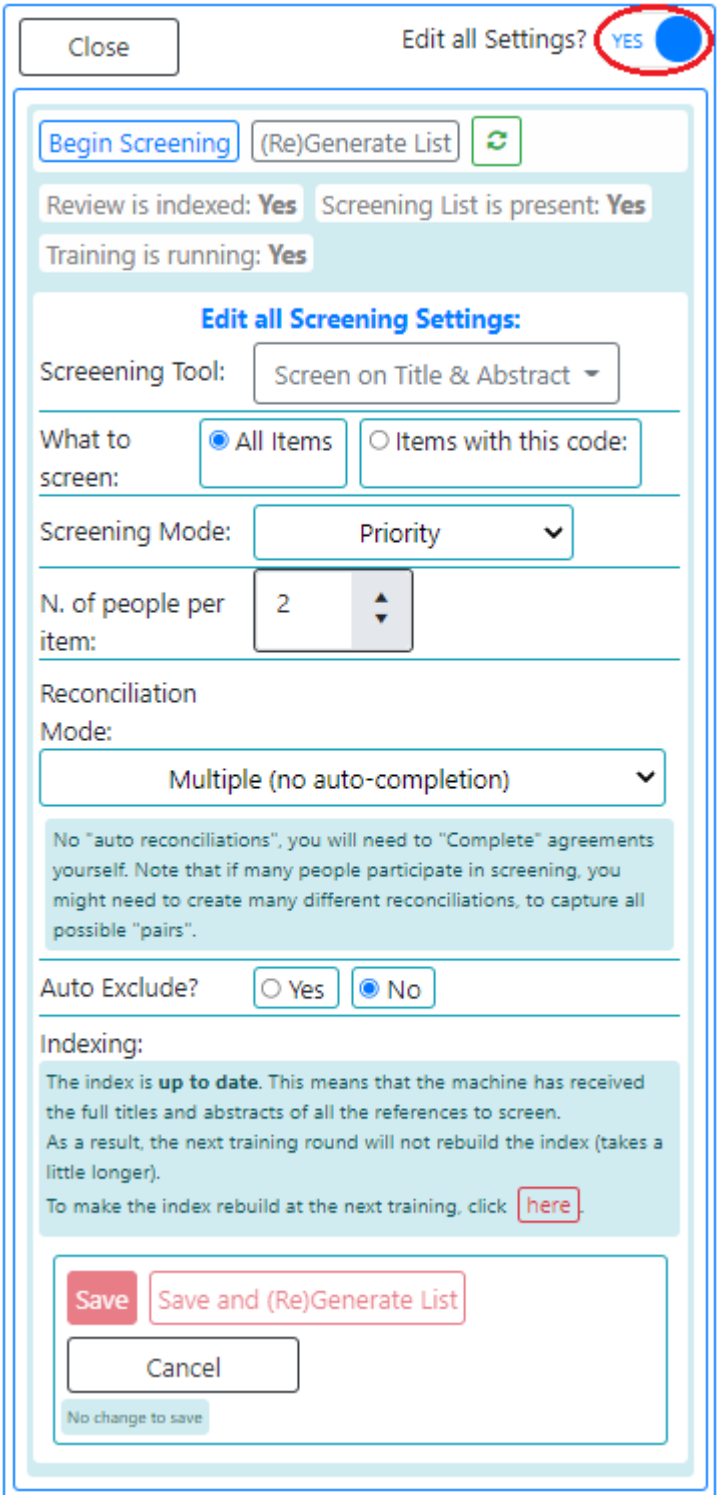
Returning to the ***PS*** page does allow you to view a chart of your ***Screening progress*** chart.

You can also show the absolute figures via the ***Show Progress Table*** button.

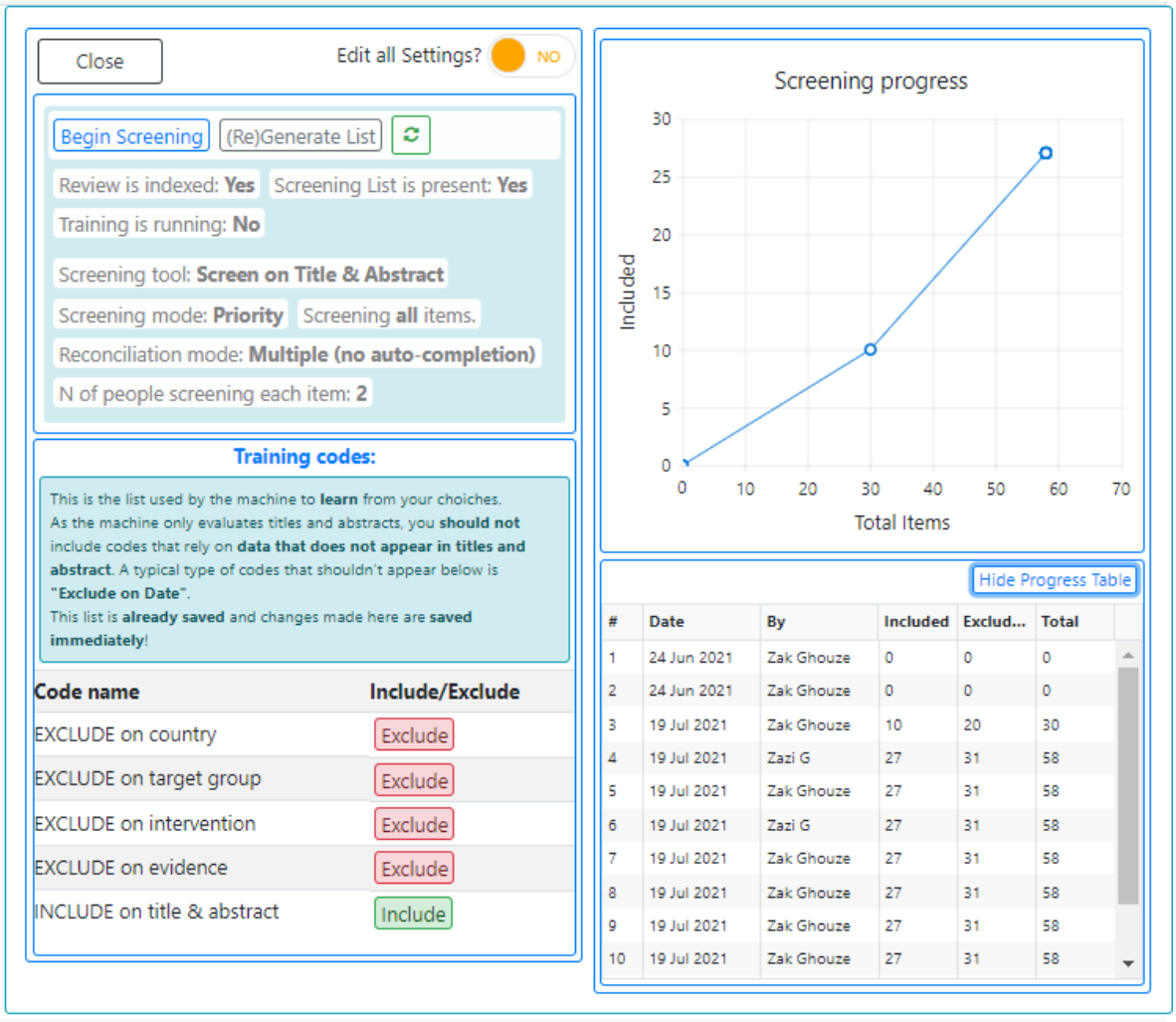


#	Date	By	Included	Exclud...	Total
1	24 Jun 2021	Zak Ghouze	0	0	0
2	24 Jun 2021	Zak Ghouze	0	0	0
3	19 Jul 2021	Zak Ghouze	10	20	30
4	19 Jul 2021	Zazi G	27	31	58

You can also edit your PS settings again via the ***Edit all Settings*** switch.



It is important to note that all the features described here are designed to work for standard screening exercises. Departures from the expected conventions might produce unexpected results: for example, the "Multiple (auto-complete)" reconciliation mode, expects that items will receive one and only one code from the screening codeset, assigning more than one code might lead to incorrect detection of agreements.

Manual Set-up

The setings for manual set-up are identical to those shown above, but you will not see the prompts or steps provided in the wizard. The settings are all there as described, for you to adjust as you wish. We recommend you read the guidance for the Wizard, which will explain each setting in detail.