

## 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.

ReviewID	Name of review	Date review created	Last login by this reviewer	Expiry date	Edit
12366	ABCD ZAZA's example non-shareable review 2	15 May 2017	N/A	31 Dec 2020 Expired	Edit
12206	ie3 - screening on	25 Apr 2017	29 Jan 2021 20:14	31 Dec 2020 Expired	Edit

Review # 12206  
Review title ie3 - screening on

Save Cancel/close Priority screening  On  Off

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

Review home References Reports Search & Classify Collaborate

Screening Distribute Work Create reference groups Create new code Create coding assignment Create comparison

You can setup and review your screening settings in two ways:

1. Via the guided steps wizard (preferred)
2. By viewing progress and then editing all settings from there

Setup Wizard View Progress and Status Cancel

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.)

**Setup Screening - Step 1: define what to do**

This wizard will help you setting up "random" and "priority" screening:

**1. Screening tool and what to screen:** Tool: Screen on Title & Abstract | All Items

2. How to screen:

3. Automation options

1.1 Screening Tool: Screen on Title & Abstract ▾

- Screen on Title & Abstract
- Screen on Full Text

This is the tool you will use to screen your references. Note that **priority screening** (the "active learning" system) looks at title and abstract only, so it might be 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.

1.2 What to screen:  All Items  Items with this code:

You can restrict screening to "All items with this code", or screen all items available in the review. Most frequently, you'll screen all items.

Previous **Next** Cancel

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.

### Setup Screening - Step 2: define how to do it

This wizard will help you setting up "random" and "priority" screening:

1. Screening tool and what to screen:

**2. How to screen:**

3. Automation options

2.1 Screening Mode:  ▼

[Please select]
Priority
Random

Use "Priority Screening" or randomise the order in which items are screened?

Note that it is **recommended** to enable Priority Screening only after you have found a good number of both "Included" and "Excluded" items (this is called *Seeding*). Priority Screening will use a randomised list if it is not seeded and will switch to priority mode when a *minimal* amount of seeding data is available.

Manual seeding is **recommended** because it allows the machine to learn from better data. Thus, you may want to start by picking "random" and then change to "Priority" only after you have found a **representative** sample of "Included" items. Proceeding in this way also allows to evaluate how many "Includes" you expect to find overall (useful to decide when to stop screening, if needed).

## 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.

Training codes:

Code name	Include/Exclude	Delete
EXCLUDE on target group	<input type="button" value="Exclude"/> <input type="button" value="Change"/>	<input type="button" value="Delete"/>
EXCLUDE on intervention	<input type="button" value="Exclude"/> <input type="button" value="Change"/>	<input type="button" value="Delete"/>
EXCLUDE on evidence	<input type="button" value="Exclude"/> <input type="button" value="Change"/>	<input type="button" value="Delete"/>
INCLUDE on title & abstract	<input type="button" value="Include"/> <input type="button" value="Change"/>	<input type="button" value="Delete"/>

**Confirm:**

This is the list used by the machine to **learn** from your choices.

As the machine only evaluates titles and abstracts, you **should not** include codes that rely on **data that does not appear in titles and abstract**. A typical type of codes that shouldn't appear below is "Exclude on Date".

This list is **already saved** and changes made here are **saved immediately!**

To proceed, you need to type "I've checked" in the "Confirm" box. This is because it is **extremely important** that the list of codes used to train the machine does not include codes that might confuse the machine.

## 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.

2.2 N. of people per item:

How many people should screen each item? This is always **one** if the screening tool is in "Normal data entry" mode. Otherwise, for *double/multiple screening* it should be at least **two**, and can be risen to up to the number of review members.

Please note that rising this number to more than three is **not recommended** (would make reconciliations very time consuming).

**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:

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:

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

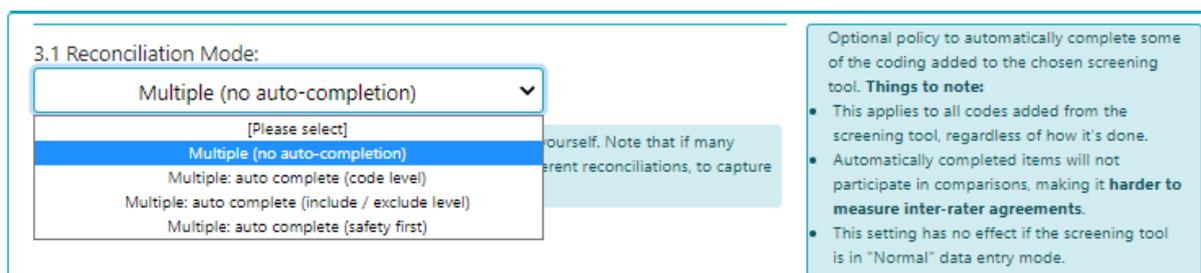
Yes, change to **Normal** mode.

### 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)



The screenshot shows a dropdown menu titled "3.1 Reconciliation Mode:" with the following options: "Multiple (no auto-completion)", "[Please select]", "Multiple (no auto-completion)", "Multiple: auto complete (code level)", "Multiple: auto complete (include / exclude level)", and "Multiple: auto complete (safety first)". A callout box to the right explains the optional policy to automatically complete some coding, noting that it applies to all codes and that automatically completed items will not participate in comparisons, making it harder to measure inter-rater agreements. It also states that the setting has no effect if the screening tool is in "Normal" data entry mode.

**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.



The screenshot shows a radio button selection for "3.2 Auto Exclude?" with "Yes" and "No" options. The "No" option is selected. A callout box to the right explains that the "Auto Exclude" option means that the Exclude (E) flag will be automatically assigned to items when an Exclude code is assigned and (automatically) completed. It also states that important: the auto exclusion does not happen when manually completing some coding (either on a per item basis or via reconciliations).

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.)

3.3 Indexing:

The index is **up to date**. This means that the machine has received the full titles and abstracts of all the references to screen.  
As a result, the next training round will not rebuild the index (takes a little longer).  
To make the index rebuild at the next training, click **here**. 2

When this index is not up to date, the machine will produce sub-optimal results. EPPI-Reviewer keeps track of whether it's necessary to (re)build the index, but you can manually force the indexing to happen (once) via this setting. If you are setting up screening for the first time, please ensure that the indexing will happen (default).

In order to begin screening, a screening list needs to be present and up-to-date. Thus, in most cases you'll want to click on "Save and Create List", which will also close this panel. Clicking "Save settings" will bring you to a summary page, where you can click "Create list" if needed and/or edit all settings.

Previous Save settings Save and Create List Cancel

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.)

Close Edit all Settings? NO

Begin Screening (Re)Generate List

Review is indexed: **Yes** Screening List is present: **Yes**

Training is running: **Yes**

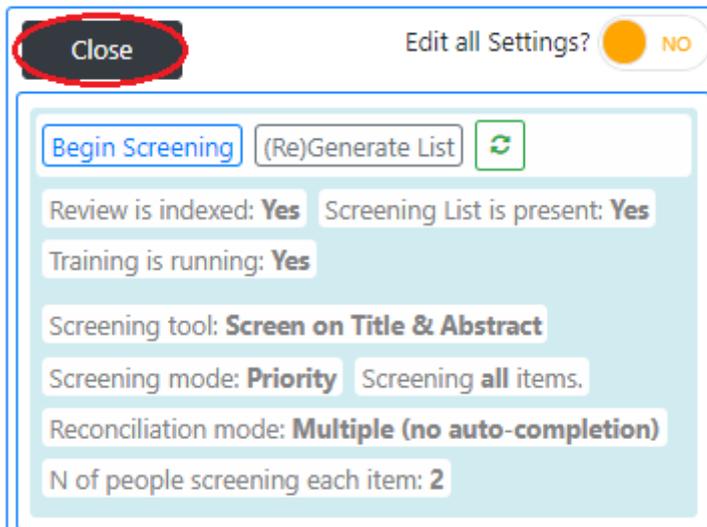
Screening tool: **Screen on Title & Abstract**

Screening mode: **Priority** Screening all items.

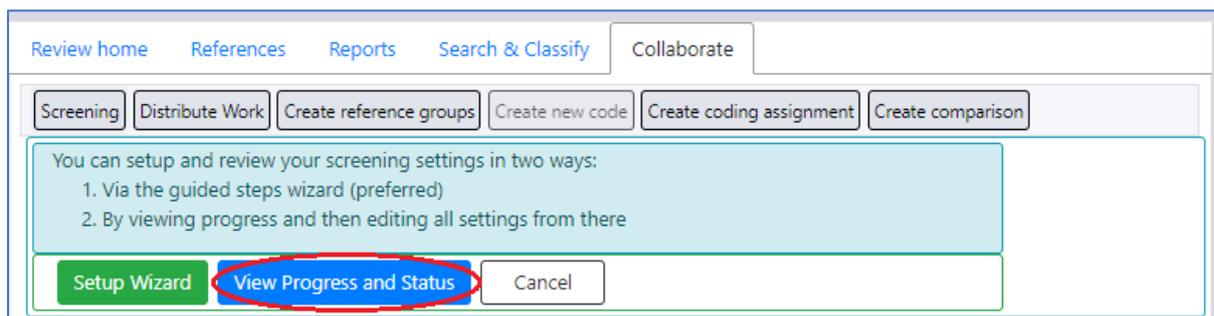
Reconciliation mode: **Multiple (no auto-completion)**

N of people screening each item: **2**

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.

Close Edit all Settings? ● NO

**Begin Screening** (Re)Generate List

Review is indexed: **Yes** Screening List is present: **Yes**  
 Training is running: **No**  
 Screening tool: **Screen on Title & Abstract**  
 Screening mode: **Priority** Screening **all** items.  
 Reconciliation mode: **Multiple (no auto-completion)**  
 N of people screening each item: **2**

**Training codes:**

This is the list used by the machine to **learn** from your choices. As the machine only evaluates titles and abstracts, you **should not** include codes that rely on **data that does not appear in titles and abstract**. A typical type of codes that shouldn't appear below is "Exclude on Date".  
 This list is **already saved** and changes made here are **saved immediately!**

Code name	Include/Exclude
EXCLUDE on target group	<span style="border: 1px solid red; padding: 2px;">Exclude</span>
EXCLUDE on intervention	<span style="border: 1px solid red; padding: 2px;">Exclude</span>
EXCLUDE on evidence	<span style="border: 1px solid red; padding: 2px;">Exclude</span>
INCLUDE for second opinion	<span style="border: 1px solid green; padding: 2px;">Include</span>
INCLUDE on title & abstract	<span style="border: 1px solid green; padding: 2px;">Include</span>

Screening progress

Included

Total Items

Show Progress Table

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.

Review home References Reports Search & Classify Collaborate

Review Items Import Items Manage Duplicates Update review

Included: **3581** Excluded: **0** Deleted: 0 Duplicates: 0

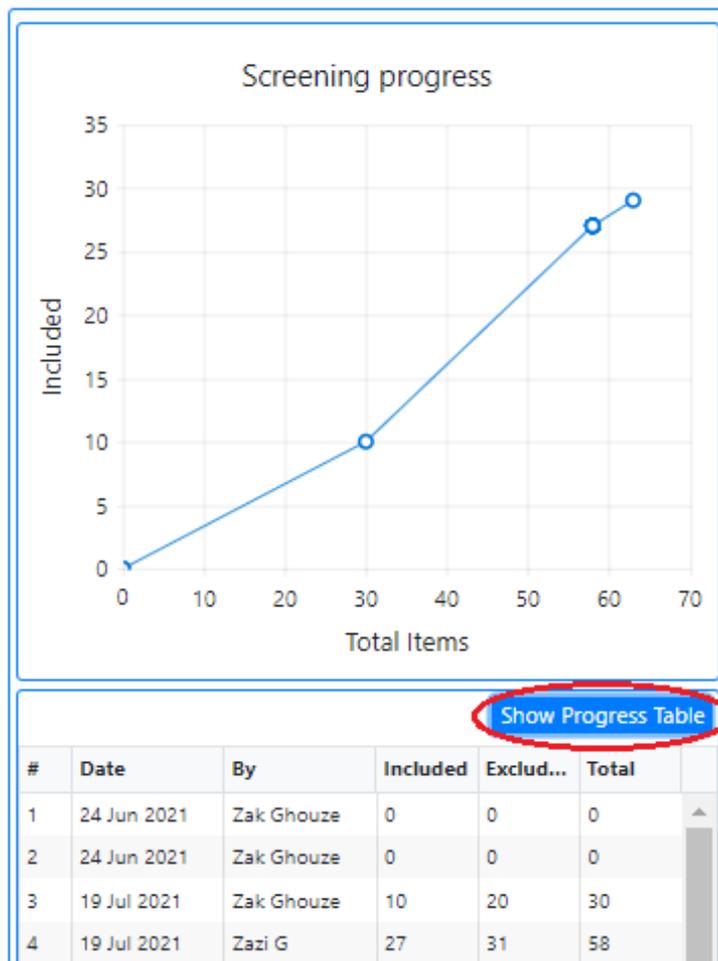
Coding Progress Coding Tools

My Reviews ↓ **My Work ↓** Sources ↓

The Screening List is **Enabled and Ready** [Click Here](#) to start screening.

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.



Show Progress Table

#	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.

Close Edit all Settings?  YES

Begin Screening (Re)Generate List

Review is indexed: **Yes** Screening List is present: **Yes**  
Training is running: **Yes**

**Edit all Screening Settings:**

Screening Tool: Screen on Title & Abstract ▾

What to screen:  All Items  Items with this code:

Screening Mode: Priority ▾

N. of people per item: 2

Reconciliation Mode: Multiple (no auto-completion) ▾

No "auto reconciliations", you will need to "Complete" agreements yourself. Note that if many people participate in screening, you might need to create many different reconciliations, to capture all possible "pairs".

Auto Exclude?  Yes  No

Indexing:  
The index is **up to date**. This means that the machine has received the full titles and abstracts of all the references to screen. As a result, the next training round will not rebuild the index (takes a little longer). To make the index rebuild at the next training, click [here](#).

Save Save and (Re)Generate List  
Cancel  
No change to save

**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 settings 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.

Close
Edit all Settings? ● NO

Begin Screening
(Re)Generate List
↻

Review is indexed: **Yes**
Screening List is present: **Yes**

Training is running: **No**

Screening tool: **Screen on Title & Abstract**

Screening mode: **Priority**
Screening **all** items.

Reconciliation mode: **Multiple (no auto-completion)**

N of people screening each item: **2**

**Training codes:**

This is the list used by the machine to **learn** from your choices. As the machine only evaluates titles and abstracts, you **should not** include codes that rely on **data that does not appear in titles and abstract**. A typical type of codes that shouldn't appear below is **"Exclude on Date"**.

This list is **already saved** and changes made here are **saved immediately!**

Code name	Include/Exclude
EXCLUDE on country	<span style="border: 1px solid red; padding: 2px 5px; color: red;">Exclude</span>
EXCLUDE on target group	<span style="border: 1px solid red; padding: 2px 5px; color: red;">Exclude</span>
EXCLUDE on intervention	<span style="border: 1px solid red; padding: 2px 5px; color: red;">Exclude</span>
EXCLUDE on evidence	<span style="border: 1px solid red; padding: 2px 5px; color: red;">Exclude</span>
INCLUDE on title & abstract	<span style="border: 1px solid green; padding: 2px 5px; color: green;">Include</span>

Screening progress

Hide Progress Table

#	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
5	19 Jul 2021	Zak Ghouze	27	31	58
6	19 Jul 2021	Zazi G	27	31	58
7	19 Jul 2021	Zak Ghouze	27	31	58
8	19 Jul 2021	Zak Ghouze	27	31	58
9	19 Jul 2021	Zak Ghouze	27	31	58
10	19 Jul 2021	Zak Ghouze	27	31	58