

How the interactive Summary of Qualitative Findings (iSoQ) tool can help you apply GRADE-CERQual in your QES

Cochrane Learning Live Webinar, Sept. 26 2024



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GRADE-CERQual coordinating team

&

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Epistemonikos Foundation

Today's webinar

- Presentation (10 mins)
 - Q&A (5 mins)
- Demo (20 mins)
 - Q&A (10 mins)
- What's coming – CAMELOT integration (10 mins)
- Final questions (5 mins)

What is iSoQ?

- A free online data management tool to assist review authors with applying **the GRADE-CERQual approach** to the individual review findings of their **qualitative evidence synthesis**.
- Assists authors to produce Evidence Profiles and Summary of Qualitative Findings tables in-line with the guidance
- An online open database of Summary of Qualitative Findings tables

Signposting for QES and GRADE-CERQual resources

What is a Qualitative Evidence synthesis?

"A qualitative evidence synthesis, or QES, is a type of systematic review that brings together the findings from primary qualitative research in a systematic way. (Flemming & Noyes 2021)

Never done a QES?



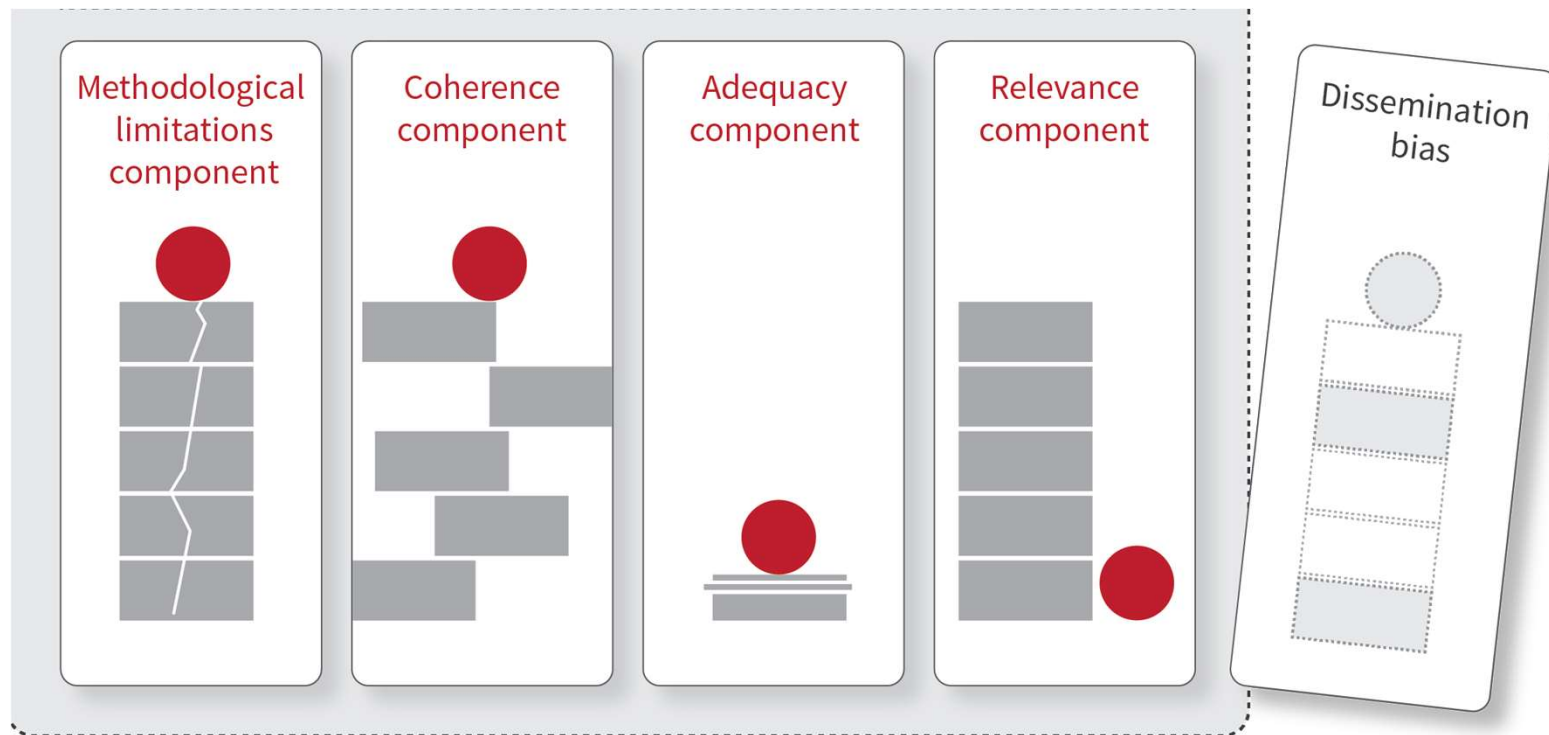
Check out the Cochrane Learning Live series on QES.
8 webinars – free to view online
<https://training.cochrane.org/qes-learning-live-webinar-series>

What is GRADE-CERQual?

- GRADE-CERQual is an approach for assessing how much confidence to place in the individual review findings of a qualitative evidence synthesis (systematic review of qualitative research)
- GRADE-CERQual Project Group - ~200 members
- 700+ Mailing List (3 newsletters per year) – visit cerqual.org/contactus

The GRADE-CERQual approach

4 Components



Never applied GRADE-CERQual?

- iSoQ assumes you know how to apply GRADE-CERQual, it does not teach you how to apply it.

BMC Part of Springer Nature

IS Implementation Science

Official guidance
7 papers

BMC Part of Springer Nature

Health Research Policy and Systems

Home About Articles Submission Guidelines Submit manuscript

Research | Open access | Published: 25 July 2023

The use of GRADE-CERQual in qualitative evidence synthesis: an evaluation of fidelity and reporting

Megan Wainwright, Rana Islamiah Zahroh, Özge Tunçalp, Andrew Booth, Meghan A. Bohren, Jane Noyes, Weilong Cheng, Heather Munthe-Kaas & Simon Lewin

Health Research Policy and Systems 21, Article number: 77 (2023) | Cite this article

2769 Accesses | 4 Citations | 15 Altmetric | Metrics

Cochrane-Campbell Handbook for Qualitative Evidence Synthesis

Version 1.0, 2023



Newsletter August 2024 **№ 25**

GRADE CERQual

Confidence in the Evidence from Reviews of Qualitative Research

In this newsletter:

- From the Coordinating Team - Thank you Arash!
- Intro to CAMELOT webinar - Sept. 3
- Intro to iSoQ webinar - Sept. 26
- New QES uses iSoQ to apply GRADE-CERQual
- Coming soon - QES template in RevMan
- Reporting and Fidelity Tips
- EDI in evidence synthesis - webinars from Evidence Synthesis Ireland

iSoQ Drop-in Support Webinar

Sept. 12, 2024 17:00 (Oslo)

30 minutes, open to prospective, new and returning iSoQ users

Sign-up [HERE](#)

Cerqual.org

GRADE-CERQual videos

INTRODUCTION TO GRADE-CERQUAL (9:47 MINS)



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Qualitative Evidence Synthesis (QES): Learning Live webinar series

Welcome to this series of eight Cochrane Learning Live webinars, all dedicated to Qualitative Evidence Synthesis (QES). We were pleased to be joined throughout the series by leading experts in this field, and you can find out more about each of the eight webinars and watch the recordings below.

Watch the recordings of previous sessions

Integrating qualitative evidence syntheses with intervention effect findings (May 2022)
Angela Harden, Professor of Health Sciences, City, University of London.
James Thomas, Professor of Social Research & Policy, UCL Social Research Institute, UCL Institute of Education, London.
[\[click here for recording & accompanying materials\]](#)

GRADE CERQual (April 2022)
Megan Wainwright, consultant in qualitative research, Portugal & member of the GRADE-CERQual coordinating team.
[\[click here for recording & accompanying materials\]](#)



GRADE CERQual

Growth in use of the approach

- Required for Cochrane QESs.
- Adopted by WHO, NICE, with growing interest in various government HTA settings.
- Translations in Mandarin, Portuguese, Spanish
- Train the Trainer workshop at GRADE Meeting in Bogotá 2018
- We evaluated its use in the literature (Wainwright et al. 2023)
 - Over 1000 citations
 - 251 syntheses have applied GRADE-CERQual
 - 187 of these published since 2018



iSoQ Version 1.0

An online tool for applying the GRADE-CERQual approach to findings of a qualitative evidence synthesis

- Learn more about iSoQ
- Browse
- Watch a short video



Our aim in developing the iSoQ tool

- Facilitate the use of GRADE-CERQual
- Improve reporting of GRADE-CERQual assessments
- Support review authors by producing a user-friendly tool that displays the information they need to make each assessment and provides practical tips and guidance that compliments the full guidance in the papers.

How was iSoQ funded?

- Norwegian Institute of Public Health's Centre for Epidemic Interventions Research (CEIR)
- Epistemonikos Foundation

Who is developing iSoQ?

GRADE-CERQual

- Megan Wainwright
- Claire Glenton
- Simon Lewin
- Heather Munthe-Kaas (for CAMELOT team)

EPISTEMONIKOS

- Damian Garrido
- Camilo Vergara
- Javiera Peña
- Gabriel Rada

iSoQ timeline

- March 2019 - Start
- Sept 2019 - June 2020 - 8 one-on-one user tests in 4 rounds
- Summer 2020 - pre-release testing with 3 review teams
- Jan. 2021 Limited release of Beta Version 1 for use on demand
 - 186 accounts created in that phase
 - Was used in 5 GRADE-CERQual training workshops (Ministry of Health Brazil, AHRQ, ESQUIRE, USP, International workshop on rational use of medicines, Brazil).
- Full launch of iSoQ v.1 March 2022
 - 600+ accounts created so far
- 2023-2024 developing a prototype for CAMELOT tool integration into iSoQ

When in the review process can I use the iSoQ tool?

- Once you have finished screening and have a list of included studies for your review

Does the iSoQ tool replace other kinds of software used in reviews?

- No, this tool is specific to applying the GRADE-CERQual approach.
- You do not conduct your whole review in iSoQ
- It will be used in addition to other software for other stages of the review process. E.g.
 - reference management software (e.g. Endnote)
 - software for screening and selecting studies (e.g. Covidence and Distiller SR)
 - software and programs for extracting and analysing data (e.g. DistillerSR, NVivo, Microsoft Excel).
 - Writing-up a the manuscript/report (e.g. Revman)

Which steps in the review process can be conducted in iSoQ

- ~~Managing references (remove duplicates, apply styles)~~
- ~~Screening studies for inclusion or exclusion~~
- ~~Extracting data from included studies~~
- ~~Analysing and synthesising data~~
- **Created a characteristics of studies table**
- **Creating a methodological assessments table (critical appraisal)**
- **Applying the GRADE-CERQual approach to review findings**
- **Producing GRADE-CERQual Summary of Qualitative Findings tables and Evidence Profile tables.**

Can you invite collaborators to an iSoQ project?

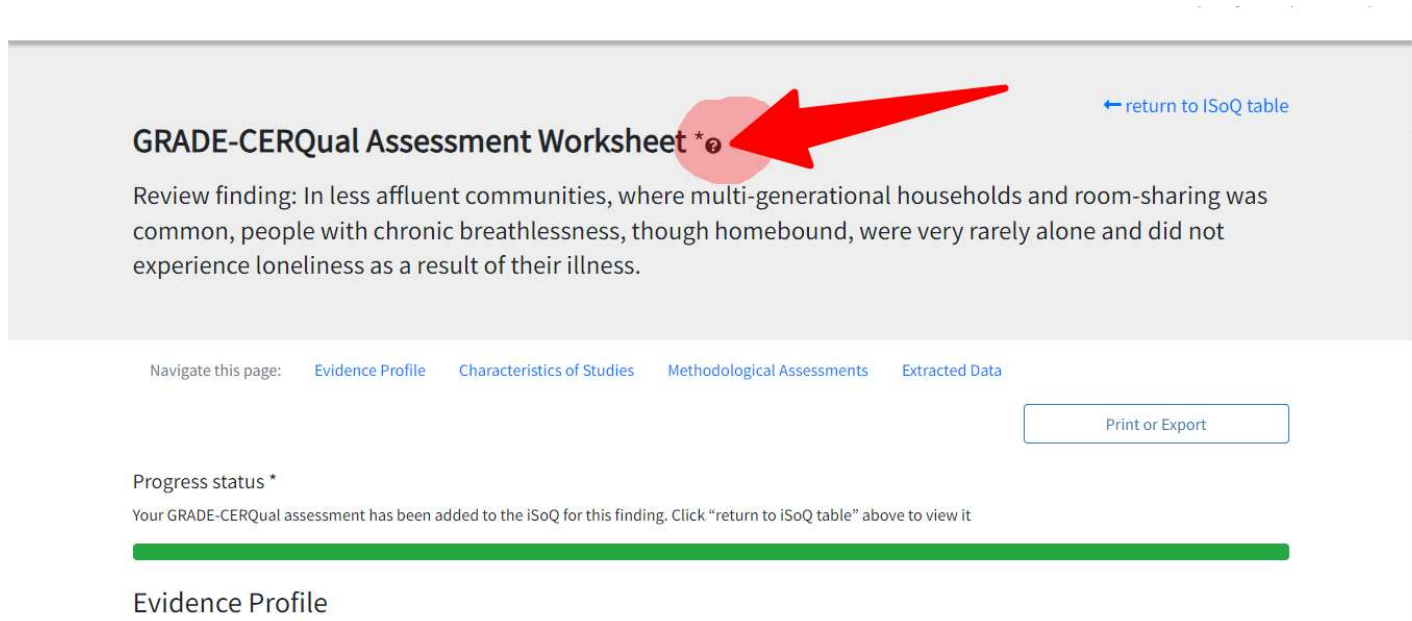
- Yes, you can invite collaborators (for example other review authors) to a shared project and assign them either "view only" or "view and edit" rights.
- You can also generate a temporary link to send to collaborators who only need to view the project for a limited amount of time (for example a guideline panel or a peer reviewer).
- Note that collaborators cannot work on the same content at the same time.

iSoQ Database

- We hope iSoQ will become a repository for SoQF tables and evidence profiles.
- By publishing to the iSoQ database, confidence assessments are transparent to end-users
- End-users can explore iSoQ tables and underlying Evidence Profiles to understand how authors arrived at their confidence assessments
- As authors you have options:
 - Private
 - Fully public
 - Partially public
 - Minimally public

How can I get help with iSoQ?

- Email: isoq@epistemonikos.org
- Sign-up for drop-in support - <https://www.cerqual.org/upcoming-events/>
- Help videos embedded on the platform. Look for the question mark icon



GRADE-CERQual Assessment Worksheet * ? [← return to iSoQ table](#)

Review finding: In less affluent communities, where multi-generational households and room-sharing was common, people with chronic breathlessness, though homebound, were very rarely alone and did not experience loneliness as a result of their illness.

Navigate this page: [Evidence Profile](#) [Characteristics of Studies](#) [Methodological Assessments](#) [Extracted Data](#)

[Print or Export](#)

Progress status *

Your GRADE-CERQual assessment has been added to the iSoQ for this finding. Click "return to iSoQ table" above to view it

Evidence Profile

Your feedback

- We will be working to continually improve iSoQ
- Send us feedback any time!
- Link provided to feedback form on the Help tab

Demo

GRADE CERQual interactive Summary of Qualitative Findings

[About](#) [Browse](#) [Help](#) [Login](#)

iSoQ

Version 1.0

*An online tool for applying the
GRADE-CERQual approach to
findings of a qualitative evidence
synthesis*

- Learn more about iSoQ
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- Watch a short video

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 **EPISTEMONIKOS
FOUNDATION**



In progress: CAMELOT integration into iSoQ

What is CAMELOT?

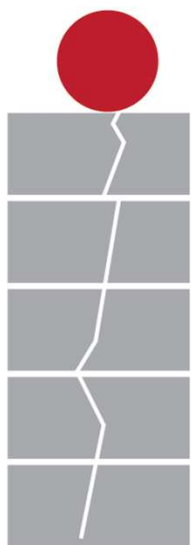
The Cochrane qualitative Methodological Limitations Tool (CAMELOT) is a new evidence-based tool for assessing the methodological strengths and limitations of primary qualitative research studies in a QES.

Review authors must have applied a critical appraisal tool to each included study in order to assess the methodological limitation component of the GRADE-CERQual approach. CAMELOT is designed to work with GRADE-CERQual

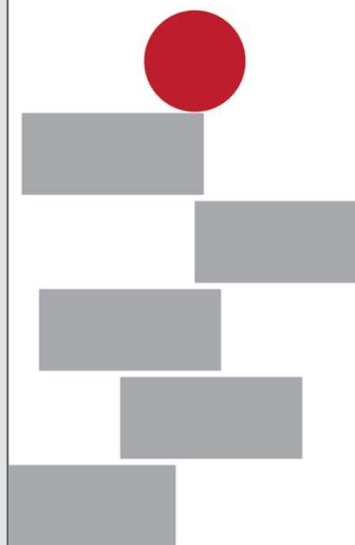
CAMELOT tool



Methodological limitations component



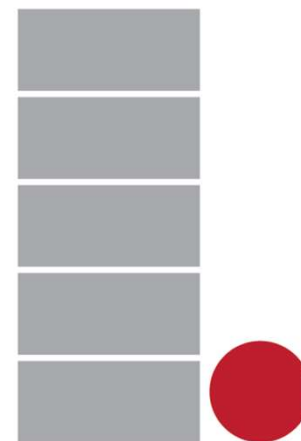
Coherence component



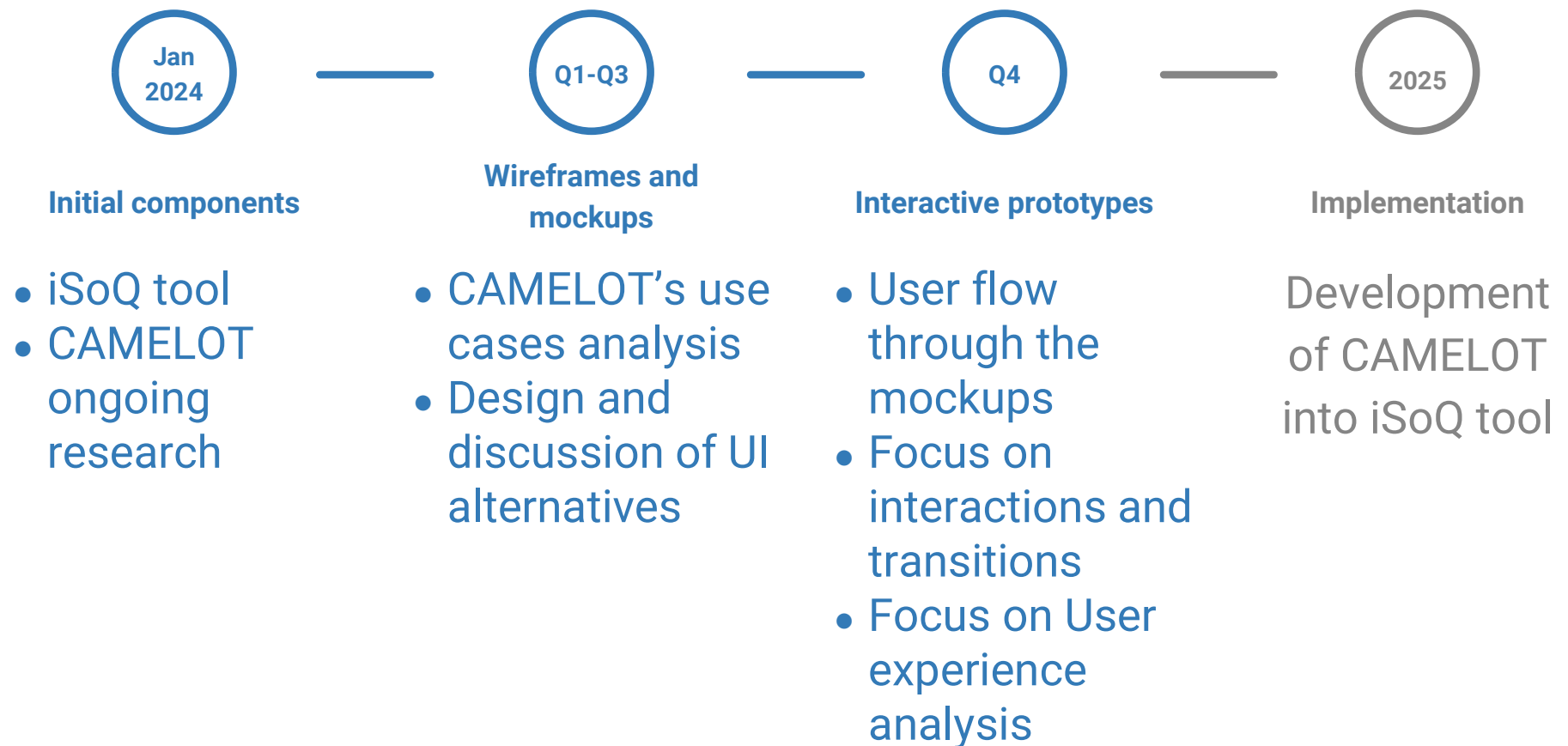
Adequacy component



Relevance component

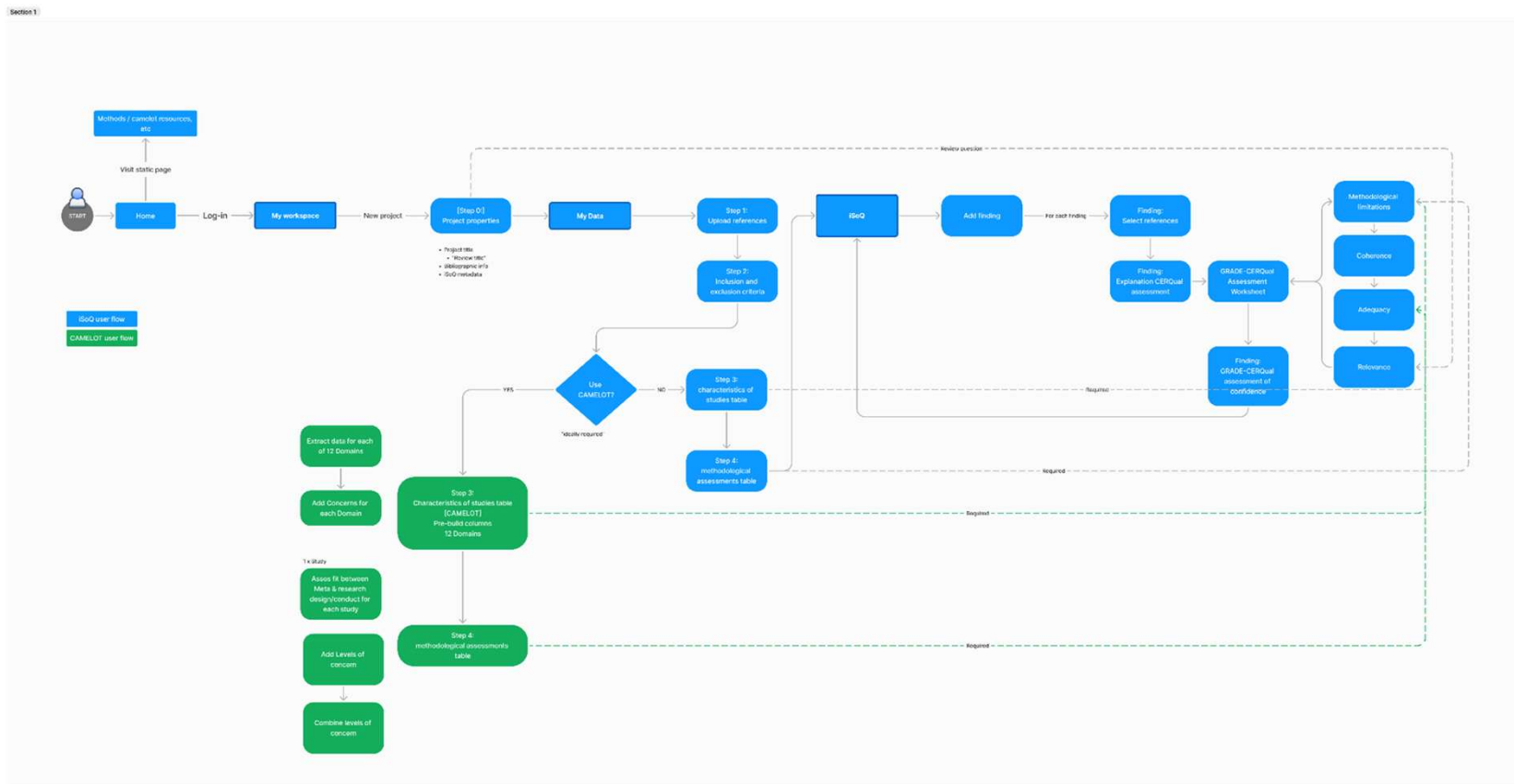


Timeline - CAMELOT integration into iSoQ



Initial steps - CAMELOT as a web tool

How does CAMELOT integrates into the current iSoQ user workflow?



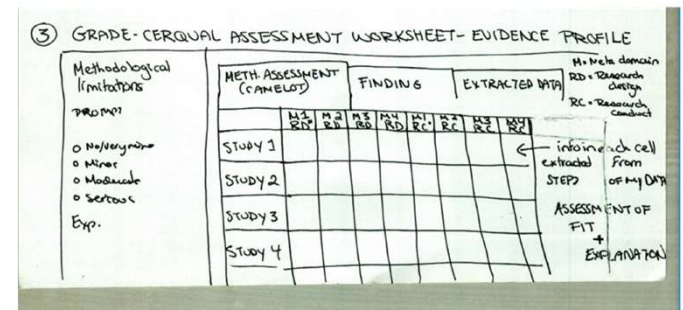
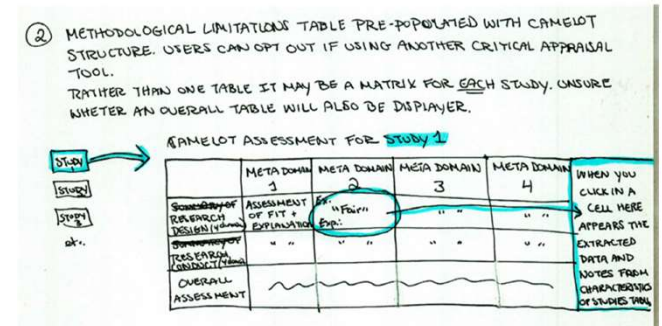
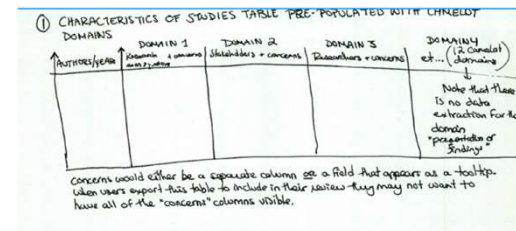
Initial steps - CAMELOT as a web tool

What's the vision of CAMELOT from the GRADE-CERQual team?

Sources:

- The GRADE-CERQual team has been testing "manual" CAMELOT assessments (via docs and spreadsheets)
- The CERQual team have proposed layouts for CAMELOT into iSoQ

STUDY ID		
META domains	Data extracted from primary study	Optional comments (notes to self, including any problems or missing information)
Research aim & question(s)		
Stakeholders		
Researchers		
Context		
METHOD domains		
Research design domains	Data extracted from primary study	Optional comments (notes to self, including any problems or missing information)
Research strategy		
Ethical considerations		
Equity, diversity & inclusion considerations		
Theory		
Research conduct domains	Data extracted from primary study	Optional comments (notes to self, including any problems or missing information)
Participant recruitment & selection		
Data collection		
Analysis and interpretation		
Presentation of findings		



UI alternatives exploration

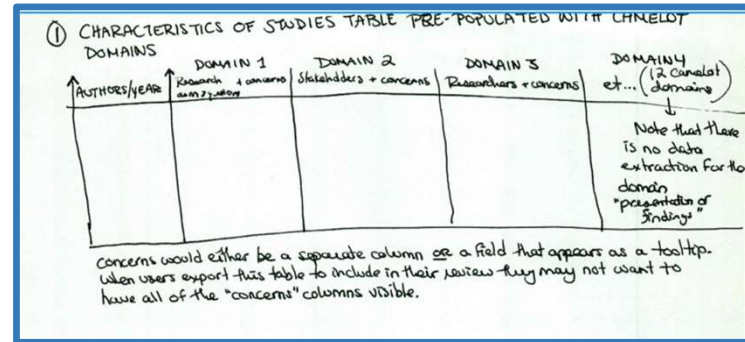
Proposal of new user interfaces into iSoQ

Considerations:

- Existing iSoQ layout and behaviour
- GRADE-CERQual team's insight and feedback
 - CAMELOT research
- Focus on User experience
 - New UI/UX trends
 - Use cases analysis
- **Iterative process**

The screenshot displays the GRADE CERQual web interface. The main heading is "Exploring the Experiences of Trauma of People Working in Homelessness: Mixed Methods Systematic Review". The interface is divided into sections for "PROJECT PROPERTIES", "MY DATA", "ISOQ", and "GUIDANCE ON APPLYING GRADE-CERQUAL". The current step is "STEP 3: Create or import your characteristics of studies table (recommended)". Below this, there are options to "Add or Edit column headings", "Import table", and "Export to XLS file". A large handwritten note is overlaid on the interface, titled "CHARACTERISTICS OF STUDIES TABLE PRE-POPULATED WITH CAMELOT DOMAINS". The note shows a table with columns for "AUTHORS/YEAR", "DOMAIN 1 (2 concerns + concerns)", "DOMAIN 2 (Sketchholders + concerns)", "DOMAIN 3 (Researchers + concerns)", and "DOMAIN 4 (2 CAMELOT et... (2 domains))". A note below the table states: "Note that there is no data extraction for the domain 'presentation of findings'". Another note at the bottom says: "Concerns would either be a separate column or a field that appears as a tooltip when users export this table to include in their reviews they may not want to have all of the 'concerns' columns visible." Below the table, there is a list of studies with checkboxes: Bantal 2005, Bateman et al. 2004, Beyer et al. 2008, and Bhoemik et al. 2005. The interface also includes a "Back to top" button and "Step 2" and "Step 4" navigation buttons.

UI alternatives exploration: example



Option 1

Option 1 shows a table with three domains. The first domain is empty, the second is filled with text, and the third is collapsed. Labels "Empty domain", "Filled-up domain", and "All domains" are placed below the respective columns.

Option 2

Option 2 shows a table with three domains. The first domain is empty, the second is filled with text, and the third is collapsed. Labels "Empty domain", "Filled-up domain", and "All domains" are placed below the respective columns.

Option 3

Option 3 shows a table with three domains. The first domain is empty, the second is filled with text, and the third is collapsed. Labels "Empty domain", "Filled-up domain", and "All domains" are placed below the respective columns.

UI alternatives exploration: example

Author, year	Meta domain 1 Research aims and questions	Meta domain 2 Stakeholders	Notes	• • •	all the following domains + respective concerns: Method domains (research design) 4 - 8 Method domains (research conduct) 9 - 12
Vergara 2024	Add research aims and questions (+)	Add concerns (+)	This is the extracted data lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur accumsan, velit id scelerisque dapibus, diam libero fringilla leo, eleifend ultrices nulla lacus id dui. Suspendisse quis sagittis ligula. Sed porta augue ut eli... See more		This are the concerns lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur accumsan, velit id scelerisque dapibus, diam libero fringilla leo, eleifend ultrices nulla lacus id dui.... See more
Wilson 2020	Add extracted data (+)	Add concerns (+)	Donec quis neque turpis. Suspendisse est sapien, auct...		Proin eleifend cursus efficitur. Donec quis neque turpis
Expert 2023	Add extracted data (+)	Add concerns (+)	Suspendisse quis sagittis ligula. Sed porta augue ut elit...		Phasellus at aliquam turpis. Vivamus massa sem, commo...

Wireframe

Author - Year	Meta domain 1 - Research aims and questions		Meta domain 1 - Rese
	Extracted data	Concerns	Extracted data
✓ Forger 2024 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur accumsan, velit id scelerisque dapibus, diam libero fringilla leo, eleifend ultrices nulla lacus id dui. Suspendisse quis sagittis ligula. Sed porta augue ut elit rhoncus consectetur. Proin el...	Add research aims and questions	Cancel Save	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur accumsan, velit id scelerisque dapibus, diam libero fringilla leo, eleifend ultrices nulla lacus id dui. Suspendisse quis sagittis ligula. Sed porta augue ut elit rhoncus consectetur. Proin el...
✓ Wilson 2020 Lorem ipsum dolor sit amet, consectetu...			Lorem ipsum dolor sit amet, consectetu...
✓ Expert 2023 Lorem ipsum dolor sit amet, consectetu...			Lorem ipsum dolor sit amet, consectetu...
✓ Wilson 2020 Lorem ipsum dolor sit amet, consectetu...			Lorem ipsum dolor sit amet, consectetu...
✓ Expert 2023 Lorem ipsum dolor sit amet, consectetu...			Lorem ipsum dolor sit amet, consectetu...
✓ Wilson 2020 Lorem ipsum dolor sit amet, consectetu...			Lorem ipsum dolor sit amet, consectetu...

Mockup

UI alternatives exploration: example

iSoQ - current status

The current iSoQ interface displays a list of studies in a table. The table has columns for Author(s), Year, p, i, and c. The studies listed are:

Author(s), Year	p	i	c
Agosti 2004	04th		Metabisk
Ambinder et al. 2005	05th		
Altam et al. 2020			
Amisat et al. 2020			
Anthony 1989			
Ayers & Harrison 1995			
Bartal 2005			
Bateman et al. 2004			
Byern et al. 2008			
Bhoshmik et al. 2005			



Mockups into iSoQ

The proposed iSoQ mockup shows a detailed view of a study. The study title is "Exploring the Experiences of Trauma of People Working in Homelessness: Mixed Methods Systematic Review". The interface includes a sidebar with navigation options: PROJECT PROPERTIES, MY DATA, ISOQ, and GUIDANCE ON APPLYING GRADE-CERQUAL. The main content area is titled "Add data needed to make GRADE-CERQual assessments" and includes a "STEP 3: Create or import your characteristics of studies table (recommended)" section. This section contains a table with columns for Author - Year, Meta domain 1 - Research aims and questions, and Meta domain 2 - Research aims and questions. The table is currently empty, and a form is visible for adding research aims and questions.

Author - Year	Meta domain 1 - Research aims and questions	Meta domain 2 - Research aims and questions
Forger 2024	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns
Wilson 2020	Extracted data	Concerns
Expert 2023	Extracted data	Concerns

Next steps - CAMELOT integration into iSoQ

2024 Q4: Interactive prototype - it follows the user flow through the tool

The screenshot shows the 'STEP 3: Create or import your characteristics of studies table (recommended)' section. It includes a table with columns for 'Author - Year', 'Meta domain 1 - Research aims and questions', and 'Meta domain 2 - Research aims and questions'. The table contains entries for 'Folger 2024', 'Wilson 2019', 'Expert 2023', 'Wilson 2020', and 'Expert 2023'. A red circle highlights the 'Add research aims and questions' button in the first row. A red arrow points from this button to the 'STEP 4: METHODOLOGICAL ASSESSMENTS TABLE' section in the adjacent screenshot.

The screenshot shows the 'STEP 4: METHODOLOGICAL ASSESSMENTS TABLE' section. It displays a detailed assessment for 'Kawasaki, 2001'. The assessment is organized into several domains: 'Research design domains', 'Ethical considerations', 'Equity, diversity & inclusion considerations', 'Theory', 'META domains - Fit assessment', 'Research question & aim domain', 'Stakeholders domain', and 'Researchers domain'. Each domain has a 'Concerns' section and an 'Extracted data' section. A red circle highlights the 'Research design domains' section, and a red arrow points from this section to the 'STEP 3: Create or import your characteristics of studies table' section in the adjacent screenshot.

GRADE CERQual

We would like to thank everyone who has given us feedback and the following people who have participated in user tests, Meghan Bohren, Heather Ames, Kenny Finlayson, Natalie de Leon, Asbjorn Steiro, Catherine Houghton, Susan Bulthuis, Catrin Evans, Alison Swartz and Chris Colvin

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