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

GRADE CERQual

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&

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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

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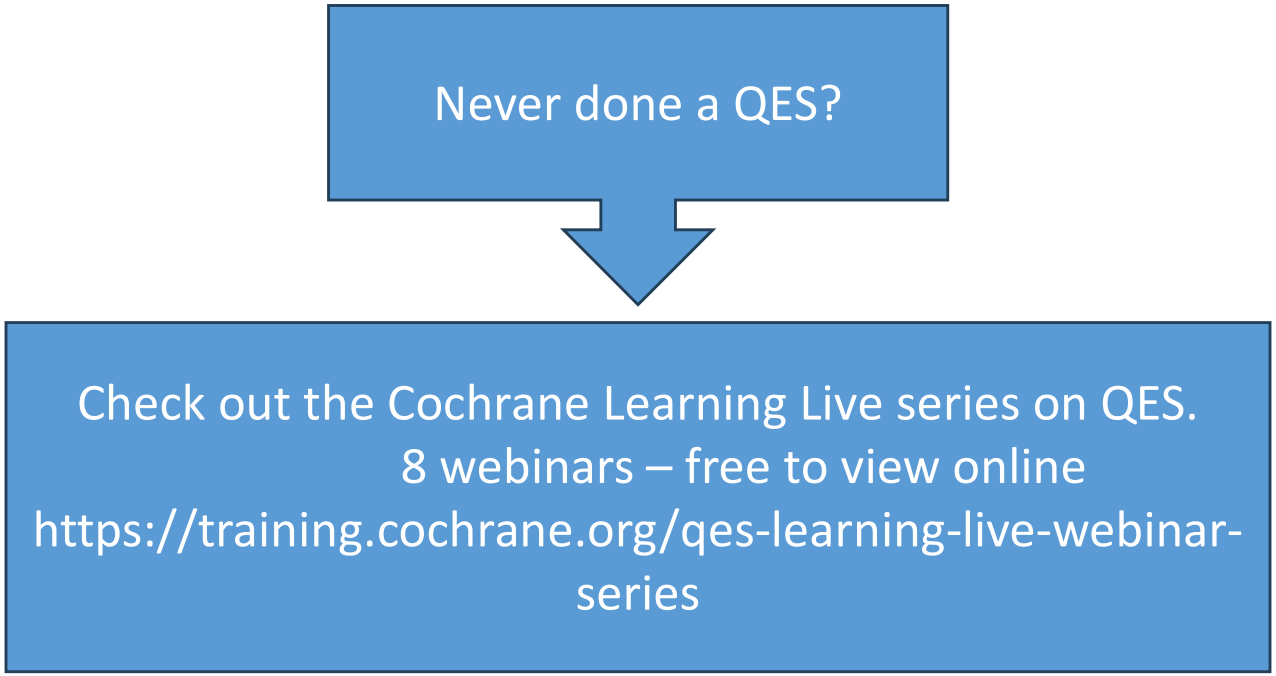
What is a Qualitative Evidence synthesis?

"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)



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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

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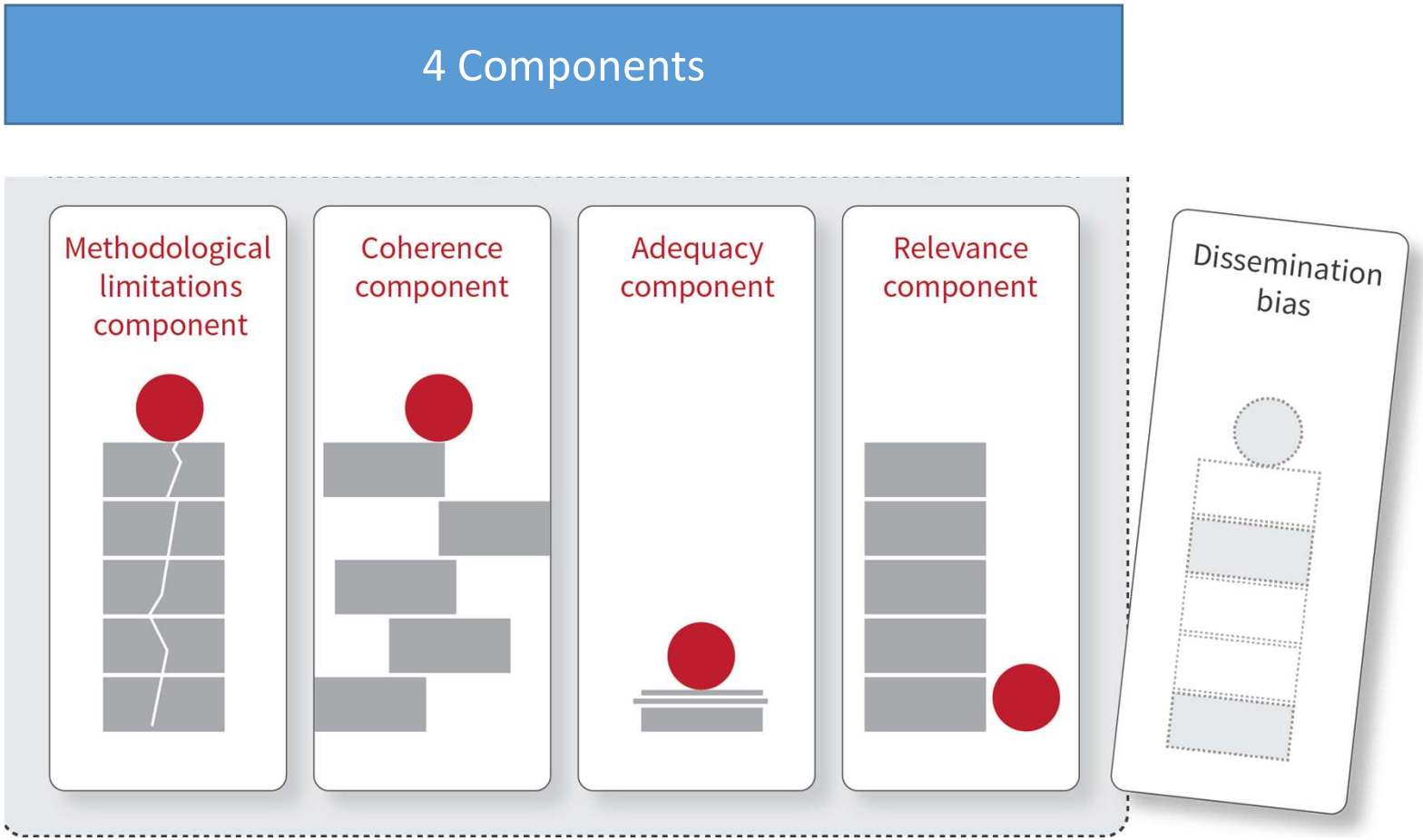
The GRADE-CERQual approach



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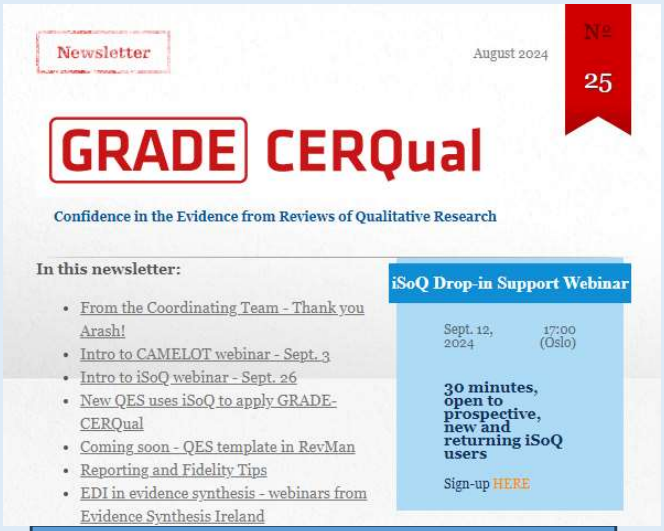
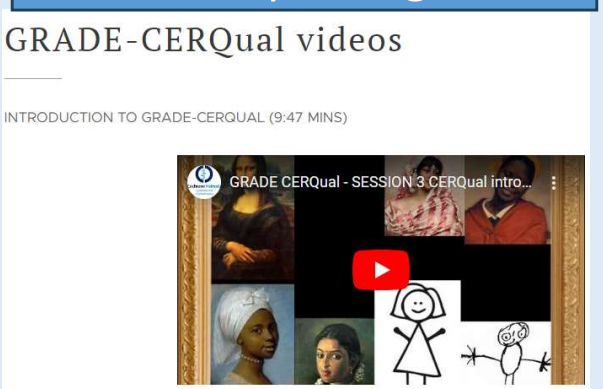
Never applied GRADE-CERQual?

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



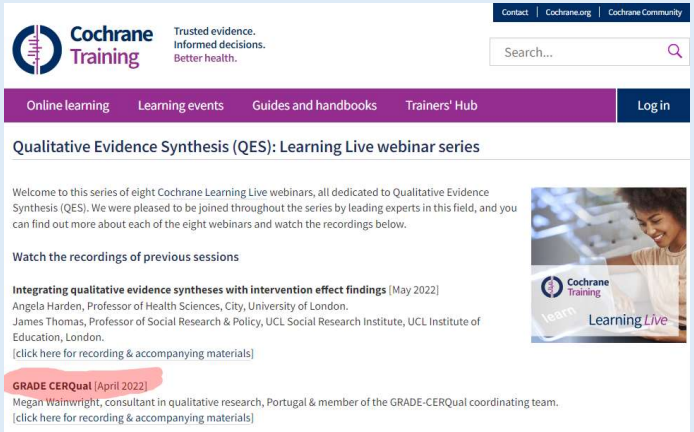
Cerqual.org



BMC Part of Springer Nature

IS Implementation Science

Official guidance
7 papers



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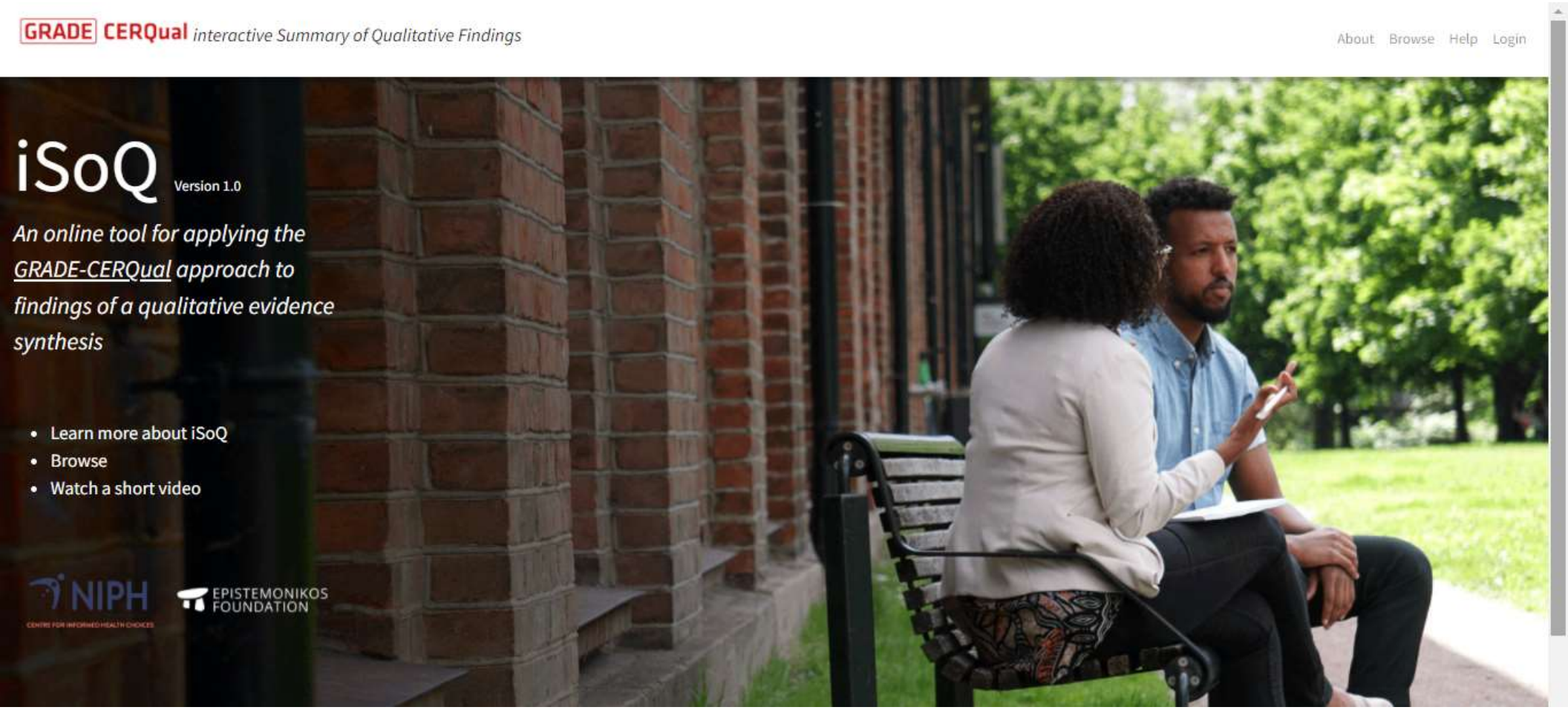
Growth in use of the approach

- 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.epistemonikos.org



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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.

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How was iSoQ funded?

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

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Who is developing iSoQ?

GRADE-CERQual

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

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

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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

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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

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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.**

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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.

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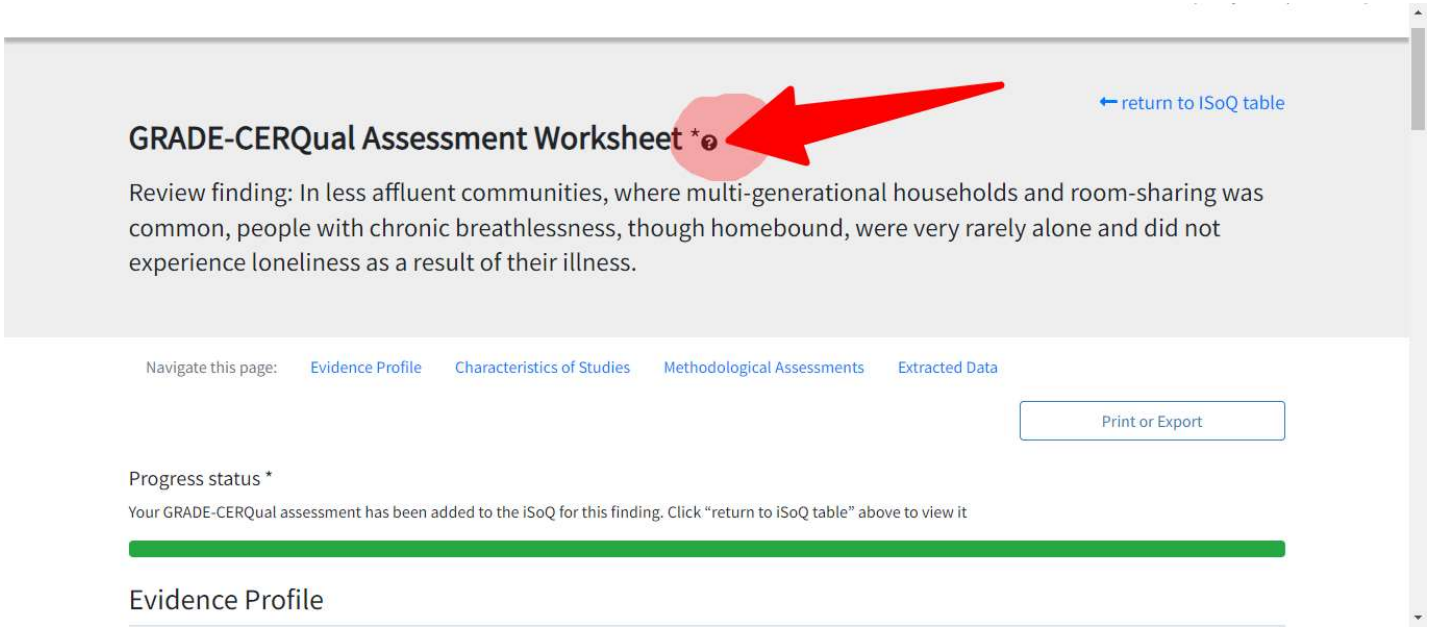
iSoQ Database

- 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



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Your feedback

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

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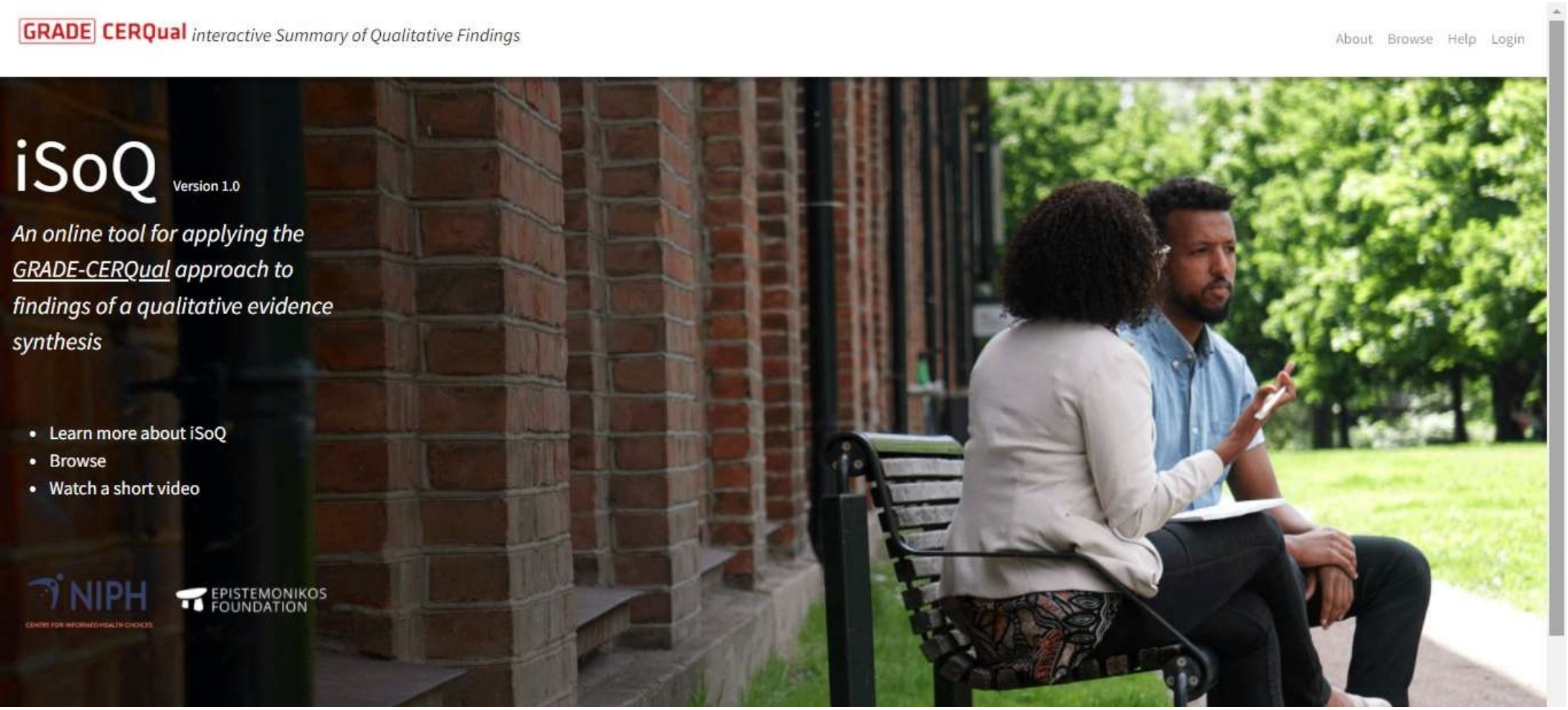
Demo


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
Browse
Watch a short video
NIPH
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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.

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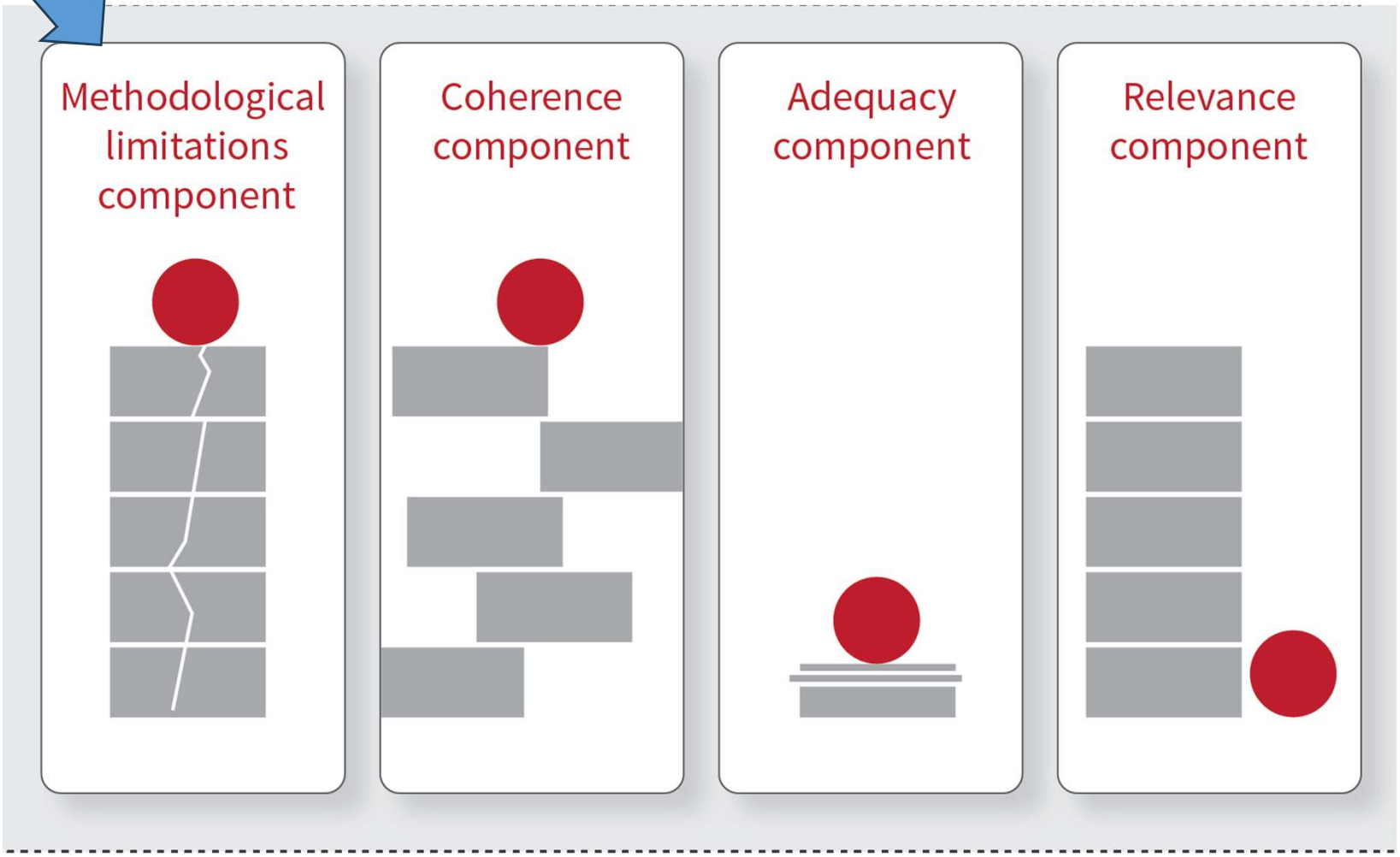
CAMELOT tool

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



Timeline - CAMELOT integration into iSoQ

Jan 2024

Initial components

- iSoQ tool
- CAMELOT ongoing research

Q1-Q3

Wireframes and mockups

- CAMELOT's use cases analysis
- Design and discussion of UI alternatives

Q4

Interactive prototypes

- User flow through the mockups
- Focus on interactions and transitions
- Focus on User experience analysis

2025

Implementation

Development of CAMELOT into iSoQ tool

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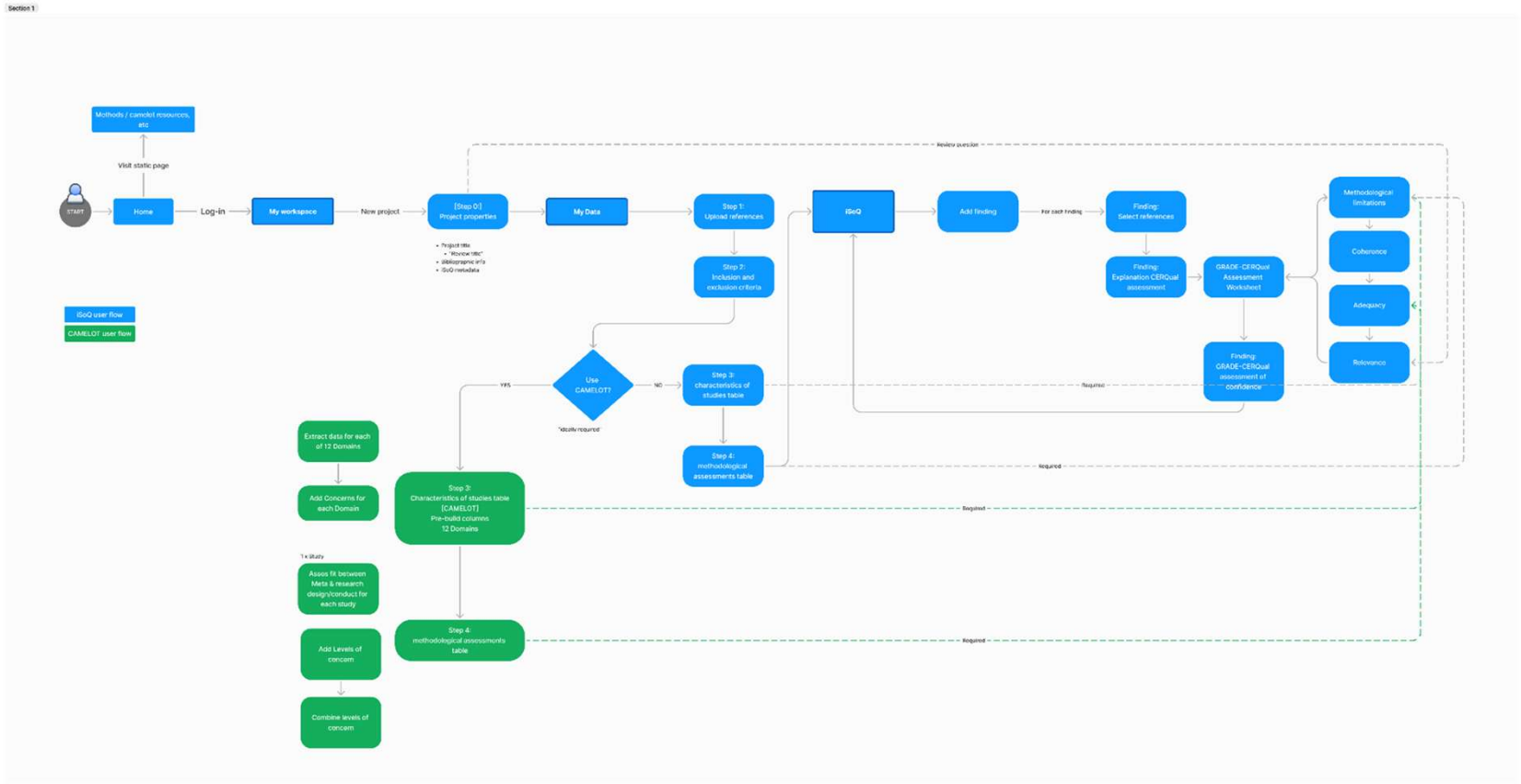
Initial steps - CAMELOT as a web tool

How does CAMELOT integrates into the current iSoQ user workflow?



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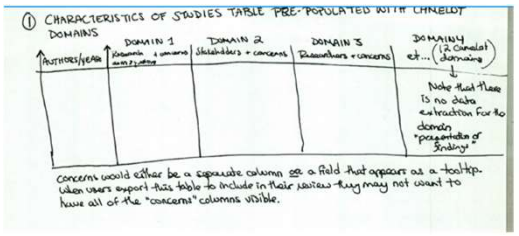
Initial steps - CAMELOT as a web tool

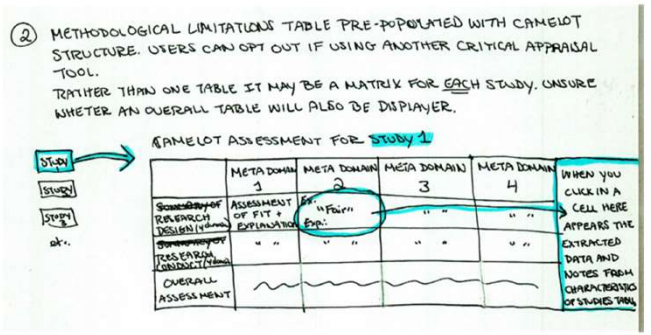
What's the vision of CAMELOT from the GRADE-CERQual team?

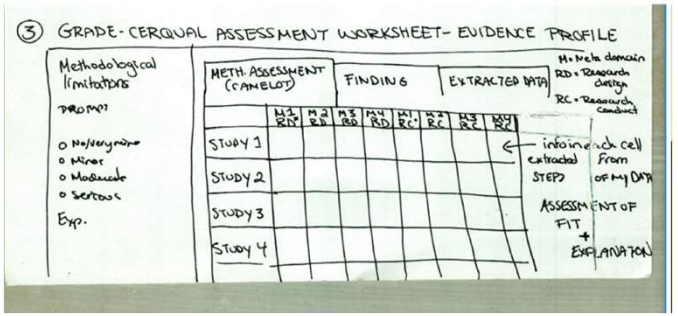
Sources:

- 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		







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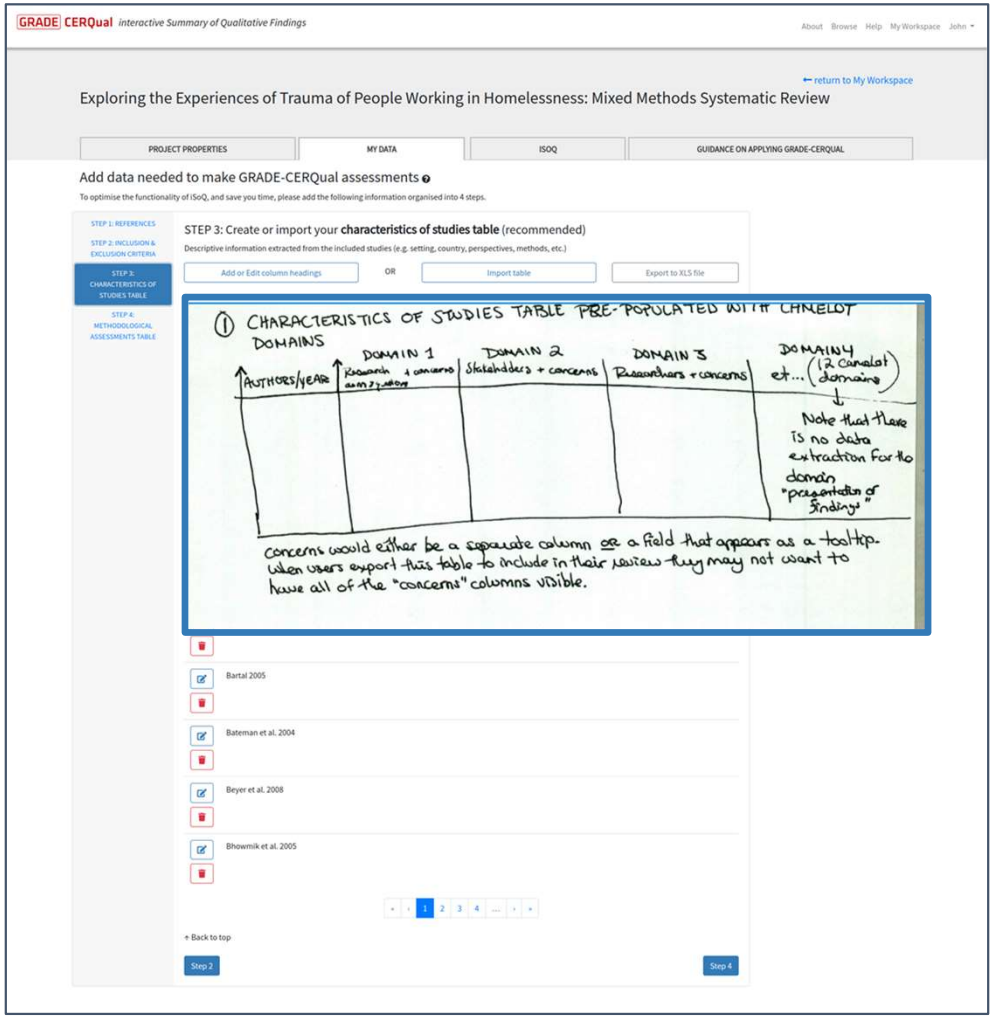
UI alternatives exploration

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**



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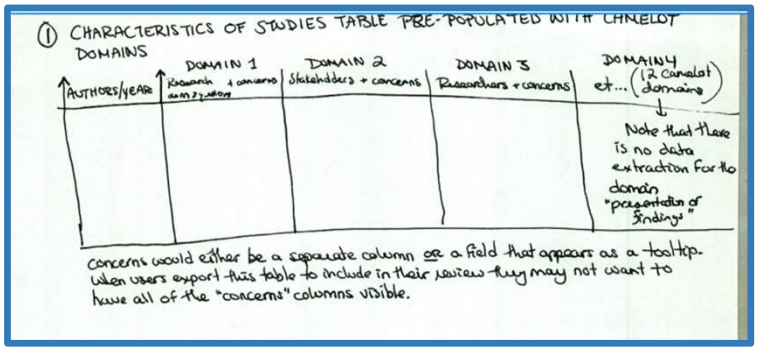
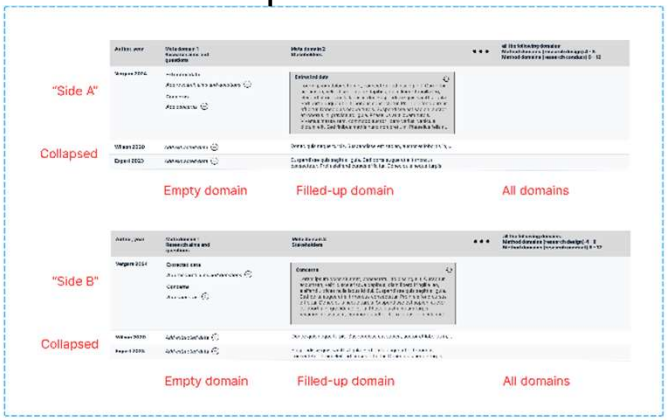
UI alternatives exploration: example

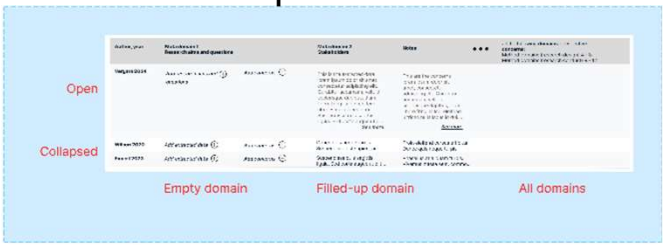


Option 1

Option 2



Option 3



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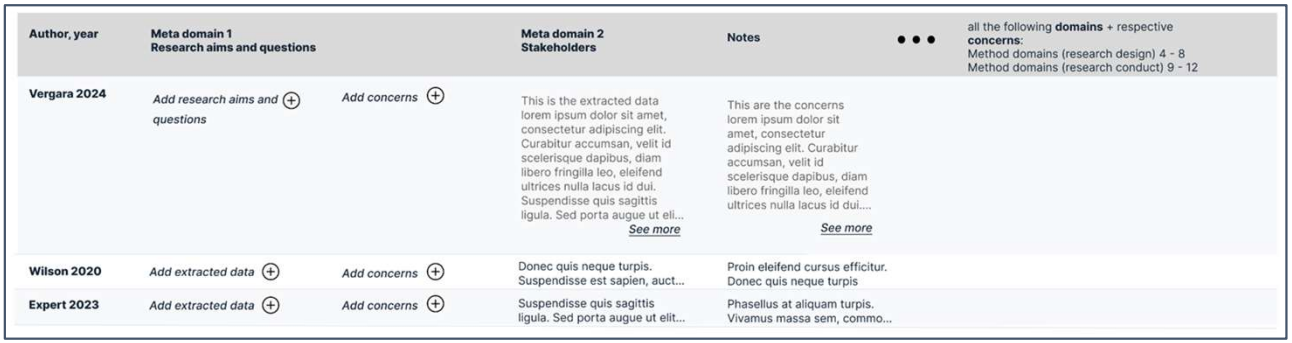
UI alternatives exploration: example

Wireframe



Mockup

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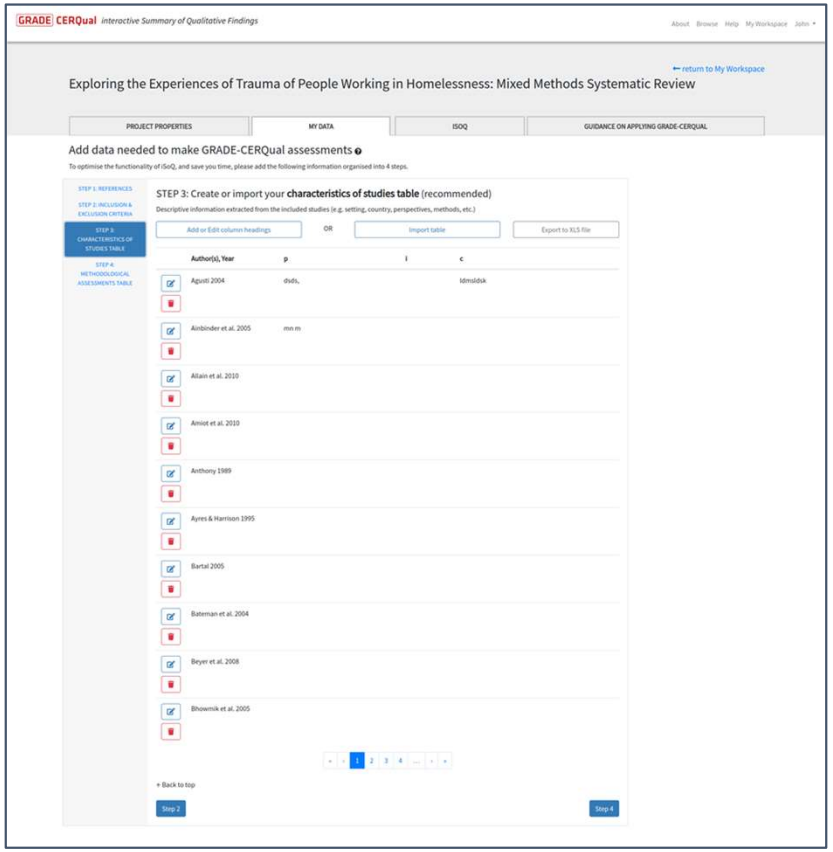
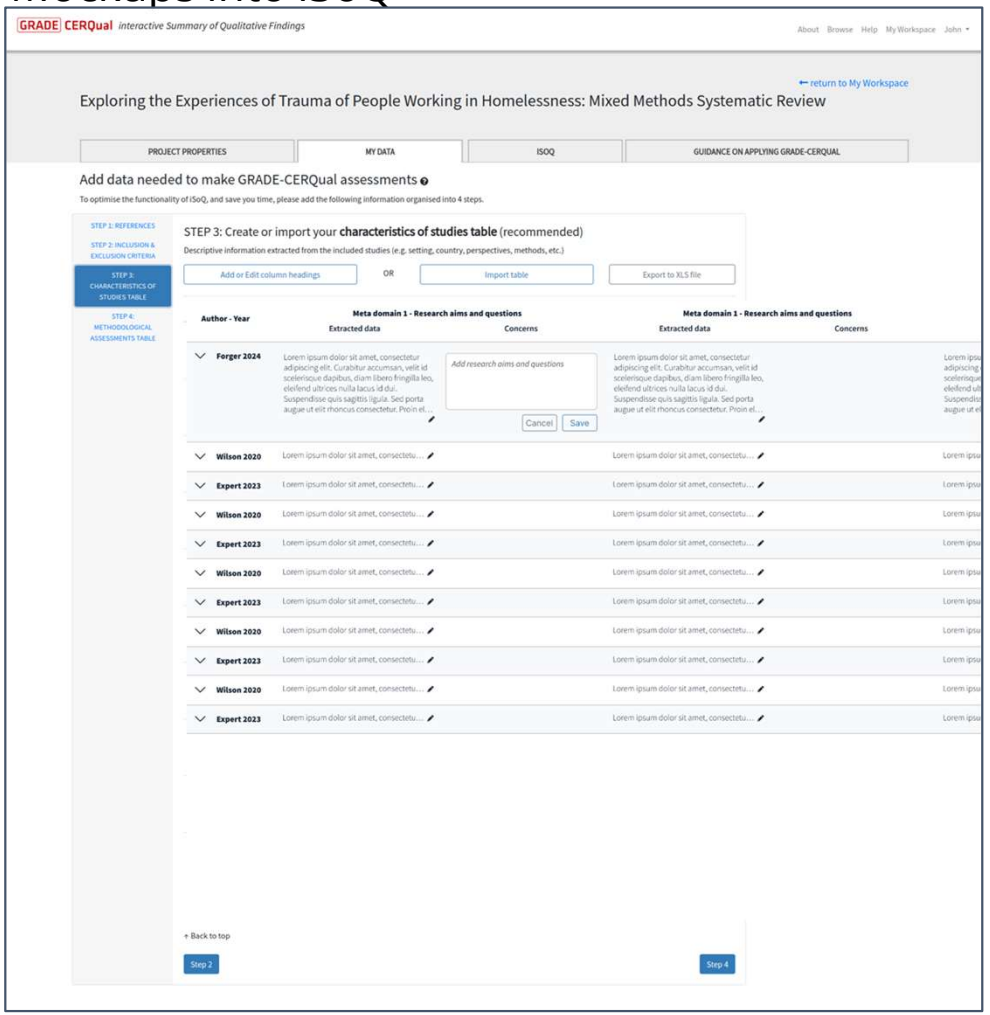
UI alternatives exploration: example

iSoQ - current status



Mockups into iSoQ



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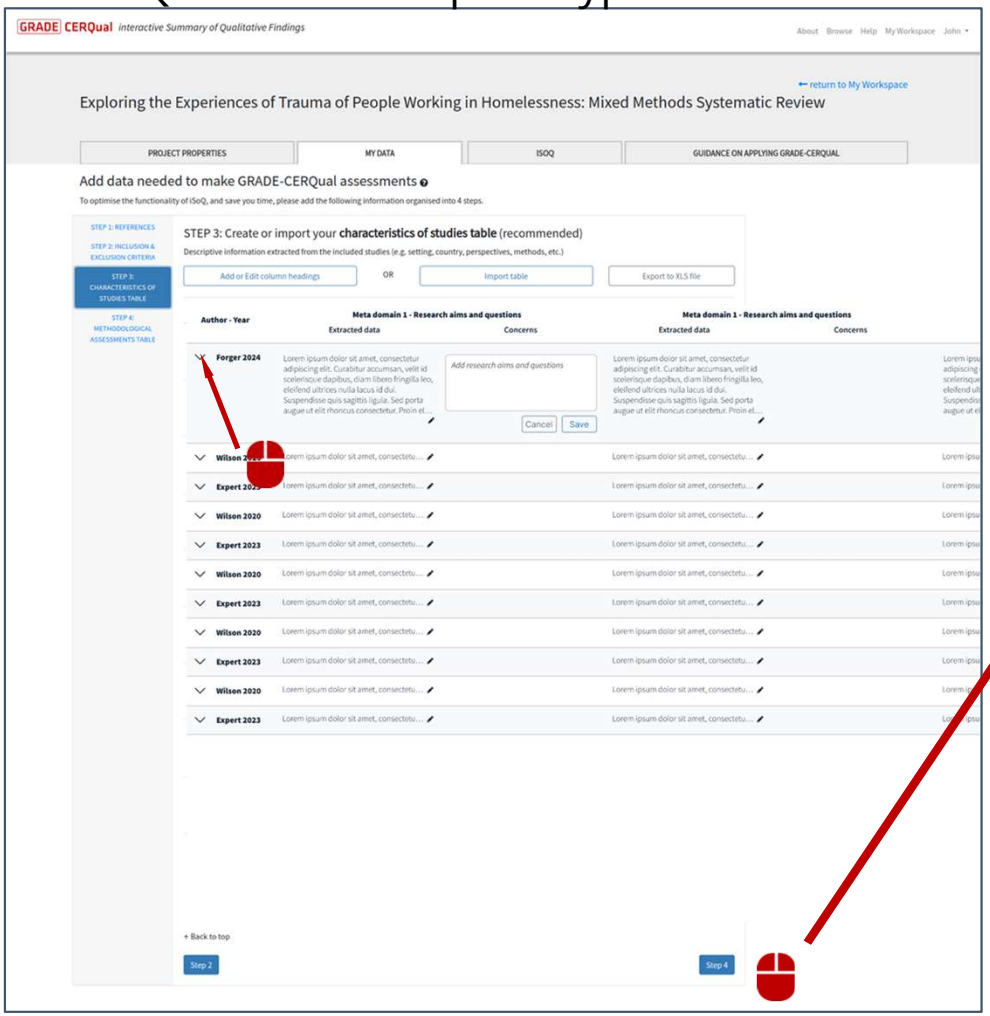
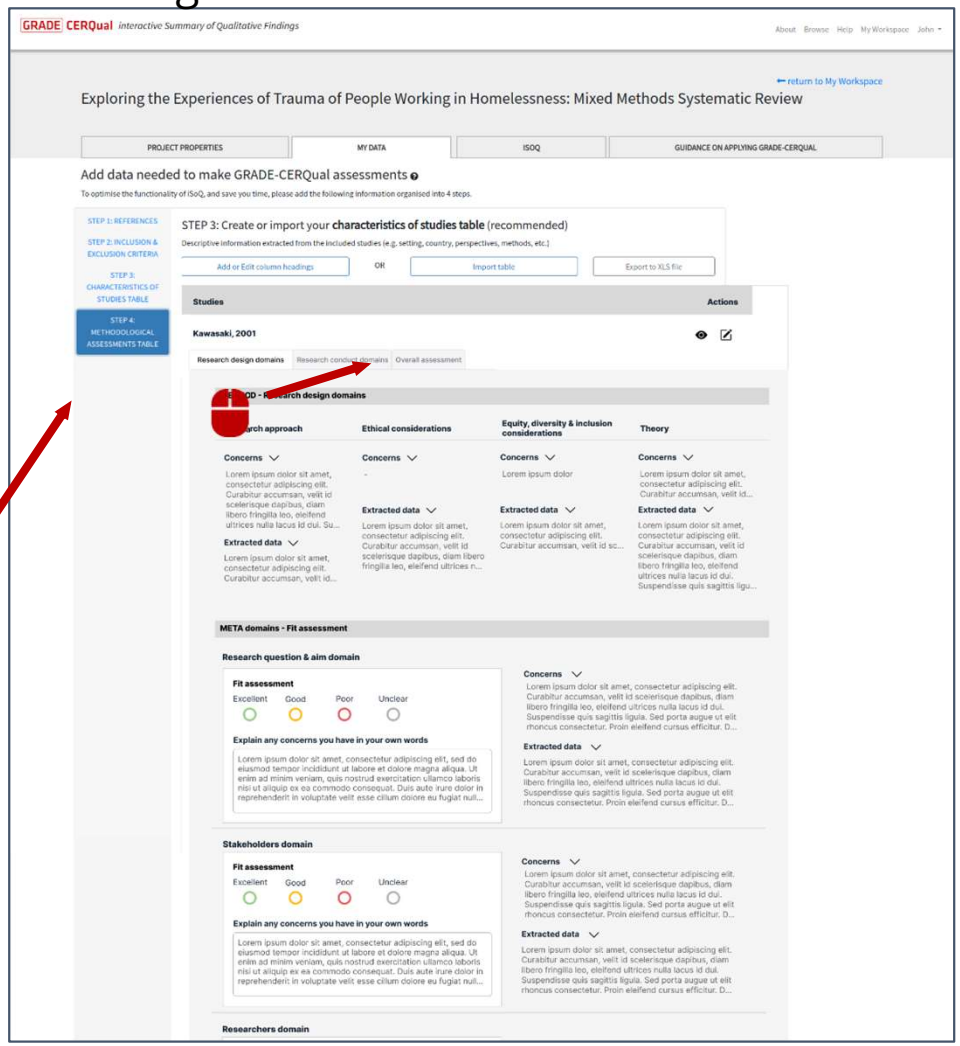
Next steps - CAMELOT integration into iSoQ

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





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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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