Checklist for Developing and Documenting Search Strategy

For Previewed-Reviewed Articles

Section/topic	#	Checklist item	Your notes (for writing out search process)
What are you researching?			
Topic or question	1	State your topic or research question.	
Where did you search?			
Database names	2	Name each individual database searched.	
Citation searching	3	Describe any methods used for locating cited/citing references (e.g., browsing reference lists).	
Other approaches	4	Indicate whether additional studies or data were sought using other approaches (e.g., contacting authors and/or experts).	
How did you search?			
Main concepts and search terms	5	Identify the main concepts that make up your topic and describe how you developed search terms for each main concept.	
Search tactics	6	Indicate what search tactics you used to improve results.	
Limits	7	Describe any limits or restrictions applied to a search (e.g., peer-reviewed, date, language).	
Prior work	8	Indicate when search strategies from other literature reviews were adapted or reused for a substantive part or all of the search, citing the previous review(s).	

What tools did you use?			
Citation management software	9	Indicate the name of the software used (e.g., Zotero).	
Other tools	10	Describe any additional tools used to facilitate different parts of your literature review, including AI tools (e.g., an AI citation mapping tool).	

Adapted from Rethlefsen, M.L., Kirtley, S., Waffenschmidt, S., Ayala, A.P., Moher D., Page, M.J., Koffel, J.B., & PRISMA-S Group. PRISMA-S: an extension to the PRISMA Statement for Reporting Literature Searches in Systematic Reviews. *Systematic Review*, *10*(39), 1-19. https://doi.org/10.1186/s13643-020-01542-z

Template for Writing Your Search Strategy

To identify peer-reviewed articles that address [state your topic], I searched the following databases [list databases]. [If you used citation searching or other approaches, list them here]. The main concepts for my topic are [list the main concepts]. To develop search terms for each main concept, I [describe how you developed search terms]. I combined terms for each concept using the following search tactics [describe some search tactics that were effective]. I used these filters in my searches OR I did not use any filters. [If you adapted a search from an existing review, cite it here].

This tool [state tool] facilitated [this part] of my search process. [Continue listing tools and describing use if there are more].