1. Create folders for each of the databases from which you import citations. Also create a folder called “FullSetToScreen” (or similar) and add all of the records to it as well as the original folder. You can see the tags for the folders in which the citations appear in the record.

2. Right click on the All References folder and choose “Find Duplicates” and then “Close Duplicates in this Folder” options.
3. a. Once the window is showing the potential duplicates, you can remove the ones that are true duplicates in 2 ways. One at a time, you can right click on the 1FullSetToScreen tag of the individual record and then select “Remove from Folder”. I don’t recommend deleting the references.

b. You can also remove the duplicates from the folder in batches by verifying that all of the checked references on the page are true duplicates, and then click the “Remove from Folder” icon to remove the selected references from the 1FullSetToScreen folder. You can then move on to the next page to repeat (actually the next set of duplicates will appear in the same window as you remove the previous ones).
Note that you can change the number of records that show on a page by opening the Customize box from the upper right hand corner of the RefWorks screen. I usually choose to show 100 references per page. This is also where you can change the default sort setting, if you would like.

Using this method, you will end up with a folder, “All References”, which has only unique citations, while retaining the original number of records that you identified from each database in the folder for the respective sets. This information (# of results from each database and the total, deduplicated number) is important for reporting, as reflected by the PRISMA reporting guidelines (http://www.prisma-statement.org/). The PRISMA website also has a template for the flow diagram which can be incorporated into your manuscript to illustrate the searching and screening results.

The set of citations in the “All References” folder is what you (and another team member) will screen by applying your inclusion/exclusion criteria. One reviewer may do this right in RefWorks (by creating “Include” and “Exclude” subfolders into which you can move records as appropriate). In order to avoid bias, the other reviewer should not look at these decisions. You can export the citations (including abstracts) to a Word or Excel document for separate screening and then later reconcile the decisions.