

Literature search planning sheet

Leave with a testable search, a retrieval check, and a record you can rerun.

Use and limits. A planning aid, not a validated systematic-review search. Database syntax differs. Ask an information specialist to review searches intended to support an evidence synthesis.

WORKED EXAMPLE · FICTIONAL

Fictional project: a scoping search on sleep interventions for rotating-shift nurses. The example is a starting point, not a validated query.

1. Question and boundaries

Which interventions address sleep in rotating-shift nurses?
Initial scoping only; exclude students and fixed daytime schedules.

3. Database, platform, and exact query

PubMed exploratory query: (nurs*[tiab]) AND ("shift work"[tiab] OR "night shift"[tiab]) AND (sleep[tiab] OR insomnia[tiab]). Not yet validated.

5. Limits and their consequences

No date or language filter during exploration. If a date boundary is later required, record the rationale and rerun the retrieval test.

2. Concepts and alternative terms

Population: nurse, nursing staff. Schedule: shift work, night shift, rotating shift. Outcome: sleep, insomnia. Investigate relevant MeSH terms.

4. Retrieval test

Illustrative retrieval test: paper A found; paper B missed because it used "night duty"; paper C found. Add that synonym, rerun, and preserve both query versions.

6. Search log and handoff

Illustrative log only: PubMed, 2026-09-11, query v2, 214 records; export pubmed-sleep-20260911.nbib. Search lead retains the raw export and schedules an update before screening closes.

SOURCE GUIDANCE · CHECKED 2026-09-11

[NLM: PubMed User Guide](https://pubmed.ncbi.nlm.nih.gov/help/). Query syntax, field tags, search details, and exporting records.
<https://pubmed.ncbi.nlm.nih.gov/help/>

[PRISMA-S](https://www.prisma-statement.org/prisma-search). Reporting the search methods used in systematic reviews.
<https://www.prisma-statement.org/prisma-search>

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Literature search planning sheet

Project / date: _____

Keep completed copies private when they contain unpublished work. Use the online version for longer notes.

1. Question and boundaries

Name the population, intervention or topic, and purpose. State what is outside scope.

2. Concepts and alternative terms

Group synonyms under each concept. Keep separate concepts separate; identify controlled vocabulary to investigate.

3. Database, platform, and exact query

Record the database and interface. Save the exact executed query, not a prose description of it.

4. Retrieval test

Choose known relevant papers independently. Check whether the query finds them and investigate misses before narrowing.

5. Limits and their consequences

Record each language, date, or study-type limit and why it is justified. Note what it could exclude.

6. Search log and handoff

Save execution date, result count, export filename, deduplication method, and who will update the search.

BEFORE YOU USE THE RESULT

- A colleague can rerun the recorded query on the named platform.
- Known-paper misses and changes are documented, not hidden.
- For a systematic review, consult PRISMA-S for reporting and seek search-method review.

[Open the interactive worksheet.](#) This is a planning aid; follow applicable institutional and publisher instructions.