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ADMINISTRATIVE INFORMATION

Support - Universidad de Antioquia.

Review Stage at time of this submission - Preliminary searches.

Conflicts of interest - None declared.

INPLASY registration number: INPLASY202560119

Amendments - This protocol was registered with the International Platform of Registered Systematic Review and Meta-Analysis Protocols (INPLASY) on 29 June 2025 and was last updated on 29 June 2025.

INTRODUCTION

Review question / Objective What evidence exists regarding the Theory of Informal Caregivers' Contribution to the Self-Care of People with Heart Failure from the Perspective of the Situation-Specific Theory.

Rationale Heart failure (HF) represents one of the most pressing global public health challenges due to its high prevalence, frequent hospital readmissions, and significant impact on the quality of life of patients and their families. In this context, self-care has emerged as a cornerstone in the effective management of the disease. However, a considerable proportion of individuals with HF experience physical, cognitive, or emotional limitations that hinder their ability to carry out necessary self-care behaviors, thereby highlighting the essential role of the informal caregiver.

The Situation-Specific Theory of Caregiver Contribution to Self-Care in Heart Failure, developed by Vellone and colleagues, offers a

middle-range theoretical framework that conceptualizes and integrates the caregiver's role in the maintenance, monitoring, and management of self-care. This theory recognizes caregiving as a dynamic, relational, and context-dependent process influenced by individual, social, and cultural factors of both the patient and the caregiver. Analyzing this theory is particularly relevant, as it aligns with contemporary nursing challenges in managing chronic diseases and embraces a family-centered approach to care.

Despite its increasing application, there is a need to deepen the theoretical evaluation of this model to assess its utility, internal consistency, and applicability across different settings. This integrative literature review is justified as it allows for the consolidation of theoretical and empirical evidence, identification of knowledge gaps, and guidance for future research. Moreover, it provides nursing professionals with a robust conceptual framework to support interventions aimed at strengthening the caregiver role, improving health

outcomes, and enhancing the well-being of the patient-caregiver dyad.

Importantly, this review emphasizes the theoretical analysis of the Situation-Specific Theory based on the criteria proposed by Provencher and Fawcett, which include significance, internal consistency, parsimony, testability, empirical adequacy, and pragmatic adequacy. These criteria enable a comprehensive and structured assessment of the theory's relevance and contributions to nursing knowledge, clinical practice, and disciplinary development.

Condition being studied Heart failure (HF) is a chronic and progressive disease characterized by the heart's inability to pump blood effectively, leading to symptoms such as fatigue, dyspnea, and edema. This condition significantly impacts quality of life and represents a major burden on healthcare systems due to frequent hospitalizations and high mortality rates. Management of HF includes both pharmacological and non-pharmacological interventions. Among the latter, self-care is essential to prevent decompensation and improve outcomes.

However, many patients face challenges in performing adequate self-care, making the involvement of family caregivers fundamental. Caregivers assist with treatment adherence, symptom monitoring, and daily decision-making, becoming key actors in the non-pharmacological management of HF.

This study is relevant as it explores how caregivers contribute to patients' self-care in HF, guided by the Situation-Specific Theory of Caregiver Contribution to Self-Care. Through an integrative review, it aims to examine how the dynamics of the patient-caregiver dyad have been studied and validated in previous research. This approach provides theoretical and practical insights that support nursing practice and guide the development of collaborative, caregiver-centered interventions to improve patient outcomes and enhance chronic care management.

METHODS

Search strategy The literature search was conducted in specialized scientific databases such as PubMed, Scopus, SciELO, and LILACS (vía biblioteca virtual en salud- BVS).

Participant or population People with heart failure and their caregivers.

Intervention Studies that evaluate the caregiver's contribution to the self-care of the person with heart failure.

Comparator There is no comparator for this.

Study designs to be included Qualitative, quantitative, descriptive, correlational studies, clinical trials, and nursing interventions will be included.

Eligibility criteria Inclusion and exclusion criteria were established based on the objective of the review. Articles published between 2020 and 2025 in English, Portuguese, and Spanish were included, provided they offered full-text access and addressed the role of the caregiver in the self-care of individuals with heart failure, whether from a conceptual, theoretical, or empirical perspective. Duplicated documents, editorials, book chapters, theses, and articles that did not provide relevant information for theoretical analysis were excluded.

Information sources The literature search was conducted in specialized scientific databases such as PubMed, Scopus, SciELO, and LILACS (via Biblioteca Virtual en Salud - BVS).

Main outcome(s) Caregiver contribution to self-care in heart failure.

Data management The following variables were extracted from the studies: Article, Author and year of publication, Study development location, Objective, Design, Characteristics of the population, Results, Conclusions, and Reference.

Quality assessment / Risk of bias analysis For the evaluation of the included articles, the ICRESAI instrument was used, which establishes specific criteria to determine the eligibility of studies in systematic reviews, assessing aspects such as methodological design, coherence, and clarity of the research purpose. In addition, the theoretical-empirical structure proposed by Provencher and Fawcett was applied, which allows for the analysis of situation-specific theories based on six criteria: significance, internal consistency, parsimony, testability, empirical adequacy, and pragmatic adequacy.

Strategy of data synthesis The data synthesis was carried out through a thematic analysis approach, allowing for the identification of patterns, similarities, and differences across the included studies. The extracted data were organized in a comparative matrix that included key variables such as study design, population

characteristics, theoretical framework, caregiver contributions, and main findings. This process facilitated the grouping of results into thematic categories aligned with the components of the situation-specific theory of caregiver contribution to self-care in heart failure. The synthesis emphasized both theoretical and empirical contributions, highlighting how the dynamics of the patient-caregiver dyad have been addressed, validated, or operationalized in different research contexts. Findings were critically interpreted in relation to the criteria proposed by Provencher and Fawcett for evaluating situation-specific theories.

Subgroup analysis Not applicable.

Sensitivity analysis Not applicable.

Country(ies) involved Colombia.

Keywords caregiver; family caregivers; Heart Failure; Self-Care; Nursing.

Contributions of each author

Author 1 - Juan Pablo Ceron Lubo - drafted the manuscript, applied the inclusion and exclusion criteria, participated in the theoretical and empirical writing, and contributed to the synthesis and categorization of the results, conducted the analysis and evaluation of the research studies, and coordinated the writing process.

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Author 2 - Ivone Evangelista Cabral - carried out the literature search, applied the inclusion and exclusion criteria, participated in the theoretical and empirical writing, and contributed to the synthesis and categorization of the results.

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Author 3 - Mauricio Arias Rojas - participated in the methodological quality assessment using the ICRESAI instrument and the theoretical-empirical framework by Provencher and Fawcett, and contributed to the analysis of the educational components in the selected studies.

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Author 4 - Elvigia Maria Posada Vera - contributed to the critical revision of the theoretical analysis and the final editing of the manuscript for intellectual content.

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