

VA



U.S. Department
of Veterans Affairs

Using qualitative author guidelines and reporting standards:

How to select which to use and how they can help
with publishing your qualitative results and
methods

VA Cyberseminar

9/22/22

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Quick Poll

How familiar are you with qualitative reporting guidelines?

- A) Not at all familiar
- B) Somewhat familiar
- C) Quite familiar
- D) Very familiar

Agenda

Reporting Guidelines

- What are reporting guidelines (and what are they not)?
- Why use reporting guidelines?
- Common elements of reporting guidelines
- Differences between qualitative reporting guidelines
- Considerations for use

Manuscript Development

- Process for using reporting guidelines
- Incorporating reporting guidelines into writing

Equator Network

- Equator network overview
- Using the equator network
- Reporting guidelines not in the equator network

Section 1

What are qualitative (author) reporting guidelines?

Context

- Across the more than 30,000 biomedical journals being published, how can editors assess the quality of your article over another?
- How can readers be assured that valuable information about research methods hasn't been omitted, or that the outcomes have not been selectively reported?
- Errors such as these can lead to inaccurate conclusions, which in turn can have a serious impact on medical practice and decision-making.
- Tools can assist authors, reviewers and editors, and provide effective quality control across all biomedical journals.
 - The EQUATOR Network (Enhancing the QUALity and Transparency Of health Research) “develops and maintains a comprehensive collection of online resources providing up-to-date information, tools, and other materials related to health research reporting.”

www.wolterskluwer.com/en/expert-insights/authors-equator-network

What are reporting guidelines? What are they not?

Reporting guidelines are not ...

A rubric for evaluation of quality. There is not a single, all-encompassing guideline and guidelines are not stringent or fixed.

Reporting guidelines are ...

Used to aid in study design and outlining articles. They serve to determine the relevant and appropriate methods for a study and assist articles in meeting journal expectations.

What are qualitative reporting guidelines?

- A set of standards to guide researchers in reporting on their work and to enable readers and reviewers to evaluate the quality of the work
- SRQR (O'Brien, Harris, Beckman, Reed, & Cook, 2014) was designed to be flexible to accommodate various qualitative approaches and methods
- COREQ (Tong, Sainsbury, & Craig, 2007) was designed to apply to qualitative studies using interviews and focus groups

Why use qualitative reporting guidelines?

- Ensure complete information for reviewers and readers to evaluate, compare, and understand your approach
- Meet requirements for many journals (and head off reviewers' questions)
- Support broader aim in the field for more transparency and clarity in qualitative inquiry and analytic approaches

Common elements of SRQR and COREQ

- Research team characteristics and reflexivity
- Approach/paradigm/methodological orientation (e.g., grounded theory, phenomenology, content analysis, discourse analysis, etc.)
- Sampling strategy
- Context/setting
- Data collection methods, instruments, and technologies
- Analysis
 - Who was involved
 - Codebook, coding tree, or data processing steps
 - Techniques to enhance trustworthiness (e.g., member-checking)
- Reporting of findings and clear links to data
- Audit trail

Differences between SRQR and COREQ

SRQR includes items for every section of the paper, from the Title to the Discussion section and Conflict of Interest section

COREQ includes more granular points for the Methods and Results/Findings sections. Many specifically pertain to interview and focus group studies.

Considerations for using reporting guidelines

- Not all elements apply to every study or manuscript
- It's important to include the elements listed; it's less important where they go
 - Example: “Integration with prior work” (SRQR) may go in Discussion section for many journals, or in Results/Discussion blended section in some qual journals

Section 2

How to use qualitative reporting guidelines to build a manuscript?

Quick Poll

How often do you use a standard technical writing process (e.g., an outline) when developing a manuscript?

- A) Not at all often
- B) Somewhat often
- C) Quite often
- D) Very often

Process for using reporting guidelines

Writing team creates a paper file for the manuscript.

PI and writing team meet to review and discuss the design, focus, and/or the data to be used in a manuscript.

Under the PI's guidance, the team selects a reporting guideline for their manuscript.

They place the methods section into their paper file by copying the entire checklist and pasting them into the methods section.

Writing team starts writing the methods section using these guidelines and make the headers out of the reporting guidelines subsections.

Creating the paper file

A paper file is a blank document with just APA headings on each page. Using a paper file, you can paste in relevant information and headings in each section. This helps get your manuscript moving forward.

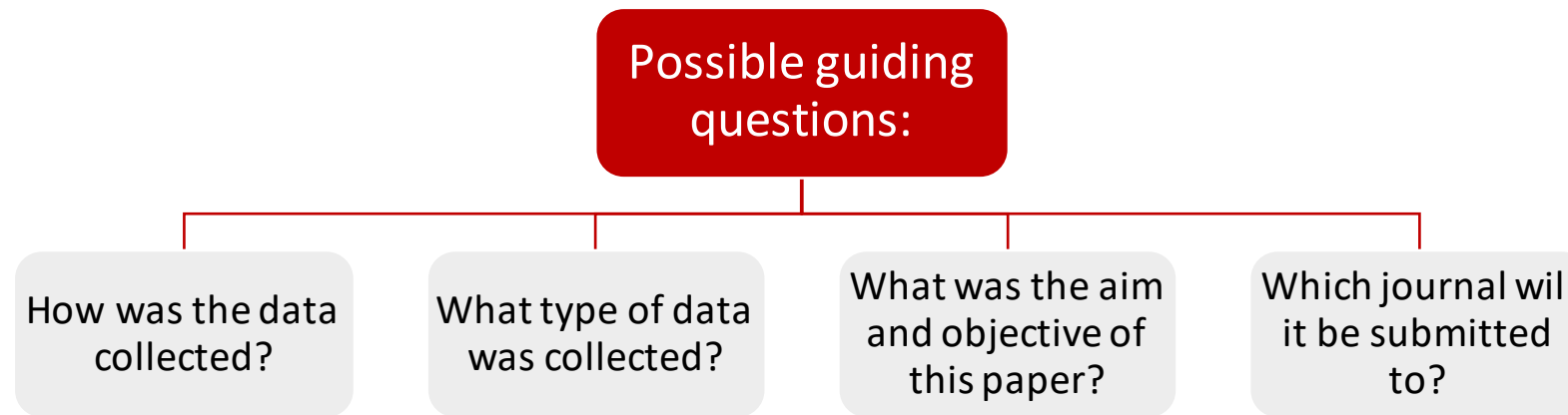
Possible APA paper file layout:

Title and authors affiliation
Abstract
Introduction
Methods
Results
Discussion
Tables
References

Review and discuss the design, focus, and/or data

When the PI and writing team meet to review and discuss the design, focus, and/or data of their manuscript, those aspects should guide the development of the article.

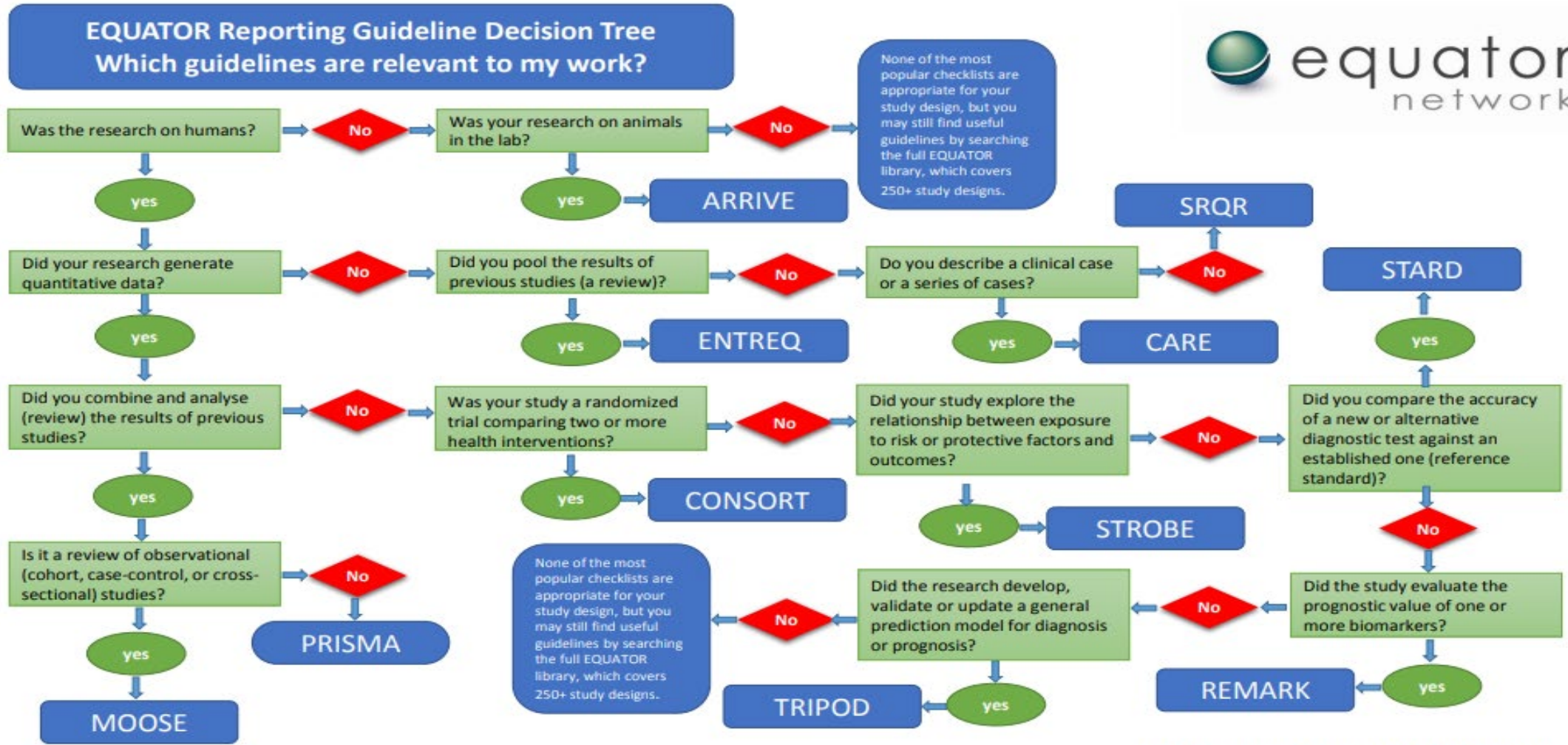
Deciding the direction of the paper will help narrow their search for the appropriate author's guideline (e.g., qualitative, mixed methods, quantitative, etc.).



Reporting guideline selection

Now that the focus of the paper is decided, the writing team reviews relevant reporting guidelines and work together to select a guideline that is best tailored to their paper.

Although these guidelines aren't stringent or fixed, they should match up with your methods, objective, and aim of your manuscript as closely as possible. This will help drive the manuscript production forward.



CC-BY 4.0 The EQUATOR Network 26 February 2016

<https://www.equator-network.org/wp-content/uploads/2021/11/RG-decision-tree-for-Wizard-CC-BY-26-February-2016.pdf>

Building the methods section by using guidelines

The first part of the manuscript to develop will be the methods section, so it is important that the reporting guidelines checklist can be integrated into your prospective paper.

Through the equator network, you can access the pdf and other versions of your chosen guideline. Take the checklist from the reporting guideline and directly paste it into the methods section of your manuscript to start.

Writing the methods section using guidelines

Having the checklist in the developing manuscript, will help you identify your section and sub-section headings of your methods section and serve to verify that you are reporting all the relevant aspects of your methods.

Using the questions from the checklist, you can began filling in information and data from your study. By the end of the checklist, most of your methods section should be completed and written.

Table 1 Consolidated criteria for reporting qualitative studies (COREQ): 32-item checklist

| No | Item | Guide questions/description |
|--|--|---|
| Domain 1: Research team and reflexivity | | |
| Personal Characteristics | | |
| 1. | Interviewer/facilitator | Which author/s conducted the interview or focus group? |
| 2. | Credentials | What were the researcher's credentials? <i>E.g. PhD, MD</i> |
| 3. | Occupation | What was their occupation at the time of the study? |
| 4. | Gender | Was the researcher male or female? |
| 5. | Experience and training | What experience or training did the researcher have? |
| Relationship with participants | | |
| 6. | Relationship established | Was a relationship established prior to study commencement? |
| 7. | Participant knowledge of the interviewer | What did the participants know about the researcher? <i>e.g. personal goals, reasons for doing the research</i> |
| 8. | Interviewer characteristics | What characteristics were reported about the interviewer/facilitator? <i>e.g. Bias, assumptions, reasons and interests in the research topic</i> |
| Domain 2: study design | | |
| Theoretical framework | | |
| 9. | Methodological orientation and Theory | What methodological orientation was stated to underpin the study? <i>e.g. grounded theory, discourse analysis, ethnography, phenomenology, content analysis</i> |
| Participant selection | | |
| 10. | Sampling | How were participants selected? <i>e.g. purposive, convenience, consecutive, snowball</i> |
| 11. | Method of approach | How were participants approached? <i>e.g. face-to-face, telephone, mail, email</i> |
| 12. | Sample size | How many participants were in the study? |
| 13. | Non-participation | How many people refused to participate or dropped out? Reasons? |

Methods

Research team and reflexivity

Personal characteristics

Which author/s conducted the interview or focus group? What were the researcher's credentials? (*E.g.* PhD, MD) What was their occupation at the time of the study? Was the researcher male or female? What experience or training did the researcher have?

Relationship with participants

Was a relationship established prior to study commencement? What did the participants know about the researcher? (*e.g.* personal goals, reasons for doing the research) What characteristics were reported about the interviewer/facilitator? (*e.g.* Bias, assumptions, reasons and interests in the research topic)

Study design

Methodological orientation

What methodological orientation was stated to underpin the study? *e.g.* grounded theory, discourse analysis, ethnography, phenomenology, content analysis

Sampling

How were participants selected? (*e.g.* purposive, convenience, consecutive, snowball) How were participants approached? (*e.g.* face-to-face, telephone, mail, email) How many participants were in the study? How many people refused to participate or dropped out? Reasons?

Section 3

What the heck is the equator network?

Quick Poll

How familiar are you with equator network?

- A) Not at all familiar
- B) Somewhat familiar
- C) Quite familiar
- D) Very familiar

Navigating equator network

Equator network home page link: <https://www.equator-network.org/>

There is a lot of useful information on this home page; however, we are looking for the reporting guidelines search engine.

Navigate to the tab titled “Search for reporting guidelines” to access the search engine.

Reporting guidelines search

equator-network.org/reporting-guidelines/

The screenshot shows the EQUATOR network website. The header includes the EQUATOR network logo and the tagline "Enhancing the QUALity and Transparency Of health Research". A navigation menu contains links for Home, About us, Library, Toolkits, Courses & events, News, Blog, Librarian Network, and Contact. The main content area is titled "Search for reporting guidelines" and features three dropdown menus for "Study type", "Clinical area", and "Section of report", each highlighted with a red circle. Below these are search buttons and a "Start again" link. On the right, a sidebar titled "Reporting guidelines for main study types" lists various categories such as Randomised trials, Observational studies, Systematic reviews, Study protocols, Diagnostic/prognostic studies, Case reports, Clinical practice guidelines, Qualitative research, Animal pre-clinical studies, Quality improvement studies, and Economic evaluations, each with associated reporting guideline names like CONSORT, STROBE, PRISMA, SPIRIT, STARD, TRIPOD, CARE, AGREE, RIGHT, SRQR, COREQ, ARRIVE, SQUIRE, and CHEERS.

Reporting guidelines search engine link: <https://www.equator-network.org/reporting-guidelines/>

The three fields of the reporting guideline search engine:

Clinical area

Section of report

Study type

Searching for qualitative research reporting guidelines

The screenshot shows the Equator Network website interface. At the top, the logo for Equator Network is displayed with the tagline "Enhancing the QUALity and Transparency Of health Research". Below the logo is a navigation menu with links for Home, About us, Library, Toolkits, Courses & events, News, and Blog. The current page is identified as "Home > Library > Reporting guideline".

The main content area is titled "Search for reporting guidelines" and features a search form. The form includes three dropdown menus: "Study type" (set to "Qualitative research"), "Clinical area" (set to "Please select..."), and "Section of report" (set to "Please select..."). Below these is a text input field for "Or search with free text" and a "Search Reporting Guidelines" button. A "Start again" link and a "Help" link are also present.

Below the search form, it states "Displaying 33 reporting guidelines found." and provides a link to "Show the most recently added records first." The search results are listed in a table with three entries:

- 1 Standards for reporting qualitative research: a synthesis of recommendations
- 2 Enhancing transparency in reporting the synthesis of qualitative research: ENTREQ
- 3 Consolidated criteria for reporting qualitative research (COREQ): a 32-item checklist for interviews and focus groups

Qualitative search alone = 33 reporting guidelines

1st is SRQR
2nd is ENTREQ
3rd is COREQ

NOTE: They are sorted by added first not necessarily the most used

The article: COREQ

JOURNAL ARTICLE

Consolidated criteria for reporting qualitative research (COREQ): a 32-item checklist for interviews and focus groups FREE

Allison Tong ✉, Peter Sainsbury, Jonathan Craig

International Journal for Quality in Health Care, Volume 19, Issue 6, December 2007. Pages 349–357, <https://doi.org/10.1093/intqhc/mzm042>

Published: 14 September 2007 [Article history](#) ▼

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After clicking on the reporting guideline in the equator network search, it should take you to where the guideline is stored.

You will be able to see where the article was published, the doi number, and a pdf.

Download the PDF so that you can easily copy and paste the table into your methods.

COREQ DOI:
<https://doi.org/10.1093/intqhc/mzm042>

COREQ checklist

Table 1 Consolidated criteria for reporting qualitative studies (COREQ): 32-item checklist

| No | Item | Guide questions/description |
|--|--|---|
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| Personal Characteristics | | |
| 1. | Interviewer/facilitator | Which author/s conducted the interview or focus group? |
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| Domain 2: study design | | |
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| 12. | Sample size | How many participants were in the study? |
| 13. | Non-participation | How many people refused to participate or dropped out? Reasons? |

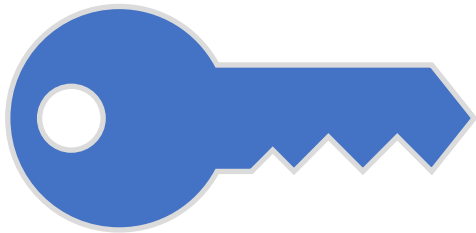
Most reporting guideline checklist will look similar to this one.

This is the COREQ checklist and is used for the methods section.

A guide: Use “Domain” headings as the methods sections and the non-numbered writing as the sub-sections.

Reporting guidelines not found in the equator network

- The equator network is just one clearing house for finding reporting guidelines or writing standards.
- If you are looking for a guideline that incorporates multiple methodologies or applies directly to a particular content area, you might have to look outside the network.
 - You can do a lit search for other reporting guidelines if you know the author, journal, title, etc.
 - For example: Methodological standards for qualitative and mixed methods patient centered outcomes research (Gaglio, Henton, Barbeau, Evans, Hickam, Newhouse & Zickmund 2020) can be found on Google Scholar.
 - Doi: <https://doi.org/10.1136/bmj.m4435>
- Others?



- There are specific reporting guidelines for qualitative methods.
- The equator network is one place to find a variety of tools to assist in reporting.
- Reporting guidelines can be a scaffolding to enhance transparency and clarity of qualitative methodology for dissemination.

KEY TAKE-AWAYS OF REPORTING GUIDELINES

Questions?



Upcoming and Related Cyber seminar:
How to Write a Qualitative Manuscript
Jen Van Tiem, Linda Kawentel, Gemmae Fix
12/8

Thank you!

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References

- O'Brien, B. C., Harris, I. B., Beckman, T. J., Reed, D. A., & Cook, D. A. (2014). Standards for reporting qualitative research: A synthesis of recommendations. *Academic Medicine, 89*(9), 1245-1251.
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- Gaglio, B., Henton, M., Barbeau, A., Evans, E., Hickam, D., Newhouse, R., & Zickmund, S. (2020). Methodological standards for qualitative and mixed methods patient centered outcomes research. *British Medical Journal, 371*-379.