

Supplementary Table 1. Quality Appraisal and Methodological Descriptions of Included Studies (n=49)

Author (Study Setting)	Quality Rank L/M/H	Main Strengths (+) and Weaknesses (-)	Method/s	Sampling Strategy	Sample Pt, HP, Cg (Male/Female)	Mean Age and/or Range (sex)
Bennett [71] (USA)	M	+ Congruity between research methodology, data analysis, and interpretation of results; detailed description of analysis procedures - Did not provide sufficient sample characteristics (NYHA class, age range); difficult to assess the generalizability of the analyses	FG	Convenience	23 Pt (16/7) 18 Cg (17/1)	60 Pt only
Boren [57] (USA)	H	+ Congruity between research methodology and interpretation of results; strong grounded theory approach - Discusses data collected in the study data but also data collected within the author's nurse practice	SSI	Convenience	15 Pt (0/15)	28-76
Buetow [50] (New Zealand)	L	+ Data analysis procedures are well-described; large sample size - Difficult to generalize results; lacks description of sample and rationale for sampling strategy	SSI	Convenience	62 Pt (NR)	NR
Clark [72] (UK)	M	+ Congruity between the research questions and research design; study participants are adequately represented; quote identifiers are used - Limited information on data analysis, researcher position, caregiver demographics	SSI	Convenience; purposive	50 Pt (33/17) 30 Cg (NR)	68 (F); 67 (M) Pt only
Clark [19] (UK)	H	+ Congruity between the research questions and research design; representative use of quotes as quote identifiers are used - Focus is on the description of patients although caregivers are focus of the study	SSI	Convenience	30 Cg (7/23) 50 Pt (33/17)	68 (F); 67 (M)
Clark [37] (Canada)	H	+ Congruity between research methodology and methods; participants are adequately represented - Age of caregivers in sample is not clear	SSI	Convenience; quota	42 Pt (27/15) 30 Cg (NR)	76 Pt only
Costello [35] (Canada)	M	+Congruity between research methods and data collection procedures; analysis done by two researchers - Small sample size; analysis and interpretation of results	SSI	Purposive	6 Pt (3/3) 6 Cg (NR)	30-73

		appear superficial				
Dickson [49] (NR)	M	+ Congruity between conceptual basis for study, research methodology, theoretical framework and interview methods - Sample may be too small to draw conclusions about typology; analysis procedures described but not illustrated	SSI	Purposive for NYHA II or III, younger age	41 Pt (26/15)	25-65
Dickson [29] (NR)	M	+Clear conceptual basis for study; integration of qualitative and quantitative findings - Small sample size limits strength of quantitative evidence; sample predominantly white, male	SSI; survey	Purposive	41 Pt (26/15)	49 25-65
Dickson [40] (USA)	H	+Congruity between research methodology and interpretation of results; detailed description analysis procedures and data triangulation through mixed-methods design - Sample is likely too small to generalize quantitative results	SSI; survey	Purposive	41 Pt (26/15)	49 25-65
Dickson [62] (USA)	M	+Congruity between research methodology and methods; detailed description of data integration and triangulation; use of a theory-driven interview guide - Lack of researcher reflexivity; very few sample interview questions provided	SSI; survey	Purposive	30 Pt (18/12)	59.6 26-98
Falk [70] (Sweden)	M	+Clear description of data analysis; provides sample data for all main categories - Interview questions not provided; illustrative quotes are sometimes rather mundane	SSI	Purposive	17 Pt (12/5)	72 55-83
Gary [53] (USA)	M	+ Theoretical framework informs interview questions; provides quotes and frequency counts for each topic - Interview guide may limit qualitative data generation; unclear how representative the data are of the sample	SSI	Convenience	32 Pt (0/32)	68
Glassman [69] (USA)	M	+Detailed systematic research approach; use of independent auditor to verify transcripts - Small sample; quotes appear to draw from few participants; data seems repetitive	UI	Convenience; purposive	5 Pt (3/2)	77.2 60-85
Granger [28] (USA)	M	+Congruity between theoretical framework and interview guide and approach to analysis; unique focus on patient-physician dyads - Findings appear to be congruent with data collection and analysis, yet there is little patient data to substantiate	SSI	Purposive	6 Pt (5/1) 6 HP (3/3)	58 Pt only

		results				
Helleso [75] (Norway)	M	+ Basic interpretive descriptive approach; rationale for data collection approach - Sample not well described; quote identifiers not used; themes appear superficial	SSI	Convenience	14 Pt (6/8)	79.6 71-93
Horowitz [38] (USA)	H	+ Robust theoretical framework; rigorous sampling methods; detailed description of analysis and sample characteristics; recommendations and conclusions appear to flow from the interpretation of the data - None identified	SSI	Purposive	19 Pt (10/9)	52-89
Hoyt [73] (USA)	H	+Congruity between iterative research process and creative approach to analysis; patient demographics are well described - Sampling appears to be convenience not purposive	SSI	Convenience	11 Pt (5/6)	67 50-81
Jowsey [48] (Australia)	L	+Sample includes patients, caregivers, and health professionals; congruity in the interpretation of findings through a policy lens - Insufficient information on participant age; not all of the findings are HF-specific, may affect transferability of findings	SSI; survey	Purposive for age, medical conditions	52 Pt (28/24) 14 Cg (1/13) 63 HP (19/44)	NR
Jurgens [39] (USA)	L	+Congruity between methodology and mixed-methods used to collect data - Participants are not adequately represented (limited qualitative data presented), small sample size limits generalizability of the quantitative data	SSI	Convenience	77 Pt (40/37)	75.9
Kaholokula [51] (USA)	L	+ Focus on ethnic minority groups living with HF; rationale for use of theoretical model - Findings/discussion does not adequately represent caregiver participants; does not adequately describe sample (NYHA class, age range), research questions not stated; does not report ethical approval of the study	FG	Convenience	11 Pt (5/6) 25 Cg (4/21)	65.9 Pt 50.5 Cg
Lough [47] (NR)	M	+Congruity between the methodology and data analysis; novel conceptualization of HF self-care as work - Researcher position not stated	SSI	Purposive	25 Pt (12/13)	71 66-91
Macabasco-O'Connell [32] (USA)	L	+Focus on under-served population (low income patients) - Lacks discussion on the approach to integrating results of the mixed-methods approach; participants do not appear to be adequately represented (insufficient use of	Structured interviews; survey	Convenience	65 Pt (29/36)	59

		quotes from participants)				
Mahoney [42] (USA)	M	+Congruity between methods and analysis of data; participants selected from multiple sites; use of a pilot study; - Conclusions appear somewhat simplistic	SSI	Purposive	16 Pt (12/4) 12 Cg (NR)	67.7 Pt only
Mead [34] (USA)	M	+Congruity between research questions and data collection methods; very large sample size; patients recruited from multiple sites; participants are adequately represented in the data through illustrative quotes - Lack of age or sex-based descriptive analysis	FG	Convenience; purposive	387 Pt (84/198: 105 sex not described)	41% ≥ 65
Meyerson [31] (USA)	M	+Research design and overall study is well described -Conclusions/findings are based on anecdotal records written during an HF self-care intervention; the study would likely be more rigorous if interviews had been conducted with patients to triangulate the case note data	Written anecdotal records	Convenience	27 Pt (NR)	75
Ming [65] (Malaysia)	M	+Sufficient description of sample; patients appear to be adequately represented (via use of supporting quotes from participants) -Theoretical basis not described; the interview guide or sample interview questions are not provided	SSI	Purposive	20 Pt (15/5)	56.5 27-75
Reid [67] (UK)	H	+Congruity between the research methodology and data collection methods; large sample size -Patients recruited from outpatient HF clinics (these patients may already be receiving support for medication management)	SSI	Convenience	50 Pt (33/17) 29 Cg	67.1 41-80 Pt only
Rerkluenrit [33] (Thailand)	M	+Congruity between grounded theory approach and data collection and analysis methods; participants are adequately represented; good use of illustrative quotes -Despite use of grounded theory approach authors do not identify a core variable	SSI	Purposive; theoretical	35 Pt (19/16)	NR
Riegel [54] (USA)	M	+Basic interpretive descriptive design and approach to analysis -Unsure about rigour of qualitative design; minimal description or interpretation of quotes provided for themes	Structured interviews; FG	Convenience	26 Pt (17/9)	74.4 59-91
Riegel [55] (USA)	H	+Congruity between mixed-methods approach and integration and interpretation of qualitative and quantitative data -Results obtained during intervention sessions	Face-to-face intervention	Convenience	15 Pt (6/9)	59.7

Riegel [36] (USA)	H	+ Congruent methodology, data analysis and interpretation of results; theory driven purposive sampling - Lacks information on age and number of participants in NYHA class III or IV	Structured interviews	Theoretical	29 Pt (18/11)	NR
Riegel [46] (Australia)	M	+Congruity in mixed-methods design and triangulation of qualitative and quantitative data -Participants are not adequately represented in results (limited use of quotes)	SSI	Purposive	29 Pt (21/8)	68.7
Riegel [56] (Australia)	M	+Congruity in mixed-methods approach; detailed steps indicate rigorous design -Low proportion of women in sample; qualitative themes appear to draw upon quantitative results	SSI	Purposive	27 Pt (19/8)	68.7 35-94
Sanford [63] (USA)	M	+Participants were recruited from multiple sites; use of quote identifiers suggests that participants are adequately represented the results / findings -Use of unstructured interviews	UI	Convenience	20 Cg (5/15)	NR
Schnell [66] (Canada)	L	+Inclusion of ethnic minority groups; data analysis and report of findings is theoretically guided -The small convenience sample is inadequately described; interview guide not validated / piloted and appears superficial; coding/analysis appears to lack rigour	SSI	Convenience	11 Pt (7/4)	64 43-79
Scott [64] (USA)	M	+Congruity in research methods, questions, data analysis, and interpretation of results -Study is more quantitative than qualitative; researcher position not stated	SSI	Convenience	20 Pt (NR) 18 Cg (NR)	71.3 Cg only
Scotto [52] (USA)	L	+Congruity between research methods and research questions -Analysis appears superficial; themes appear to reflect nursing theory, not data; purports to be phenomenology but the process followed is generic interpretive descriptive	SSI	Convenience	14 Pt (9/5)	63 42-84
Scotto [45] (USA)	H	+Congruity in methodological approach; clear conceptualization of self-care and sampling rationale - None identified	SSI	Convenience	14 Pt (9/5)	63 42-84
Seto [41] (Canada)	L	+Provides sample interview questions and detailed demographic characteristics of participants -Interviews may lack depth given their very short duration; no details on qualitative data analysis; no details on triangulation of quantitative and qualitative data	Survey; SSI	Convenience	94 Pt (74/20)	54.6

Sloan [30] (USA)	H	+Focus on cognitive impairment is unique; congruity between theoretical/philosophical perspectives and data analysis - Sample is literate and socially supported, findings may not be representative of larger population	SSI	Purposive	12 Pt (10/2)	43-81
Stromberg [74] (Sweden)	H	+Congruity between methodology and data collection methods -Interview questions use sophisticated language which may not be understood by participants; superficial examples might have more complex interpretations	SSI	Purposive	25 Pt (17/8)	46-93
Stull [43] (USA)	M	+Congruity between theoretical framework (interactionist perspective) and data analysis and interpretation -Triangulation of data in analysis is not apparent	SSI	Convenience	21 Pt (17/4)	61 29-79
Thornton [61] (USA)	M	+Appears rigorous (peer debriefing, use of an audit trail), provides interview guide; researcher position and reflexivity apparent -Unclear how participants were originally recruited in parent study	SSI	Convenience (from parent study sample)	7 Cg (0/7)	45 39-52
van der Wal [44] (Netherlands)	M	+Identifies specific, practical issues into supporting self-care -The term 'compliance' is dated (addressed by authors), but may influence approaches to data collection and/or analysis; themes seem to overlap and are very broad	SSI	Purposive	15 Pt (9/6)	70 42-87
Weierbach [59] (USA)	M	+ Congruity in research methods, research questions, data analysis, and interpretation of results -Discussion is brief and appears superficial	SSI; Case note review	Convenience	20 Pt (9/11)	74.6 65-90
Wu [60] (USA)	L	+Basic interpretive descriptive approach; participants are adequately represented in the results -Interview guide is specific and directed; themes appear simplistic	SSI; structured interviews	Convenience; purposive	16 Pt (9/7)	60.4 41-84
Wu [68] (USA)	M	+Clear description of sample and methods; conclusions appear to flow from the analysis / interpretation of data -Limited description of setting and recruitment strategies; reliance on convenience sampling	SSI	Convenience	16 Pt (9/7)	60.4 41-84
Zambroski [58] (USA)	H	+Congruity in research methodology, methods, and data analysis; strong rationale for creative use of metaphor; participants are adequately represented; use of illustrative quotes to support themes; participants recruited from	SSI	Purposive	11 Pt (5/6)	67

multiple sites
- Several interview questions provided but entire
interview guide not included

Cg = Caregiver; F = Female; FG = Focus Group; HP = Health Professional; M= Male; NR = Not Reported; Pt = Patient; SSI = Semi-Structured Interviews; UI = Unstructured Interviews