

# BMJ Open Self-efficacy instruments for individuals with coronary artery disease: a systematic review protocol

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**To cite:** Almeida JAB, Florêncio RB, Lemos DA, *et al.* Self-efficacy instruments for individuals with coronary artery disease: a systematic review protocol. *BMJ Open* 2022;**12**:e062794. doi:10.1136/bmjopen-2022-062794

► Prepublication history and additional supplemental material for this paper are available online. To view these files, please visit the journal online (<http://dx.doi.org/10.1136/bmjopen-2022-062794>).

Received 15 March 2022  
Accepted 13 July 2022



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## ABSTRACT

**Introduction** Self-efficacy is associated with management of diseases, psychological well-being, improved quality of life and rehabilitation adherence. Several instruments related to behaviour or specific disease (eg, coronary artery disease (CAD)) assess self-efficacy. The evaluation of cardiac self-efficacy in individuals with CAD will support healthcare professionals to improve self-efficacy via interventions; therefore, a suitable instrument is crucial. This systematic review aims to assess measurement properties, methodological quality and content of outcome measures of cardiac self-efficacy instruments for individuals with CAD.

**Methods and analysis** The study has been developed according to Preferred Reporting Items for Systematic Reviews and Meta-Analyses Protocol and Consensus Norms for Selection of Health Measuring Instruments (COSMIN). The following databases will be searched: MEDLINE (Ovid), Web of Science, EMBASE and PsycINFO. Studies assessing measurement properties of cardiac self-efficacy instruments for individuals with CAD will be included. No date or language restrictions will be applied to the search. Two independent authors will be responsible for assessing the eligibility of studies. Methodological quality of studies will be assessed using the COSMIN RoB Checklist, and the Grading of Recommendations, Assessment, Development and Assessment will be used to assess the quality of each study. Two authors will independently evaluate the content of instruments and link this to the International Classification of Functioning, Disability and Health.

**Ethics and dissemination** This study does not require ethics committee approval since it is based on previously published data. Evidence from this systematic review will be disseminated through publication in peer-reviewed journals and presentation at scientific conferences.

**PROSPERO registration number** CRD42021262613.

## INTRODUCTION

Self-efficacy is defined as the belief of individuals about their ability to organise and perform a certain activity. It consists of elements of awareness, planning and motivation, which can reflect on self-responsibility throughout the disease process;<sup>1</sup> thus, it is important for health promotion and

## STRENGTHS AND LIMITATIONS OF THIS STUDY

- ⇒ This systematic review protocol is designed according to the Preferred Reporting Items for Systematic Reviews and Meta-analyses Protocol and the Consensus-based Standards for the Selection of Health Measurement Instruments.
- ⇒ No language and date restrictions will be used, to include the maximum number of relevant studies.
- ⇒ The publication of this protocol will ensure use of a preplanned methodology, helping to reduce the risk of biased reporting and avoid duplication of effort.
- ⇒ The review will not include studies of instruments that have self-efficacy in their construct (eg, self-management, self-care), limiting only to self-efficacy instruments for coronary patients.
- ⇒ This protocol may be limited by the lack of patient and public involvement in its development.

management of chronic diseases.<sup>1–3</sup> Moreover, self-efficacy is associated with psychological well-being, improved quality of life and better rehabilitation adherence.<sup>4,5</sup>

Measurement instruments of self-efficacy can be general,<sup>6</sup> for specific health conditions (eg, feeding behaviour, physical activity and medication adherence)<sup>7–9</sup> or specific diseases (eg, asthma, stroke and coronary artery disease (CAD)).<sup>10–13</sup> Although many scales and questionnaires are available for self-efficacy, literature lacks methodological rigour and choice of instrument for individuals in pulmonary, metabolic and cardiovascular rehabilitation programmes.

CAD is characterised as reduced coronary artery lumen due to atherosclerotic plaques and may lead to chest pain, pressure or tightness sensation at different degrees of exertion and dyspnoea.<sup>14,15</sup> Conventional treatment implies cardiovascular rehabilitation and changes in daily habits. The admission of individuals to cardiovascular rehabilitation programmes aims to delay and prevent

complications and improve physical fitness through aerobic and strength training.<sup>16</sup>

Therefore, instruments assessing self-efficacy are needed to prevent complications and increase treatment adherence.<sup>1 3</sup> In this context, the assessment of cardiac self-efficacy instruments for individuals with CAD will support healthcare professionals in individual interventions and improve self-efficacy of patients. This systematic review aims to identify instruments developed to assess cardiac self-efficacy in individuals with CAD and evaluate methodological quality and measurement properties. We also aim to link the content of instruments to the International Classification of Functioning, Disability and Health (ICF). Based on this, the review will facilitate identifying discrepancies in measurement instruments and guide further research.

## METHODS AND ANALYSIS

### Study design and registration

This protocol was developed according to the Preferred Reporting Items for Systematic Reviews and Meta-analyses Protocol (PRISMA-P)<sup>17</sup> and the Consensus-based Standards for the Selection of Health Measurement Instruments (COSMIN).<sup>18 19</sup> The protocol was registered in the international prospective register of systematic reviews. Relevant changes in the systematic review will be documented in the PROSPERO and published in the final study report.

### Inclusion and exclusion criteria

Studies on the development of assessment of measurement properties of cardiac self-efficacy instruments for individuals with CAD will be included without language and date restrictions. Translation of other languages will be performed by language experts. Clinical trials or validation studies using self-reported or proxy-reported measurements and those published as abstracts will be excluded. Moreover, studies of instruments that have self-efficacy in their construct (eg, self-management, self-care) will also be excluded, limiting to self-efficacy instruments for coronary patients.

### Search strategy

The search strategy will be conducted from database inception to the date of the final searches in MEDLINE (ovid), Web of Science, EMBASE and PsycINFO databases considering the following: (1) construct of interest (cardiac self-efficacy); (2) target population (individuals with CAD); (3) type of instrument (questionnaire or scale) and (4) measurement properties; the latter will be assessed using search filters validated for measurement studies and already applied in previous reviews. Additional searches for relevant studies will be manually performed in reference lists of primary studies and review articles. Searches will be repeated before the final analysis to check for new studies. Online supplemental

file 1 shows the search strategies we developed for the databases search. The study will follow COSMIN recommendations.<sup>20</sup>

### Screening and selection of studies

The search results will be imported into the reference list management tool Mendeley (<https://www.mendeley.com>). Duplicates will be deleted before selections, and the reference list exported to the Rayyan Qatar Computing Research Institute systematic review platform (<https://rayyan.qcri.org>).<sup>21</sup> The detailed selection process will be presented in the PRISMA-P flowchart.

Two independent authors (JABA and DAL) will select studies using titles and abstracts, conduct a complete reading of potentially eligible studies and identify and record reasons for excluding those ineligible. In the case of disagreement, a virtual meeting will be held for discussion and consultation with a third reviewer (LPG).

### Data extraction

Two authors (JABA and DAL) will extract data following the Cochrane Collaboration and PRISMA guidelines. Other authors will independently review data to verify inclusion and exclusion criteria. The extracted information will include first author, year of publication, general characteristics of the instrument (construct, subscales, number of items and version), study design, sample size, characteristics of individuals (eg, age, sex, location, country, language, methods for selecting participants and response rate) and results of measurement properties (ie, internal consistency, reliability, measurement error, content validity (including face validity), construct validity (subdivided into structural validity, hypothesis testing and cross-cultural validity), validity of criterion, responsiveness and interpretability (not a measurement property, but necessary to adapt a research instrument or clinical practice)).

### Data quality

Methodological quality of studies will be assessed by two independent authors (RBF and JCL) using COSMIN RoB Checklist.<sup>18 19</sup> This tool considers 10 measurement properties and contains nine boxes with 3 to 35 items. Each box assigns a methodological quality score for instrument development: (1) content validity, (2) structural validity, (3) internal consistency, (4) cross-cultural validity and measurement invariance, (5) reliability, (6) measurement error, (7) criterion validity, (8) hypothesis testing for construct validity and (9) responsiveness. Each item has four response options: inadequate, doubtful, adequate and very good.<sup>22</sup> Disagreements will be solved by a third author (KSM).

The content extracted from measurement instruments will be compared using the ICF framework.<sup>23–25</sup> Two independent authors (JABA and RBF) will evaluate the content and link items of questionnaires to ICF standards. After, a third author (JCL) will review the content.

## Data synthesis

A narrative synthesis of results will be provided. In the possibility of validation studies of the same instrument for different populations, methodological and psychometric properties, quality of such studies will be addressed as a unique instrument but discussing the particularity of each version. A combination of measurement properties will determine the overall evidence of the instrument. Studies will be grouped according to similarity in terms of language, instrument version, study population and application form.

Results will be evaluated in clusters or summarised against the criteria for good measurement properties to determine whether they are sufficient (+), insufficient (-), inconsistent ( $\pm$ ) or indeterminate (?). Furthermore, a modified Grading of Recommendations, Assessment, Development and Evaluation will determine study quality.<sup>26 27</sup>

Afterward, instruments will be categorised and justified according to COSMIN recommendations.<sup>28</sup> (A) instrument is recommended for use and results are reliable; (B) when it may be recommended but requires further research to assess quality of these instruments and (C) instrument should not be recommended.

## Patient and public involvement

None.

## Ethics and dissemination

The study does not require ethics committee approval since it is based on published data. Evidence from this systematic review will be disseminated through publication of results in peer-reviewed journals and presentation at scientific conferences.

**Contributors** Authors made substantial contributions to the study design, developed inclusion criteria and search strategies. JABA developed the protocol, RBF, DAL, JCL, KSM and LPG provided critical insights and reviewed the protocol. JABA registered the protocol in the PROSPERO database. All authors read and approved the final version of the protocol.

**Funding** The authors have not declared a specific grant for this research from any funding agency in the public, commercial or not-for-profit sectors.

**Competing interests** None declared.

**Patient and public involvement** Patients and/or the public were not involved in the design, or conduct, or reporting, or dissemination plans of this research.

**Patient consent for publication** Not applicable.

**Provenance and peer review** Not commissioned; externally peer reviewed.

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**Author note** This study was partly financed by the Coordenação de Aperfeiçoamento de Pessoal de Nível Superior – Brasil (CAPES). Fiance Code 001.

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## SUPPLEMENTARY FILE 1

### Search strategy for MEDLINE (Ovid)

1. exp Self Efficacy/
2. self-efficacy.mp.
3. 1 or 2
4. exp Coronary Artery Disease/
5. Coronary Artery Disease.mp.
6. coronary heart disease.mp.
7. exp Coronary Disease/
8. exp Acute Coronary Syndrome/
9. Heart disease.mp. [mp=title, abstract, original title, name of substance word, subject heading word, floating sub-heading word, keyword heading word, organism supplementary concept word, protocol supplementary concept word, rare disease supplementary concept word, unique identifier, synonyms]
10. exp heart diseases/
11. exp myocardial ischemia/
12. exp Cardiovascular Diseases/
13. Cardiovascular Disease.mp.
14. exp Heart Failure/
15. heart failure.mp.
16. 4 or 5 or 6 or 7 or 8 or 9 or 10 or 11 or 12 or 13 or 14 or 15
17. instrument\*.mp.
18. instruments\*.mp.
19. measure\*.mp.
20. measures\*.mp.
21. questionnaire\*.mp.
22. exp "Surveys and Questionnaires"/
23. questionnaires\*.mp.
24. scale\*.mp. [mp=title, abstract, original title, name of substance word, subject heading word, floating sub-heading word, keyword heading word, organism supplementary concept word, protocol supplementary concept word, rare disease supplementary concept word, unique identifier, synonyms]
25. scales\*.mp. [mp=title, abstract, original title, name of substance word, subject heading word, floating sub-heading word, keyword heading word, organism supplementary concept word, protocol supplementary concept word, rare disease supplementary concept word, unique identifier, synonyms]
26. tool\*.mp. [mp=title, abstract, original title, name of substance word, subject heading word, floating sub-heading word, keyword heading word, organism supplementary concept word, protocol supplementary concept word, rare disease supplementary concept word, unique identifier, synonyms]
27. tools\*.mp.
28. survey\*.mp.
29. test\*.mp.
30. 17 or 18 or 19 or 20 or 21 or 22 or 23 or 24 or 25 or 26 or 27 or 28 or 29
31. 3 and 16 and 30
32. (instrumentation or methods).fs.
33. (Validation Studies or Comparative Study).pt.

34. exp Psychometrics/
35. psychometr\*.ti,ab.
36. (clinimetr\* or clinometr\*).tw.
37. outcome assessment.ti,ab.
38. outcome measure\*.tw.
39. exp Observer Variation/
40. observer variation.ti,ab.
41. exp Health Status Indicators/
42. exp Reproducibility of Results/
43. reproducib\*.ti,ab.
44. exp Discriminant Analysis/
45. (reliab\* or unreliab\* or valid\* or coefficient or homogeneity or homogeneous or internal consistency).ti,ab.
46. (cronbach\* and (alpha or alphas)).ti,ab.
47. (item and (correlation\* or selection\* or reduction\*)).ti,ab.
48. (agreement or precision or imprecision or precise values or test-retest).ti,ab.
49. (test and retest).ti,ab.
50. (reliab\* and (test or retest)).ti,ab.
51. ((replicab\* or repeated) and (measure or measures or findings or result or results or test or tests)).ti,ab.
52. (generaliza\* or generalisa\* or concordance).ti,ab.
53. (intraclass and correlation\*).ti,ab.
54. (discriminative or known group or factor analysis or factor analyses or dimension\* or subscale\*).ti,ab.
55. (multitrait and scaling and (analysis or analyses)).ti,ab.
56. (item discriminant or interscale correlation\* or error or errors or individual variability).ti,ab.
57. (variability and (analysis or values)).ti,ab.
58. (uncertainty and (measurement or measuring)).ti,ab.
59. (standard error of measurement or sensitiv\* or responsive\*).ti,ab.
60. ((minimal or minimally or clinical or clinically) and (important or significant or detectable) and (change or difference)).ti,ab.
61. (small\* and (real or detectable) and (change or difference)).ti,ab.
62. (meaningful change or ceiling effect or floor effect or Item response model or IRT or Rasch or Differential item functioning or DIF or computer adaptive testing or item bank or cross-cultural equivalence).ti,ab.
63. exp Reproducibility of Results/
64. cross-cultural equivalence.ti,ab.
65. development.ti,ab.
66. 32 or 33 or 34 or 35 or 36 or 37 or 38 or 39 or 40 or 41 or 42 or 43 or 44 or 45 or 46 or 47 or 48 or 49 or 50 or 51 or 52 or 53 or 54 or 55 or 56 or 57 or 58 or 59 or 60 or 61 or 62 or 63 or 64 or 65
67. 31 and 66

## Search strategy for Web of Science

<i>n</i>	Search terms
#1	Search: TS=(Self-Efficacy*) OR TS=(Self Efficacy*)
#2	Search: TS=(Coronary Artery Disease*) OR TS=(Coronary Disease*) OR TS=(Coronary Heart Disease*) OR TS=(Acute Coronary Syndrome) OR TS=(Heart disease*) OR TS=(Cardiovascular disease*) OR TS=(Heart failure) OR TS=(Myocardial ischemia)
#3	Search: TS=(Instrument*) OR TS=(instruments*) OR TS=(measure*) OR TS=(measures*) OR TS=(questionnaire*) OR TS=(questionnaires*) OR TS=(scale*) OR TS=(scales*) OR TS=(tool*) OR TS=(tools*) OR TS=(survey*) OR TS=(test*)
#4	Search: TS=(instrumentation) OR TS=(methods) OR TS=(“validation stud**”) OR TS=(“comparative stud**”) OR TS=(psychometrics) OR TS=(psychometr*) OR ALL=(clinimetr*) OR ALL=(clinometr*) OR TS=(“outcome assessment”) OR TS=(“outcome measure”) OR TS=(“observer variation”) OR TS=(“observer variation”) OR TS=(“health status indicators”) OR TS=(“reproducib**”) OR TS=(“discriminant analysis”) OR TS=(reliab*) OR TS=(unreliab*) OR TS=(valid*) OR TS=(“coefficient of variation”) OR TS=(coefficient) OR TS=(homogeneity) OR TS=(homogeneous) OR TS=(“internal consistency”) OR ((TS=(alpha) OR TS=(alphas)) AND TS=(cronbach*)) OR ((TS=(correlation*) OR TS=(selection*) OR TS=(reduction*)) AND TS=(item)) OR TS=(agreement) OR TS=(precision) OR TS=(imprecision) OR TS=(precise values) OR TS=(test-retest) OR (TS=(test) AND TS=(retest)) OR ((TS=(test) OR TS=(retest)) AND TS=(reliab*)) OR TS=(stability) OR TS=(interrater) OR TS=(inter-rater) OR TS=(intra-rater) OR TS=(intra-rater) OR TS=(intertester) OR TS=(inter-tester) OR TS=(intratester) OR TS=(intra-tester) OR TS=(interobserver) OR TS=(inter-observer) OR TS=(intraobserver) OR TS=(intra-observer) OR TS=(intertechician) OR TS=(inter-technician) OR TS=(intra-technician) OR TS=(interexaminer) OR TS=(inter-examiner) OR TS=(intraexaminer) OR TS=(intra-examiner) OR TS=(interassay) OR TS=(inter-assay) OR TS=(intraassay) OR TS=(intra-assay) OR TS=(interindividual) OR TS=(inter-individual) OR TS=(intraindividual) OR TS=(intra-individual) OR TS=(interparticipant) OR TS=(inter-participant) OR TS=(intraparticipant) OR TS=(intra-participant) OR TS=(kappa) OR TS=(kappa’s) OR TS=(kappas) OR TS=(repeatab*) OR ((ALL=(replicab*) OR ALL=(repeated)) AND (ALL=(measure) OR ALL=(measures) OR ALL=(findings) OR ALL=(result) OR ALL=(results) OR ALL=(test) OR ALL=(tests))) OR TS=(generaliza*) OR TS=(generalisa*) OR TS=(concordance) OR (TS=(intraclass) AND TS=(correlation*)) OR TS=(discriminative) OR TS=(known group) OR TS=(“factor analysis”) OR TS=(“factor analyses”) OR TS=(“factor structure”) OR TS=(“factor structures”) OR TS=(dimension*) OR TS=(subscale*) OR ((TS=(analysis) OR TS=(analyses)) AND TS=(scaling) AND TS=(multitrait)) OR TS=(“item discriminant”) OR TS=(“interscale correlation**”) OR TS=(error) OR TS=(errors) OR TS=(“individual variability”) OR TS=(“interval variability”) OR TS=(“rate variability”) OR ((TS=(values) OR TS=(analysis)) AND TS=(variability)) OR ((TS=(measurement) OR TS=(measuring)) AND TS=(uncertainty)) OR TS=(“standard error of measurement”) OR TS=(sensitiv*) OR TS=(responsive*) OR (TS=(limit) AND TS=(detection)) OR TS=(“minimal detectable concentration”) OR TS=(interpretab*) OR ((TS=(minimal) OR TS=(minimally) OR TS=(clinical) OR TS=(clinically)) AND (TS=(important) OR TS=(significant) OR TS=(detectable)) AND (TS=(change) OR TS=(difference))) OR (TS=(small) AND (TS=(real) OR TS=(detectable)) AND (TS=(change) OR TS=(difference))) OR TS=(“meaningful change”) OR TS=(“ceiling effect”) OR TS=(“floor effect”) OR TS=(“Item response model”) OR TS=(IRT) OR TS=(Rasch) OR TS=(“differential item functioning”) OR TS=(DIF) OR TS=(“computer adaptive testing”) OR TS=(“item bank”) OR TS=(“cross-cultural equivalence”) OR TS=(“development”)
#5	#1 AND #2 AND #3 AND #4

## Search strategy for Embase and PsycINFO

<i>n</i>	Search terms
#1	("Self-Efficacy*" OR "Self Efficacy*")
#2	("Coronary Artery Disease*" OR "Coronary Disease*" OR "Coronary Heart Disease*" OR "Acute Coronary Syndrome" OR "Heart disease*" OR "Cardiovascular disease*" OR "Heart failure" OR "Myocardial ischemia")
#3	("Instrument*" OR "Instruments*" OR "measure*" OR "measures*" OR "questionnaire*" OR "questionnaires" OR "scale*" OR "scales*" OR "tool*" OR "tools*" OR "survey*" OR "test*")
#4	("instrumentation" OR "methods" OR "Validation Studies" OR "Comparative Study" OR "psychometrics" OR "psychometr*" OR "clinimetr*" OR "clinometr*" OR "outcome assessment (health care)" OR "outcome assessment" OR "outcome measure*" OR "observer variation" OR "observer variation" OR "Health Status Indicators" OR "reproducibility of results" OR "reproducib*" OR "discriminant analysis" OR "reliab*" OR "unreliab*" OR "valid*" OR "coefficient of variation" OR "coefficient" OR "homogeneity" OR "homogeneous" OR "internal consistency" OR ("cronbach*" AND "alpha" OR "alphas") OR ("item" AND ("correlation*" OR "selection*" OR "reduction*")) OR "agreement" OR "precision" OR "imprecision" OR "precise values" OR "test-retest" OR ("test" AND "retest") OR ("reliab*" AND ("test" OR "retest")) OR "stability" OR "interrater" OR "inter-rater" OR "intrarater" OR "intra-rater" OR "intertester" OR "inter-tester" OR "intratester" OR "intra-tester" OR "interobserver" OR "inter-observer" OR "intraobserver" OR "intra-observer" OR "intertechician" OR "inter-technician" OR "intratechnician" OR "intra-technician" OR "interexaminer" OR "inter-examiner" OR "intraexaminer" OR "intra-examiner" OR "interassay" OR "inter-assay" OR "intraassay" OR "intra-assay" OR "interindividual" OR "inter-individual" OR "intraindividual" OR "intra-individual" OR "interparticipant" OR "inter-participant" OR "intraparticipant" OR "intra-participant" OR "kappa" OR "kappa's" OR "kappas" OR "repeatable*" OR (("replicab*" OR "repeated") AND ("measure" OR "measures" OR "findings" OR "result" OR "results" OR "test" OR "tests")) OR "generaliza*" OR "generalisa*" OR "concordance" OR ("intraclass" AND "correlation*") OR "discriminative" OR "known group" OR "factor analysis" OR "factor analyses" OR "factor structure" OR "factor structures" OR "dimension*" OR "subscale*" OR ("multitrait" AND "scaling" AND ("analysis" OR "analyses")) OR "item discriminant" OR "interscale correlation*" OR "error" OR "errors" OR "individual variability" OR "interval variability" OR "rate variability" OR ("variability" AND ("analysis" OR "values")) OR ("uncertainty" AND ("measurement" OR "measuring")) OR "standard error of measurement" OR "sensitiv*" OR "responsive*" OR ("limit" AND "detection") OR "minimal detectable concentration" OR "interpretab*" OR (("minimal" OR "minimally" OR "clinical" OR "clinically") AND ("important" OR "significant" OR "detectable") AND ("change" OR "difference")) OR ("small*" AND ("real" OR "detectable") AND ("change" OR "difference")) OR "meaningful change" OR "ceiling effect" OR "floor effect" OR "Item response model" OR "IRT" OR "Rasch" OR "Differential item functioning" OR "DIF" OR "computer adaptive testing" OR "item bank" OR "cross-cultural equivalence" OR "development")
#5	#1 AND #2 AND #3 AND #4