

INTERVENÇÕES PARA O CUIDADOR DA PESSOA IDOSA NA TRANSIÇÃO HOSPITAL-DOMÍCILIO: UM PROTOCOLO DE SCOPING REVIEW

INTERVENTIONS FOR THE OLDER PERSON'S CAREGIVER IN THE HOSPITAL-HOME TRANSITION: A PROTOCOL OF SCOPING REVIEW

INTERVENCIONES PARA EL CUIDADOR DE LA PERSONA MAYOR EN LA TRANSICIÓN HOSPITAL-HOGAR: UN PROTOCOLO DE SCOPING REVIEW

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RECEIVED: 29th October, 2024

ACCEPTED: 19th September, 2025

PUBLISHED: 30th November, 2025

2025



RESUMO

Introdução: A evidência identifica lacunas na preparação dos cuidadores de pessoas idosas no processo de transição do hospital para o domicílio. Os próprios cuidadores sentem-se inadequadamente preparados, enquanto os profissionais de saúde também enfrentam desafios neste processo.

Objetivo: Mapear as intervenções dirigidas ao cuidador da pessoa idosa durante a transição do hospital para o domicílio.

Métodos: Será desenvolvida uma *scoping review*, de acordo com a metodologia JBI. Nesta revisão serão considerados estudos que abordem cuidadores informais de pessoas idosas (População), intervenções utilizadas em cuidados de transição (Conceito) e especificamente no contexto da transição hospital-domicílio (Contexto), primários quantitativos/qualitativos e secundários, publicados e não publicados, nos idiomas português, inglês e espanhol, em qualquer ano de publicação. A pesquisa de evidência incluirá sete bases de dados. Dois revisores, de forma independente, selecionarão os estudos e extraerão os dados. Os resultados serão apresentados de forma narrativa e com recurso a tabelas.

Resultados: Perspetiva-se incluir estudos que abordam este conceito de interesse, permitindo mapear as intervenções e suas características.

Conclusão: A condução desta *scoping review* revela-se essencial para sintetizar as intervenções neste âmbito, de forma a produzir a implementação de uma abordagem sistematizada aos cuidadores da pessoa idosa.

Palavras-chave: cuidadores; idoso; transição do hospital para o domicílio; revisão.

ABSTRACT

Introduction: The evidence identifies gaps in the preparation of older person's caregiver in the transition process from hospital to home. Caregivers perceive their care as inadequately prepared, while health professionals also face challenges in this process.

Objective: Map the interventions aimed at the caregiver of the older person during the transition from hospital to home.

Methods: A scoping review will be conducted in accord with the JBI methodology. This review will consider studies that approach informal caregivers of older people (Population), interventions used in transitional care (Concept) and specifically in the context of the hospital-home transition (Context), primary quantitative/qualitative and secondary, published and unpublished, in Portuguese, English and Spanish, in any year of publication. The search for evidence will include seven databases. Two reviewers will independently select the studies and extract the data. The results will be presented in narrative form and using tables.

Results: The proposal is to include studies that approach this concept of interest, in order to map the interventions and their characteristics.

Conclusion: Conducting this scoping review is essential to synthesize interventions in this field, to produce the implementation of a systematized approach to older people's caregivers.

Keywords: caregivers; aged; hospital to home transition; review.

RESUMEN

Introducción: Las evidencias identifican deficiencias en la preparación del cuidador de la persona mayor en el proceso de transición del hospital al domicilio. Los cuidadores perciben su atención como inadecuadamente preparada, mientras que los profesionales sanitarios también se enfrentan a retos en este proceso.

Objetivos: Mapear las intervenciones dirigidas al cuidador de la persona mayor durante la transición del hospital al domicilio.

Métodos: Se realizará una *scoping review* de acuerdo con la metodología del JBI. Esta revisión considerará estudios que aborden cuidadores informales de personas mayores (Población), intervenciones utilizadas en cuidados de transición (Concepto) y específicamente en el contexto de la transición hospital-domicilio (Contexto), primarios cuantitativos/cualitativos y secundarios, publicados y no publicados, en portugués, inglés y español, en cualquier año de publicación. La búsqueda de evidencias incluirá siete bases de datos. Dos revisores, de forma independiente, seleccionarán los estudios y extraerán los datos. Los resultados se presentarán en forma narrativa y mediante tablas.

Resultados: El propósito es incluir estudios que aborden este concepto de interés, lo que permitirá trazar un mapa de las intervenciones y sus características.

Conclusión: La realización de esta *scoping review* es esencial para sintetizar las intervenciones en este campo, con el fin de producir la aplicación de un enfoque sistematizado para los cuidadores de personas mayores.

Palabras Clave: cuidadores; anciano; transición del hospital al hogar; revisión.

Introduction

Population ageing is an unavoidable reality and one of the most significant factors in the transformation of the 21st century. This demographic shift has profound social and financial implications, as well as consequences for individuals and families (United Nations Regional Information Center, 2019). The United Nations (UN) estimates that the number of people aged 60 years or older will double by 2050 and triple by 2100 (United Nations Regional Information Center, 2019).

Society is struggling to adapt to this new demographic structure. Insufficient social and local health responses often lead to recurrent hospitalizations, which are associated with high rates of functional and cognitive decline in older adults (Limão & Martins, 2021; Tavares et al., 2021). In addition, ageing itself brings changes related to senility and senescence, resulting in a gradual decline in physical and mental capacity (World Health Organization, 2022) and a consequent increase in self-care needs (Limão & Martins, 2021; Tavares et al., 2021).

In response, the UN has set 2021-2030 goals for reducing health inequalities and improving the lives of older people, their families and communities through actions in the following areas: changing the way we think, feel and act about ageing; promoting the older people capabilities; promoting access to long-term quality care; and promoting the provision of integrated/person-centered care and primary health care services in order to respond to their needs (World Health Organization [WHO], 2022).

Considering the challenges of ageing, the associated risk of hospitalization, and the UN's call for integrated and person-centred care, the transition from hospital to home requires a systematized and integrative approach that also encompasses caregiver support (Leithaus et al., 2022; World Health Organization, 2022). This transition is often stressful and demanding for both the older person and their caregiver or family (Health Quality Ontario, 2022). It therefore requires the active involvement of a multidisciplinary team to address the needs of the older person-caregiver dyad, ensure adequate support in the home environment, and prevent avoidable hospital readmissions (Health Quality Ontario, 2022; Sousa et al., 2023).

The hospital-home transition can be analyzed through the philosophy of transitional care. This philosophy of care includes a set of interventions aimed at ensuring continuity and coordination of care, where a comprehensive and systematized care plan must be established and implemented. The older person and their family/caregiver should benefit from care provided by a multidisciplinary team, that is familiar with the person's preferences and state of health, to achieve the objectives defined in the plan of care (National Transitions of Care Coalition, 2023). This includes, among other areas of intervention, the management and empowerment of the old person and caregiver, as well as coordination between the health professionals involved in this transition (Naylor et al., 2017).

Despite its importance, evidence reveals persistent gaps in caregiver preparation for this transition. Caregivers often report inadequate preparation, while health professionals face challenges in providing consistent support. As noted in prior research, hospital-home transition care should systematically involve the caregiver as part of a multidisciplinary approach (Lutz et al., 2011, 2017; Nunes et al., 2019, 2022; Santos et al., 2024).

Although previous studies have investigated interventions targeting caregivers during hospital-to-home transitions (Costa et al., 2020; Gomes et al., 2021), including interventions focused on supporting the caregiver role, assessing needs, training in the management of dependent older adults and self-care, and ensuring continuity of care (Gomes et al., 2021), the evidence remains highly heterogeneous in both clinical content and methodology, highlighting the need for a systematic mapping of these interventions.

A preliminary search of PROSPERO, MEDLINE via PubMed, the Cochrane Database of Systematic Reviews and JBI Evidence Synthesis was conducted and no current or in-progress scoping reviews or systematic reviews about this topic were identified.



The objective of this review is to map the interventions aimed at older person's caregiver during the transition from hospital to home. The review question is: What are the interventions for the older person's caregiver in the hospital-home transition? And subquestions are: What are the characteristics of the interventions? Who are the health professionals who implement the interventions? What is the context in which these interventions are implemented (hospital, home or both)?

1. Methods

The proposed scoping review will be conducted in accordance with the JBI methodology for scoping reviews (Aromataris et al., 2024), and in line with the Preferred Reporting Items for Systematic Reviews and Meta-Analyses extension for Scoping Reviews (PRISMA-ScR) (Tricco et al., 2018). This protocol follows the Preferred Reporting Items for Systematic Reviews and Meta-Analyses Protocols (PRISMA-P) (Moher et al., 2015) and has been registered in Open Science Framework (<https://doi.org/10.17605/OSF.IO/7FDQP>).

1.1 Inclusion criteria

The inclusion criteria were defined according to Population, Concept, Context, and Types of sources.

1.1.1 Population

This review will consider studies that include informal caregivers of older people. According to the International Council of Nursing (2021), a "caregiver" is an individual responsible for providing care to a person, who assists in the identification, prevention or treatment of illness or disability, is involved in the care, and attend to the needs of the dependent person. The WHO (2022) defines the elderly as people aged 60 or over, which is the definition considered in this review. Old people with any morbidity or level of cognition will be considered.

1.1.2 Concept

This review will consider studies that explore interventions for the older person's caregivers in the transitional care, specifically hospital-home transition. This transitional care includes interventions to ensure continuity and coordination of care (National Transitions of Care Coalition, 2023; Naylor et al., 2017).

1.1.3 Context

This review will consider studies that include the hospital-home transition context.

1.1.4 Types of sources

This review will consider for inclusion all types of studies, including quantitative, qualitative, and mixed methods studies, as well as systematic reviews and text and opinion articles. Information obtained from the websites of global organizations will also be considered.

1.2 Search strategy

The search strategy will be conducted by the researchers as a team, with the purpose of locating studies relevant to the topic in question. The search strategy will be undertaken in three phases. An initial limited search was conducted in MEDLINE (PubMed) and CINAHL (EBSCO) to identify papers on the topic. The text words contained in the titles and abstracts of the relevant papers and the index terms used to describe the papers were used to develop a concept map. This map supported the development of a search strategy in MEDLINE (PubMed), which integrates the combination of keywords and index terms (Table 1).

Table 1 – Search strategy in MEDLINE (PubMed), conducted on June 26, 2024.

Search	Query	Records retrieved
#1	Search: Aged[Title/Abstract] OR Elder*[Title/Abstract] OR Old[Title/Abstract] OR Older[Title/Abstract] OR Oldest-old[Title/Abstract] OR "oldest old"[Title/Abstract] OR Senior*[Title/Abstract]	2,642,301
#2	Search: "Aged"[Mesh] Sort by: Most Recent	3,524,449
#3	Search: (Aged[Title/Abstract] OR Elder*[Title/Abstract] OR Old[Title/Abstract] OR Older[Title/Abstract] OR Oldest-old[Title/Abstract] OR "oldest old"[Title/Abstract] OR Senior*[Title/Abstract]) OR ("Aged"[Mesh])	5,389,967
#4	Search: Caregiver*[Title/Abstract] OR Carer*[Title/Abstract] OR Caretaker*[Title/Abstract] OR care-dyad*[Title/Abstract] OR "care dyad"[Title/Abstract] OR "care dyads"[Title/Abstract] OR "care givers"[Title/Abstract] OR "care giver"[Title/Abstract] OR care-giver*[Title/Abstract]	127,389
#5	Search: "Caregivers"[Mesh] Sort by: Most Recent	53,481
#6	Search: (Caregiver*[Title/Abstract] OR Carer*[Title/Abstract] OR Caretaker*[Title/Abstract] OR care-dyad*[Title/Abstract] OR "care dyad"[Title/Abstract] OR "care dyads"[Title/Abstract] OR "care givers"[Title/Abstract] OR "care giver"[Title/Abstract] OR care-giver*[Title/Abstract]) OR ("Caregivers"[Mesh])	137,283
#7	Search: ((Aged[Title/Abstract] OR Elder*[Title/Abstract] OR Old[Title/Abstract] OR Older[Title/Abstract] OR Oldest-old[Title/Abstract] OR "oldest old"[Title/Abstract] OR Senior*[Title/Abstract]) OR ("Aged"[Mesh])) AND ((Caregiver*[Title/Abstract] OR Carer*[Title/Abstract] OR Caretaker*[Title/Abstract] OR care-dyad*[Title/Abstract] OR "care dyad"[Title/Abstract] OR "care dyads"[Title/Abstract] OR "care givers"[Title/Abstract] OR "care giver"[Title/Abstract] OR care-giver*[Title/Abstract]) OR ("Caregivers"[Mesh]))	53,217
#8	Search: Intervention*[Title/Abstract] OR Model*[Title/Abstract] OR Program*[Title/Abstract] OR service*[Title/Abstract] OR project*[Title/Abstract]	6,732,174
#9	Search: Discharge[Title/Abstract] OR "Transitional care"[Title/Abstract] OR "care transition"[Title/Abstract] OR "care transitions"[Title/Abstract] OR "continuity of care"[Title/Abstract] OR "continuity of patient care"[Title/Abstract] OR "hospital to home"[Title/Abstract]	269,879
#10	Search: ("Patient Discharge"[Mesh] OR "Hospital to Home Transition"[Mesh]) Sort by: Most Recent	41,795
#11	Search: (Discharge[Title/Abstract] OR "Transitional care"[Title/Abstract] OR "care transition"[Title/Abstract] OR "care transitions"[Title/Abstract] OR "continuity of care"[Title/Abstract] OR "continuity of patient care"[Title/Abstract] OR "hospital to home"[Title/Abstract]) OR (("Patient Discharge"[Mesh] OR "Hospital to Home Transition"[Mesh]))	280,449
#12	Search: (((Aged[Title/Abstract] OR Elder*[Title/Abstract] OR Old[Title/Abstract] OR Older[Title/Abstract] OR Oldest-old[Title/Abstract] OR "oldest old"[Title/Abstract] OR Senior*[Title/Abstract]) OR ("Aged"[Mesh])) AND ((Caregiver*[Title/Abstract] OR Carer*[Title/Abstract] OR Caretaker*[Title/Abstract] OR care-dyad*[Title/Abstract] OR "care dyad"[Title/Abstract] OR "care dyads"[Title/Abstract] OR "care givers"[Title/Abstract] OR "care giver"[Title/Abstract] OR care-giver*[Title/Abstract]) OR ("Caregivers"[Mesh]))) AND ((Intervention*[Title/Abstract] OR Model*[Title/Abstract] OR Program*[Title/Abstract] OR service*[Title/Abstract] OR project*[Title/Abstract])) AND ((Discharge[Title/Abstract] OR "Transitional care"[Title/Abstract] OR "care transition"[Title/Abstract] OR "care transitions"[Title/Abstract] OR "continuity of care"[Title/Abstract] OR "continuity of patient care"[Title/Abstract] OR "hospital to home"[Title/Abstract]) OR (("Patient Discharge"[Mesh] OR "Hospital to Home Transition"[Mesh])))	1,698

This search strategy will be adapted for each database considered. The databases to be searched include MEDLINE (PubMed), CINAHL (EBSCO), Academic Search Complete (EBSCO), Psychology & Behavioral Sciences Collection (EBSCO), and SciELO. Sources of unpublished studies and grey literature will include the Repositório Científico de Acesso Aberto de Portugal (RCAAP) and Google Scholar (only the first 10 pages). Finally, in the third phase, the references of the full texts included will be analyzed. This search strategy will consider studies published in any language, with no limit on the date of publication. However, due to the review team's expertise in Portuguese, English and Spanish, only studies published in these languages will be included. Studies with full text only in other languages will be excluded and will be reported in the final review.

1.3 Study/Source of evidence selection

After searching the published and unpublished literature, all the records identified will be compiled and uploaded to Mendeley version 1.19.8. (Mendeley Ltd., Elsevier, Netherlands). In this software, duplicates will be removed. Titles and abstracts will be selected by two independent reviewers to be assessed according to the review's inclusion criteria.



Potentially relevant articles will be retrieved in full, and their citation details will be imported into Rayyan® (Qatar Computing Research Institute, Doha, Qatar). The full text of the selected citations will be assessed in detail by two independent reviewers according to the inclusion criteria. The reasons for excluding full-text articles that do not meet the inclusion criteria will be recorded and communicated in the scoping review. Any disagreements that arise between the reviewers at each stage of the selection process will be resolved through discussion or with a third reviewer. At each stage, the review team will meet to discuss possible disagreements and clarify the inclusion criteria. The results of the search will be reported in full in the final scoping review and presented in a PRISMA flow diagram (Page et al., 2021).

1.4 Data extraction

Data will be extracted from the articles included in the scoping review by two independent reviewers. For this process, a data extraction instrument developed by the reviewers will be built (Table 2).

Table 2 – Draft of data extraction instrument.

Data extraction instrument										
Review title	Interventions for the older person's caregiver in the hospital-home transition: a scoping review									
	What are the interventions for the older person's caregiver in the hospital-home transition?									
Subquestions: What are the characteristics of the interventions? Who are the health professionals who implement the interventions? What is the context in which these interventions are implemented (hospital or home)?										
Study characteristics										
Authors	Publication year	Country	Study design	Participants	Context					
Concept										
Authors/Year	Characteristics of the interventions	Health professionals who implement	Other information							

The data extracted will include: authors and year of publication of the study (or other document/website considered); specific details about the caregiver of the older person and elderly person; interventions for caregivers of older people in hospital-home transition care and conclusions relevant to the review question, such as what the characteristics of the interventions are, which health professionals implement them and the context in which they are implemented. A pilot test will be conducted with five studies to standardize data extraction. The data extraction tool will be modified and revised as necessary during this process. Review team meetings will be held to clarify doubts and discuss aspects related to the extraction. Any disagreements that arise between reviewers will be resolved through discussion or with a third reviewer. The authors of the articles will be contacted to request missing or additional data when necessary.

1.5 Data analysis and presentation

The data is commonly presented in tabular form. A narrative summary will accompany the tabulated results. Specifically, we are interested in knowing which professionals, in which context and how they implement interventions for informal caregivers that facilitate the transition of the old person from hospital to home. Regarding the results, we will summarize the findings related to the interventions reported, their characteristics and the measurement instruments used. In addition to the narrative synthesis, if possible, the synthesis will also include the categorization and subcategorization of the interventions. This review will also highlight any intervention gaps in the Portuguese context and the implications for future research on caregivers of older people and their preparation. The data analysis and presentation processes may be refined during the review process.

2. Results/ Discussion

This review is expected to include studies that approach this concept of interest: interventions for the caregiver of the older person in the hospital-home transition. It aims to identify and describe the characteristics of these interventions, the health professionals responsible for their implementation, and the specific contexts in which they are carried out. This scoping analysis will help identify current practices and existing gaps in research into this important concept. This knowledge could inform the development of better strategies for preparing carers and contribute to the design of more

structured, context-appropriate support systems, ultimately improving the continuity and quality of care provided to the elderly.

Conclusion

This transitional period is often marked by significant challenges as caregivers take on new responsibilities for providing complex care in a home setting. This review will systematically identify the range, scope, and characteristics of existing interventions to provide a comprehensive overview of current strategies and reveal gaps and inconsistencies in caregiver preparation and support. The results are ultimately expected to inform the development of structured, evidence-based approaches that enhance safety and continuity of care, prevent unnecessary hospital readmissions, and mitigate the emotional and physical burden frequently experienced by caregivers.

Conflict of interest

The authors have no conflicts of interest to declare.

Acknowledgements and Funding

Acknowledgements: The authors also gratefully acknowledge the support of the Health Sciences Research Unit: Nursing (UICISA: E), hosted by the Nursing School of Coimbra (ESEnfC) and funded by the Foundation for Science and Technology (FCT). This study is part of the associated project “Transição de cuidados hospital-domicílio: o percurso do prestador de cuidados da pessoa idosa” registered in UICISA: E.

Funding sources: Not applicable.

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