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Abstract

The American Psychological Association (APA) Publications and Communications (P&C) Board Working Group on Journal Article Reporting Standards for Qualitative Research (JARS–Qual Working Group) was charged with examining the state of journal reporting standards as they applied to qualitative research and with generating recommendations for standards that would be appropriate for a wide range of methods within the discipline of psychology. These standards describe what should be included in a research report to enable and facilitate the review process. This publication marks a historical moment—the first inclusion of qualitative research in the *Publication Manual of the American Psychological Association*. In addition to the general JARS–Qual guidelines for qualitative research, the Working Group has developed modules for both qualitative meta-analysis and mixed methods research. The reporting standards were developed for psychological qualitative research but may hold utility for a broad range of social sciences. They honor a range of qualitative traditions, methods, and reporting styles. The working group was composed of a group of researchers, with backgrounds in varying methods, research topics, and approaches to inquiry. In this article, they present these standards, their rationale, and they detail the ways that the standards differ from the quantitative research reporting standards. They describe how the standards can be used by authors in the process of writing qualitative research for submission as well as for reviewers and editors in the process of reviewing research.

Journal Article Reporting Standards for Qualitative Research in Psychology

Historically, the *Publication Manual of the American Psychological Association* (hereinafter *Publication Manual*) has defined the standards and style of research reporting for psychology as well as many other social science journals. The *Publication Manual*, however, has not included reporting standards for qualitative research. As a result, authors preparing reports of qualitative, mixed methods research, and have faced challenges when deciding how to prepare manuscripts for submission. The American Psychological Association (APA) standards often did not make sense for their inquiry traditions, methods, or research goals. Similarly, journal editors and reviewers often were confused about how reports should be evaluated. Should they insist that qualitative research articles model the reporting style and include components that were helpful for evaluating quantitative research? Given that qualitative research involves a plurality of inquiry traditions, methods, and goals, it was uncertain how to best adapt the existing standards. Instead, standards of reporting were needed that can be applicable to and coherent with diverse qualitative research methods.

The Working Group on Journal Article Reporting Standards for Qualitative Research (JARS–Qual Working Group) was formed to develop recommendations to the APA Publication and Communications (P&C) Board. Their goal was to have these recommendations considered for inclusion in the seventh edition of the *Publication Manual*. They strove to form reporting standards that could advance qualitative research in a way that is sensitive to traditions in the field, while recognizing the complexity of addressing constituencies who have quite varied language and assumptions. To be clear, the standards developed are focused on the act of reporting—that is, they articulate what information should be expected in a manuscript to enable its adequate evaluation. They are an explicit set of criteria for authors to reflect upon in preparing

manuscripts and for reviewers to consider while evaluating the rigor of a manuscript. They were not developed to act as a primer on qualitative research traditions, to teach how to design qualitative research, to describe the evaluation of rigor, or to articulate the justifications for using certain procedures. Instead, the working group reviewed the literature on qualitative research reporting standards and considered a broad range of qualitative methods and traditions in the process of shaping these standards. This article articulates the process of developing their recommendations and presents the reporting standards that were generated for general qualitative research as well as for qualitative meta-analyses, and mixed methods research.

Reviewing Qualitative Research

Research employing qualitative methods has made significant contributions to psychology since its early development; however, at the turn of the 19th century, psychologists began to define their field by its focus on experimental and correlational research methods (Danziger, 1990). Instead of supporting multiple approaches to inquiry and philosophical assumptions about the research endeavor, qualitative research was thought to threaten the credibility of psychology as a science and was marginalized (Harré, 2004). This turn was poignantly recounted in Danziger's (1979) description of the systematic erasure of Wundt's cultural psychology tradition (based within introspective approaches to research) in favor of his psychophysiology laboratory (based within experimental approaches). Although qualitative methods remained in use after a post-positivist approach came into vogue, they were not systematized and tended not to be reported as part of the formal inquiry process within psychology (Wertz, 2014). Over the past half-century, however, there has been a gradual revival of qualitative methods and a great number of qualitative methods now have been detailed and advanced in the field. Many of the methods that have been embraced in psychology have had

multidisciplinary roots in philosophy, social sciences, or practice disciplines, such as nursing (e.g., Giorgi, 2009; Glaser & Strauss, 1967). Although qualitative methods have become accepted in the field, as indicated by their increased publication in journals, increased representation in graduate coursework and dissertations (Ponterotto, 2005a, 2005c), and the retitling of APA Division 5 to Quantitative and Qualitative Methods, many psychologists are still unfamiliar with these approaches to investigation and continue to marginalize them.

What Are Qualitative Methods?

The term *qualitative research* is used to describe a set of approaches that analyze data in the form of natural language (i.e., words) and expressions of experiences (e.g., social interactions and artistic presentations). Researchers tend to centralize the examination of meanings within an iterative process of evolving findings—typically viewing this process as driven by induction (cf., Wertz, 2010)—and viewing subjective descriptions of experiences as legitimate data for analyses. This iterative process of induction means that that researchers tend to analyze data by identifying patterns tied to instances of a phenomenon and then developing a sense of the whole phenomenon as informed by those patterns. Seeing the pattern can shift the way the whole is understood just as seeing a pattern in the context of the whole phenomenon can shift the way it is understood. In this way, a number of writers have theorized that this hermeneutic circle is a fundamental core process within qualitative inquiry (see Levitt, Motulsky, Wertz, Morrow & Ponterotto, 2017; Osbeck, 2014; Rennie, 2012; Wertz et al., 2011). This process is self-correcting; as new data are analyzed their analysis corrects and refines the existing findings.

Qualitative data sets typically are drawn from fewer sources (e.g., participants) than quantitative studies but include rich, detailed, and heavily contextualized descriptions from each source. Following from these characteristics, qualitative research tends to engage data sets in

intensive analyses, to value open-ended discovery rather than verification of hypotheses, to emphasize specific histories or settings in which experiences occur rather than expect findings to endure across all contexts, and to recursively combine inquiry with methods that require researchers' reflexivity (i.e., self-examination) about their influence upon research process. As such, qualitative reports need to be evaluated in terms of their own logic of inquiry. The data or findings from these analyses may or may not be transformed into future numerical quantification in quantitative or mixed methods analyses.

There is a broad range of qualitative methods, however, and they stem from a diversity of philosophical assumptions, intellectual disciplines, procedures, and goals (e.g., Gergen, 2014; Gergen, Josselson, & Freeman, 2015). Also, they use varied forms of language in detailing their processes and findings, which complicates the development of uniform reporting standards. To provide a few examples, methods more widely used in psychology that fall under this rubric include narrative (e.g., Bamberg, 2012; Josselson, 2011), grounded theory (e.g., Charmaz, 2014; Glaser & Strauss, 1967), phenomenological (e.g., Giorgi, 2009; Smith, 2004), critical (e.g., Fine, 2013; Steinberg & Cannella, 2012), discursive (e.g., Pea, 1993; Potter & Wetherell, 1987), performative (e.g., Gergen & Gergen, 2012), ethnographic (e.g., Suzuki, Ahluwalia, Mattis, & Quizon, 2005; Wolcott, 2010), consensual qualitative research (e.g., Hill, 2012), case study (e.g., Fishman & Messer, 2013; Yin, 2013), psychobiography (e.g., Schultz, 2005), and thematic analysis approaches (e.g., Braun & Clarke, 2006; Finfgeld-Connett, 2014). Many of these approaches can take multiple forms by virtue of shifts in philosophical assumptions or the evolution of their procedures. Reviewing or conducting qualitative research does not only entail a familiarity with broad distinctions between qualitative and quantitative methods then but requires a familiarity with the method used; the form selected of that method; and the process of

adapting methods and procedures to the goals, approach to inquiry, and characteristics of a given study.

What Research Goals do Qualitative Methods Advance?

Qualitative methods are increasingly prevalent and central in research training (Ponterotto, 2005a, 2005c). Qualitative designs are used for research goals including but not limited to developing theory and attuned understandings (e.g., Stiles, 1993; Hill, 2012), examining the development of a social construct (e.g., Neimeyer, Hogan, & Laurie, 2008), addressing societal injustices (e.g., Fine, 2013), and illuminating social discursive practices—that is, the way interpersonal and public communications are enacted (e.g., Parker, 2015). In particular, these methods have been found useful to shed light upon sets of findings or literatures that are contradictory, problematic, or ill-fitting for a subpopulation (e.g., Chang & Yoon, 2011); to give a voice to historically disenfranchised populations whose experiences may not be well-represented in the research literature (e.g., APA, Presidential Task Force on Immigration 2012; Frost & Ouellette, 2011); and to develop initial understandings in a less explored area (e.g., Creswell, 2013). Qualitative methods may stand alone, serve as the basis for meta-syntheses, or be combined with with quantitative methods in mixed methods designs. This article will consider all three contexts in turn.

The Need for Qualitative Reporting Standards

Without the guidance of reporting standards, qualitative researchers, reviewers, and editors have faced numerous complications (e.g., Levitt et al., 2017). Authors have suffered from conflicting manuscript expectations in the style or content of reporting. For instance, they may be asked to adhere to standards and rhetorical styles that are inappropriate for their methods. Authors also may be asked to educate reviewers about basic qualitative methods' assumptions or

to defend qualitative methods as a field in a paper focused otherwise. Also, editors and reviewers face challenges when they lack training in qualitative methods, which may make them uncertain about what information should be reported and how qualitative approaches may be distinctive. Reporting guidelines can support authors in writing manuscripts, encourage reviewers to better evaluate qualitative methods, and assist editors in identifying when reviewers' responses are appropriate for a given paper.

Rhetorical Distinctions of Qualitative Research

In developing our recommendations, we worked to identify reporting standards that could facilitate the review of research and that would be applicable across a range of qualitative traditions. We recognized, however, that there are characteristic features in the general form reporting of qualitative research that may be unfamiliar to some readers (Gilgun, 2005; Sandelowski & Leeman, 2012; Walsh, 2015). The following sections describe key features of this rhetorical style and responses to facilitate adequate reviews in light of these features.

Representation of Process Rather Than Standardized Section Demarcation

Qualitative approaches to inquiry may utilize distinct styles of reporting that still may be unfamiliar to many psychologists and social scientists (Sandelowski & Leeman, 2012). These can include a narrative style of reporting in which the research endeavor is presented as a story. These reports may be organized thematically or chronologically. They may be presented in a reflexive first-person style, detailing the ways in which researchers arrived at questions, methods, findings, and considerations for the field. We encourage reviewers and editors to learn to recognize whether reporting standards have been met regardless of the rhetorical style of the research presentation. In particular, qualitative researchers often combine Results and Discussion sections, as they may see both as intertwined and therefore not possible to separate a

given finding from its interpreted meaning within the broader frame of the analysis. Also, they may use headings that reflect the values in their tradition (such as 'Findings' instead of 'Results') and omit ones that do not. As long as the necessary information is present in a given manuscript, we do not suggest mandating that manuscripts be segmented into the same sections and subsections that organize the presentation of the standards in the present article.

An Ethic of Transparency

Qualitative researchers often are concerned with how their expectations and assumptions might influence the research process. As a result, qualitative traditions tend to be based within approaches to inquiry that value transparency in the reporting of data-collection and data-analytic strategies as well as ethical procedures. Researchers typically enact this value by communicating both their perspectives and their influence upon the research process. As such, many traditions prefer not to use objectivist rhetoric and instead tend to prefer to use reporting styles that make overt the researchers' influences on data collection and analysis (Morrow, 2005; Rennie, 1995). Following from this concern, for example, is a preference for the use of first person and personal narratives to convey the positions and experiences of researchers. Because of the wide range of qualitative approaches, it is not possible to describe how reporting might be tailored to every approach, but we consider how approach to inquiry might influence the reporting of data collection, analysis, and ethics.

Data collection often involves processes of self-reflection and making explicit how investigators' values guided or limited the formation of analytic questions. Similarly, the demonstration of analyses tends to convey transparently the ways that interpretations were shaped or observations were formed. Across approaches to inquiry, qualitative researchers embrace a reporting standard of transparency as it enhances the methodological integrity (Levitt

et al., 2017; Rennie, 1995). When researchers openly describe the ways their perspectives guided their research (e.g., in critical methods) this transparency provides the reader with information that permits an understanding of their goals and increases the trustworthiness of the researchers' reports. When transparency involves describing how researchers approached the task of setting aside their own expectations (e.g., in empirical phenomenology; Giorgi, 2009), it also enhances the trust in the report as it demonstrates the efforts by which the researcher sought to remain open to the phenomenon. In addition, by recognizing their own standpoint and positionality in relation to the topic of the research and the population under study (e.g., Harding, 1992), researchers enhance the credibility of their claims by simultaneously pointing out their contextual embeddedness (or lack thereof) and its role in the interpretative process (e.g., Hernández, Nguyen, Casanova, Suárez-Orozco, & Saetermoe, 2013).

Because the data collection and analytic strategies may be shaped recursively, the process of inquiry shifts across the course of a qualitative study. Incoming data might alter the questions that are asked and preliminary findings might encourage new recruitment procedures. The shifting of procedures in use and, sometimes, extensive interpersonal contact with participants can mean that research ethics within a study require continual reconsideration (see Haverkamp, 2005; Josselson, 2007). For instance, if participants find it taxing to answer questions related to a traumatic experience, those questions may need to be dropped or altered, and other supports might need to be recruited for the study to continue—even within the process of a single interview. Qualitative researchers strive to be explicit on the ways their procedures and perspectives might influence their study and how they might shift across the study. For these reasons, the value of transparency is at the root of the reporting standards across qualitative methods.

Contextualization

Because their work tends to focus on human experiences, actions, and social processes, which fluctuate, qualitative researchers do not aim to seek natural laws that extend across time, place, and culture, but to develop findings that are bound to their contexts. Qualitative researchers report their research to reflect the situatedness of their research in a number of ways. (a) As described in the previous section, *the context of the investigators* themselves is an issue. Researchers' relationship to the study topic, with their participants, and to related ideological commitments all may having bearing upon the inquiry process. (b) Qualitative researchers describe the *context within which a phenomenon or study topic* is being construed. For instance, studying sexual orientation in the 2000s in the New England would be quite different from studying it in Russia in the1980s. (c) They also describe the *contexts of their data sources*. Interviews with immigrants from Mexico and immigrants from England might relay very different experiences and concerns.

In addition to describing the phenomenon, data sources, and investigators in terms of their location, era, and time periods, qualitative researchers seek to situate these factors in relation to relevant social dynamics. A description of their position within a social order or key relationships can aid readers in understanding and transferring a study's findings. For instance, to the extent that experiences of marginalization and privilege influence the issue under investigation, the explication of these relationships is necessary. African-American students in predominantly White institutions of learning may have experiences with a phenomenon that are distinct from those in historically Black ones because of the different minority stressors in those contexts. This contextual description, along with the need for exemplification of the analytic process, and transparent reporting all contributes to the length of a qualitative paper.

Length of Manuscripts

Strong qualitative and mixed methods manuscripts both tend to be longer than quantitative papers and require more manuscript pages. Because readers are less familiar with qualitative methods and methods are often idiosyncratically adapted to fit a problem at hand, the Method sections may need to detail procedures and rationales at each point in the analysis. In addition, qualitative method descriptions entail a discussion of the researchers' own backgrounds and beliefs when approaching and engaging in a study. Results sections also tend to be lengthy because the methodological integrity of qualitative methods is enhanced within a demonstrative rhetoric in which authors show how they moved within the analysis from their raw data to develop their findings.

When journals expect authors of qualitative research to present their work within restrictive page limits, authors often must leave out parts of their manuscript that justify the use of their methods and/or present results less convincingly. Because reviewers may hold differing opinions, journal expectations may be challenging to predict and authors may be unsure which aspects to emphasize. It can be helpful for editors and reviewers to keep in mind that qualitative articles typically have concise literature reviews and discussions and often have excluded central information to meet page restrictions. If further information on an article can be clarifying, editors and reviewers can engage authors within the review process to assist them in identifying which aspects of a manuscript should be prioritized.

Some journals indicate in their instructions to authors that they will allocate extra pages to support the adequate description of qualitative methods rather than expect qualitative reporting to conform to quantitative standards. If an extension is not possible in printed versions of a paper, journals may want to permit qualitative manuscripts to submit longer Method or Results

sections for review with the understanding that editors can direct some supplementary material to be posted on a website post-review. This practice can help support the appropriate review and reading of qualitative research when page lengths cannot be extended. In general, however, we agree with the recommendation of the Society for Qualitative Research in Psychology task force (Levitt et al., 2017) that providing an extension of at least 10 pages for qualitative research (as is the practice of the *Journal of Counseling Psychology*) and more for mixed methods research would be ideal, and that this decision should be informed by a journal's existing page limits and its desire to support reporting that permits an adequate appraisal of articles by its readers and reviewers. The following two sections describe responses for authors, reviewers, and editors given the specific rhetorical features of qualitative methods reporting.

Letter to Editor

Before a research review begins, researchers submit their work to a journal editor who assigns reviewers to a project. Information that is advisable to share in these letters includes a description of the method used, the type of phenomenon explored, and the participants or form of data studied. This description can aid editors in selecting reviewers who are competent to review a particular manuscript and can suggest to informed editors that the article might use a reporting style in line with a specific tradition of inquiry. In these letters, authors who have collected data from human subjects should provide assurance that relevant ethical processes of data collection and consent were used (e.g., Institutional Review Board Approval).

If relevant, there should be a description of how the current analysis is related to already-published work from the same data set. It is common for qualitative researchers to divide results into several articles with distinct foci because of the richness of the data and the challenges in meaningfully representing that work within a journal-length manuscript. Thus, researchers will

want to assure the editor of the distinct focus of a submission and describe how it emerged from a subset of data that has not been published yet or that has been published with an alternative goal (e.g., a content-focused paper vs. a method-focused paper).

Selecting Reviewers and Communicating About Reviewers' Competencies

Although much of this paper speaks to the concerns of authors preparing manuscripts, this section addresses how editors and reviewers can ensure an adequate review of qualitative research. Because of the need to understand how to evaluate qualitative research across a range of research traditions and methods, we recommend that journals have at least one associate, consulting, or action editor who has expertise in multiple qualitative approaches to inquiry. Although these general standards can assist in the review process, they do not replace the need to learn about how to use or evaluate qualitative methods. Editors can use the information in a manuscript and its accompanying letter to the editor to seek reviewers who are appropriate for both the content and the methods of the manuscript. Although it may not be possible to obtain reviewers who have expertise in both the design and the content area, editors should be aware of the type of expertise reviewers bring to evaluate the manuscript or should ask reviewers to clarify this. In this way, editors might appropriately prioritize content-related concerns of some reviewers and method-related concerns of others. This process is similar to the process of assigning quantitative manuscripts for review, but differences exist.

Presumably, editors would expect that most reviewers of quantitative research with terminal degrees would have had some graduate coursework in and experience using quantitative methods. These experiences provide reviewers with an understanding of both the theory underlying analyses and ideal approaches and how research methods often require adaption in practice. Although a similar level of expertise is needed to review qualitative research, most

psychology programs still do not require training in qualitative methods, although the number is growing (Ponterotto, 2005a). As a result, it can be challenging for editors to assess reviewers' competence by their degree. Systems that invite reviewers to indicate their methodological areas of expertise can be helpful in this regard. Examinations of potential reviewers' past publications can be useful as well.

In any case, reviewers should assess their own degree and scope of competence. To provide a competent, complete review, a reviewer would have a depth of understanding of (a) the topic being studied, (b) the specific method in use (keeping in mind that multiple versions exist of many qualitative methods and these may be based in varying traditions of inquiry; see Levitt, 2014), and (c) the processes of appropriately adapting qualitative methods to specific projects. If a reviewer does not have experience using the specific method at hand or in adapting qualitative methods for use in research projects, it can be helpful for the reviewer to check with the editor on the appropriateness of the assignment. The editor still may request that a reviewer provide commentary on the literature review from a position as a content expert. At minimum, one of the reviewers should have expertise and experience as a qualitative researcher—preferably in a method similar to the one in use. In any case, reviewers should clarify the basis of their expertise in their reviews so editors can consider how to weigh their remarks in relation to other reviewers' comments. Regardless of reviewers' areas of expertise, they should be mindful of the distinctive reporting standards in the JARS-Qual and so editors may wish to routinely point to these resources in review request letters. As well, the APA has produced a video that provides guidance on reviewing qualitative manuscripts free of charge that can be a helpful resource for reviewers (see Levitt, 2016).

Process of Developing the JARS–Qual

The JARS–Qual Working Group met in Washington, DC, at APA for an intensive 2-day meeting to develop the core of the JARS–Qual. Prior to this meeting, the members reviewed readings on qualitative methods reporting (e.g., Madill & Gough, 2008; Neale, 2015; O'Brien, Harris, Beckman, Reed & Cook, 2014; Tong, Sainsbury, & Craig, 2007; Tong, Flemming, McInnes, Oliver, & Craig, 2012; Walsh, 2015; Wisdom, Cavalier, Onwuegbuzie & Green, 2012; Wong, Greenhalgh, Westhorp, Buckingham & Pawson, 2013), a task force report to the Society for Qualitative Inquiry in Psychology, a section of APA Division 5, on the recommendations regarding publishing and reviewing of qualitative research (Levitt et al., 2017), and the initial quantitative APA journal article reporting standards (APA Publications and Communications Board Working Group on Journal Article Reporting Standards, 2008). The work of these leaders in qualitative methods provided valuable suggestions for us to consider in the formation of our standards. When they met, the group reviewed a summary chart of these readings developed by the JARS–Qual Working Group chair (Levitt).

In this process, the Working Group force decided that separate modules were needed for qualitative meta-analyses (sometimes called *meta-syntheses*) as well as for mixed methods research. The members discussed the items on the chart and decided together on the items to be included as the basis of the JARS–Qual. The chair (Heidi M. Levitt) developed an initial draft based on the conclusions of this meeting and the members edited and added into this version. They then divided into two subgroups to develop modules on qualitative meta-analysis (Michael Bamberg, Ruthellen Josselson, and Heidi M. Levitt) and on mixed methods (John W. Creswell, David M. Frost, and Carola Suárez-Orozco). These modules were based on the general JARS–Qual standards and their efforts to maintain relevance to a wide range of qualitative methods, but specified when there were differences in the reporting standards that were particular to these two

approaches to research. The subgroups presented their findings to the larger group for feedback. The group continued to engage in cycles of seeking feedback and creating revisions until the Working Group members were satisfied with the recommendations. Then they were presented to the APA Council of Editors, the International Committee of the Society for Qualitative Research in Psychology, and the APA Publication and Communications Board; feedback was requested and revisions were then made. The APA Publication and Communications Board endorsed the recommendations. In addition, the JARS–Qual Working Group presented their recommendations for reporting standards at the annual convention of the APA in 2016 (Levitt et al., 2016) to seek feedback and comments from the research community. Although the text in this paper will be reworked for a chapter in the upcoming edition of the *Publication Manual*, the reporting standards should remain the same.

The JARS–Qual Working Group recognized that before the standards could be presented, the terms that will be used in their report needed to be defined. The following sections relay this information, which will be relevant to both the JARS–Qual and its modules. Also, the Working Group wished to convey recommendations about shaping letters to the editor when manuscripts are first submitted.

Defining Terms

Although we welcome researchers to use the terms that reflect their local research strategies and values, we needed to settle on a vocabulary for use in the description of our recommendations for reporting standards. As a result, we define here terms that are used throughout our paper. We use the term *approach to inquiry* to refer to the philosophical assumptions that describe researchers' understanding of the research traditions or strategies. Researchers may wish to make explicit these assumptions, especially when they are useful in

illuminating the research process. These assumptions are described in varied literatures as the researchers' epistemological beliefs, worldview, paradigm, strategies, or research traditions (Morrow, 2005; Ponterotto, 2005b; Creswell, 2013). For instance, they could indicate whether their approaches to inquiry are descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, postmodern or constructivist; theorists often carve these philosophies along different lines (e.g., Guba & Lincoln, 2005; Madill & Gough, 2008; Mertens, 2010; Parker, 2004). Although some research is firmly grounded in one or more set of these assumptions, research also may be question driven and conducted pragmatically (Morgan, 2007).

The term *data-collection strategies* refers to the many ways qualitative researchers gather data. These can include activities such as conducting archival research, focus groups, interviews, ethnographic observation, fieldwork, media searches, and reflexive note-taking. In contrast, the term *data-analytic strategies* refers to the procedures used to analyze the data. These strategies also may be creatively combined in response to the specific goals of a research project, as is typical of the bricoleur tradition in qualitative research (e.g., Denzin & Lincoln, 2005; Kuckartz, 2014; McLeod, 2011) in which researchers generate their own design by assembling procedures to best meet the goals and characteristics of a research project. When we refer to *research design*, we mean the combination of approaches to inquiry, data-collection strategies, and data-analytic strategies selected for use in a given study. Data-collection and analytic strategies may be informed by established qualitative methods or designs (e.g., grounded theory, Glaser & Strauss, 1967; narrative, Lieblich, Tuval-Mashiach & Zilber, 1998; phenomenology, Giorgi, 2009) but, because many of these methods have been utilized within varied approaches to inquiry (e.g., Charmaz, 2014; Glaser & Strauss, 1967), a complete description of a design should articulate each of these elements, even when an established

method or design is in use.

Because qualitative researchers describe their analyses and frameworks using diverse perspectives and terminology, we encourage authors to translate our terms into those of their own preferred approaches, taking care to define terms for readers. We also encourage reviewers and editors to view our terms as placeholders that may be usefully varied by authors to reflect the values of their research traditions. We recognize that our language inevitably carries philosophical implications (e.g., do we discover, understand, or co-construct findings?). This said, we have worked to generate substantive recommendations that are congruent with and would enhance the reporting of qualitative methods when imported within a diverse range of approaches.

Qualitative researchers have long sought language to describe rigor in their approach. *Trustworthiness* is a concept that qualitative researchers often use to reflect the idea that the evaluation of the worth of a qualitative research presentation is based in the judgments of its readers and its ability to be presented to them in a convincing manner (Lincoln & Guba, 1985; Morrow, 2005). This concept may include evaluations that are not related to the research processes themselves (e.g., reputation of authors, congruence with readers' own experiences and beliefs, or cosmetic features of presentation). *Methodological integrity* is a concept that has been advanced by a task force of the Society for Qualitative Inquiry in Psychology (a section of APA Division 5), in consultation with a broad range of leading qualitative researchers, as the underlying methodological basis of trustworthiness, independent of non-method qualities (see Levitt et al., 2017 for details). It enriches considerations of research design and is particularly relevant to a journal review process in which these non-method aspects of trustworthiness are not central bases of evaluation (e.g., cosmetic features) or are unavailable (e.g., authors' identities,

the resonance of the article for readers who differ from oneself). Instead, reviews should be focused on how methodological processes are enacted throughout an article—including how well the literature review is conducted to situate a study's aims, approaches to inquiry are selected to address those aims, methods and procedures are used in an investigation to meet those aims, and the articulation of implications are grounded in the methods used and the findings produced.

Methodological integrity can be evaluated through its two composite processes, *fidelity to the subject matter* and *utility in achieving research goals*. Both fidelity and utility have been conceptualized as having four central features. (1) Fidelity to the subject matter is the process by which researchers select procedures that develop and maintain allegiance to the phenomenon under study as it is conceived within their approach to inquiry (e.g., the phenomenon might be understood as a social construction). It is improved when researchers collect data from sources that can shed light upon variations in the phenomenon that are relevant to the research goals (*data adequacy*); when they recognize and are transparent about the influence of their own perspectives and appropriately limit that influence within data collection (*perspective management in data collection*); when they consider how these perspectives influenced or guided their analytic process in order to enhance their perceptiveness (*perspective management in data analysis*); and when findings are rooted in data which support them (*groundedness*). (2) Utility in achieving research goals is the process by which researchers select procedures that usefully answer their research questions and address their aims (e.g., raising critical consciousness, developing theory, deepening understanding, identifying social practices, forming conceptual frameworks, and developing local knowledge). It is strengthened when findings are considered in their context—for instance, their location, time, and cultural situation (*contextualization of data*); when data are collected that provide rich grounds for insightful analyses (*catalyst for insight*);

when analyses lead to insights that meaningfully address the analytic goals (*meaningful contributions*); and when differences within a set of findings are explained (*coherence among findings*).

The evaluation of methodological integrity considers whether the procedures used to enhance fidelity and utility are coherent in relation to the researchers' goals, approaches to inquiry (e.g., philosophical assumptions), and study characteristics (e.g., the particular subject matter, resources, participants, researchers). In other words, fidelity and utility need to be assessed in relation to the overall research design. When procedures are used with coherence, they build a foundation for increased confidence in the claims made. When procedures are not used in synchrony with the study design features, however, they will not support a foundation of methodological integrity or might act to erode it.

Procedures that add to methodological integrity may relate to participant selection, recruitment, data-collection strategies, data-analytic strategies, procedures used to check findings (e.g., member-checking), as well as broader aspects of the research, such as the formulation of research questions or the articulation of implications. A detailed description of fidelity and utility, and their constituent features can be found in Levitt et al., 2017. Principles can be found therein to guide the evaluation of fidelity and utility methodological integrity within both the process of research design and manuscript review. In contrast, the standards in the current paper are concerned with the reporting of research so that methodological integrity can be evaluated.

Information for Inclusion in Primary Qualitative Research (JARS–Qual)

The reporting standards generated have been divided into three tables that are reviewed in the following subsections. The JARS–Qual table (see Table 1) was developed as the foundation of the recommended standards for meta-analyses. The mixed methods reporting standards were

developed while considering the standards for both qualitative and quantitative research and identifying the unique reporting standards for designs that integrate both of these approaches. Table 1 describes the recommended reporting standards for research manuscripts reporting primary qualitative findings. This table has three columns. The first column contains the topic to be reported on, which might be organized into these section headings or in a narrative format. The second column contains a description of the information reported. The third column contains recommendations that are not standards but that might be useful for authors (indicated as recommendations) and reviewers (indicated as notes) to consider.

Although we have developed a module on mixed-methods approaches, qualitative and quantitative analyses being reported together, researchers also may combine two qualitative analyses in the same study. For example, in the example article by Frost (2011) both a content analysis and a narrative analysis were conducted together to achieve the researcher's aims. In those types of articles, the reporting of the analyses both should follow the JARS-Qual guidelines. Similar to the way that the mixed methods standards guide authors to discuss the goals and integrate the insights of qualitative and quantitative projects throughout their reporting (see Table 3), reporting two qualitative analyses in one article should reflect upon the ways that the analyses work together to meet the study objectives and how findings enhance one another.

Information for Inclusion in Qualitative Meta-Analytic Research (QMARl

Qualitative meta-analysis is a form of inquiry in which qualitative research findings about a process or experience are aggregated or integrated. Their aims can be to synthesize qualitative findings across primary studies, to generate new theoretical or conceptual models, identify gaps in research, as well as to generate new questions (e.g., Paterson, Thorne, Canam, & Jillings, 2001; Sandelowski & Barroso, 2007). There are a variety of methods that engage these

aims, including qualitative meta-synthesis, meta-ethnography, meta-method, and critical interpretive synthesis. The term qualitative meta-analysis does not indicate a singular procedure but refers to the aggregating function common to these approaches. Qualitative meta-analyses are not to be confused with *quantitative reviews* that generate a narrative description of a quantitative literature base. We recommend referring to those studies as *narrative reviews* to avoid confusion with qualitative meta-analyses.

The methodological integrity of the results of meta-analysis studies rests largely on the extent to which those carrying out the analysis can detail and defend the choices they made of studies to review and the process they undertook to weigh and integrate the findings of the studies. Authors of meta-analysis reports are often aggregating qualitative studies from multiple methodological or theoretical approaches and they must communicate the approaches of the studies they review as well as the approach to secondary data analysis that is in use. Qualitative meta-analysis involves the interpretive aggregation of thematic findings rather than reanalysis of primary data. Forms of qualitative meta-analysis range on a continuum from assessing the ways in which findings do or do not replicate each other to arranging interpreted findings into narrative accounts that relate the studies to one another. Meta-analyses enhance their fidelity to the findings by considering the contradictions and ambiguities within and across studies. Qualitative meta-analysis entails the amplification of primary findings and can permit a broader perspective on the types of findings that ensue from analytic processes. In Table 2 are the reporting standards for qualitative meta-analyses. The column headings organize information in the same manner as the JARS–Qual table (Table 1).

Information for Inclusion in Mixed Methods Research (MMARS)

The reporting standards recommendations for the module on mixed methods research are presented in Table 3. Mixed methods research is a methodology that combines qualitative and quantitative approaches. It should not be confused with mixed-models research, which is a quantitative procedure. It involves (a) collecting and analyzing both qualitative and quantitative data in response to overarching research aims–questions–hypotheses; (b) using rigorous methods for both qualitative and quantitative research; (c) integrating or "mixing" the two forms of data intentionally to generate new insights; (d) framing the methodology with distinct forms of research designs or procedures; and (e) using philosophical assumptions or theoretical models to inform the designs (Creswell, 2015). It originated approximately 30 years ago, and its procedures have been steadily developing across disciplines through multiple articles, an estimated 30 books, and several dedicated journals (e.g., Creswell & Plano Clark, 2011; Hesse-Biber, 2010; Onwuegbuzie, 2012; Small, 2011). The basic assumption of this methodology is that the combined qualitative findings and quantitative results lead to additional insights not gleaned from the qualitative or quantitative findings alone (Creswell, 2015; Greene, 2007; Tashakkori & Teddlie, 2010). In mixed methods, value accrues from both qualitative findings and quantitative results, and the integration of the two in a thoughtful way leads to greater mining of the data and enhanced insights. In addition, authors can publish multiple papers from a mixed methods study, such as a qualitative study, a quantitative study, and a mixed methods overview study.

The thoughtful and robust use of mixed methods requires meeting the standards of both quantitative and qualitative research methodology in the design, implementation, and reporting stages. To this end, various mixed methods designs have emerged in the literature (Creswell & Plano Clark, 2011), and they help inform the procedures used in reporting studies (e.g., the

convergent design, the exploratory sequential design, the explanatory sequential design). Although some standards and recommendations exist by authors writing in the health sciences (e.g., Creswell, Klassen, Plano Clark, & Smith, 2011) and by journal editors (e.g., the *Journal of Mixed Methods Research;* Fetters & Freshwater, 2015), reporting standards for mixed methods research have not been advanced to date in psychology or in the APA *Publication Manual*.

Table 3 conveys information about mixed methods article reporting standards (MMARS). The column headings organize information in the same manner as the JARS–Qual table. Typically, in mixed methods research, both JARS–Qual and JARS–Quant standards must be met, with additional MMARS standards also needing to be met. In the presentation of qualitative and quantitative components, the sequence should represent the order that unfolded in the study. When these components co-occurred, authors may use their discretion in presenting the sequencing of studies but are encouraged to do so in a way that presents a logical progression of narrative as well as an audit trail (Merriam, 2014).

Recommendations and Future Considerations

A concern of the JARS–Qual Working Group is that the use of qualitative methods in psychology is expanding rapidly and it is likely that new approaches to research will continue to emerge. Indeed, we hope that these standards are used to support the publication of qualitative research and to increase the methodological integrity of research published but that they are not used to limit the development of new qualitative methods. We expect that qualitative reporting standards will continue to shift and change in relation to growth of the field and evolving writings on these issues (e.g., Gough, & Deatrick, 2015; Wu, Thompson, Aroian, McQuaid, & Deatrick, 2016). We also hope that, as the reporting standards continue to develop, they do not

contribute to the marginalization of minority epistemological perspectives and designs but support methodological pluralism in our field.

Also, we are not suggesting that every element that we advance is relevant in every study. We do not support the writing of empty statements that are not related to the research being reported. For instance, some of our recommendations make sense for research on human subjects but not for textual or other analyses. Authors, reviewers, and editors should use their judgment in making decisions about which standards are relevant for the research manuscripts at hand.

In sum, the publication of these standards in the *Publication Manual* heralds the acceptance of qualitative methods squarely within the canon of psychological approaches to inquiry. These recommendations can aid authors as they craft manuscripts for publication and can assist reviewers and editors as well in the evaluation process. We have articulated features of qualitative methods that are helpful to report in the written formulations of a study to convey with clarity the research process. At the same time, we recommend permitting flexibility in reporting styles to preserve and respect qualitative traditions of inquiry. As such, these recommendations are intended to help reviewers and editors consider the distinctive and essential features of qualitative designs in the process of research evaluation. They should help readers appreciate the value of the findings that are presented and enhance the quality of work in this field moving forward.

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Table 1
Qualitative Article Reporting Standards (JARS–Qual): Information Recommended for Inclusion in Manuscripts That Report New Data Collections

Paper section or element	Description of information to be reported	Recommendations for authors to consider & notes for reviewers
Title	• Identify key issues/topic under consideration.	
Cover page	• Acknowledge funding sources or contributors. • Acknowledge conflicts of interest, if any.	
Abstract	• State the problem/question/objectives under investigation. • Indicate the study design, including types of participants or data sources, and analytic strategy, main results/findings, main implications/significance. • Identify five keywords.	• *Authors*: Consider including at least one keyword that describes the method and one that describes the types of participants or phenomenon under investigation. • *Authors*: Consider describing your approach to inquiry when it will facilitate the review process and intelligibility of your paper. If your work is not grounded in a specific approach to inquiry or your approach would be too complicated to explain in the allotted word count, however, it would not be advisable to provide explication on this point in the abstract.
Introduction **Description of research problem or question**	• Frame the problem or question and its context. • Review, critique, and synthesize the applicable literature to identify key issues/debates/theoretical frameworks in the relevant literature to clarify barriers, knowledge gaps, or practical needs.	• *Reviewers*: The introduction may include case examples, personal narratives, vignettes or other illustrative material.
Study objectives/aims/research goals	• State the purpose(s)/goal(s)/aim(s) of the study. • State the target audience, if specific. • Provide the rationale for fit of design used to investigate this purpose/goal (e.g., theory building, explanatory, developing understanding, social	• *Authors*: If relevant to objectives, explain the relation of the current analysis to prior articles/publications. • *Reviewers*: Qualitative studies often legitimately need to be divided into

	action, description, highlighting social practices). ● Describe the approach to inquiry, if it illuminates the *objectives* and research rationale (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, postmodern or constructivist, or pragmatic approaches).	multiple manuscripts because of journal article page limitations but each manuscript should have a separate foci. ● Reviewers: Qualitative studies tend not to identify hypotheses but research questions and goals.
Method **Research design overview**	● Summarize the research design (data collection strategies, data analytic strategies and, if illuminating, approaches to inquiry (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, critical, post-modern or constructivist, pragmatic approaches). ● Provide the rationale for the design selected.	● *Reviewers*: Method sections can be written in a chronological or narrative format. ● *Reviewers*: Although they provide a method description that other investigators should be able to follow, it is not required that other investigators arrive at the same conclusions, but rather that their method should lead them to conclusions with a similar degree of methodological integrity. ● *Reviewers*: At times, elements may be relevant to multiple sections and authors need to organize what belongs in each subsection in order to describe the method coherently and reduce redundancy. For instance, the overview and the objectives statement may be presented in one section. ● *Reviewers*: Processes of qualitative research are often iterative versus linear, may evolve through the inquiry process and may move between data collection and analysis in multiple formats. As a result, data collection and analysis sections might be combined. ● *Reviewers*: For the reasons above and because qualitative methods often are adapted and combined creatively, requiring detailed description and rationale, an average qualitative method section typically is longer than an average

		quantitative method section.
Study participants or data sources **Researcher description**	• Describe the researchers' backgrounds in approaching the study, emphasizing their prior understandings of the phenomena under study (e.g., interviewers, analysts, or research team). • Describe how prior understandings of the phenomena under study were managed and/or influenced the research (e.g., enhancing, limiting, or structuring data collection and analysis).	• *Authors*: Prior understandings relevant to the analysis could include but are not limited to descriptions of researchers' demographic/cultural characteristics, credentials, experience with phenomenon, training, values, decisions in selecting archives or material to analyze. • *Reviewers*: Researchers differ in the extensiveness of reflexive self-description in reports. It may not be possible for authors to estimate the depth of description desired by reviewers without guidance.
Participants or other data sources	• Provide the numbers of participants/documents/events analyzed. • Describe the demographics/cultural information, perspectives of participants or characteristics of data sources that might influence the data collected. • Describe existing data sources, if relevant (e.g., newspapers, Internet, archive). • Provide data repository information for openly shared data, if applicable. • Describe archival searches or process of locating data for analyses, if applicable.	
Researcher–participant relationship	• Describe the relationships and interactions between researchers and participants relevant to the research process and any impact on the research process (e.g., was there a relationship prior to research, are there any ethical considerations relevant to prior relationships).	
Participant recruitment **Recruitment process**	• Describe the recruitment process description (e.g., face-to-face, telephone, mail, email, recruitment	• *Reviewers*: There is no agreed-upon minimum number of participants for a

	protocols). ● Describe any incentives or compensation, and provide assurance of relevant ethical processes of data collection and consent process as relevant (may include IRB approval, particular adaptations for vulnerable populations, safety monitoring). ● Describe the process via which the number of participants was determined in relation to the study design ● Provide any changes in numbers through attrition and final number of participants/sources (if relevant, refusal rates or reasons for drop out). ● Describe the rationale for decision to halt data collection (e.g., saturation). ● Convey the study purpose as portrayed to participants, if different from the purpose stated.	qualitative study. Rather, the author should provide a rationale for the number of participants chosen. ● *Authors*: Some studies begin by recruiting participants to the study and then selecting participants from the pool that responds. Other studies begin by selecting a type of participant pool and then recruit from within that pool. Sections and their contents should be ordered to reflect the study's process—specifically the discussion of the number of participants is likely to be placed in reference to whichever process came second.
Participant selection	● Describe the participants/data sources selection process (e.g., purposive sampling methods such as maximum variation, diversity sampling, or convenience sampling methods such as snowball selection, theoretical sampling), inclusion/exclusion criteria. ● Provide the general context for study (when data was collected, sites of data collection). ● If your participant selection is from an archived data set, describe the recruitment and selection process from that dataset as well as any decisions in selecting sets of participants from that dataset.	● *Authors*: A statement can clarify how the number of participants fits with practices in the design at hand, recognizing that transferability of findings in qualitative research to other contexts is based in developing deep and contextualized understandings that can be applied by readers rather than quantitative estimates of error and generalizations to populations. ● *Reviewers*: The order of the recruitment process and the selection process and their contents may be determined in relation to the authors' methodological approach. Some authors will determine a selection process and then develop a recruitment method based upon those criteria. Other authors will develop a recruitment process and then select participants responsively in relation to evolving findings.

Data collection **Data collection/identification procedures.**	• State the form of data collected (e.g., interviews, questionnaires, media, observation) • Describe the origins or evolution of the data collection protocol. • Describe any alterations of data collection strategy in response to the evolving findings or the study rationale. • Describe the data selection or collection process (e.g., were others present when data were collected, number of times data were collected, duration of collection, context) • Convey the extensiveness of engagement (e.g., depth of engagement, time intensiveness of data collection) • For interview and written studies, indicate the mean and range of the time duration in data collection process (e.g., interviews were held for 75 to 110 minutes, with an average interview time of 90 minutes). • Describe the management or use of reflexivity in the data collection process, as it illuminates the study • Describe questions asked in data collection: Content of central questions, form of questions (e.g., open vs. closed)	• *Reviewers*: Researchers may use terms for data collection that are coherent within their research approach and process, such as data identification, collection, or selection. Descriptions should be provided, however, in accessible terms in relation to the readership. • *Reviewers*: It may not be useful for researchers to reproduce all of the questions they asked in an interview, especially in the case of unstructured or semi-structured interviews as questions are adapted to the content of each interview.
Recording and data transformation	• Identify data audio/visual recording methods, field notes, transcription processes used.	
Analysis **Data-analytic strategies**	• Describe the methods and procedures used and for what purpose/goal • Explicate in detail the process of analysis, including some discussion of the procedures (e.g., coding, thematic analysis, etc.) with a principle of transparency • Describe coders or analysts and their training, if not	• *Reviewers*: Researchers may use terms for data analysis that are coherent within their research approach and process (e.g., interpretation, unitization, eidetic analysis, coding). Descriptions should be provided, however, in accessible terms in relation to the readership.

	already described in the researcher description section (e.g., coder selection, collaboration groups) ● Identify whether coding categories emerged from the analyses or were developed a priori ● Identify units of analysis (e.g., entire transcript, unit, text) and how units were formed, if applicable ● Describe the process of arriving at an analytic scheme, if applicable (e.g., if one was developed before or during the analysis or was emergent throughout) ● Provide illustrations and descriptions of their development, if relevant. ● Indicate software, if used	● *Authors*: Provide rationales to illuminate analytic choices in relation to the study goals.
Methodological integrity	● Demonstrate that the claims made from the analysis are warranted and have produced findings with methodological integrity. The procedures that support methodological integrity (i.e., fidelity and utility) typically are described across the relevant sections of a paper, but they could be addressed in a separate section when elaboration or emphasis would be helpful. Issues of methodological integrity include: o Assess the *adequacy* of the data in terms of its ability to capture forms of diversity most relevant to the question, research goals, and inquiry approach. o Describe how the *researchers' perspectives* were managed in both the data collection and analysis (e.g., to limit their effect on the data collection, to structure the analysis). o Demonstrate that findings are *grounded* in the evidence (e.g., using quotes, excerpts, or descriptions of researchers' engagement in data collection). o Demonstrate that the contributions are *insightful* and *meaningful* (e.g., in relation to the current literature and the study	● *Reviewers*: Research does not need to use all or any of the checks (as rigor is centrally based in the iterative process of qualitative analyses which inherently include checks within the evolving, self-correcting iterative analyses), but their use can augment a study's methodological integrity. Approaches to inquiry have different traditions in terms of using checks and which checks are most valued.

	goal). o Provide relevant *contextual* information for findings (e.g., setting of study, information about participant, interview question asked is presented before excerpt as needed). o Present findings in a *coherent* manner that makes sense of contradictions or disconfirming evidence in the data (e.g., reconcile discrepancies, describe why a conflict might exist in the findings). ● Demonstrate *consistency* with regard to the analytic processes (e.g., analysts may use demonstrations of analyses to support consistency, describe their development of a stable perspective, interrater reliability, consensus) or describe responses to inconsistencies, as relevant (e.g., coders switching mid-analysis, an interruption in the analytic process). If alterations in methodological integrity were made for ethical reasons, explicate those reasons and the adjustments made. ● Describe how support for claims was supplemented by any checks added to the qualitative analysis. Examples of supplemental checks that can strengthen the research may include: o Transcripts/data collected returned to participants for feedback. o Triangulation across multiple sources of information, findings, or investigators. o Checks on the interview thoroughness or interviewer demands. o Consensus or auditing process. o Member checks or participant feedback on findings. o Data displays/matrices o In-depth thick description, case examples, illustrations. o Structured methods of researcher reflexivity (e.g., sending memos, field	

	notes, diary, log books, journals, bracketing). o Checks on the utility of findings in responding to the study problem (e.g., an evaluation of whether a solution worked)	

Findings/Results **Findings subsections**	• Describe research findings (e.g., themes, categories, narratives) and the meaning and understandings that the researcher has derived from the data analysis. • Demonstrate analytic process of reaching findings (e.g., quotes, excerpts of data). • Present research findings in a way that is compatible with the study design. • Present synthesizing illustrations (e.g., diagrams, tables, models), if useful in organizing and conveying findings. Photographs or links to videos can be used.	• *Reviewers*: Findings section tends to be longer than in quantitative papers because of the demonstrative rhetoric needed to permit the evaluation of the analytic procedure. • *Reviewers*: Depending on the approach to inquiry, findings and discussion may be combined or a personalized discursive style might be used to portray the researchers' involvement in the analysis. • *Reviewers*: Findings may or may not include quantified information, depending upon the study's goals, approach to inquiry, and study characteristics. • *Authors*: Findings presented in an artistic manner (e.g., a link to a dramatic presentation of findings) should also include information in the reporting standards to support the research presentation. • *Reviewers*: Use quotes or excerpts to augment data (e.g., thick, evocative description, field notes, text excerpts) but these should not replace the description of the findings of the analysis.

Discussion **Discussion subsections**	• Describe the central contributions and their significance in advancing disciplinary understandings. • Describe the types of contributions made by findings (e.g., challenging, elaborating on, and supporting prior research or theory in the literature describing the relevance) and how findings can be best utilized. • Identify similarities and differences from prior theories and research findings. • Reflect on any alternative explanations of the findings. • Identify the study's strengths and limitations (e.g., consider how the quality, source, or types of the data or the analytic processes might support or weaken its methodological integrity). • Describe the limits of the scope of transferability (e.g., what should readers bear in mind when using findings across contexts). • Revisit any ethical dilemmas or challenges that were encountered, and provide related suggestions for future researchers • Consider the implications for future research, policy, or practice.	• *Reviewers*: Accounts could lead to multiple solutions rather than a single one. Many qualitative approaches hold that there may be more than one valid and useful set of findings from a given dataset.

Table 2
Qualitative Meta-Analysis Article Reporting Standards (QMARS): Information Recommended for Inclusion in Manuscripts That Report Qualitative Meta-Analyses

Paper section or element	Description of information to be reported	Recommendations for authors to consider & notes for reviewers
Title	· Indicate the key issues/topic under consideration. · Indicate that the work is a form of meta-analysis (e.g., qualitative metasynthesis, meta-ethnography critical interpretive synthesis, review).	
Cover page	· Acknowledge funding sources or contributors acknowledged. · Acknowledge conflicts of interest.	
Abstract	· State the problem/question/objectives under investigation. · Indicate the study design, the types of literature reviewed, analytic strategy, main results/findings, and main implications/significance. · Identify five keywords.	· *Authors*: Consider using one keyword that describes the meta-analytic strategy and one that describes the problem addressed. · *Authors*: Consider describing your approach to inquiry when it will facilitate the review process and intelligibility of your paper. If your work is not grounded in a specific approach to inquiry or your approach would be too complicated to explain in the allotted word count, however, it would not be advisable to provide explication on this point in the abstract.
Introduction **Description of Research problem–question**	· State the problem–question the meta-analysis addresses. · Describe what literature is to be included and synthesized and the relevant debates, theoretical frameworks, and issues	

	contained therein. · Describe the importance or relevance of the meta-analysis to clarify barriers, knowledge gaps or practical needs.	
Study objectives–research goals	· Describe the meta-analytic method (e.g., metasynthesis, meta-analysis, meta-ethnography, thematic synthesis, narrative synthesis, or critical interpretive analysis). · Identify the purpose/goals of the study. · Describe the approach to inquiry, if it illuminates the *objectives* and meta-research rationale (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, postmodern or constructivist, or pragmatic approaches). · Describe the contribution to be made.	
Method **Research design overview**	· Summarize the research design (data-collection strategies, data/meta-analytic strategies and, if illuminating, approaches to inquiry (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, post-modern or constructivist, or pragmatic approaches). · Provide the rationale for the design selected.	· *Reviewers*: This section may be combined into the same section as the objectives statement.
Study data sources **Researcher description**	· Describe the researchers' backgrounds in approaching the study, emphasizing their prior understandings of the phenomena under study (e.g., interviewers, analysts or research team). · Describe how prior understandings of the phenomena were managed and/or influenced the research (e.g., enhancing, limiting, or structuring data collection and meta-analysis).	· *Authors*: Prior understandings relevant to the meta-analysis could include but are not limited to descriptions of researchers' demographic–cultural characteristics, credentials, experience with phenomenon, training, values, decisions in selecting archives or material to analyze. · *Reviewers*: Researchers differ in the extensiveness of reflexive self-description in

		reports. It may not be possible for authors to estimate the depth of description desired by reviewers without guidance.
Study selection	· Provide a detailed description of how studies to be reviewed were selected, including search strategies and criteria for inclusion and exclusion, and rationale. · Describe search parameters (e.g., thematic, population, and/or method). · Identify the electronic databases searched, web searches, or other search processes (e.g., calls for papers). · Indicate the final number of studies reviewed and how it was reached.	· *Reviewers*: Qualitative meta-analyses may seek to review the literature comprehensively or may use iterative or purposive sampling strategies (e.g., maximum variation sampling, theoretical sampling, saturation seeking). In any case, the strategy should be described as well as the rationale for its use.
Studies reviewed	Present, when possible the following: · Year of publication of studies · Disciplinary affiliation of primary author · Geographic location of study · Language of study · Method of data collection (e.g., interview, focus group, online) · Method of analysis of study (e.g., thematic analysis, narrative analysis, grounded theory) · Purpose of primary studies and differences (if any) from the main questions of the meta-analysis · Number of participants · Recruitment method of study (snowball, convenience, purposive, etc.)	· *Reviewers*: This information might be best presented in a tabular format, but should also be summarized in the text.
Analysis **Data-analytic strategies**	· Describe the approach to extracting study findings. This description may include the following:	· *Reviewers*: Findings of qualitative primary studies may be presented in disparate ways and

	· Description of coders or analysts and training, if not already described (inter-rater reliability, if used) · Description of which parts of studies were assessed or appraised (e.g. abstract, Discussion, Conclusions, full article) · Description of units for coding (words, concepts, interpretations) · Description of software, if used · Description of team or collaborative discussions relevant to determining what constitutes findings of studies, how inconsistencies among analysts were managed, and how consensus was determined. · Discussion of whether coding categories emerged from the analyses or were developed a priori · Describe the process of arriving at an analytic scheme, if applicable (e.g., if one was developed before or during the analysis or was emergent throughout). · Describe how issues of consistency were addressed with regard to the analytic processes (e.g., analysts may use demonstrations of analyses to support consistency, describe their development of a stable perspective, interrater reliability, consensus) or how inconsistencies were addressed. · Describe the appraisal process in cases in which some studies were considered to be more consequential in the interpretive process or others discounted. · Describe how illustrations or other artistic products (if any) were developed from the analytic process.	researchers should be transparent in making clear how they identified and extracted findings from primary reports. · *Reviewers*: Typically, qualitative researchers do not assign numerical weights to findings in qualitative meta-analyses as the analyses are not statistical in nature.
Methodological integrity	· See the JARS–Qual Standards. · Meta-analyses should describe the integrity of their secondary analyses as well as comment on the integrity of the primary studies under review.	

Findings (Results) **Findings subsections**	· Describe the research findings and the meaning and understandings that the researcher has derived from the analysis of the studies. · Provide quotations from the primary studies to illustrate and ground the themes or codes identified, when relevant. · Explore whether differences in themes across studies appear to reflect differences in the phenomena under study or differences in the rhetoric or conceptual stances of the researchers. · Present findings in a manner that is coherent within the study design and goals (e.g., common themes, common interpretations, situated differences). · Consider the contexts of the meta-analytic findings as well as contradictions and ambiguities among the reviewed studies so that findings are presented in a coherent manner or discrepancies are addressed. · Present synthesizing illustrations (e.g., diagrams, tables, models) if helpful in organizing and conveying findings.	· *Reviewers*: Results section tends to be longer than in quantitative meta-analyses because of the demonstrative rhetoric needed to permit the evaluation of the meta-analytic method. · *Reviewers*: Findings may or may not include the quantified presentation of relevant codes, depending on the study goals, approach to inquiry, and study characteristics.
Situatedness	· Reflect on the situatedness of the studies reviewed (e.g., the positions and contexts of the primary researchers and their studies). · Simplify the complexity of displaying trends in studies by using tables as is helpful.	· *Reviewers*: Situatedness can be considered in the Results or Discussion section.
Discussion **Discussion subsections**	· Provide a discussion of findings that interpretively goes beyond a summary of the existing studies. · Include reflections on alternative explanations in relation to findings, as relevant. · Discuss the contributions that the meta-analysis presents to the literature (e.g., challenging, elaborating on, and	· *Reviewers*: Rather than having only one possible set of findings, meta-analyses could lead to multiple insights and understandings of the literature, that each have methodological integrity.

	supporting prior research or theory in the literature). · Draw links to existing scholarship or disputes in the literature that the meta-analysis is designed to address. · Describe the significance of the study and how findings can be best utilized. · Identify the strengths and limitations of the meta-study (e.g., consider how the quality or source or types of the data or analytic process might support or weaken its methodological integrity). · Describe the limits of the scope of transferability (e.g., what readers should bear in mind when using findings across contexts). · Consider implications for future research, policy, or practice.	

Table 3
Mixed Methods Article Reporting Standards (MMARS): Information Recommended for Inclusion in Manuscripts That Report the Collection and Integration of Qualitative and Quantitative Data

Paper section or element	Description of information to be reported	Recommendations for authors to consider & notes for reviewers
· **Title**	· See the JARS–Qual and JARS–Quant Standards.	· *Authors*: Refrain from using words that are either qualitative (e.g., *explore*, *understand*) or quantitative (e.g., *determinants*, *correlates*) because mixed methods stands in the middle between qualitative and quantitative research. *Authors*: Reference the terms *mixed methods* or *qualitative and quantitative*.
· **Cover page**	· See the JARS–Qual and JARS–Quant Standards.	
· **Abstract**	· See the JARS–Qual and JARS–Quant Standards. · Indicate the mixed methods design, including types of participants or data sources, and analytic strategy, main results–findings, and major implications–significance.	· *Authors*: Specify the type of mixed methods design used. See the note on types of designs in the methods research design overview section below. · *Authors*: Consider using one keyword that describes the type of mixed methods design and one that describes the problem addressed. · *Authors*: Describe your approach(es) to inquiry and, if relevant, how intersecting approaches to inquiry are combined when this description will facilitate the review process and intelligibility of your paper. If your work is not grounded in a specific approach(es) to inquiry or your approach would be too complicated to explain in the allotted word count, however, it would not be advisable to provide explication on this point in the abstract.

Introduction **Description of research problems–questions**	· See the JARS–Qual and JARS–Quant Standards	· *Authors*: This section may convey barriers in the literature that suggest a need for both qualitative and quantitative data. *Reviewers*: Theory or conceptual framework-use in mixed methods varies depending on the specific mixed methods design or procedures used. Theory may be used inductively or deductively (or both) in mixed methods research.
Study objectives/ Aims /Research goals	· See the JARS–Qual and JARS–Quant Standards · State three types of research objectives/aims/goals: qualitative, quantitative, and mixed methods. Order these goals to reflect the type of mixed methods design. · Describe the ways approaches to inquiry were combined, as it illuminates the *objectives* and mixed method rationale (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, postmodern or constructivist, or pragmatic approaches).	· *Reviewers*: A mixed-method objective, aim, or goal may not be familiar to reviewers. It describes the results to be obtained from using the mixed methods design-type where "mixing" or integration occurs (e.g., the aim is to explain quantitative survey results with qualitative interviews in an explanatory sequential design). For instance, the goal of a qualitative phase could be the development of a conceptual model, the goal of a quantitative phase might be hypothesis testing based upon that model, and the goal of the mixed methods could be to generate integratedx support for a theory based upon quantitative and qualitative evidence.
Methods **Research design overview**	· See the JARS–Qual and JARS–Quant Standards · Explain why mixed methods research is appropriate as a methodology given the paper's goals. · Identify the type of mixed methods design used and define it. · Indicate the qualitative approach to inquiry and the quantitative approach used within the mixed methods design type (e.g., ethnography, randomized experiment) · If multiple approaches to inquiry were combined describe how this was done and provide a rationale (e.g., descriptive, interpretive, feminist, psychoanalytic, post-positivist, constructivist, critical, post-modern or constructivist, or pragmatic	*Reviewers*: Because mixed methods research is a relatively new methodology, it is helpful to provide a definition of it from a major reference in the field. · *Reviewers*: Mixed methods research involves rigorous methods, both qualitative and quantitative. Refer to the JARS–Qual standards (qualitative) and JARS–Quant standards (quantitative) for details of rigor. *Reviewers*: One of the most widely discussed topics in the mixed methods literature would be research designs. There is not a generic mixed methods design, but multiple types of designs. At the heart of designs would be basic,

	approaches), as it is illuminating for the mixed method in use. · Provide a rationale or justification for the need to collect both qualitative and quantitative data and the added value of integrating the results (findings) from the two databases.	core designs, such as a convergent design, an explanatory sequential design, and an exploratory sequential design. Although the names and types of designs may differ among mixed methods writers, a common understanding is that procedures for conducting a mixed methods study may differ from one project to another. Further, these basic procedures can be expanded by linking mixed methods to other designs (e.g., intervention or experimental trial mixed methods study), theories or standpoints (e.g., a feminist mixed methods study), or to other methodologies (e.g., a participatory action research mixed methods study).
Participants and other data sources	· See the JARS–Qual and JARS–Quant Standards. · When data are collected from multiple sources, clearly identify the sources of qualitative and quantitative data (e.g., participants, text), their characteristics, as well as the relationship between the data sets if there is one (e.g., an embedded design). · State the data sources in the order of procedures used in the design-type (e.g., qualitative sources first in an exploratory sequential design followed by quantitative sources), if a sequenced design is used in the mixed methods study.	· *Authors*: Because of multiple sources of data collected, separate descriptions of samples are needed when they differ. A table of qualitative sources and quantitative sources is helpful. This table could include: type of data, when it was collected, and from whom it was collected. This table might also include study aims/research questions for each data source and anticipated outcomes of the study. In mixed methods research, this table is often called an *implementation matrix*. · *Authors*: Rather than describe data as represented in numbers versus words, it is better to describe sources of data as open-ended information (e.g., qualitative interviews) and closed-ended information (e.g., quantitative instruments).
Participant sampling or	· See the JARS–Qual and JARS–Quant Standards. · Describe the qualitative and the quantitative sampling in	

selection	separate sections. · Relate the order of the sections to the procedures used in the mixed methods design type.	
Participant recruitment	· See the JARS–Qual and JARS–Quant Standards. · Discuss the recruitment strategy for qualitative and quantitative research separately in mixed methods research.	
Recording and transforming the data	· See the JARS–Qual Standards	
Researcher description	· See the JARS–Qual Standards	· *Reviewers*: It is helpful to establish in a publication the researchers' experiences (or research teams' experiences) with both qualitative and quantitative research as a pre-requisite for conducting mixed methods research. · *Authors*: Because mixed methods research includes qualitative research, and reflexivity is often included in qualitative research, we would recommend statements as to how the researchers' backgrounds influence the research.
Data analysis	· See the JARS–Qual and JARS–Quant Standards · Devote separate sections to the qualitative data analysis, the quantitative data analysis, and the mixed methods analysis. This mixed methods analysis consists of ways that the quantitative and qualitative results will be "mixed" or integrated according to the type of mixed methods design being used (e.g., merged in a convergent design, connected in explanatory sequential designs and in exploratory sequential designs).	·

Validity, reliability and methodological integrity	· See the JARS–Qual and JARS–Quant Standards. · Indicate qualitative integrity, quantitative validity and reliability, and mixed methods validity or legitimacy. Further assessments of mixed methods integrity are also indicated to show the quality of the research process and the inferences drawn from the intersection of the quantitative and qualitative data.	
Findings/Results subsections	· See the JARS–Qual and JARS–Quant Standards. · Indicate how the qualitative and quantitative results were "mixed" or integrated (e.g., discussion, tables of joint displays, graphs, data transformation in which one form of data is transformed to the other, such as quantitative text, codes, themes are transformed into counts or variables)	· *Authors*: In mixed methods research, the findings section typically includes sections on qualitative findings, quantitative results, and mixed methods results. This section should mirror the type of mixed methods design in terms of sequence (i.e., whether quantitative strand or qualitative strand comes first; if both are gathered at the same time, either qualitative findings or quantitative results could be presented first). · *Reviewers*: In mixed methods Results sections (or in the Discussion section to follow) authors are conveying their mixed methods analysis through "joint display" tables or graphs that array in qualitative results (e.g., themes) against the quantitative results (e.g., categorical or continuous data). This enables researchers to directly compare results or to see how results from the quantitative and qualitative strands.
Discussion subsections	· See the JARS–Qual and JARS–Quant Standards	· *Authors*: Typically, the Discussion section, like the Methods and Findings/Results, mirrors in sequence the procedures used in the type of mixed methods design. It also reflects upon the implications of the integrated findings from across the two methods.