

## AI-Informed but Human-Led

*A practical guide for thoughtful, reflexive integration of AI into qualitative research*

Many qualitative researchers are asking how to use AI without compromising ethics, depth, or their research paradigm. This guide offers a clear, practical roadmap for using AI thoughtfully, ethically, and with confidence.

It includes:

- Guiding metaphors to help you frame AI's role
- A reflexive self-assessment tool
- A glossary of key terms
- Sample methods text for transparent writing
- Journal submission guidance
- A short reading list for deeper thinking

Whether you're exploring AI for literature reviews, coding, or reflexive journalling, this resource helps you stay in control of your process, without compromising your ethics, voice, or epistemology. If you're new to using AI in qualitative research, you're not alone — many researchers are still exploring what these tools can (and can't) do. Let's dive in!

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### 1. Guiding Metaphors: Understanding AI's Role

The role of AI in qualitative research is still unfolding and can feel unfamiliar, even disorienting. These guiding metaphors help frame your relationship to AI in ways that foreground your role as the researcher. They're not technical explanations, but conceptual anchors to help you keep interpretation, ethics, and human judgement at the centre of your work.

- **AI as an intern**  
The intern can organise data, draft text, and flag patterns — but it's your job to make sense of what matters. The intern lacks context, ethics, and reflexivity.
- **AI as a mirror**  
AI often reflects back dominant discourses or biases embedded in its training data. If it misses nuance, it may be reflecting a broader epistemological gap, in other words, AI "knows" through probability and pattern recognition, rather than through understanding or interpreting meaning.
- **AI as an amplifier**  
AI can speed up parts of your process — but it also magnifies any assumptions or blind spots. It's your responsibility to guide and filter what's amplified.

## 2. Your Research Project

When designing your research project, it's important to reflect on each aspect of your research design, consider where AI might play a role, and think critically about the implications of those choices.

While AI tools can speed up many stages of research, their use must be thoughtfully aligned with your **theoretical perspective** and overall **research paradigm**. Ask yourself:

- Does AI use complement or conflict with your methodological commitments?
- How might AI assist at different stages of your project?
- What are the ethical implications of using these tools?
- Do you need to consult your ethics committee before proceeding?

The table below outlines key AI tool categories and how they are typically used in qualitative research:

AI Tool Category	What It Does	Examples
Speech-to-Text	Transcribes interviews or audio	Otter, Whisper, Trint
Generative AI (Analysis/Writing)	Summarises, codes, and supports writing	ChatGPT, Claude, Gemini
Clustering	Detects similar phrases or themes	MAXQDA AI Assist, InfraNodus
Literature Mapping	Suggests or summarises academic papers	Elicit, ResearchRabbit
Writing Support	Refines or helps rewrite your text	Wordtune, Grammarly
Visualisation Tools	Builds word clouds, maps, and diagrams	Kumu, ChatGPT Plugins

### 3. Epistemological Considerations: Pattern vs. Interpretation

AI systems, including large language models, generate responses based on statistical patterns in training data. This is not interpretation — it is prediction.

Qualitative research, by contrast, is rooted in **subjective meaning-making, contextual understanding, and reflexive interpretation**. These are practices AI cannot authentically perform.

- **AI assumes knowledge is in the data**; qualitative research assumes knowledge is constructed through interaction, reflexivity, and context.
- **AI prioritises fluency and frequency**; qualitative research seeks contradiction, complexity, and depth. Remember, frequency is not an indication of importance in qualitative research.
- **AI mirrors dominant norms**: qualitative research often aims to surface marginalised voices.

This **epistemological tension** matters. If your research is grounded in constructionist or interpretivist paradigms, you must ensure that AI is not replacing the core interpretive work that defines your analytic lens.

Use AI as a support tool — not as a surrogate thinker.

### 4. Self-Assessment Checklist

This self-assessment is a reflective starting point designed to help you think critically about where AI might fit in your process, how to use it ethically and effectively, and what practices support integrity in qualitative work. It also highlights the range of ways AI can support — but not replace — human interpretation.

Use this checklist to assess whether your use of AI aligns with key qualitative principles: transparency, reflexivity, ethical practice, and methodological fit. It's designed to support critical thinking throughout your project.

#### Section 1: Ethics & Bias

Question	Yes / No / Unsure	Notes or Actions to Take
Did I consider potential biases in AI-generated outputs or training data?		
Where appropriate, do I have ethics approval for AI use in my project?		
Have I ensured compliance with ethics approval and data privacy obligations?		
If using participant data, did I anonymise it before inputting it into AI tools?		

## Section 2: Methodological Fit

Question	Yes / No / Unsure	Notes or Actions to Take
Does AI use align with my research paradigm (e.g. constructionist, interpretivist)?		
Am I using AI to support (and not replace!) critical thinking and analytical depth?		

## Section 3: Interpretation & Reflexivity

Question	Yes / No / Unsure	Notes or Actions to Take
Did I critically assess AI outputs rather than accept them at face value?		
Have I reflected on how AI might shape or limit interpretation?		
Am I confident that human interpretation remains central in my process?		

## Section 4: Transparency & Documentation

Question	Yes / No / Unsure	Notes or Actions to Take
Have I clearly documented where and how I used AI in my research?		
Did I acknowledge AI assistance in my methodology or acknowledgements?		
Have I verified any AI-generated summaries or citations manually?		

### Interpreting Your Responses:

- **10–12 Yes** → You're using AI thoughtfully. Great work.
- **9–7 Yes** → Strong foundations. Use this guide to help identify gaps in your practice.
- **Below 7 Yes** → Time to pause and reflect on how AI is shaping your qualitative practice.

## 5. Writing Transparently: A Sample Paragraph for Methods Sections

As noted, ensure you have ethics approval for AI use in your research project. Here's a short example of how to disclose AI use in qualitative research writing:

"AI tools were used to assist with preliminary organisation and summarisation of interview data. Specifically, OpenAI's ChatGPT was used to generate initial theme groupings, which were then reviewed, refined, and interpreted by the first author in alignment with a constructionist theoretical perspective. All AI-generated outputs were critically assessed for bias, accuracy, and relevance, and were not used in place of human analysis or interpretation."

You can adapt this to suit different tools or contexts — but transparency is key.

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## 6. Journal Submissions: What You Need to Know

While AI can support research in many ways, its use in scholarly publications remains a developing area. Editorial policies vary, and some journals reject submissions where AI has been used, even when limited to non-interpretive support.

To protect your work:

- **Check each journal's submission guidelines** before using AI tools during your project. If unsure, seek clarification from the journal editor.
- **Disclose AI use** clearly in your methods or acknowledgements.
- **Avoid entering participant data into AI tools** unless your ethics application has explicitly approved it.
- **State explicitly** that human interpretation remains central (presuming, of course, that this is how you conducted your research).

Using AI transparently and within ethical and methodological boundaries will strengthen your credibility and protect the integrity of your work.

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## 6. Useful AI Terms

- **Hallucination**  
When an AI generates false or fabricated information. Particularly relevant when summarising literature or producing citations.
- **Token limit**  
The amount of content an AI can process at once. If you exceed this, the model may lose context or truncate output.

- **Prompting**

The act of instructing AI via written input. Crafting clear, contextualised prompts improves the quality and relevance of the output.

- **Co-interpretation**

A research process where meaning is collaboratively generated — this can be between humans, or (in this context) between a human and an AI tool. This should always be led by the researcher.

- **Epistemology**

Your underlying view of knowledge and truth. AI tools typically operate through a positivist logic, which does not align with a qualitative paradigm.

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## 7. Short Reading List

These resources explore the role of AI in research and education from thoughtful, critical perspectives:

Acheampong, K. O., & Nyaaba, M. (2024). Review of qualitative research in the era of generative artificial intelligence. *Journal of Empirical Research on Human Research Ethics*, 19(3), 92-102.

Carvalho, T., Negm, H., & El-Geneidy, A. (2024). A Comparison of the Results from Artificial Intelligence-based and Human-based Transport-related Thematic Analysis. *Findings*.

Christou, P. A. (2023a). How to use artificial intelligence (AI) as a resource, methodological and analysis tool in qualitative research? *The Qualitative Report*, 28(7), 1968-1980.

Christou, P. A. (2023b). The use of artificial intelligence (AI) in qualitative research for theory development. *The Qualitative Report*, 28(7), 1981-1994.

Hitch, D. (2024). Artificial intelligence augmented qualitative analysis: The way of the future? *Qualitative Health Research*, 34(7), 595-606.

Marshall, D. T., & Naff, D. B. (2024). The ethics of using artificial intelligence in qualitative research. *Journal of Empirical Research on Human Research Ethics*, 19(3), 92-102.

Morgan, D. L. (2023). Exploring the use of artificial intelligence for qualitative data analysis: The case of ChatGPT. *International Journal of Qualitative Methods*, 22, 16094069231211248.

Roberts, J., Baker, M., & Andrew, J. (2024). Artificial intelligence and qualitative research: The promise and perils of large language model (LLM) 'assistance'. *Critical Perspectives on Accounting*, 99, 102722.

Zhang, H., Wu, C., Xie, J., Lyu, Y., Cai, J., & Carroll, J. M. (2023). Redefining qualitative analysis in the AI era: Utilizing ChatGPT for efficient thematic analysis. arXiv preprint arXiv:2309.10771.

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## 8. Final Reflection

The purpose of this guide is not to warn you against using AI — but to help you use it well. When we treat AI as a research assistant, rather than an interpreter, we make space for speed and efficiency without sacrificing the core values of qualitative inquiry.

Stay grounded in your epistemology. Let interpretation, reflexivity, and participant meaning-making lead the way!

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### Looking for More Support?

Explore training options at [clairemoran.com/training](https://clairemoran.com/training) or get in touch to discuss tailored sessions [claire@clairemoran.com](mailto:claire@clairemoran.com). I'd be delighted to hear from you!