# Exploring responsible AI use in evidence synthesis: A framework for selecting AI tools

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Informed decisions.
Better health.

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# Session objectives

1. Highlight the four main expectations for evidence synthesists when using AI tools
2. Understand how the Responsible AI use in evidence SynthEsis (RAISE) guidance helps you navigate these four expectations
3. Introduce the responsible handover framework of an AI tool to evidence synthesists
4. Understand what details about an AI tool evidence synthesists should demand from tool developers

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# Introducing RAISE (Responsible AI use in evidence SynthEsis)

# Recommendations and guidance

## Three-paper RAISE collection

1. **Responsible AI in Evidence synthesis 1:** Recommendations for practice
2. **Responsible AI in Evidence synthesis 2:** Building and evaluating evidence synthesis tools
3. **Responsible AI in Evidence synthesis 3:** Selecting and using evidence synthesis tools

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We need to support the wider adoption of AI

We need cross-field standards *and an evidence base*

We are part of an ecosystem made up of individuals, collaborations, and organisations

Each has a role to play in developing and using AI in a responsible way

*One person / organisation may play multiple roles*

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# AI use expectations for evidence synthesists

1. Evidence synthesists are ultimately responsible for their research, including the decision to use AI and how it is used
2. Evidence synthesists can use AI provided they can demonstrate it will not compromise the methodological rigor or integrity of their synthesis
3. AI use should be fully and transparently reported
4. AI should be used with human oversight

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# Expectation 1: Evidence synthesists are ultimately responsible for their research, including the decision to use AI and how it is used

*Introducing the responsible handover framework for an AI tool for evidence synthesists*

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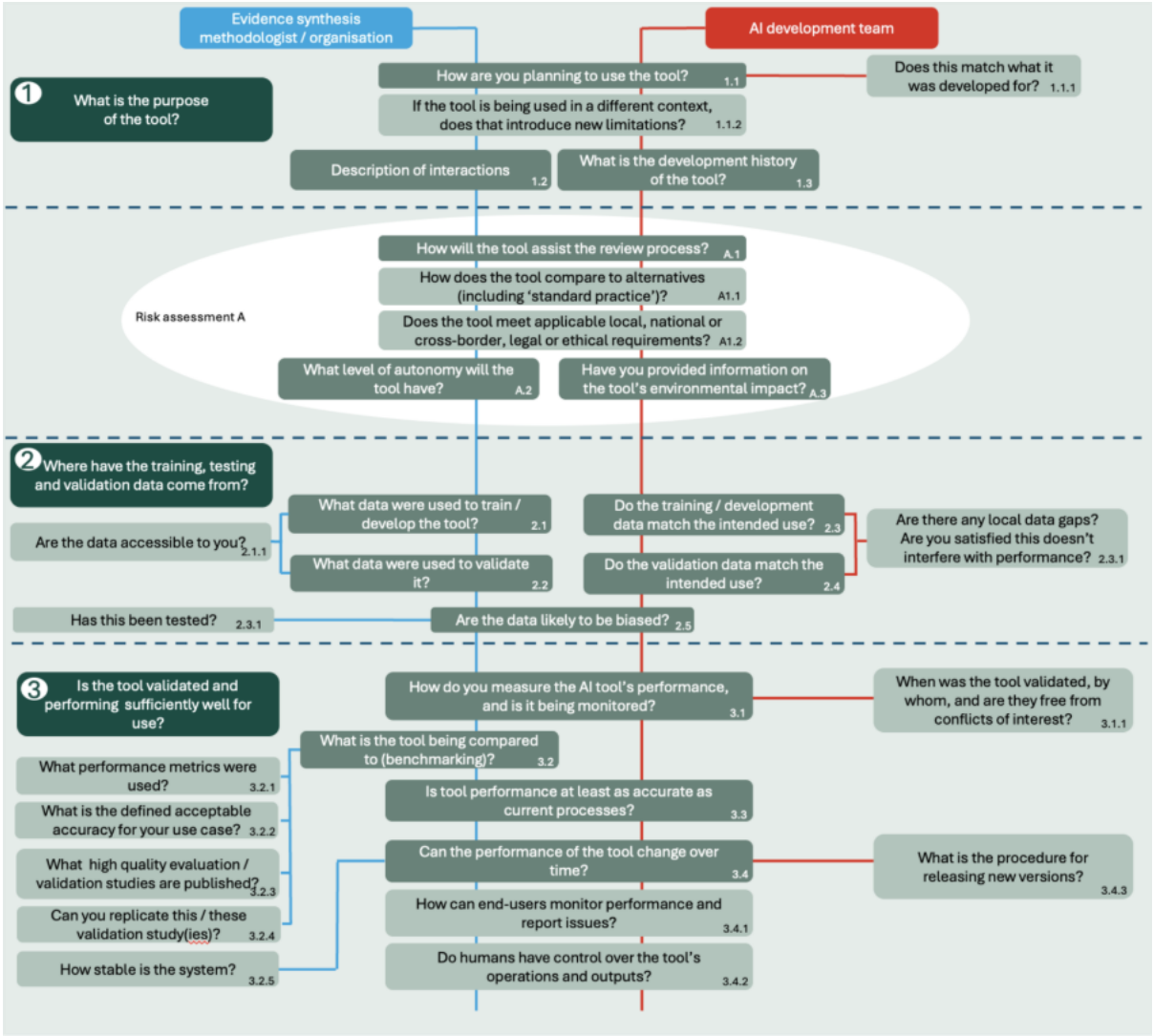
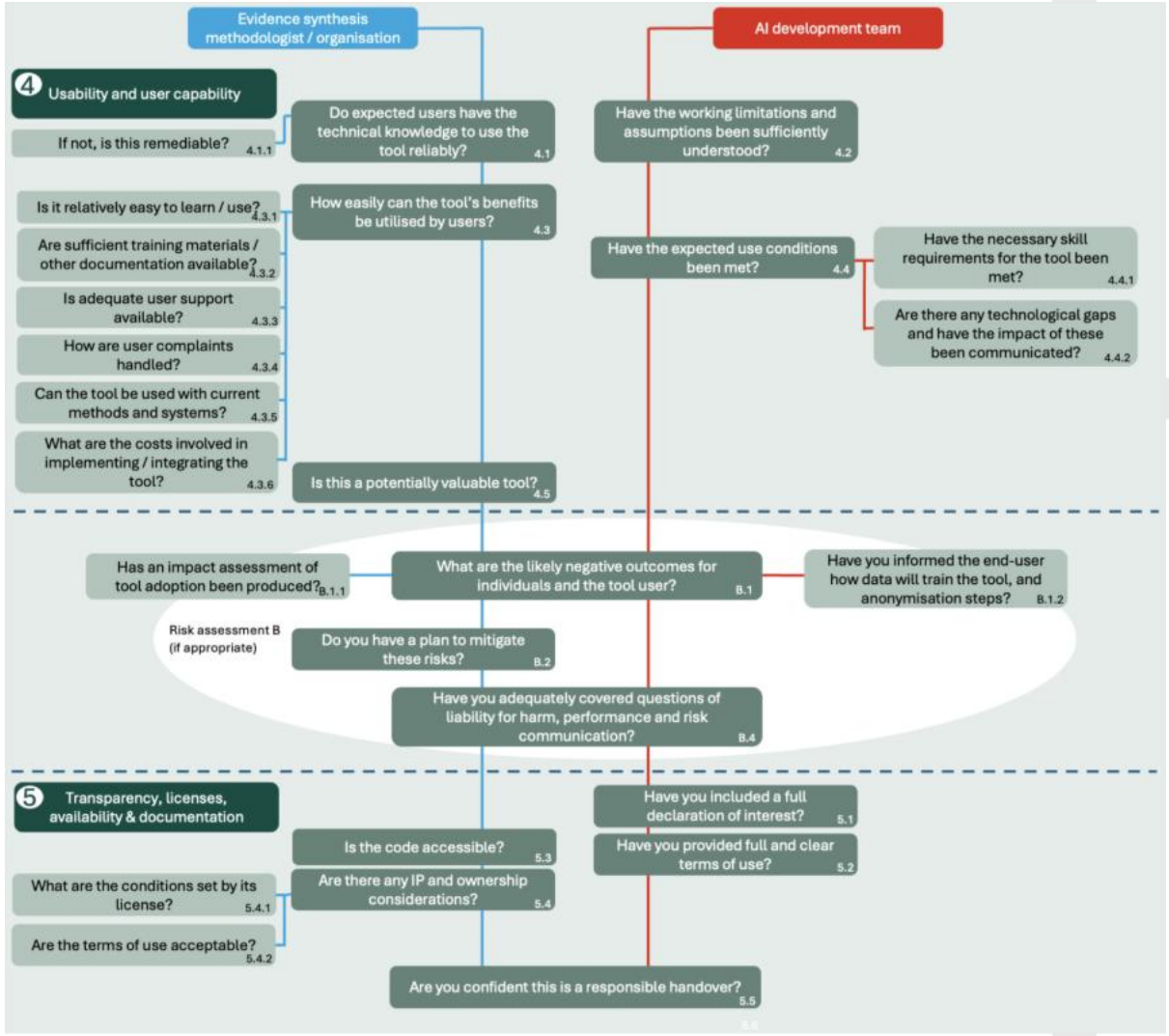
# Responsible handover framework

- **Domain 1: What is the purpose of the AI tool?**
- **Domain 2: Where have the training and testing data come from?**
- **Domain 3: Is the AI tool validated and perform sufficiently for use?**
- **Domain 4: Usability and user capability**
- **Domain 5: Transparency, licenses, availability and documentation**

From RAISE 3


Evidence synthesis methodologist / organisation
AI development team
1 What is the purpose of the tool?
How are you planning to use the tool? 1.1
Does this match what it was developed for? 1.1.1
If the tool is being used in a different context, does that introduce new limitations? 1.1.2
Description of interactions 1.2
What is the development history of the tool? 1.3
Risk assessment A
How will the tool assist the review process? A.1
How does the tool compare to alternatives (including 'standard practice')? A1.1
Does the tool meet applicable local, national or cross-border, legal or ethical requirements? A1.2
What level of autonomy will the tool have? A.2
Have you provided information on the tool's environmental impact? A.3
2 Where have the training, testing and validation data come from?
Are the data accessible to you? 2.1.1
What data were used to train / develop the tool? 2.1
What data were used to validate it? 2.2
Do the training / development data match the intended use? 2.3
Do the validation data match the intended use? 2.4
Are there any local data gaps? Are you satisfied this doesn't interfere with performance? 2.3.1
Has this been tested? 2.3.1
Are the data likely to be biased? 2.5
3 Is the tool validated and performing sufficiently well for use?
How do you measure the AI tool's performance, and is it being monitored? 3.1
When was the tool validated, by whom, and are they free from conflicts of interest? 3.1.1
What is the tool being compared to (benchmarking)? 3.2
What performance metrics were used? 3.2.1
What is the defined acceptable accuracy for your use case? 3.2.2
What high quality evaluation / validation studies are published? 3.2.3
Can you replicate this / these validation study(ies)? 3.2.4
How stable is the system? 3.2.5
Is tool performance at least as accurate as current processes? 3.3
Can the performance of the tool change over time? 3.4
What is the procedure for releasing new versions? 3.4.3
How can end-users monitor performance and report issues? 3.4.1
Do humans have control over the tool's operations and outputs? 3.4.2


Evidence synthesis methodologist / organisation
AI development team
4 Usability and user capability
If not, is this remediable? 4.1.1
Do expected users have the technical knowledge to use the tool reliably? 4.1
Have the working limitations and assumptions been sufficiently understood? 4.2
Is it relatively easy to learn / use? 4.3.1
Are sufficient training materials / other documentation available? 4.3.2
Is adequate user support available? 4.3.3
How are user complaints handled? 4.3.4
Can the tool be used with current methods and systems? 4.3.5
What are the costs involved in implementing / integrating the tool? 4.3.6
How easily can the tool's benefits be utilised by users? 4.3
Have the expected use conditions been met? 4.4
Have the necessary skill requirements for the tool been met? 4.4.1
Are there any technological gaps and have the impact of these been communicated? 4.4.2
Is this a potentially valuable tool? 4.5
Has an impact assessment of tool adoption been produced? B.1.1
What are the likely negative outcomes for individuals and the tool user? B.1
Have you informed the end-user how data will train the tool, and anonymisation steps? B.1.2
Risk assessment B (if appropriate)
Do you have a plan to mitigate these risks? B.2
Have you adequately covered questions of liability for harm, performance and risk communication? B.4
5 Transparency, licenses, availability & documentation
Is the code accessible? 5.3
Are there any IP and ownership considerations? 5.4
What are the conditions set by its license? 5.4.1
Are the terms of use acceptable? 5.4.2
Have you included a full declaration of interest? 5.1
Have you provided full and clear terms of use? 5.2
Are you confident this is a responsible handover? 5.5

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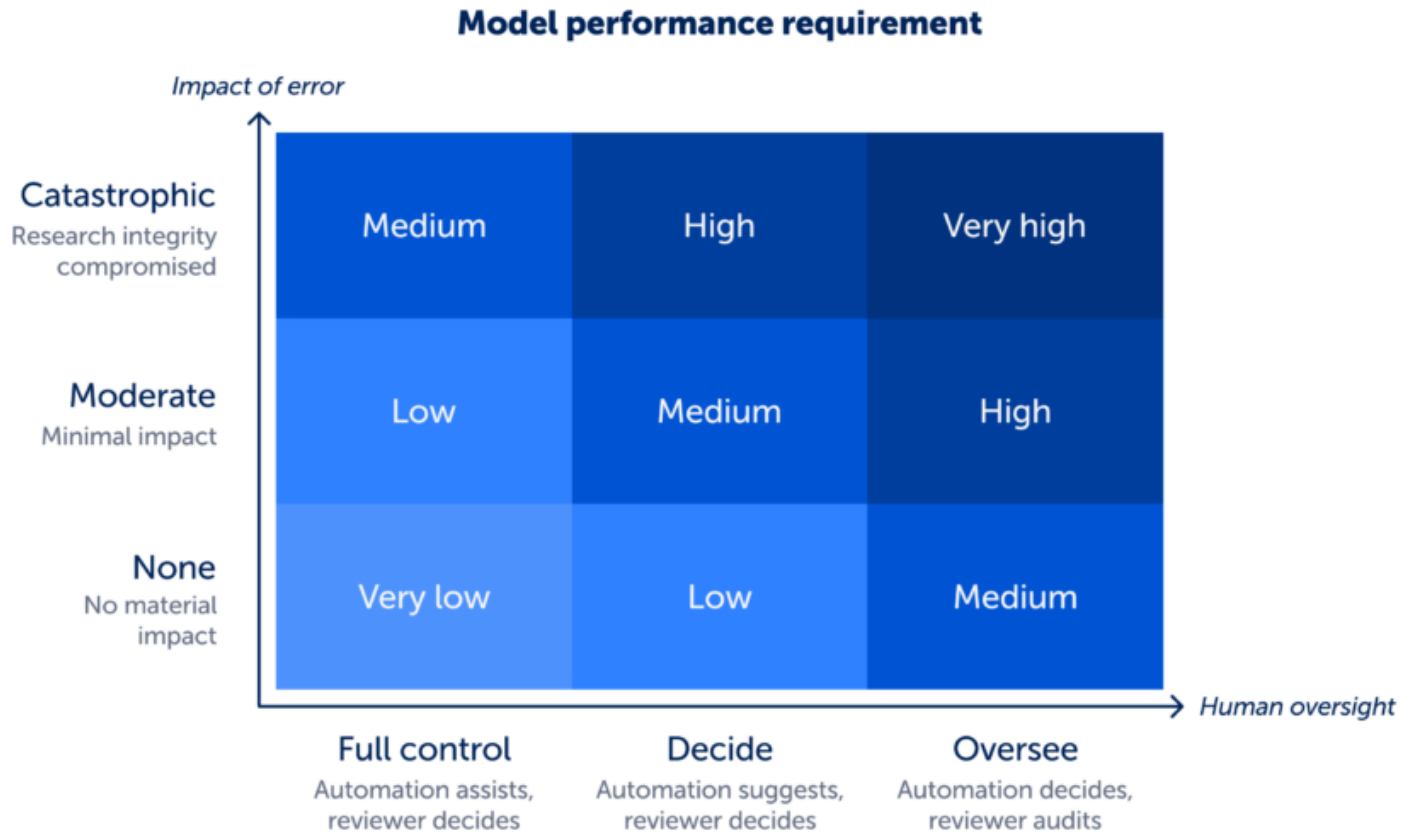
# Considerations before using the framework

- Look critically; **all tools have limitations**
- Consider the acceptable model performance given the potential impact of errors and degree of human oversight
- Collaborate with those who have complementary backgrounds




Covidence, Beyond evaluation: deciding when AI is appropriate in evidence synthesis (April 2026)

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# Example evidence synthesis and task

- **Living systematic review**
- Focused on public health interventions addressing the **health impacts of climate change**
- Commissioned to **inform policy** at a national level
- Considerable time pressures

**You will use AI for abstract and title screening**

**If the performance and use of the tool is acceptable then the AI could make the decisions (with disagreements flagged and ability to audit all decisions)**

**Or if not, you want the tool to assist or suggest with authors making the decisions**

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# Responsible handover framework

- **Domain 1: What is the purpose of the AI tool?**
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- Domain 5: Transparency, licenses, availability and documentation

From RAISE 3

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# Domain 1: What is the purpose of the tool?

Main considerations for evidence synthesists:

- ❑ Is the intended use case and expected benefit clearly defined?
- ❑ Does it match your specific task and context?
- ❑ Is the level of human oversight appropriate?
- ❑ For LLMs, are the model version and prompts recorded?

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## Is it clear what the AI tool does and does it match our example review task?

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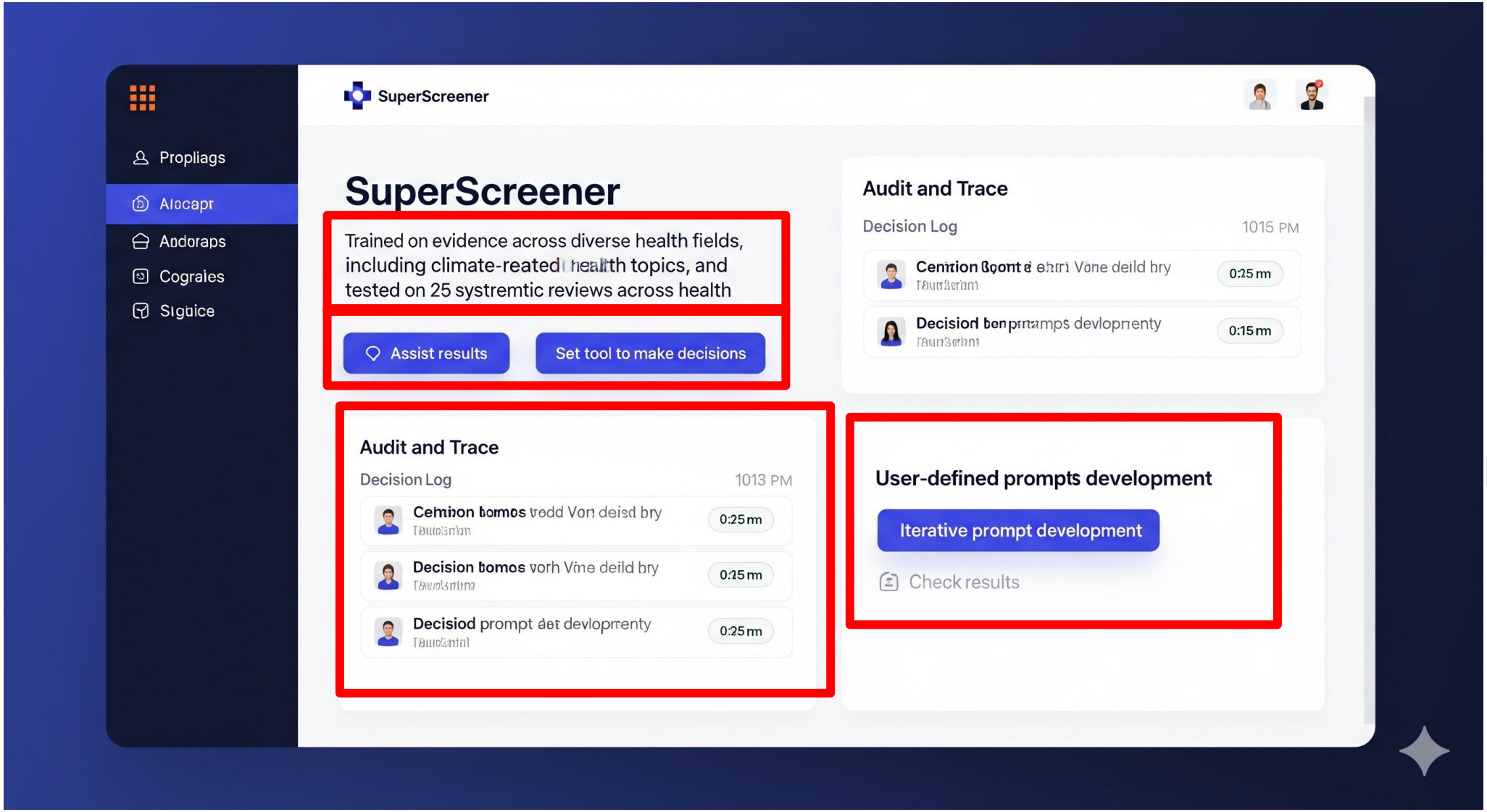


Public health interventions addressing the health impacts of climate change

Abstract and title screening

Depending on performance, the tool could make the decisions (disagreements flagged, auditability) or if not, could suggest

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# Responsible handover framework

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From RAISE 3

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# Domain 2: Where have the training and testing data come from?

Main considerations for evidence synthesists:

- ❑ Are training and testing data sources disclosed and accessible?
- ❑ Do training and testing data match your evidence synthesis domain/context?
- ❑ Are there known limitations or biases (language, geography, date range, methods, etc.)?
- ❑ Is there a separation between the training, testing and validation datasets?

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*The importance of separation between training data and test data*

**Whose general medical knowledge are you more likely to trust?**

Consider two medical students who have just sat their final exams:

1. Kai scored 95%, but you know that they had access to a leaked copy of the exam paper a week beforehand
2. Ren scored only 68%, but you know they did not cheat in this way

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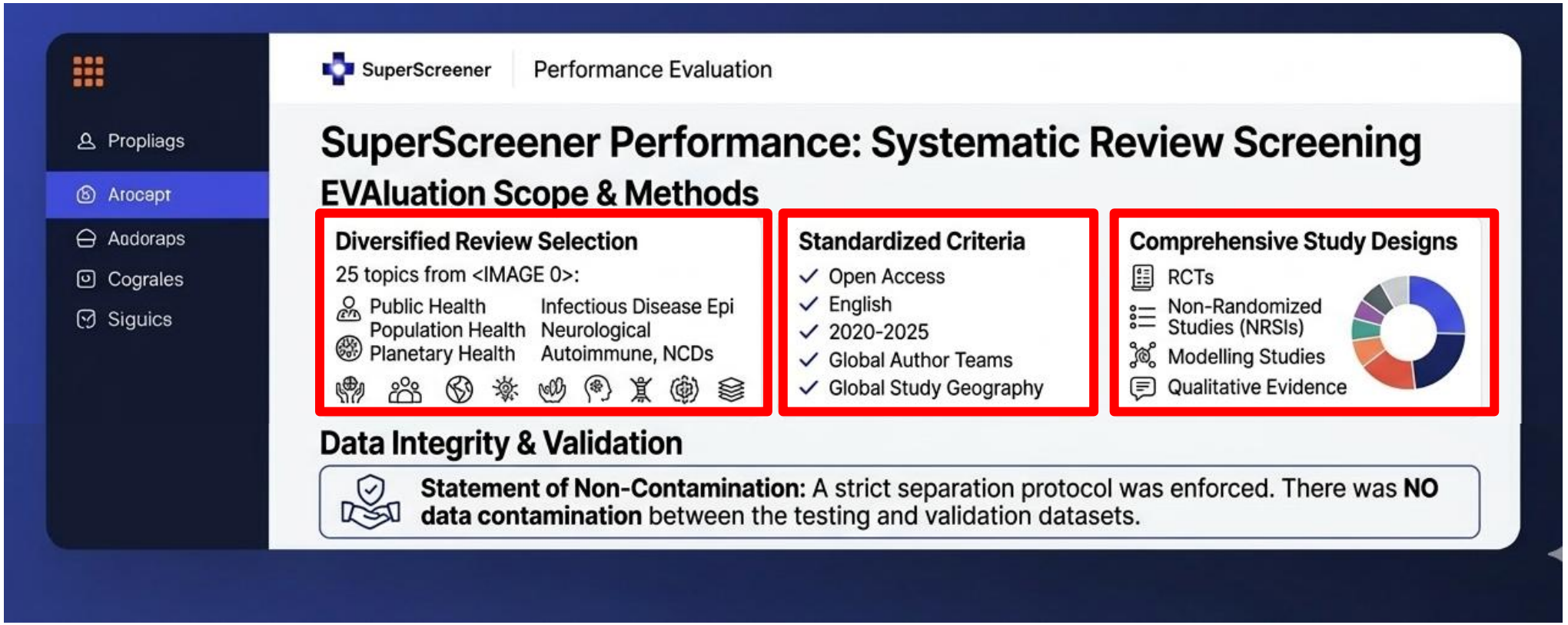


Public health interventions addressing the health impacts of climate change

Living review

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**Given there are gaps in the testing data and this is an LLM-based AI tool (so we do not know anything about the training data), with what types of mitigations would you consider if you proceeded with this tool?**

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From RAISE 3

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# Domain 3: Is the AI tool validated and performs sufficiently for use?

Main considerations for evidence synthesists:

- ❑ Has performance been validated?
- ❑ Is the validation published and / or peer-reviewed?
- ❑ Is it reported in sufficient enough detail to be transparent and replicable?
- ❑ Are metrics appropriate and does performance meet your acceptable threshold?
- ❑ Can performance change over time?

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# The question of acceptable thresholds

- What's good enough?
- Lack of community consensus on the **appropriate level of confidence** and **appropriate level of performance**

**Table 2. Stopping Boundaries and Decision Rules for Interim Analyses**

| Performance Metrics | Futility Boundaries (Point Estimate)* | Non-inferiority Margins (Upper Limit of 95% CI)* | Decision Rules |
|---|---|---|---|
| Screening | | | |
| Sensitivity | <80%** | <95%** | Stop if either boundary is crossed |
| Specificity (for full-text screening only) | <50%*** | <60%*** | Stop if either boundary is crossed |
| Data Extraction | | | |
| Sensitivity | <92%** | <97%** | Stop if either boundary is crossed |
| Major Error Proportion | >3%† | >2%† | Stop if either boundary is crossed |
| Usability | | | |
| System Usability Scale (score) | <57‡ | <75‡ | Stop if threshold is not met |

Cochrane Evaluation of (Semi-) Automated Review (CESAR) Methods: Protocol for an adaptive platform study within reviews (April 2026) Gartlehner et al. MedRxiv.

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# Responsible handover framework

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From RAISE 3

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# Domain 4: Usability and user capability

Main considerations for evidence synthesists:

- ❑ Does your team have the skills to use it reliably?
- ❑ Is training/documentation available?
- ❑ What are the costs (financial, time, infrastructure)?
- ❑ Is user support available?

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If you got to this stage of the framework and there was adequate training, guidance and support from the AI tool developer, and no reason not to proceed from the previous domains, **how confident do you think you would be in using LLM-based or genAI tools for review tasks?**

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# Responsible handover framework

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From RAISE 3

# Domain 5: Transparency, licenses, availability and documentation

Main considerations for evidence synthesists:

- Are the terms of use clear and acceptable?
  - Plagiarism and provenance; copyright and intellectual property; jurisdiction and licensing; data security and usage rights; and data protection and confidentiality
- Will uploaded content be used for training? Can you opt out?
- Does the tool meet your legal and ethical requirements?
- Is there a conflict-of-interest disclosure?

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# Menti – quick fire questions

1. You hereby grant (...) to Company a (…) license to reproduce (…) and otherwise use and exploit any and all information and content that you submit to, or use with the Site.

2. When you use our services for individuals such as ChatGPT, Codex, and Sora, we may use your content to train our models.

3. We do not and will not permit any third party to use your content or User Data to improve or train AI models.

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# Example using Cochrane's RCT classifier

From RAISE 3, Supplementary file 2

Supplementary file 2: example of completed responsible handover tool

| What type of handover is this? |
| --- |
| **Who is completing this form?**<br>For example, is it a tool development team handing a tool over to the evidence synthesis community for their use? Is it an evidence synthesis methodologist reporting the results of an evaluation and recommending a tool for use in a specific way? Or is it the result of collaboration between a tool development team and an evidence synthesis methodologist, who are jointly reporting their understanding about the suitability of a tool for use? Record the tool name and version (including model version, where relevant) and the date this form was completed. If any question cannot be answered, record this explicitly (for example, 'Unknown' or 'Not disclosed') and treat missing information as a potential risk signal. Schedule a reassessment date (e.g. annually or when major version updates occur) and record this in the form. |
| This form is the joint work of information retrieval methodologists at an evidence synthesis organisation (Cochrane), and an AI development team. |
| **(1) What is the purpose of the tool?** |
| Methodologists and AI development teams: agree a **statement that defines how the tool should be used** (1.1) in an evidence synthesis project... Record the tool name, version, and deployment context (platform, local installation, API, etc.). If the AI tool uses generative AI, state the model provider and model version, and (where relevant) the prompt set or template version. Then, jointly consider whether there are contextual limitations (1.1.2), informed by input from the AI development team, and whether the intended context of use matches that originally envisaged (1.1.1). State whether the use case is to replace an existing task or method, or if it is to be used in parallel with current methods. If the latter, state which existing task or method this new approach should complement or be used alongside, and what human is required. |
| 1.1: The system estimates the likelihood of a given study report describing a Randomized Controlled Trial (RCT), using only the title and abstract. This allows studies that are very unlikely to be RCTs to be automatically screened out during the development of systematic reviews for which this is desirable.<br><br>The RCT classifier is designed for use as a binary classifier. The cut-point is set to achieve ≥99% recall (to identify at least 99% of reports of RCTs). Within Cochrane, the classifier is implemented as a step in the Screen4Me workflow, with all studies not excluded at this step being screened by a human before an inclusion decision. See figure from Thomas et al 2021. Deployed in this way, the RCT classifier aims to significantly reduce manual |

# Expectation 2: Demonstrate AI will not compromise the methodological rigor or integrity of the synthesis

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# Decisions after using the framework

## Proceed

- AI was validated for its proposed use; supporting evidence is strong
- Risk of well-understood with moderate errors or inconsequential differences
- Limitations known and reasonably manageable

## Proceed with mitigations

- Tool shows promise but has gaps in evidence,
- Requires additional monitoring, or presents moderate risks that can be actively managed.

## Do not proceed

- AI not validated for its proposed used; missing or weak supporting evidence
- Transparency is insufficient for meaningful assessment
- Risks cannot be adequately mitigated; AI unreliable

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# Menti – quick fire questions

**Would you proceed if…?**

The validation study only partially matches your review context

The validation study was conducted by tool developers

The tool requires your consent to train an AI model on your data

The tool's workflow is not transparent nor reproducible

The tool produces transparent outputs and limitations are well understood

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# Consider not proceeding if...

- No published validation in a relevant context
- Concerns about the replicability of the validation
- Concerns about performance claims based only on the developer's own validation and /or methodological limitations
- Lack of legal or policy compliance at the evidence synthesist’s or tool user’s organisation, or at the national or international level
- Terms allow use of your content for model training without opt-out
- Inappropriate level of human oversight available, e.g. no way to monitor or audit outputs
- The AI tool developer is unresponsive to questions

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# Current state of AI tools

**Table 2: current (February 2026) state of AI tools**

| Task | Tool Class | Detail and considerations | Example tools | Recommendation |
|---|---|---|---|---|
| **Writing a proto** | | | | |
| Question formulation | Generative LLMs | Asking LLMs to provide novel questions for synthesis may support early question development. However, suggestions may be incomplete, irrelevant, subject to bias (based on its sources), or overlap with past reviews. | ChatGPT, CoPilot, Claude, Gemini, DeepSeek | Human verification required |
| Drafting | Generative LLMs | Pre-trained LLMs can provide an outline using well-established protocol formats. Users may also provide a format / direct the LLM to resources to support this. | ChatGPT, CoPilot, Claude, Gemini, DeepSeek | Human verification required |
| **The Search** | | | | |
| Exploring the literature | Unsupervised | Topic modelling tools aid in identifying clusters of evidence quickly to get a sense of key themes/areas of interest. | Carrot2 (https://search.carro 2 .org) | Acceptable for use |
| | Agentic AI | AI agents develop, refine, and perform searches based on natural language queries. Highly dependent on data sources the tool has access to and requires human input at each stage to guide agent. May be helpful to gain a sense of the literature at an early stage but should not be used as part of any formal evidence retrieval. | Undermind (https://www.under i nd.ai/), Elicit (https://elicit.com/), Asta Find Papers (https://asta.allen.a | Acceptable for use |
| Search strategy development | Rule-based | Tools analyse frequency of keywords and/or controlled vocabularies in search results. Specialised tools are required to cover indexing from different bibliographic databases. May provide additional keywords to inform search strategy but should be used in combination with other search development methods. | Yale MeSH Analyzer (https://mesh.med.y l e.edu/), TERA WordFreq (https://tera-tools.com/word-fre PubReMiner (https://hgserver2.a | Acceptable for use |

Excerpt from RAISE 3, Table 2

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# Current state of AI tools

**Table 1: Tool use recommendations**

| Recommendation | |
|---|---|
| Acceptable for use | AI outputs may be used directly within the review workflow, if any limitations or potential biases are acknowledged and accounted for. |
| Human verification required | AI outputs may be used to support review tasks but must be carefully checked by humans before use. The degree of checking required may vary, but typically this will require a human to read and possibly make amendments to the entirety of the output. |
| Requires validation within the review | AI outputs may be used if their performance is explicitly evaluated within the context of the review itself and deemed adequate (e.g. comparable to human performance). |
| Exploratory and supplementary use | AI outputs may be used for developing ideas or as a starting point to support understanding. All outputs should be extensively refined by human reviewers prior to use for a review task. Alternatively, outputs may be appropriate for use as an additional, supplementary approach, but without replacing established processes. |
| Not acceptable for use | The current state of technology means that these AI outputs have such serious limitations, that they should not be relied upon. |

**Table 2: current (February 2026) state of AI tools**

| Task | Tool Class | Detail and considerations | | |
|---|---|---|---|---|
| **Writing a protocol** | | | | |
| Question formulation | Generative LLMs | Asking LLMs to provide nove question development. How subject to bias (based on its | | |
| Drafting | Generative LLMs | Pre-trained LLMs can provid formats. Users may also pro support this. | | |
| **The Search** | | | | |
| Exploring the literature | Unsupervised | Topic modelling tools aid in sense of key themes/areas o | | |
| | Agentic AI | AI agents develop, refine, ar queries. Highly dependent o human input at each stage t the literature at an early sta evidence retrieval. | | |
| Search strategy development | Rule-based | Tools analyse frequency of k results. Specialised tools are bibliographic databases. Ma strategy but should be used in combination with other search development methods. | WordFreq (https://tera-tools.com/word-freq); PubReMiner (https://hgserver2.am | |

From RAISE 3, Table 1

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# A word about validation vs. verification in your review

Requires valic
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Human verific
required

medRxiv

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**Cochrane Evaluation of (Semi-) Automated Review (CESAR) Methods: Protocol for an adaptive platform study within reviews**

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**doi:** https://doi.org/10.64898/2026.04.13.26350802

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# A word about validation vs. verification in your review

| | | |
|---|---|---|
| **Requires validation within the review** | How did *authors* validate whether AI tool would perform well for their specific review, e.g., SWAR | For example, any AI use in screening, data extraction, quality assessment |
| **Human verification required** | How did *authors* check and verify the AI outputs were correct | For example, genAI use in question formulation, text drafting, search query translation |

# Expectation 3:
# Full and transparent reporting of AI use

# Disclosure of AI use

**Name and purpose of AI tool**

We will use [*AI system/tool/approach name, version, date of use*] developed by [*organization/developer*] for [*specific purpose(s)] in [the evidence synthesis process*]. The [*AI system/tool/approach*] will [*state it will be used according to the user guide, and include reference, and/or briefly describe any customization, training, or parameters to be applied*].

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**Degree of human oversight**

Outputs from the [*AI system/tool/approach*] are justified for use in our synthesis because:

- [*state the degree of human oversight such as any steps taken to review, verify, or override AI-generated outputs*.]

# Disclosure of AI use

**Name and purpose of AI tool**

**Degree of human oversight**

**Justify use of AI system or tool (conduct of review)**

We will use [*AI system/tool/approach name, version, date of use*] developed by [*organization/developer*] for [*specific purpose(s)] in [the evidence synthesis process*]. The [*AI system/tool/approach*] will [*state it will be used according to the user guide, and include reference, and/or briefly describe any customization, training, or parameters to be applied*].

Outputs from the [*AI system/tool/approach*] are justified for use in our synthesis because:

- [*state the degree of human oversight such as any steps taken to review, verify, or override AI-generated outputs*.]

- [*describe how you have determined it is methodologically sound and will not undermine the trustworthiness or reliability of the synthesis or its conclusions (e.g., model validation, feature validation)*]
- [*describe how it has been validated or calibrated to ensure that it is appropriate for use in the context of the specific evidence synthesis, to include degree of author involvement, if not covered in the user guide, evaluations or elsewhere (e.g., real-world effectiveness)*].

Limitations [*of the AI system/tool/approach*] include [*describe known limitations, potential biases, and ethical concerns*]/ [*are included as a supplementary material*]. [*If applicable*] A detailed description of the methodology, including parameters and validation procedures, is available in [*supplementary materials*].

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# Other considerations for reporting AI use

- Methods:
  - PRISMA items include a note about reporting any automation tools
- Discussion > Limitations of the review process:
  - detail any limitations or potential biases, consider the potential impact of errors, limitations or generalizability
- Declaration of interest
  - declare any financial and non-financial interests related to the tool, including any relevant interests in the organization(s) that own or fund them

# Expectation 4:
# AI should be used with human oversight

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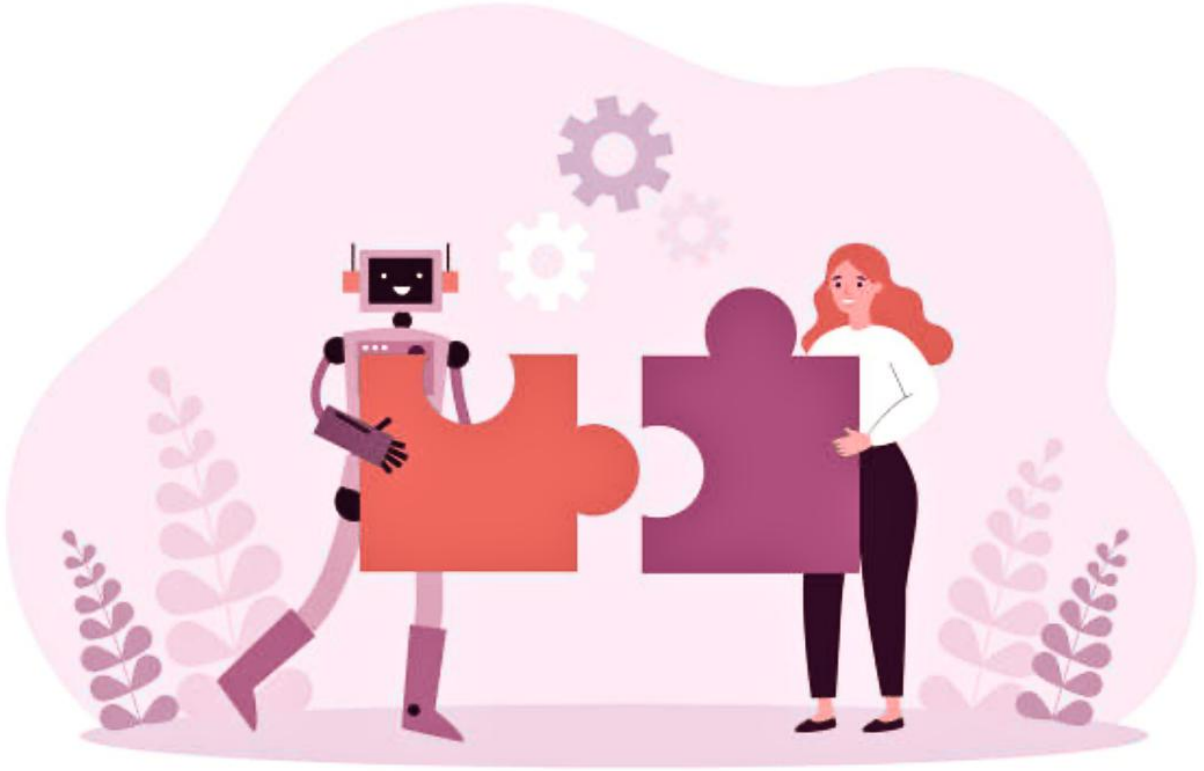
# Human oversight and accountability



AI should be a companion, not a replacement

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# AI use expectations for evidence synthesists

| | | |
|---|---|---|
| 1 | • Evidence synthesists are ultimately responsible for their research, including the decision to use AI and how it is used | Apply the responsible handover framework |
| 2 | • Evidence synthesists can use AI provided they can demonstrate it will not compromise the methodological rigor or integrity of their synthesis | Via evidence, verification methods, or real-world validation methods |
| 3 | • AI use should be fully and transparently reported | Adhere to reporting expectations |
| 4 | • AI should be used with human oversight | Via all of the above |

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## Menti

# What was your biggest learning from this framework / this session?

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# Thank you!

# Questions?