

Pre-Finalization Review Worksheet

Apply before any record enters an official system of record.

Version 1.0 | Effective May 2026 | JRS Deployment Kit

RECORD INFORMATION

Record / File Reference:

Record Type (circle): Performance Disciplinary Termination Investigation Accommodation Other

Drafter / Author:

Reviewer:

Review Date:

SECTION 1 / RECONSTRUCTION CHECK

Each item is pass/fail. A failed item requires resolution before submission.

Can the record stand on its own?
A later reviewer understands the conclusion without calling the original author.

Are dates or date ranges present for each stated pattern or conduct claim?
Missing dates are the most common single documentation gap.

Are referenced records, policies, or prior documentation identifiable?
Without calling the drafter or relying on institutional memory.

Does the reasoning hold without verbal explanation from the drafter?

Were AI-assisted summaries reviewed against original source notes before this review?
Complete only if automated drafting tools contributed to this record.

SECTION 2 / EVIDENCE AND ANCHORING CHECK

Each evaluative adjective is supported by a specific behavioral fact.
What occurred, when, and where.

Policy references name the specific policy and section.
Confirm the policy acknowledgment is on file.

Escalation conclusions reference prior documented warnings or counseling.

Investigation conclusions identify source materials.
 Conflicting accounts are noted, not resolved away.

SECTION 3 / AI-ASSISTED CONTENT CHECK

Complete only if automated drafting tools contributed to this record.

AI-assisted wording was reviewed against original source notes before this review.

No characterizations appear in the record that are absent from the source notes.

Where notes contained gaps or conflicts, the record reflects them.
 Not smoothed over by automated drafting.

Human reviewer confirmation is documented and on file before submission.

SECTION 4 / RECORD TYPE ESCALATION CHECK

Termination: HR secondary review and legal consultation completed or waived in writing.

Formal discipline: conduct dates, policy references, and prior warnings identifiable.

Accommodation: interactive process steps and determination rationale documented.

Investigation: source materials named, conclusions stay within what evidence shows.

RAPID REVIEW / Minimum Standard

1. Identify unsupported evaluative language anywhere in the record
2. Confirm timeline anchors are present for any stated pattern of conduct
3. Verify referenced policies or source records are identifiable in the file
4. Ensure each conclusion is reconstructable from the record alone

DISPOSITION / Check one

READY	Self-contained. Anchored to specific evidence. Reviewable from the record alone.
REVIEW	Conclusion likely accurate but basis not fully visible. Clarification required.
STOP	Unsupported conclusion or missing anchor. Do not submit. Return to drafter.

REVIEWER CONFIRMATION

Reviewer Name: _____ Date: _____

Notes: _____

This worksheet confirms review for documentation quality. It does not certify factual accuracy or legal sufficiency.