

Secondary Review Escalation Form

Complete when a record requires secondary review before system entry.

Version 1.0 | Effective May 2026 | JRS Deployment Kit

RECORD INFORMATION

Record / File Reference:

Record Type:

Original Drafter:

Date Submitted for Review:

Secondary Reviewer:

ESCALATION TRIGGER / Check all that apply

- Evaluative language without a specific behavioral anchor
- Pattern conduct claim without specific dated instances
- Escalation conclusion without referenced prior warnings or counseling records
- Termination documentation with generalized characterizations and no referenced records
- Accommodation record missing interactive process documentation
- AI-assisted wording not reviewed against source notes before submission
- Investigation conclusion where source materials are not identified
- Timeline inconsistency between documented events and formal record dates
- Other:

FROM PRACTICE

Most escalation files fail at the timeline level. Conduct is described. Dates are not. Without dates, the pattern cannot be independently established.

DOCUMENTATION GAP DESCRIPTION

Describe the specific gap that requires resolution before the record can be submitted.

ACTION REQUIRED

- Return to drafter for behavioral anchoring before resubmission

- Return to drafter for timeline clarification and specific dated instances

- HR secondary review completed. Record approved for system entry.

- Legal consultation required before record enters system

- AI-assisted wording to be reviewed against source notes. Human confirmation required.

- Record held pending missing attachment or supporting documentation

SECONDARY REVIEWER DISPOSITION

APPROVED	Record meets review conditions. Approved for system entry.
RETURNED	Record returned to drafter. Gap identified above must be resolved before resubmission.
ESCALATED	Routed to legal or compliance for further review before system entry.

REVIEWER CONFIRMATION

Secondary Reviewer: _____ Date: _____

Title / Function: _____

Secondary review confirms documentation quality. Does not establish legal sufficiency.