

SECTION D / REDLINED EXAMPLES

JRS Redlined Documentation Examples

Before-and-after documentation examples with reviewer annotations.

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HOW TO USE

Each example presents a record as it commonly appears at the drafting stage, followed by reviewer annotations identifying gaps, and a supported revision satisfying the four JRS review conditions.

Example 01 / Performance Review**MISSING OBSERVABLE ANCHOR****BEFORE / As submitted**

"Employee has had a difficult year and has struggled to meet expectations. Performance has been below acceptable levels. Attitude has been a concern."

- "Difficult year" and "struggled" -- impressions, not documented events. No specific conduct.
- "Below acceptable levels" -- no standard, no period, no source data referenced.
- "Attitude has been a concern" -- no behavioral anchor. No dates, no incidents on file.
- Reviewer note: record returned. No conclusion anchored to specific evidence.

AFTER / Supported revision

Employee missed three project deadlines (February 17, March 1, April 14) against the performance plan established January 5. Check-in notes from January 19, February 28, and April 2 are on file. Employee declined to participate in two team planning sessions (March 7 and March 14) without stated reason; two colleagues submitted written notes March 14 referencing project coordination impact.

- ✓ Three deadline misses identified with specific dates.
- ✓ Performance plan referenced and dated. Standard identifiable.
- ✓ Pattern supported: two documented absences, written notes on file.
- ✓ Basis reconstructable without contacting the original drafter.

Example 02 / Disciplinary Action**ADJECTIVE ALERT****BEFORE / As submitted**

"Employee has demonstrated unprofessional and hostile behavior toward colleagues and has been uncooperative with supervisory direction."

- "Unprofessional" -- no specific conduct. Adjective without behavioral anchor.
- "Hostile" -- no incident identified, no date, no documentation of what occurred.
- "Uncooperative with supervisory direction" -- which instructions, on what dates?
- Reviewer note: three evaluative adjectives, zero anchored behavioral facts. Returned.

AFTER / Supported revision

On April 4 and April 11, employee interrupted two client meetings after receiving written instruction on March 28 regarding meeting protocols (on file). On April 9, employee declined a direct supervisor request stating "I don't need to do that." Supervisor documented this in a contemporaneous note dated April 9. Incident report dated April 12 covers both meeting incidents.

- ✓ Each adjective replaced with specific behavioral description and date.

- ✓ Documentation identified for each incident -- all dated.
- ✓ Prior written instruction referenced and dated.
- ✓ Each claim independently verifiable from the file.

Example 03 / Counseling Note / Attendance

MISSING TIMELINE ANCHOR

BEFORE / As submitted

"Employee has been repeatedly absent without advance notice and has failed to follow the attendance policy on multiple occasions."

- "Repeatedly" and "multiple occasions" -- no dates. Pattern cannot be independently established.
- No attendance policy referenced or acknowledged.
- No prior counseling or attendance discussion documented on file.
- Reviewer note: pattern claim unsupported. Dates not identified. Returned before system entry.

AFTER / Supported revision

Employee was absent without advance notice on January 5, January 12, and February 3, contrary to the Attendance Policy acknowledged January 2. Policy requires 48-hour advance notice except in documented emergencies. No emergency documentation was provided for any of the three absences. Counseling note issued February 4. Policy acknowledgment and counseling note are on file.

- ✓ Three specific absence dates identified.
- ✓ Policy named, section referenced, acknowledgment dated and on file.
- ✓ Pattern established with at least two anchored instances.
- ✓ Prior counseling documented: note dated and on file.

Example 04 / Termination / Performance-Based**UNSUPPORTED ESCALATION****BEFORE / As submitted**

"After repeated coaching and progressive discipline, employee has failed to meet performance expectations. Due to ongoing performance issues and inability to improve, the decision was made to separate employment effective today."

- "Repeated coaching" -- no coaching notes referenced, no dates, no documentation on file.
- "Progressive discipline" -- no prior disciplinary records identified in the file.
- "Ongoing performance issues" -- no performance plan, no specific failures identified.
- Reviewer note: record arrived without supporting documentation. PIP not identified. Hold pending documentation.

AFTER / Supported revision

Employee placed on Performance Improvement Plan January 5 following three missed deadlines in Q4 (October 14, November 3, December 1). Check-in notes from January 19, February 9, and March 2 reflect continued performance gaps. Written warning issued March 5 after error rate remained above the documented threshold. Employee acknowledged PIP and warning in writing. Following the 60-day review, performance had not met the documented standard. HR secondary review completed March 8. All records on file.

- ✓ Performance plan identified and dated. Prior steps referenced with dates.
- ✓ Each coaching discussion documented. Written warning on file.
- ✓ Performance standard identified. Employee acknowledgments documented.
- ✓ HR secondary review completed and noted. Supporting records identified.

Example 05 / AI-Assisted Summary**SOURCE INTEGRITY GAP****BEFORE / As submitted**

"AI summary: Employee has consistently demonstrated difficulty working within team structures and shown resistance to supervisory guidance. Performance has been assessed as below the expected standard."

- "AI summary" present but source records not identified. What was reviewed?
- "Consistently demonstrated" -- no dates, no incidents, no behavioral anchors.
- "Resistance to supervisory guidance" -- not traceable to documented interactions.
- Reviewer note: AI characterizations unanchored. Human confirmation not on file. Returned. Hold pending source verification.

AFTER / Supported revision

Summary reviewed against meeting notes dated March 4, 11, and 18, and coaching records from February 10 and March 3. Summary reflects documented interactions only. No unverified characterizations introduced. On March 4, employee declined project planning participation without stated reason (meeting notes). On March 11, employee did not submit required status report despite two documented requests (March 8 and 10). Human review completed March 19. Confirmed against original notes. No conflicts identified.

- ✓ Source records identified: three meeting notes and two coaching records, all dated.
- ✓ Each characterization traceable to a specific documented event.
- ✓ Human reviewer confirmed wording against source material before finalization.
- ✓ Reviewer confirmation documented and on file.

Example 06 / Investigation Record

DOCUMENTED REASONING GAP

BEFORE / As submitted

"Based on the investigation, it was determined that the employee engaged in inappropriate conduct toward a colleague. The evidence supports a finding that a policy violation occurred."

- "Inappropriate conduct" -- no specific behavior described. What occurred, when, where?
- "Evidence supports a finding" -- what evidence? No source materials identified.
- "Thoroughly investigated" -- what materials were reviewed? Witnesses identified?
- Reviewer note: conclusion extends beyond identified evidence. Source materials not named. Returned.

AFTER / Supported revision

Investigation reviewed: complainant interview (April 10), respondent interview (April 12), two witness interviews (April 11 and 14), email correspondence April 3 and 7. On April 3, respondent sent an email complainant described as threatening; respondent acknowledged sending it but disputed the characterization. One witness corroborated the complainant; one stated they were not present. Conflicting accounts noted and preserved. Finding: April 3 email violated Respectful Workplace Policy Section 4.2, acknowledged January 15. Human review completed April 16 by independent reviewer.

- ✓ Source materials identified: four interviews and email correspondence -- all dated.
- ✓ Specific conduct described: identified communication on a specific date.
- ✓ Conflicting accounts acknowledged and preserved.
- ✓ Policy basis and independent reviewer noted.

Example 07 / Accommodation Record**RECONSTRUCTION FAILURE****BEFORE / As submitted**

"The employee's accommodation request was reviewed and a determination was made. The requested accommodation could not be provided due to operational requirements."

- No interactive process steps documented. What discussions, with whom, on what dates?
- "Operational requirements" -- what requirements? No undue hardship analysis referenced.
- "Could not be provided" -- no alternatives considered or documented.
- Reviewer note: accommodation record missing interactive process documentation. Legal review recommended.

AFTER / Supported revision

Employee submitted accommodation request March 10 for modified scheduling due to documented medical condition. HR met with employee March 14 and reviewed supporting documentation. HR consulted with department manager March 17 regarding scheduling constraints. Two alternative schedules proposed March 19; employee declined both. HR issued written determination March 22 explaining constraints and alternatives. Employee acknowledged receipt March 23. All documentation on file. Legal review completed March 21.

- ✓ Interactive process steps documented with dates: request, meeting, consultation, determination.
- ✓ Alternatives considered and documented. Employee responses recorded.
- ✓ Operational constraint identified with specific basis.
- ✓ Written determination issued. Employee acknowledgment and legal review on file.

How to Apply These Examples

Use these examples at the drafting stage, before records enter official systems. Share with managers, investigators, and HR reviewers as onboarding references.

FROM PRACTICE

Most records that fail during later review looked complete to the person who drafted them. The gap is usually not intent. It is the distance between what the author understood and what the file actually shows.

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