

## SECTION E / IMPLEMENTATION GUIDANCE

# JRS™ Implementation Playbook

A practical guide for introducing JRS within existing organizational workflows. No dedicated software, system replacement, or formal rollout required.

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**CORE PRINCIPLE**

JRS is designed for incremental adoption. Organizations apply it at varying levels depending on documentation sensitivity, organizational structure, and workflow. Start with one record type. Expand from demonstrated usefulness.

01

## What You Are Implementing

JRS is a pre-finalization documentation review control. It operates at the drafting stage, before records enter official systems. It does not replace existing HR, compliance, or investigative procedures. It fits inside them.

The review checks three things: can the record stand on its own, does each conclusion have a specific anchor in the file, and can a later reviewer reconstruct the basis without contacting the original author.

JRS is not:	JRS is:
A software platform or system replacement	A review methodology applied within existing workflows
A legal sufficiency standard	A documentation quality check before system entry
A compliance mandate or certification regime	An operational reviewer reference compatible with existing procedures
A replacement for HR expertise or legal counsel	A structured method for identifying documentation traceability gaps

02

## Three Implementation Models

Organizations apply JRS at varying levels. These models are illustrative. Start wherever current workflow supports. Expand incrementally.

**Phase 1**    **Self-Review** Minimum viable implementation. No secondary review required.

-- **Drafter applies the Pre-Finalization Worksheet**

Before submitting any elevated-risk record.

-- **Five questions applied**

Before the record enters an official system of record.

-- **No dedicated tooling required**

Works inside existing drafting workflow.

-- **Appropriate for**

Standard performance records, routine counseling, informational records.

**Phase 2**    **Secondary Review** Standard model for elevated-risk documentation.

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-- **HR or compliance reviewer applies the Escalation Form**

When a high-risk indicator is present.

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-- **Secondary review before system entry**

For termination, formal discipline, accommodation, and AI-assisted records.

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-- **Reviewer Signoff Template attached**

Upon completion of secondary review.

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-- **Appropriate for**

All elevated-risk records. Standard model for HR and compliance teams.

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**Phase 3**    **Audit Integration**    Systemic quality monitoring across record populations.

-- **Compliance or audit personnel sample records periodically**

Using the failure-mode catalog from the Redlined Examples.

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-- **Sampling results identify**

Departments or record types where documentation quality is consistently insufficient.

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-- **Reviewer operates independently of the drafting chain**

Where staffing allows.

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-- **Appropriate for**

Organizations with active audit programs or compliance review functions.

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03

## Implementation Sequence

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The following sequence applies when introducing JRS to a team or organization for the first time. No formal rollout required. Each step builds on the previous.

### 1 Identify one record type to start with

Termination records, accommodation documentation, or investigation conclusions are the highest-leverage starting points. Performance records are the most common entry point.

### 2 Share the Redlined Examples with drafters and reviewers

Work through the seven before/after examples together. Identify which failure modes appear most often in your record types.

### 3 Apply the Pre-Finalization Worksheet to the next record

Drafter or first-line reviewer applies the five questions before submission. No training required. The worksheet is self-explanatory.

### 4 Apply the Escalation Form when a high-risk indicator appears

High-risk indicators: evaluative language without anchors, escalation without a prior counseling trail, AI-assisted summaries without source verification.

### 5 Introduce the AI Verification Checklist for AI-assisted records

Apply before any AI-assisted content enters an official system. Human confirmation documented before system entry.

### 6 Expand to additional record types

Once the workflow is established for one record type, introduce to other elevated-risk categories. Incremental. No structural change required.

### 7 Audit sampling (optional)

Periodic sampling of existing records identifies systemic gaps across departments. Use the failure-mode catalog. Results identify where documentation quality intervention is most warranted.

#### IMPLEMENTATION NOTE

Most implementation problems occur when JRS is introduced as a policy requirement before practitioners find it operationally useful. The stronger approach is demonstrated usefulness first. Start with one record type and one team. Expand from there.

04

## Introduction by Role

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Each role has a natural entry point. The following describes how JRS is most usefully introduced depending on the practitioner's function.

**HR Generalists and HR Business Partners**

**Entry point:** Pre-submission review of performance, disciplinary, termination, and accommodation records.

**Primary tools:** Pre-Finalization Worksheet, Secondary Review Escalation Form, Reviewer Signoff Template

**Compliance Personnel**

**Entry point:** Audit sampling of existing records. Escalation review for high-risk documentation.

**Primary tools:** Redlined Examples, failure-mode catalog, Secondary Review Escalation Form

**Investigators and EEO Reviewers**

**Entry point:** Source identification, conflict acknowledgment, and reconstruction review for investigation records.

**Primary tools:** Investigator Field Guide, Redlined Example 06 (Investigation)

**Managers and Supervisors**

**Entry point:** Self-review of performance and conduct documentation before submission.

**Primary tools:** Pre-Finalization Worksheet, Redlined Examples 01-04

**AI Governance Reviewers**

**Entry point:** Source verification and human confirmation for AI-assisted records before system entry.

**Primary tools:** AI Verification Checklist, Redlined Example 05 (AI Summary)

**Legal and Compliance Counsel**

**Entry point:** Secondary review of elevated-risk records. Escalation routing for termination and accommodation.

**Primary tools:** Secondary Review Escalation Form, Reviewer Signoff Template, Investigator Field Guide

## Common Implementation Questions

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**Q: Does implementation require a formal policy change?**

No. JRS operates within existing workflows without requiring policy revisions, system changes, or dedicated software. It can be introduced as a reviewer reference before any formal adoption decision.

**Q: Do we need to notify employees that JRS is being used?**

JRS is a documentation quality review applied internally before records enter official systems. It does not change the substance of employment decisions or alter employee-facing communications.

**Q: What if our records are already in the system?**

JRS applies prospectively at the pre-submission stage. It is not designed for retroactive revision of existing records. For existing records under review, the failure-mode catalog and reviewer questions can assist in identifying gaps that may require supplementation where permitted.

**Q: How do we handle AI-assisted drafting that is already in use?**

Apply the AI Verification Checklist before any future AI-assisted content enters an official system. Human confirmation documented before system entry. This is the most reliable control point.

**Q: What does implementation look like under staffing pressure?**

Under staffing constraints, apply the Rapid Review minimum standard: identify unsupported evaluative language, confirm timeline anchors for pattern claims, verify referenced policies or source records are identifiable, and ensure each conclusion is reconstructable from the record alone. Four checks before any record enters the system.

**Q: Can JRS be used in union environments?**

JRS evaluates documentation sufficiency independently of the underlying administrative outcome. It does not affect substantive employment decisions, grievance procedures, or contractual obligations. Organizations should assess applicability in their specific labor relations context.

### LIMITATIONS

JRS does not constitute legal advice. It does not establish legal sufficiency or eliminate organizational risk. Organizations should consult with legal counsel regarding applicable documentation requirements in their jurisdiction. Documentation that satisfies JRS may still be insufficient under applicable law.

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