

VIKRAM JHA - DEFENSIBLE AI METHOD

THE ANNOTATED DOCUMENT - METHOD AND TEMPLATE

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<https://vikramjha.work/artifacts/primary-source-annotation-method>

How to brief others on a primary document so that the brief survives being checked
- four marks, a template, and a source-tier scale stated out loud.

WHY IT EXISTS

A summary cannot be audited; a marked-up document can. The discipline is small and it is the whole product: go in the document's order rather than your own, disagree in place at the passage, mark what you could not verify, and count the natural unit rather than estimating it. The moment you reorganize a document into your own argument you have written an opinion piece with extra steps, and the reader was trusting you for fidelity.

WHAT IT CONTAINS

1. Why the annotation rather than the summary
2. The four marks, one per passage, and the obligation each one carries
3. The mark nobody else publishes, and why it does the most work
4. A template for a single annotated passage
5. A source-tier scale stated in the margin and out loud

THE FOUR MARKS

Every annotation is exactly one of these, and each passage gets one.

AGREE

Means: The document is right and the point is load-bearing.

The obligation it carries: State why it matters, briefly.

DISAGREE

Means: The document overreaches, or is wrong.

The obligation it carries: State the counter-argument at that passage, not in a closing section.

UNVERIFIED

Means: A figure or claim the document attributes to a source you did not open.

The obligation it carries: Name the tier and say so plainly: 'they cite this; I have not read the underlying study.'

NOT LICENSED

Means: A conclusion readers commonly draw from this passage that the passage does not support.

The obligation it carries: Name the overreach and refuse it. This is the mark that does the most work and the one nobody else publishes - the standing example is a

supervisory deferral being widely read as an exemption.

THE SOURCE-TIER SCALE

Stated in the margin and out loud, so a reader can weigh every claim without taking your word for its provenance.

S

Meaning: Primary, opened and read in full.

A

Meaning: Cited by the document; the underlying source was not opened.

C

Meaning: Secondary reporting of a primary that could not be reached.

D

Meaning: Not used. If it would be D, it does not ship.

THE TEMPLATE, PER PASSAGE

THE PASSAGE

What goes in it: Quoted verbatim, with its locator.

MARK

What goes in it: One of the four.

WHAT IT SAYS

What goes in it: A plain-terms restatement, with no interpretation yet.

WHAT IT MEANS

What goes in it: The mechanism, in operational terms.

MY READ

What goes in it: Agreement, disagreement, or the limit of what could be checked.

WHAT IT DOES NOT LICENSE

What goes in it: The available overreach, named and refused.

HOW TO USE IT

1. Work in the document's order, never your own.
2. Give every passage exactly one of the four marks, and disagree in place rather than in a closing section.
3. Count the document's natural unit - findings, pages, recommendations - and never estimate it. The count is the credibility claim of the entire format.
4. Do not skip the boring findings. The completeness is the product: if a finding is dull, say it is dull and move on in ten seconds, but do not silently drop it.
5. Never quote a figure the document attributes to someone else as though the document established it.

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