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Presented by Zaria Davis

Presented to Dr. Chris Lam

Presented for TECM 5290.01

# Needs Assessment:

## McConnell Hall Residence

The instillation of Incident Reports (IRs) for staff functionality

McConnell Hall provides residence to over 300 students within the University of North Texas (UNT); however, this hall differs from others in the adolescent status of its residents. Due to the sensitive nature of the students, staff members place emphasis on understanding, awareness, and synchronization between staff, students, and guardians.

The mission is heavily embodied in the act of writing an Incident Report (IR) which can cover ranges of situational context for all parties to be on the same page and in agreement with one another.

In achieving this mission, staff members are required to participate in training on how to complete an Incident Report (IR). These reports are the foundation of the relationship/ between staff, students, and concerned parties (parents/guardians). After going through a brief session concerning the implementation of the IR writing process, staff members have a potential lack of value for the task; this attitude leads to a third-party staff member tasked with making corrections on their behalf. With enhanced training, staff members will have the opportunity to:

- Understand the importance and value of the reporting process
- Improve the confidence of staff members to complete the report
- Ability to judge the quality of their own writing

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## Contents

Project Objectives: .....	1
Learner Profile .....	1
Research Questions:.....	1
Methods: .....	2
Interviews .....	2
Survey Question.....	2
Observation .....	2
Existing Materials .....	2
Results: .....	3
Data Analysis:.....	3
Interview/Survey Question .....	3
Observation .....	3
Existing Materials .....	3
Recommendations:.....	5
Training Solutions & Learning Outcomes .....	5
Training.....	5
Learning Outcome.....	5
Training.....	5
Learning Outcomes.....	5
Training.....	5
Learning Outcome.....	5

## Figures

Table 1: Report Writing Level of Difficulty .....	4
Table 2: Report Requirement Mentions.....	4

## Appendices

Appendix 1: Interview Questions .....	1
Appendix 1a – Original Interview Questions.....	1
Appendix 1b – ADSL Interview .....	3
Appendix 1c – PA Interview (1) .....	5
Appendix 1c – PA Interview (2) .....	8
Appendix 1d – RA Interview (e-mail).....	11
Appendix 2: Existing Materials.....	13
Appendix 2a – Report Writing (PDF).....	13
Appendix 2b – Report Style Guide .....	14

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# Project Objectives:

**Business Goal:** Enhanced training provides staff members with a smoother more organized work environment for all of staff without complications of an increased workload nor the stalling of further action needing to be taken in the case of an incident.

**Project Goal:** Enhanced training will ensure the competency of each staff member to complete an IR without necessary corrections from a third-party member.

**Constraints:** The sensitive nature of the residence hall's student allows for little to information to be released concerning nature of reports/situations involving the resident(s). This limitation is upheld for not only the general public, but staff members that do not have direct involvement are not allowed access to information. This is present in the training process due fictional events being used as examples instead of past scenarios.

## Stakeholders:

Assistant Director of Student Life (ASDL)  
Program Advisor (PA)  
Resident Assistant (RA)  
Desk Clerk (DC)

## Learner Profile

Age	17 -25
Prior Knowledge	Aware of the requirement to conduct an IR
Strengths	Ability to work within fast paced in environment
Attitudes	Eager to learn and connect with staff and residents
Wants	To earn staff recognition/kudos and/or later be offered a chance for promotion
Needs	Able to handle and improve from any critiques

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## Research Questions:

In summary of my research methods, each stakeholder was taken through a variety of research methods in order to answer the following questions:

- What is the level of difficulty of an IR?
- What can be improved within IR training?
- What is a reasoning behind an IR being written incorrectly?

Please click [here](#) for original questions and individual interview transcripts

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# Methods:

This section justifies the various forms of research conducted.

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## Interviews

I interviewed the Assistant Director of Student Life (ADSL) in order to gain insight on the reasoning behind current training decisions. This individual has full access to all reports filed and is one of few with the authority to request that a report be reconstructed.

I interviewed Program Advisors (PAs) as they have gone through a previous training for report writing and provide essential feedback on the stakes presented when an IR is illegible.

I interviewed a Resident Assistant (RA) for their fresh/more recent perspective of being trained in report writing and their struggles or successes throughout their experience.

## Survey Question

Included in the aforementioned interview, a single-question survey is included to further evaluate the varying level of difficulty in filling out a report based on extenuating circumstances that cause an escalated situation to require to be documented.

## Observation

In my personal observation of desk clerks involved in the report writing process I can evaluate the level of input, both physically and mentally, required to fill out an IR outside of high-intensity situations. Along with gathering the feedback from those who control the training process.

## Existing Materials

In order to clearly analyze training content and overall process, I was provided with the following materials:

- Report Writing Overview & Quiz
- Section B: Writing Reports (*RA Manual – Binder*)
- Style Guide for Writing Reports
- Report Writing (PDF)

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# Results:

The results of my research are to focus on answering the following questions:

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## Data Analysis:

The results of my data are organized by research method.

## Interview/Survey Question

In my face-to-face interview with each of the stakeholders a common theme seems to be that the overarching task of writing a report is not straining on the writer's capabilities. Each participant gave a rating below 2 for the level of difficulty. Even more in sync were the responses received from questioning their believed reason behind reports that are required to be re-written or corrected. A summarization of their response say that the level of accuracy depends on the writer's sense of importance towards writing the report. Participants believe that a general understanding of what an IR is and how to perform it has no bearing if the person does not "care" about the process.

*Sometimes [report writing] is seen as a hoop to jump through without connecting the dots of how important it is; prevention is not taking it serious enough or being lazy*  
-ADSL

## Observation

In watching the performance of desk clerks give a brief run-through of over-seeing the training process I was able to verify that there is a high-level of confidence within their instruction. In addition to guiding staff members through the training process, DCs also are responsible for all reference and document materials handed out during and after the training. Their overall purpose is to ensure that material is thorough enough to be taught and understood by anyone. They took the liberty of allocating specific areas for staff members to be in contact of procedures at any point in their job – there are reference materials located at the central desk and within a folder on the desktop for all of staff to access.

## Existing Materials

In evaluating the existing materials that staff members are asked to use as additional references, I found that content is thoroughly broken down into a memorable acronym, step-by-step procedures, and sensible sections. The information contained on each page is narrowed into simplistic paragraphs with bolded emphasis on important phrases. The PDF presentation is easy and entertaining/engaging for the audience correlates perfectly to the additional handout. In all, the provided document for staff to refer back to is direct and resourceful. They are in good standing as reference material without being overwhelming in time nor information.

<i>Stakeholder</i>	<b>Level of Difficulty (1-5)</b>	<b>Level of Difficulty (1-5) in high-risk situation</b>
<i>ADSL</i>	1	4
<i>PA (1)</i>	1	“variables can make the task tedious” possible 2
<i>PA (2)</i>	1	1
<i>RA</i>	“Pretty Easy” possible 1	“never sure what rating to give” possible 3

Table 1: Report Writing Level of Difficulty

The table above indicates the level of confidence towards each stakeholder’s ability to complete an IR. Data shows that the overall task is easy but is dependent on outside variables within the situation that is being reported. The increased difficulty of a high-risk situation is described to be caused by the possibility of information overload or drawn out timeframes in which the staff member must continuously keep track of all variables involved (witnesses, timeframe, actions, etc.).

<i>Report Requirements</i>	<b>Interview Mentions (out of 4)</b>	<b>Interview Mentions (out of 100%)</b>
<i>Date</i>	3	75%
<i>Times</i>	3	75%
<i>Location</i>	2	50%
<i>Details</i>	4	100%
<i>Witnesses/Involved Parties</i>	3	75%
<i>Report Type</i>	0	0%
<i>Title of Report</i>	0	0%
<i>3<sup>rd</sup> Person Narrative</i>	2	50%
<i>Position Titles</i>	1	25%

Table 2: Report Requirement Mentions

This table displays the number of times that each stakeholder mentioned the requirements of a report when asked the question: “*What are the main components of writing an IR?*” By evaluating which concepts were repeated through their multiple reference materials, I was able to measure their responses. Only one requirement had a unanimous score of 100% (4 out of 4 mentions); despite being an outlier, I do not feel that the ratings are representative of staff knowledge in the report writing process, but represents the level of comfort with the process. This lassitude is presented mainly by those who have worked at the residence hall for a considerable amount of time and ultimately are greatly familiar with the process.

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# Recommendations:

## **Training Solutions & Learning Outcomes**

Taking into consideration both flexibility and emotional standing of staff members towards the current training process of Incident Reporting, I have produced training procedures that will be beneficial to the entirety of staff to refer to and enhance understanding. These solutions will be most beneficial to incoming staff members in guiding the learning process of IRs while boosting task confidence/competency.

### Training

Require the utilization of notetaking during the training session where staff is required to write down highlights of an example scenario.

### Learning Outcome

Staff member will get into the natural flow of framing the timeline of the situation and better enable them to recount the events/information for the IR process. This will assist in the formulation of the report and provide a visual upload of written notes for upper management to access.

### Training

Create a simulation using veteran staff members in order to provide a visual aid of the influence improper report writing can cause.

### Learning Outcomes

Staff members will evaluate the impact and place value in the importance of report writing and further prevent lack of empathy towards the task.

### Training

Create a graded style guide for upper management and clerical staff to host a monthly critique of staff members report writing.

### Learning Outcome

By having a checks-and-balance system enforced through critiques staff moral will be enhanced and provide areas of improvement to be identified and corrected.

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# Appendix 1: Interview Questions

## Appendix 1a – Original Interview Questions

Hello! Thank you so much for your support in this assignment Listed below are my interview questions – please try your best to answer fully and there is no such thing as too much information. Feel free to skip any questions that are confusing or you feel unable to answer.

- What is your role/position in relation to staff?
- o Do you provide a type of support for all of staff or for a certain group within staff? How so?
- What is an Incident Report (IR)?
- Why is there a need for an IR to be correctly written – in relation to staff functionality NOT student welfare?
- What are the main components of writing an IR?
- What current training is in place for teaching staff members to write an IR?
- o What takes place in this training? Are staff members given written materials to look over or are they taken through the act of writing an IR? Both?
- § How long does this training last?
- § How often is this training retaught within a semester?
- § Are there any documents for staff members to refer back to once training ends?
- What changes if any would you make to the way that staff is trained to complete an IR?
- o Would you make training shorter/longer? More practice in writing? Etc.?
- Have you written an IR?
- o On a scale of 1-5, how would you rate the level of difficulty in completing this task?
- § Does your answer vary depending on if the report is covering a high-risk or low-risk situation? If so, what rating (level of difficulty for writing the report) would you give high-risk situations and low-risk situations?
- On a scale of 1-5, how confident are you in staff's ability to confidently complete an IR without error?
- How frequently are you asked by staff members to reiterate the task of completing an IR?
- o Does this question typically take place at certain points during the semester? On a weekly/monthly basis?
- How often are reports required to be re-written?



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- If a report is required to be re-written, what is the main cause?
  - o Missing date/name/details – please be specific?

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## Appendix 1b – ADSL Interview

‘Hello! Thank you so much for your support in this assignment 😊 Listed below are my interview questions – please try your best to answer fully and there is no such thing as too much information. Feel free to skip any questions that are confusing or you feel unable to answer.

- What is your role/position in relation to staff?

I supervise PA directly and HDD co supervise with Russ I would say the entire staff direct reports to me

- Do you provide a type of support for all of staff or for a certain group within staff? How so?
- What is an Incident Report (IR)?

Specifically, a report that is written in violation to policy or accident anything of a serious matter

- Why is there a need for an IR to be correctly written – in relation to staff functionality NOT student welfare?

Needs to be legible and readable overall understandable to those reading it; if it is written poorly then the reader who has no context has no bearing to make further actions (needs 3<sup>rd</sup> person); writer should have a mindset that reader depends on them in a way that is understandable

Do people keep that in mind?

Sometimes it is seen as a hoop to jump through without connecting the dots of how important it is; prevention is not taking it serious enough or being lazy so depends conditions of situation

- What are the main components of writing an IR?

Writing in 3<sup>rd</sup> person – solid timeline “at this time this happened...then at this time”; step-by-step consistent time – detail oriented – specific person involved and witnesses’ statements of facts not opinion

- What current training is in place for teaching staff members to write an IR?

PA: straightforward so PAs are not required to go through formal training like RAs

RA: is run by HD or desks; basics of what is required important things to keep in mind; case study given and told to write feedback

Possibility of what could happen if not written correctly confidentiality is kept in old reports after certain amount of years

REPORT acronym.

- What takes place in this training? Are staff members given written materials to look over or are they taken through the act of writing an IR? Both?

Yes, they are given material to look at during training it is also included in the manual

- How long does this training last?

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## An hour for IR training

Possibility for "Behind Closed Doors" experience with time allotted for going back to write the report because that is the actual experience

- How often is this training retaught within a semester?

Once each semester with ongoing report feedback of bad reports possible 1:1 training between their supervisor or the desk

Twice in the year officially with on the job training and refreshments withing staff (only if there is a trend)

- Are there any documents for staff members to refer back to once training ends?

Yes, it is also included in their manual

- What changes if any would you make to the way that staff is trained to complete an IR?

I think that I don't know what kind of assessment we give when they write the report – I would like to give a rubric and hand-graded feedback on if it meets expectations so that they know

- Would you make training shorter/longer? More practice in writing? Etc.?

Yes to more practice in writing; training time is sufficient but it is more about practice and feedback so that changes can be made

- Have you written an IR?

Yes

- On a scale of 1-5, how would you rate the level of difficulty in completing this task?

Very tedious that part is a 1; the difficult part is remembering \*accuracy through memory is a 4\* in a situation I needed to keep track and make notes/markers of who was involved and what I know so that when I sat down at the computer I could recreate the situation; it has to be done immediately – the more you delay the harder it is to recall

By vs Off memory: you can get confused or give/write the information (OFF) sometimes you can have an impression that is inaccurate nothing can take place of actually being there

- Does your answer vary depending on if the report is covering a high-risk or low-risk situation? If so, what rating (level of difficulty for writing the report) would you give high-risk situations and low-risk situations?

If it is a difficult it increases the level; your working memory can only hold so much

- On a scale of 1-5, how confident are you in staff's ability to confidently complete an IR without error?

$\frac{3}{4}$  at the point in the semester it is an increasing thing training is not the end all be all of a person's capabilities (early in the fall it may be less confident) the higher the stakes the more required

training as a waiter its easy but as an EMT/Officer you need copious amount of training before they release you

- How frequently are you asked by staff members to reiterate the task of completing an IR?

N/A they would be more comfortable going to peers with upper management they would give the impression that of course they know how to do it

- Does this question typically take place at certain points during the semester? On a weekly/monthly basis?

N/A

- How often are reports required to be re-written?

No idea; only a couple of time do we contact an RA for more information "Need another word" not re-written but questions for further details that goes back to writing the report to giving the next person enough details to take the next step; if there are no details then the report is useless

- If a report is required to be re-written, what is the main cause?
  - Missing date/name/details – please be specific?

Missing details of how the situation played out missing gaps in the timeline

Never had to re-write a report

## Appendix 1c – PA Interview (1)

Hello! Thank you so much for your support in this assignment Listed below are my interview questions – please try your best to answer fully and there is no such thing as too much information. Feel free to skip any questions that are confusing or you feel unable to answer.

- What is your role/position in relation to staff?

Program Advisor and sometimes Hall Director on Call (HDOC)

- Do you provide a type of support for all of staff or for a certain group within staff? How so?

Both if anyone needs help within staff they come to me; a certain group that work on projects

- What is an Incident Report (IR)?

If something happens (fire alarm, disruption to the peace) what happened, who is involved and the overall process of dealing with the situation

- Why is there a need for an IR to be correctly written – in relation to staff functionality NOT student welfare?

I think 1. It helps to document the process in which a situation is handled and address issues of how well the situation is handled

- What are the main components of writing an IR?

Writing in 3<sup>rd</sup> person to not be subjective, using correct date and location, knowing when where and how things happen should be included.

- What current training is in place for teaching staff members to write an IR?

During our training period there is session where the person who edits and goes through IRs teaches/leads on what component are needed to be complete and correct. We write sample IRs and are graded on efficiency

- What takes place in this training? Are staff members given written materials to look over or are they taken through the act of writing an IR? Both?

No we are not allowed to read previous IRs due to confidentiality, but there may be some in the handbook.

- How long does this training last?

An hour

- How often is this training retaught within a semester?

Once a semester

- Are there any documents for staff members to refer back to once training ends?

There are pages within the handbook for IRs and tells you what information you need to know (ex: talk in 3<sup>rd</sup> person, use the date)

- How often have you referred to this material?

Not that often, it is a simple process to understand. There is a need for the refresher, but writing is not hard.

- What changes if any would you make to the way that staff is trained to complete an IR?

I feel that based on the staff determines the type of training is needed; I feel that it depends on the people and their capabilities. Anything more would be overkill for me

- Would you make training shorter/longer? More practice in writing? Etc.?

It is fine that way it is, but people need to listen more to the training. It is not a formula that needs notes.

- Have you written an IR?

Yes

- On a scale of 1-5, how would you rate the level of difficulty in completing this task?

Zero (0)

- Does your answer vary depending on if the report is covering a high-risk or low-risk situation? If so, what rating (level of difficulty for writing the report) would you give high-risk situations and low-risk situations?

I think that the actual task of writing doesn't change, but the different variables can make the task tedious. There are times that you could be writing at 4am – which is why there is the option of taking notes of time and details so that when you go to write the report it is basically already written

- On a scale of 1-5, how confident are you in your ability to confidently complete an IR without error or corrections needing to be made?

5

- How frequently are you asked by staff members to reiterate the task of completing an IR?

2-3 times a month

The question is usually asked if they are unsure if they NEED to write an IR, but sometimes you feel that they should have asked for more information because certain details are missing after finalization. Raynelyn usually doesn't know that info is missing because she only sees what is written.

- Does this question typically take place at certain points during the semester? On a weekly/monthly basis?
- Have you had to answer other staff member's questions concerning IRs?
  - What questions are typically asked?
  - How often are you asked?
- How often are reports required to be re-written?

None so far

- If a report is required to be re-written, what is the main cause?
  - Missing date/name/details – please be specific?

I have not rewritten a report

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## Appendix 1c – PA Interview (2)

Hello! Thank you so much for your support in this assignment Listed below are my interview questions – please try your best to answer fully and there is no such thing as too much information. Feel free to skip any questions that are confusing or you feel unable to answer.

- What is your role/position in relation to staff?

Program Advisor and sometimes Hall Director on Call (HDOC)

- Do you provide a type of support for all of staff or for a certain group within staff? How so?

I provide support for all Residence Assistants (Ras)

- What is an Incident Report (IR)?

Documentation of an incident

- Why is there a need for an IR to be correctly written – in relation to staff functionality NOT student welfare?

Make sure people act right; To make sure we are all on the same page of how we are going about our job.

- What are the main components of writing an IR?

Need to know who was involved and what happened

- What current training is in place for teaching staff members to write an IR?

Raynelyn once a semester does a full training to how to do it; if staff has questions they can ask her or other PAs

- What takes place in this training? Are staff members given written materials to look over or are they taken through the act of writing an IR? Both?

Both, we receive written material, watch PowerPoint, and are given a fake scenario to write

- How long does this training last?

About 45 minutes every semester

- How often is this training retaught within a semester?

Every semester

- Are there any documents for staff members to refer back to once training ends?

Yeah; we can look back at the paperwork we received during training of the PowerPoint; I do not know if it is referenced in the handbook.

- What changes if any would you make to the way that staff is trained to complete an IR?

Maybe another follow-up practice to ensure that they still know how to write one; continuous critiques on the ones that they have written

- Would you make training shorter/longer? More practice in writing? Etc.?

Keep the same time; yes more practice after the first few so that you can ensure that staff actually knows and to catch any issues that may be a problem later on

- Have you written an IR?

Yes

- On a scale of 1-5, how would you rate the level of difficulty in completing this task?

1

- Does your answer vary depending on if the report is covering a high-risk or low-risk situation? If so, what rating (level of difficulty for writing the report) would you give high-risk situations and low-risk situations?

No

- On a scale of 1-5, how confident are you in your ability to confidently complete an IR without error or corrections needing to be made?

5

- How frequently are you asked by staff members to reiterate the task of completing an IR?

At least twice a month

The question is usually asked if they are unsure if they NEED to write an IR

- Does this question typically take place at certain points during the semester? On a weekly/monthly basis?
- Have you had to answer other staff member's questions concerning IRs?
  - What questions are typically asked?
  - How often are you asked?
- How often are reports required to be re-written?

One

- If a report is required to be re-written, what is the main cause?
  - Missing date/name/details – please be specific?

I have not had to re-write a report





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## Appendix 1d – RA Interview (e-mail)

Hello! Thank you so much for your support in this assignment Listed below are my interview questions – please try your best to answer fully and there is no such thing as too much information. Feel free to skip any questions that are confusing or you feel unable to answer.

• What is your role/position in relation to staff? I was a resident assistant at McConnell Hall

o Do you provide a type of support for all of staff or for a certain group within staff? How so? **As an RA you do provide support for all staff and residents. Just by being a good RA that can answers questions and help whenever is needed.**

• What is an Incident Report (IR)? A report that documents certain incidents such as microwave explosions that happen in the hall.

• Why is there a need for an IR to be correctly written – in relation to staff functionality NOT student welfare? It is important to accurately report what happens during an incident to ensure all parties are held accountable for whatever happened. And the report is given to all administration.

• What are the main components of writing an IR? **Date, Time, People involved, what happened, where it happened, observations**

• What current training is in place for teaching staff members to write an IR?

o What takes place in this training? Are staff members given written materials to look over or are they taken through the act of writing an IR? Both? **We get a brief tutorial on report writing that takes about an hour during a full two weeks training of all aspects of being a resident assistant.**

§ How long does this training last? **Only an hour maybe even half hour**

§ How often is this training retaught within a semester? **Mid semester but you can ask HDs or the night desk shift person about formatting the report.**

§ Are there any documents for staff members to refer back to once training ends? **There are, but they don't really cover too much**

• What changes if any would you make to the way that staff is trained to complete an IR?

o Would you make training shorter/longer? More practice in writing? Etc.?

o **All of the above. Making the training longer and letting us role play and figure out what to put in the reports would be great so that we get an understanding of what should be included or disregarded.**

• Have you written an IR? **Yes**

o On a scale of 1-5, how would you rate the level of difficulty in completing this task? **It's pretty easy (so whichever corresponds to that) but you sometimes get unsure what to include because of the situations.**

§ Does your answer vary depending on if the report is covering a high-risk or low-risk situation? If so, what rating (level of difficulty for writing the report) would you give high-risk situations and low-

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risk situations? Yes it does depend. Low level reports don't take much effort and high levels reports you are never sure what rating to give.

• On a scale of 1-5, how confident are you in staff's ability to confidently complete an IR without error? Meh not that confident tbh

• How frequently are you asked by staff members to reiterate the task of completing an IR? Not many but I often have to ask others about the process

o Does this question typically take place at certain points during the semester? On a weekly/monthly basis? Depends on when situations occur but usually every time a major situation occurs

• How often are reports required to be re-written? If not up-to-par, as many times as it needs to be written. It is most often when you are just starting. You tend to get a hang of it the more you do it.

• If a report is required to be re-written, what is the main cause?

o Missing date/name/details – please be specific?

o Wrong format on date, names, or times

o Not too detailed

o The situation does not flow or is not readable

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## Appendix 2: Existing Materials

### Appendix 2a – Report Writing (PDF)



Click [here](#) to view document

## Appendix 2b – Report Style Guide

### Style Guide for Writing Reports

Reports are written when something unusual occurs to a resident or in a resident's life that TAMS Staff should be aware of. Some basic examples are things that affect a resident's physical or psychological health, family issues, academic issues, and also achievements.

#### Report Types

[www.tams.uni.edu/studentlife/ra-portal](http://www.tams.uni.edu/studentlife/ra-portal) ← Link to reports

There are four kinds of reports.

- **Incident Report:** Any situation involving discipline or strange occurrence that is out of the ordinary i.e. all levels of disciplinary violations except for 3/30s as well as significant building issues (fire alarms, flooding, etc.)
- **Medical Report:** All health situations (from minor to major incidences) involving a resident even if those residents do not go to the hospital. All situations which involve a hospital visit *require* a medical report. All medical reports should be followed-up the next morning.
- **Concern Report:** Any general concern relating to the residents. These reports can be about academic, emotional, or health concerns. All emergency travels *must* be documented in a concern report if not already documented in a medical report.
- **Kudos Report:** This report is to bring recognition to a resident who has done something positive in the TAMS community. This can be academics, community contributions, or even personal success.

#### Report Basics

Reports *must* be written the day of the incident and should be written ASAP after an event to ensure timely notification to necessary staff and to prevent the loss of important information.

- Reports are to be written anytime a staffer has new information or is physically involved in the situation.
- Report titles should be explanative but not over encompassing of the situation at hand.
- Reports are *always* written in third person. When writing in third person, avoid using pronouns in a sentence with two persons of the same gender.

Click [here](#) to view full report