REPORT WRITING
Objective

The purpose of this training module is to introduce the security officer to several different forms of reporting. This is not all inclusive as each property will have various other reports that will need to be completed but it will give a better understanding of what information needs to be collected in order to effectively communicate the issue with management.
What does a Security Officer do?

The primary job of a security officer is to attempt to prevent or deter a criminal act and detect suspicious activity. If they are unable to do this through their presence they must be able to accurately report the events, in written form, through detailed observation.
Why are these reports so important?

Written reports provide a permanent record for Executive Security and the Client.

Verbal reports are not trackable, they are not reliable for providing a permanent record.
Here are the People who may read the report

- Security Supervisors
- Security Management
- Facility Managers
- Legal Departments
- Risk Management Departments
- Human Resources Departments

- Property Managers
- Local Law Enforcement
- District Attorneys
- Defense Attorneys
- Jury Members
- The Media
Why Write a Report?

A report will also be used to advise management of an event that has created damage or loss of property or will create the potential for liability. They will use this information as a tool for various reasons, including:

• Investigations
• Tracking
• Determining who is accountable
• Control and mitigate loss or liability in the future
Loss could be most anything from loss of property to an issue that could cause liability or legal action. May not always be a criminal act
Examples of Loss of Property

FIRE

THEFT
Examples cont.

VANDALISM

PROPERTY DAMAGE
Water leak
Possible Safety Hazard

Fire Exit Blocked

Trip Hazard
Company Policy on Procedural Violation

These could lead to theft or some other type of loss.

- Piggyback or tailgating
- Not signing in
- Unlocked doors
Other Incidents that Require a Report

- Equipment malfunction
  - Lights out
- Medical Response
- Vehicle Collision
- Bomb Threat
When to write a report?

• Fire, Flood or Blood
• If the Fire Department, Police Department or EMS are on site.
• Anytime a security officer is involved
• When in doubt, write a report

As soon after the event as possible!
Types of reports

• Daily activity reports
• Field Notes
• Incident Reports
Daily Activity Report

Basic, everyday, report that a security officer must complete at every post to account for their activities throughout the shift.

• Chronological log of events
• Briefly documents common occurrences on your shift
• Directs management to see another more detailed incident report.
• Documentation of activity for accountability
Examples Entries on a DAR

• Post start time
• Officer you relieved
• All equipment assigned to post, and its working order
  - Key, radio, golf cart.....
• Rounds and findings
  - 2114 – S/O Smith performed perimeter check of building D – No unusual activity
Field Notes

Field notes are very useful to jot down pieces of information that will be needed later to complete an accurate and complete Incident Report.

For this reason, one of the most useful tools a security officer should carry at all times is a small easy-to-carry notebook.
Information recorded in Field notes

- Descriptions of suspects
- Names and badge numbers of emergency services personnel
- Vehicle numbers of emergency service Vehicles
- Names of witnesses
- Notes from interviews of witnesses
- Descriptions of vehicles
- List of items stolen
- List of items broken
- Names and contact information of Victims
- Time of incident
- Arrival times for emergency service Personnel
- Nonworking lights (security hazard)
- Torn carpets (trip hazard)
- Leaking pipes (trip hazard or damaged fire suppression system) or any other detail or event that will be needed for a report at another time
Field Note Scenario

Have you ever learned of an incident that occurred and thought to yourself?

- You know, I saw a car driving around that area.
- I saw a guy hanging out there earlier. When was that?
- Yesterday a woman told me that she heard something about that. What was her name?
- I thought that guy seemed suspicious. What did he look like?

A simple entry into your field notebook may be able to give you all the information needed to answer those questions.
Last thought on Field Notes

Even though Field notes are just that, notes, remember that they can still be used in court proceedings so be sure and keep it all business.

No personal information or opinions should be written here.
Incident Reports

An incident report is a way to record and report any unusual activity that may require special attention or follow-up. It should:

— Provide a picture of the events to persons who were not present.
— Preserve information for investigative or tracking purposes. Your information must stand the test of time.
— Document that Security is providing the contracted service to the client.
Qualities of a Good Report

As stated before clients and managers may rarely see you and will make an opinion of you and the entire security department based primarily on written reports. So these reports must provide information that is:

- Clear
- Concise
- Complete
- Accurate
Clear

Refers to the readability and understandability of the report.

• Must help the person who was not there understand exactly what went on. A report should be written legibly or typed to ensure that others can read it. It has little value if not understood.

• Use a dictionary if needed

• Reread or have someone else look over it
Concise

• A good acronym to remember when it comes to writing reports is K.I.S.S. (Keep It Short and Simple).

• Include all relevant information but be brief. Conciseness has to do with the brevity of the report.

• Do not abbreviate – some may not understand and “ASS” is not the same as “ASSOC.”
Complete:

Ensure that all of the details are included in the report. One method to accomplish this is to consider the “5 W’s and 1 H of report writing,” which is a guide to ensuring that a report is complete. It requires that you answer the following questions as they relate to the incident: Who, What, Where, When, Why, and How?
Accurate

• Only the facts
• “Use exact quotes”
• Never add your own opinions or assumptions

Times, dates, witnesses, descriptions and locations are critical so must be recorded accurately.
A Good Report

Attempt to obtain and answer these questions while on scene and record them in your field notebook.

- Who
- What
- When
- Where
- Why
- How

If Emergency Personnel are on scene be careful not to interfere but information can be obtained by listening in or politely explaining that you need to complete a report for management.
WHO

- Who is the victim/complainant?
- Who is the culprit/accused?
- Who responded?
- Who was notified?
- Who witnessed the incident?
WHAT

Elements of the crime or activity

• What the heck happened?
• What was stolen or damaged?
• What was the violation?
• What was the response?
• What did you observe or hear?
• What was the badge number of the police who arrived?
WHERE

Be exact: include address, floor, room number, etc.

• Where did the incident occur?
• Where was the victim taken?
• Where was the suspect taken?
• Where in the building?
WHEN

• When did the incident occur?
  – Includes the date and time. Can be a time frame
    (Example: Between Friday 5pm and Monday 8am)

• When did the police or ambulance arrive?

• When was the incident reported?
HOW

• How was the incident reported or how did you hear about it?
• How was the incident discovered?
• How was the suspect apprehended?
• How was the issue resolved?
• Be prepared to support your report with evidence collected

REMEMBER to ONLY REPORT FACTS
WHY

• Why did the incident occur?
• Why were the police called?
• Why did security respond?
• Why did the alarm sound?

Same as with HOW, only report the facts or what you know happened. Do not speculate as to why you think it happened.
Report Forms

Most Incident Reports will be completed on form of both fill-in-the-box and a narrative section. (Pre-printed or Narrative)

Make sure you sign and date all reports
# Incident Report

<table>
<thead>
<tr>
<th>Incident Date</th>
<th>Incident Time</th>
<th>Type of Incident</th>
<th>Time Officer Arrived</th>
<th>Time Cleared</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Business Name</th>
<th>Business Address</th>
<th>Exact location of Incident</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Witness Name</th>
<th>Witness Contact info (phone / e-mail)</th>
</tr>
</thead>
</table>

## Additional Information:

<table>
<thead>
<tr>
<th>Suspect #1 Info</th>
<th>Race</th>
<th>Sex</th>
<th>Age</th>
<th>Height</th>
<th>Weight</th>
<th>Hair</th>
<th>Eyes</th>
<th>Marks/Scars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name/Address or Other Identification</td>
<td>DOB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suspect #2 Info</th>
<th>Race</th>
<th>Sex</th>
<th>Age</th>
<th>Height</th>
<th>Weight</th>
<th>Hair</th>
<th>Eyes</th>
<th>Marks/Scars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name/Address or Other Identification</td>
<td>DOB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suspect Vehicle</th>
<th>Make/Model</th>
<th>Color</th>
<th>License Plate</th>
<th>Other descriptors</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Police Info</th>
<th>Contact Time</th>
<th>Police Officers Name or Badge#</th>
<th>Police Report #</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Customer/Management Notified</th>
<th>Customer/Management Notified Name</th>
<th>Reporting Security Officer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes</td>
<td>☐ No</td>
<td></td>
</tr>
</tbody>
</table>

## Narrative:

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Narrative

Industry best practice is to write reports in First Person, however Third Person is also acceptable.

- 1st person - I saw broken glass on the ground.
- 3rd Person - Security Officer Barrow saw broken glass on the ground.

Keep it simple, you never want the reader to get lost, or wonder what's going on while reading. Make it as simple as possible. Walk them through the entire incident. Paint a picture of events.
Narrative: The first step

First sentences begin to paint the picture by letting the reader know some important facts:
Who is the SO, where the SO was, what the SO was doing when they first learned of the incident.

• On 8/8/05, at approx. 1915 hours, I (SO Mike Barrow) was working at the ABC shopping center, on foot patrol in the street level parking garage, near the Congress St exit.

• On 8/8/05, at approx. 0820 hours, I (SO Mike Barrow) was patrolling the exterior of ABC Center.

• On 9/9/07, at approx. 1010 hours, I (SO Mike Barrow) was assigned to the Ida patrol route, stopped at the intersection of 9th and Red River, facing north.
Narrative

Paragraph or breaks between sections of your report.

– Think of paragraphs or breaking up the body of your report into topics.
  • The first step, your standard intro..
  • The second step, describing what you heard, saw..
  • Your contact with the scene, person, item...
  • Your response, 911, further investigation...
  • Each person you introduce into your narrative can be an indication to you to make a line break.
  • Good endings:
    – EMS transported patient
    – PD cleared the scene at XX am-pm
    – Building Engineer secured door and left the area at XX am-pm.
    – Nothing further to report
Narrative: The second step

The next section should begin to set the scene for the reader. Explain what you saw, heard, smelled etc. The reader will now begin to have an understanding of the incident from your perspective.

Let’s look at an incident and walk through it together – VIDEO
On 8/8/05, at approx. 0820 hours, I (SO Mike Barrow) was patrolling the exterior of ABC Center. John Smith approached and informed me that someone had fallen down the stairs near the front entrance. I responded to the area where I saw a female sitting on the steps holding her left knee.
Narrative: The next step

Additional relevant details or descriptions

Your response? What did you do?

- On 8/8/05, at approx. 0820 hours, I (SO Mike Barrow) was patrolling the exterior of ABC Center. John Smith approached and informed me that someone had fallen down the stairs near the front entrance. I responded to the area where I saw a female sitting on the steps holding her left knee.

- I immediately contacted, via radio, the management office and offered the victim, Jane Doe, assistance. Ms. Doe stated to me that she was “looking at my phone and must have missed the step” which caused her to fall, cutting her left knee.

- Ms. Doe further stated that she was not injured, except for the small cut and just needed to get to her office on the 6th floor. Ms. Doe refused any medical aid other than the bandaid I supplied from the first-aid kit. After which I walked with her inside.

- I checked the area and found that, other than the contents of her boxes, it was clear of any debris or obvious safety hazards. Pictures of the location are attached.
Important Information

• Make sure you have all of the witnesses information:
  – Name
  – Phone #
  – Work phone
  – What did they see or hear
• They may be contacted later to clarify or testify.
• Maybe helpful to detail the weather conditions, the type of shows she was wearing & other details that they may need
Do not give your opinions to anyone – in person or on the report.

For Example:

That handrail has been loose for 3 days now. I’ve been telling them about it. Two other people have had their cars broken in to this week

Only provide the reports to Management or your supervisor.
Avoid Fuzzy Words

- \textit{INDICATED} (SAID, POINTED, DREW)
- \textit{CONTACTED} (PHONED, TALKED TO, E-MAILED)
- \textit{RESPONDED} (DROVE, WENT, RAN)
- \textit{OBSERVED} (SAW)
- \textit{DETected} (SMELLED, HEARD, SAW)
- \textit{EXITED} (LEFT, GOT OUT OF)

If in doubt, use common words.
Here are a few actual sentences, which you can see offer no clear understanding or fact.

• I told the building engineer and the security coordinator and he went to P-3.
• I saw bees by the tree by where the children play. They were in the tree.
• The ring was gold. !This is just speculation that it was made of gold!
• …it was all good.
• We was walking ...
• She yelled, but I did not hear her.
• The car and pole collided.
• The woman was ticked off.
• The employee smelt like alcohol.
• I smelled marijuana in the car.
• They were by the room where they keep the cleaning supplies.
• All secure
Good Report: Has these Items

- Date – when it happened and when it was reported
- Time or range of time
- Location
- Who was notified and when
- Vehicle information (if involved)
  - Owner
  - License #
  - Make/Model
  - Insurance information
- Weather Condition (critical for accident or injury reports)
- Witness name, phone #, company
Good Report cont.

Complaint information – name, phone number, company name
Suspect description
Property reported stolen or lost

   Owner information
   Description
   Value
   Last seen – when and where

Property Damage

   Location
   Time found or reported
   Involved person and witness information
   Pictures
Do’s and Don’ts

Do
• Accurate
• Brief
• Organized
• Keep field notes
• Use only facts

Don’t
• Give Opinions
• Make recommendations
• Falsify anything
• Assume the event did or did not happen, just report what you see
Finally

IF you have to ask yourself, “I wonder if I should write a report?” The answer will always be, “YES”

No one will ever tell you, “I wish you would not have written a report”
Questions

What are the six (6) questions that a report should answer?
Who  Where
What  Why
When  How

What are the three C’s of report writing?
Clear
Complete
Concise
Should you state your opinion or recommendation in a report?
NO

Incident reports must be treated as legal documents?
YES

Field notes are one of a security officers most important tool?
YES
Based on the previous example video/report, is this statement true? The woman fell down the stairs and cut her knee?

- Yes
- No
- Unknown

UNUNKNOWN

Give three (3) examples of when a security officer would write a report?
Should you give a copy of the report to the person who fell?

NO: Only provide a copy to management or your supervisor
END