



Incident reports – documentation guidelines



Incident reports should be...

- Factual, relevant, and objective
- Accurate and precise
- Complete, clear, and concise
- Well organized (paints a picture/tells a story)
- Timely
- Grammatically correct
- Easy to read (limited use of approved abbreviations and acronyms)



Incident reports should not have...

- Assumptions, opinions, or value judgements
- Subjective statements – unless direct quotes or supported with facts
- Incomplete, inconsistent, or inaccurate statements
- Lack of details (who, what, when, where, how, why)
- Unclear, unorganized, or confusing details (no definitive conclusion)
- Poor grammar, punctuation, and spelling
- Use of unapproved or unfamiliar terms, abbreviations, and acronyms

This document is not intended to be taken as advice regarding any individual situation and should not be relied upon as such. Marsh & McLennan Agency LLC shall have no obligation to update this publication and shall have no liability to you or any other party arising out of this publication or any matter contained herein. Any statements concerning actuarial, tax, accounting or legal matters are based solely on our experience as consultants and are not to be relied upon as actuarial, accounting, tax or legal advice, for which you should consult your own professional advisors. Any modeling analytics or projections are subject to inherent uncertainty and the analysis could be materially affected if any underlying assumptions, conditions, information or factors are inaccurate or incomplete or should change. d/b/a in California as Marsh & McLennan Insurance Agency LLC; CA Insurance Lic: 0H18131. Copyright © 2023 Marsh & McLennan Agency LLC. All rights reserved. MarshMMA.com

A business of Marsh McLennan