



COUNSELING AND GENERAL REPORT WRITING

You, as the author, should know who will be reading your report and why you have been asked to conduct this report.

1. Concentrate on the allegation(s) and relevant supporting information.
2. Concentrate on information that is relevant to the resolution. (Remember this is counseling, not an investigation; if there can be a resolution, please contact your organization's point of contact, who can provide the correct guidance.)
3. The Basics: Who, What, Where, When, How, How Often, and Why?
 - What happened?
 - Who was responsible for it or alleged to be responsible?
 - When did it happen?
 - Where did it happen?
 - How did it happen?
 - Why did it happen?
4. Don't collect character references unless required; only pertinent witnesses regarding the allegations.
5. Include the Basics Plus: Significance of various actions or events. What is the importance of an action or event?
6. When using acronyms, make sure you spell out the entire phrase the first time you use the abbreviation in your report—for example, *Society Human Resources Management (SHRM)*. Remember, not all readers are knowledgeable about acronyms.
7. Use terms consistently throughout the report.
8. Ensure you understand any technical terms that may be career or professional-related. Ask for clarification.
9. Be specific when you are discussing several similar actions. *For example, performance evaluations, requests for training, or leave (time-off) requests.* Ensure everything is clear as to which item, date, or time is referred to in your report.



10. Ensure to choose witnesses carefully. Prepare your questions beforehand and keep the witnesses focused on the allegations(s). Ask if the witnesses know of others who may have first-hand information about the allegations. ** If you are unable to interview any witness, please ensure to note the reason why in your report**
11. Avoid confusing pronouns; (if your organizations have no issues with simple sentences, consider breaking down complex sentences with simple sentences)
12. Be careful not to go directly from cause to effect. Consider intermediary steps explaining how things got from cause to effect.
13. Words matter! Try to choose the ones best suited to what you are trying to describe.
14. Timeliness: Generally, there is timeliness associated with intake reports or counseling. Be diligent throughout the process and keep this fresh in your mind.
15. Review for clarity and understanding.
16. Get copies of everything relevant to the report, and always follow the rules of your organization.

Reference: Notes provided from conducting and attending various Military and Civilian Human Resources, Leadership, and Equal Employment Opportunity pieces of training, workshops, and classes from 2000-2019.