



**SAN MATEO COUNTY  
PROBATION DEPARTMENT  
INSTITUTIONS SERVICES MANUAL**

**ARTICLE 5  
Classification and Separation  
§1362**

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**Procedure  
Report Preparation**

**PURPOSE AND SCOPE**

This policy provides general guidelines regarding report preparation.

Staff will ensure that reports (Informational or Incident) are legible, accurate, sufficiently detailed and free from errors prior to submission. All reports shall reflect the identity of the persons involved, all pertinent information seen, heard, or assimilated by any other sense, and any actions taken. Generally, the reporting employee's opinions should not be included in reports unless specifically identified as such.

**Staff**

All staff involved or witness to an incident shall complete an Incident Report prior to the end of their shift, unless a delay in reporting is approved by a supervisor. Reports shall include the date and time of the incident, the name(s) of the youth involved, the location of the incident, the type of incident (assault on staff, use of force, etc.), staff and youth witnesses, and a complete description of the incident. If the documented incident could lead to youth discipline, staff shall indicate the disposition of the incident on the Incident Report and notify the youth(s) of their appeal rights. The staff will ensure any youth involved are medically cleared and Mental Health staff notified to check in with the youth. Staff and youth should be debriefed at the end of every incident. The reporting staff shall sign and date the report. The report shall be reviewed by the lead staff, who shall direct the employee to make any necessary changes or additions. Once the report is completed, it shall be given to the On-Duty Officer of the Day to review and sign. The report shall then be submitted to admissions where it will be distributed to all assigned parties. A copy of the report will then be routed to the Superintendent of the facility for review.

**1362.2.3 CRIMINAL ACTIVITY REPORTING**

When an employee responds to an incident, or as a result of self-initiated activity, and becomes aware of any activity where a crime has occurred, the employee is required to document the activity in a crime report. The fact that a victim does not desire prosecution is not an exception to documentation.

### **USE OF FORCE AND PHYSICAL RESTRAINTS**

Reports related to the use of force or physical restraint shall be made in accordance with the Use of Force and Restraints policies.

### **GENERAL POLICY OF EXPEDITIOUS REPORTING**

In general, all employees and supervisors shall act with promptness and efficiency in the preparation and processing of all reports. Incomplete reports, unorganized reports, or reports delayed without supervisory approval are not acceptable. Reports shall be processed according to established priorities or according to special priority necessary under exceptional circumstances.

### **GENERAL POLICY OF HANDWRITTEN REPORTS**

Some incidents and report forms lend themselves to block print rather than typing. In general, the long narrative portion of reports should be typed or dictated.

Supervisors may require block printing or typing of reports for facility consistency.

### **GENERAL USE OF OTHER HANDWRITTEN FORMS**

County, state, and federal agency forms may be block printed as appropriate. In general, the form itself may make the requirement for typing apparent.

### **ADDITIONAL STATE REQUIREMENTS**

Staff shall report incidents which result in physical harm to, serious threat of physical harm to, or the death of an employee, a youth, or any other person or persons. Reports should be made by the end of the shift unless additional time is approved by the Superintendent or the authorized designee (15 CCR 1362).

### **REPORT CORRECTIONS**

Supervisors shall review reports for content and accuracy. If a correction is necessary, the reviewing supervisor should return it to the reporting employee for correction as soon as practicable. It shall be the responsibility of the originating employee to ensure that any report returned for correction is processed in a timely manner. It shall be the responsibility of the supervisor rejecting the report to follow up on any report corrections not received in a timely manner.