01 / THE INCIDENT

Record what happened

Use one worksheet per incident. Write as soon as you reasonably can, mark uncertainty and keep both pages together. Complete on paper or annotate your saved PDF.

Incident date and time

Mark approximate dates or times clearly.

Date this note was written

Record when you made this note.

Location or channel

For example: a meeting, email, phone call or group chat.

People involved

Names and roles, where known.

Witnesses

Who was present? Note what they may have seen.

What happened

Describe the sequence in your own words. Separate what you saw or heard from assumptions or information somebody else provided.

Exact words, if remembered

Use quotation marks only for words you remember accurately. Label a summary or uncertain recollection.

02 / SUPPORTING RECORD

Evidence and next steps

Continue the same incident record. Note where original material is stored and record updates separately with their own dates.

Incident date / reference

Match this page to your incident record on page 1.

Effect on you or your work

Describe the impact in your own words. Avoid guessing a diagnosis.

Supporting material

List relevant emails, messages or files and where the originals are kept. Only retain material you are entitled to access.

Action taken and response

Who did you tell, when, what did you ask for, and what reply or agreed action followed?

Follow-up

Next step, agreed action or review date. Check legal deadlines independently; a diary does not pause them.