

Record & Report Templates

Make the source, the uncertainty and the responsible person visible.

For: Individuals and teams turning notes into a clear review record.

1. Record the basics

- Name the purpose, scope, author, date, version and intended audience. Record any confidentiality or access restrictions.
- Use a short source index so a reader can find the original evidence. Keep the raw notes and originals.

2. Separate the layers

- Record observations and source references first. Put reported accounts, analysis and recommendations in separate sections.
- Use neutral language. Identify disagreements, gaps, date uncertainty and alternative explanations.

3. Check before sharing

- Check names, dates, figures, quotations and source locations. Record who checked each important statement.
- Remove unnecessary personal information from the shared copy. Keep originals intact and record redactions.

4. Sign off the next action

- Name the reviewer and authorised decision-maker. Record approval date, outstanding questions and any dissent.
- Assign actions, owners and deadlines. Define what evidence will show completion and when effectiveness will be checked.

Check your preparation

Use this checklist before sharing the pack or making the next decision. Record unresolved items; do not tick them off by assumption.

- ☐ Purpose, scope, author, version and audience are recorded.
- ☐ Findings are distinct from accounts and interpretations.
- ☐ Each important assertion has a source reference.
- ☐ Facts and figures have been checked.
- ☐ Limitations, dissent and unanswered questions are visible.
- ☐ Sharing and redaction decisions are recorded.
- ☐ A named person owns the decision and follow-up.

Editable templates included

Structured report record: Section, Content, Source reference, Evidence label, Limit or uncertainty, Reviewer, Review date

Fact-check and sign-off register: Check ID, Statement or decision, Source reference, Check performed, Result, Limit or dissent, Reviewer, Date, Decision owner, Approval status, Next action

How to use the templates

Open the CSV file in Excel, Google Sheets or another spreadsheet app. Keep one item per row. Use a clear source reference and mark uncertainty. Save a dated working version; preserve the original material separately.

Scope and boundaries

These are general preparation tools. They do not certify compliance, decide legal merits or replace clinical, safeguarding or professional judgement. Use the appropriate authorised route for urgent risk. Only collect and share material you may lawfully access.

When independent support adds value

A scoped ORVIA review can challenge completeness and source support, with named human review. The agreed output states its limitations.

Download this kit and its editable files at <https://orvia.org.uk/resources/report-templates>

Use and sharing: you may use and share the unchanged guides with attribution to ORVIA. Adapt the editable templates for your own records. Do not imply ORVIA reviewed or endorsed your completed work.