

Incident and Near Miss Report

Report every incident and every near miss, including the ones where nobody was hurt

A near miss is free information about a hazard that has not hurt anybody yet. Companies that only report injuries are paying full price for the same lesson.

Fill in sections 1 to 4 as soon as it is safe to do so. Sections 5 to 8 are the investigation and can follow within your stated timeframe.

Check this yourself. Check your jurisdiction's requirements for reporting serious incidents to the regulator and to your workers compensation board. Some incidents must be reported immediately, and the scene may have to be left undisturbed. Those obligations override this form.

1. Type of event

- | | | |
|---|---|---|
| ☐ Near miss, no injury or damage | ☐ First aid only | ☐ Medical treatment |
| ☐ Lost time injury | ☐ Occupational illness | ☐ Property or equipment damage |
| ☐ Motor vehicle incident | ☐ Environmental release | ☐ Fire |
| ☐ Security or violence | ☐ Serious incident, regulator notified | ☐ Other |

2. When and where

Date of event

Time of event

Date reported

Reported to

Exact location

Task being performed at the time

Field level hazard assessment reference for that shift

3. Who was involved

Name of person involved

Job title

Employee, subcontractor or visitor

Time on this task

Supervisor at the time

Injury or illness, and body part affected

Treatment given, and by whom

Equipment, vehicle or property damaged

4. What happened

Describe the sequence of events in order, in plain language. What was happening before, what happened, what happened immediately after. Stick to what is known. Do not assign blame here.

5. Witnesses

Printed name	Role	Statement taken by	Date

6. Immediate actions taken

What was done straight away to make the area safe and prevent it happening again in the next hour.

7. Contributing factors

Work through each heading. An investigation that concludes only that a worker was careless is an investigation that has stopped too early, and it is a finding against your program in an audit.

7a. Contributing factors, by category

Category	What we found	Evidence for that finding
People: training, competency, fatigue, fitness for duty, supervision		
Equipment: condition, guarding, maintenance, suitability for the task		
Materials: substances, loads, unexpected properties		
Environment: weather, light, noise, ground, space, other trades		
Process: procedure missing, unclear, impractical, or not followed and why		
Management systems: hazard assessment, inspection, planning, resourcing, time pressure		

7b. Root cause

Ask why the contributing factor above was allowed to exist, then ask why again, until the answer is something your management system controls. Record the answer here.

8. Corrective actions

Action	Control type in the hierarchy	Assigned to	Due date	Completed	Verified by and date

9. Communication back to the crews

How the lesson was shared, for example toolbox talk or safety meeting

Date shared

Shared by

Documents updated as a result, for example hazard assessment or procedure

Sign off

Reported by

Investigated by

Reviewed by management

Date

Date

Date