Incident Report & Investigation Form

Incidents, near misses and dangerous occurrences · ISO 45001:2018 clause 10.2

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https://www.q-hub.app/t/ir1

HOW TO USE THIS

- **Who:** section 1 by the person reporting or their supervisor, on the day. Sections 4 onward by the investigator.
- **When:** report immediately. Near misses matter as much as injuries, because they are the cheapest lesson you will get.
- **First:** make the area safe and get treatment for anyone hurt before filling anything in.
- **Evidence:** photographs, sketches, equipment readings and witness accounts, attached and referenced by number.

1. The incident

REPORT REFERENCE

DATE OF INCIDENT

TIME

DATE REPORTED

EXACT LOCATION

REPORTED BY

Type

☐ Injury ☐ Near miss ☐ Ill health ☐ Dangerous occurrence
☐ Property or equipment damage ☐ Environmental ☐ Security ☐ Other

What happened?

A factual account in sequence. What the person was doing, what changed, what the outcome was. No blame and no opinion.

2. People involved

NAME	ROLE	EMPLOYER	INJURY / EFFECT (IF ANY)

Treatment given

☐ None required ☐ First aid on site ☐ Referred to GP ☐ Hospital

FIRST AIDER / TREATMENT BY

TIME TREATED

RETURNED TO WORK?

3. Witnesses

NAME	CONTACT	STATEMENT ATTACHED	REF
		☐	
		☐	
		☐	

4. Immediate action taken

What was done at the time to make the situation safe and stop it happening again that day.

5. Investigation

INVESTIGATOR

DATE STARTED

DATE COMPLETED

What conditions and activities contributed?

Consider the task, the equipment, the environment, the information people had, and the way the work was organised.

Root cause concluded

Why it was possible for this to happen. Record the conclusion your investigation reached, using whichever analysis method your organisation has adopted.

Had this, or anything like it, been reported before?

☐ No ☐ Yes — previous reference:

6. Risk rating after the event

Rate the realistic worst outcome, not only what happened this time. A near miss can carry a high rating.

ASSESSMENT	LIKELIHOOD (1-5)	SEVERITY (1-5)	RATING
Before any further control			
After the actions in section 7			

EXISTING RISK ASSESSMENT REFERENCE

DOES IT NEED REVISING?

7. Corrective actions

NO.	ACTION	OWNER	DUE	DONE
1				
2				
3				
4				
5				

8. External reporting

Deciding whether an incident is reportable is the employer's legal duty. In Great Britain that duty sits under RIDDOR and reports are made to the HSE at **www.hse.gov.uk/riddor**. Check the current guidance and your own reporting procedure; this form records the decision and the reference, it does not make the report.

☐ Assessed as not reportable ☐ Reportable — report submitted ☐ Other regulator notified

DECISION MADE BY

DATE REPORTED

EXTERNAL REFERENCE

9. Lessons learned and communication

Who needs to know, and how the message reached them. An investigation nobody hears about prevents nothing.

SIGN-OFF

INVESTIGATED BY	SIGNATURE	DATE
REVIEWED AND CLOSED BY	**SIGNATURE**	**DATE CLOSED**

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