



Essential Guide to Health & Safety Incident Reporting

A Step-by-Step Checklist

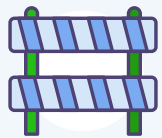


Essential Guide to Health & Safety Incident Reporting

A Step-by-Step Checklist

When workplace incidents occur, reporting them helps to ensure the work environment remains safe and favourable for all employees. To fully understand why incident reporting is important and what it entails, we recommend reading [The Ultimate Guide to Health & Safety Incident Reporting](#).

This practical checklist can help you streamline the incident reporting process. Here is a quick overview of the steps we'll cover in this checklist.



✓ **Step 1:**

Clear the area & inspect the incident location for immediate risks.



✓ **Step 5:**

Have an impartial, responsible, third party investigate the incident.



✓ **Step 2:**

Confirm that the employee has first aid assistance



✓ **Step 6:**

Evaluate if it is a RIDDOR-reportable incident and report it as such.



✓ **Step 3:**

Secure the scene and document the evidence



✓ **Step 7:**

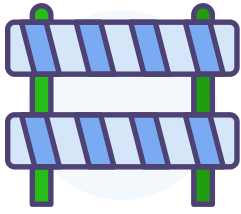
Take measures to reduce the possibility of a similar incident occurring.



✓ **Step 4:**

Report the incident on the company's incident reporting system

The next few pages will explore each step in more detail.

 **STEP 1:**

Clear the area & inspect the incident location for immediate risks.

1

Clear the area or keep others at a safe distance. If there are injured personnel, only those needed to assist the injured should remain in the area.

2

Give the incident location a quick scout for immediate risks.

3

Mitigate any risks identified or remove people away from the danger. Only do this if it is safe and call for emergency help if required.



TIPS:

Every workplace will have its own unique risks to look out for. While it's practically impossible to create a comprehensive list for every workplace, these questions are a good starting point when you scout the incident location for immediate risks.



Is there a risk of a person or object falling from a height?



Is there any damaged equipment that could cause injury due to factors like sharp edges or fire risk?



Are there any nearby power outlets at risk of catching fire?



Are there any nearby flammable goods at risk of catching fire?



Are there any conditions, such as poor lighting or slippery floors, which could cause slips, trips, and falls?



Is anyone trapped and in need of assistance?



✔ **STEP 2:**

Confirm that the employee has first aid assistance

- 1 Get an immediate count of how many people are injured.
- 2 Assess the level of injury.
- 3 Ensure all injured personnel are receiving adequate first aid assistance for their level of injury.
- 4 Call for emergency aid if required.





✔ **STEP 3:**

Secure the scene and document the evidence

- 1 Ensure all injured personnel have received appropriate medical care and all immediate risks have been mitigated.
- 2 Secure the scene to preserve the evidence as it is for investigation. Ensure you don't disturb the scene by altering, interfering, destroying, or removing anything that is critical to the fair evaluation of the incident.
- 3 Take necessary photos of the incident scene.



**✓ STEP 4:**

Report the incident on the company's incident reporting system

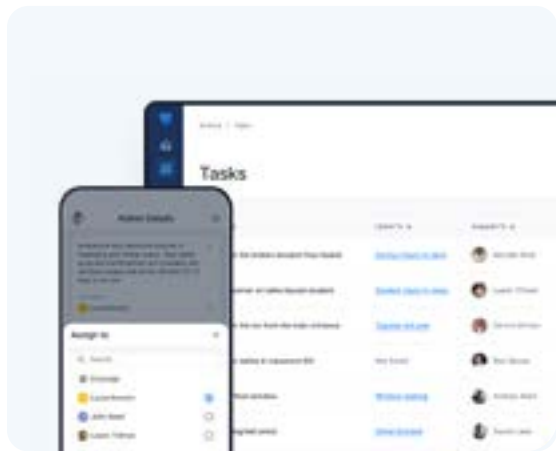
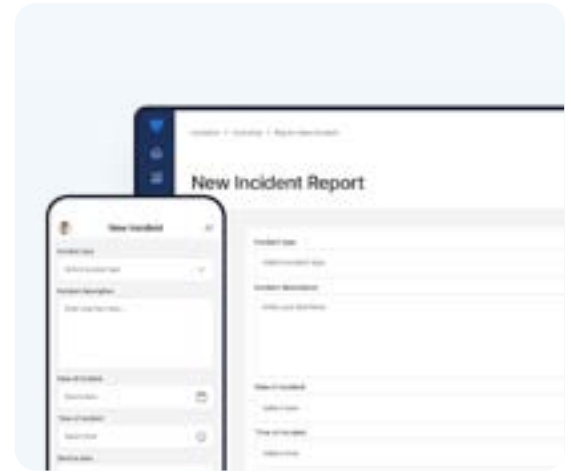
- 1 Interview any injured personnel and key witnesses, including civilians if any, at the incident and get a statement of their version of the events.
- 2 Evaluate any damage to company equipment or property.
- 3 With the detailed statements and evaluations collected, log the incident into your company's preferred incident reporting system. Attaching photos to your report can add important context.



Report and manage incidents with our incident reporting platform

Simplify Incident Reporting Across Your Organisation

- ✔ Design incident reporting forms to gather all pertinent details.
- ✔ Ensure accessibility of reporting on all devices for complete coverage.
- ✔ Include detailed descriptions and photographic evidence for a full incident overview.



Streamline Investigations & Corrective Actions

- ✔ Receive instant notifications for new reports to ensure immediate action.
- ✔ Directly assign corrective actions to employees through the platform, with a focus on thorough RIDDOR compliance tracking.
- ✔ Use custom fields to deepen analysis and understanding of each incident.

Strategic Safety Insights Through Analytics

- ✔ Analyse data to spot trends, including lost time due to injuries, enhancing preventive measures.
- ✔ Leverage automated reporting to streamline safety management and save significant time.
- ✔ Utilise over 40 chart types or create custom reports for detailed safety monitoring and enhancements.



GET A QUOTE

TIPS:

Here is a guideline of key questions you can ask when you interview key witnesses and/or injured personnel:

- a** Where and what time did the incident happen?
- b** Where were you and what were you doing before the incident happened?
- c** Describe the sequence of events leading up to the incident.
- d** Describe the sequence of events after the incident happened.
- e** Are there any other relevant details that you feel could be important?



IMPORTANT NOTE:

The objective of an incident report is to find the root cause and improve health and safety procedures. It's important not to cast or insinuate blame when conducting your investigation. If your employees fear they will get into trouble, they may leave out important details from their statements.

TIPS:



When writing an incident report, keep these tips in mind:



Write in a third party voice except when quoting people.



Stick as closely as possible to stating the facts.



Avoid writing emotional statements.



Avoid finding someone to blame and stay focused on the objective of workplace safety.



Include relevant details but write as concisely as possible.



Validate the report by getting everyone who was mentioned in the report to sign off to confirm the information is accurate.



✔ **STEP 5:**

Have an impartial, responsible, third party investigate the incident.

- 1 The third party may be able to see things from a different angle and uncover new insights.
- 2 The third party may request to investigate the location of the incident and/or interview the key people involved in the incident.
- 3 Update the incident report with any new details or amendments as recommended by the third party if it is deemed relevant and important.

TIP:

We recommend reading our [Step-by-Step Guide: How to Conduct an Incident Investigation](#).





✔ **STEP 6:**

Evaluate if it is a RIDDOR-reportable incident and report it as such.

1

Does the incident fall under the Reporting of Injuries Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR)? Check the [RIDDOR guidelines](#) to determine.

2

If it does, submit the incident to the relevant authority within the set reporting timescales.

3

Keep a record of the incident. All RIDDOR records must be kept for at least three years from the date it was recorded.





✔ **STEP 7:**

Take measures to reduce the possibility of a similar incident occurring.

1

Evaluate the **root cause** of the incident.

2

Brainstorm with team members, superiors, and witnesses and/or injured personnel of the incident on what improvements could be made to avoid a similar incident from repeating.

3

Create a **corrective action plan**

4

Invest in any safety equipment upgrades, **employee safety alarms**, or other tools that can help reduce future risk of the same incident.



Summary

It can be very stressful when an incident happens. Under this stress, you could easily miss a lot of important details for your incident report.

By following this incident reporting checklist, you have a reliable procedure to guide you through the process and ensure no important information is overlooked.

Having a standard procedure can also help manage emotional responses from all parties involved when you are investigating. It's crucial to train all employees on the incident reporting procedure and checklist.

This standardisation ensures clarity and fairness during incident investigations, reducing feelings of blame among employees. As a result, everyone knows what to expect and can contribute to a thorough resolution.

Discover how our incident reporting tool can make it easier to streamline incident reporting in your organisation

[LEARN MORE](#)

[GET A QUOTE](#)