

# MANAGEMENT INCIDENT INVESTIGATION REPORT

The information added to a Management Incident Investigation Report should be a culmination of all the data gathered during the incident investigation. Think of this form as a canvas that can be used to paint a picture of what actually happened, making sure to identify contributing factors and including ideas for improvements. Some improvements are big fixes and require budget planning and interdepartmental cooperation while others are quick fixes that can be implemented immediately.

**ORGANIZATION NAME:** \_\_\_\_\_

## TYPE OF INCIDENT

INJURY – FIRST AID ONLY	YES	NO
INJURY – MEDICAL TREATMENT	YES	NO
PROPERTY DAMAGE	YES	NO
NEAR MISS/GOOD CATCH	YES	NO

## GATHER THE FACTS

INJURED EMPLOYEE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

ASSIGNED DEPARTMENT: \_\_\_\_\_

SUPERVISOR: \_\_\_\_\_

DATE OF INCIDENT: \_\_\_\_\_

TIME OF INCIDENT: \_\_\_\_\_

ADDRESS AND LOCATION OF INCIDENT: \_\_\_\_\_

DATE INCIDENT WAS REPORTED: \_\_\_\_\_

WITNESSES/OBSERVERS: \_\_\_\_\_

## SUMMARY: TELL THE STORY OF THE EVENT

USE PHOTOS OR SKETCHES IF NECESSARY.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## ANALYSIS: IDENTIFY CONTRIBUTING FACTORS THAT LED TO THE INCIDENT

WHAT WAS EXPECTED? WHAT WAS UNANTICIPATED?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## IDENTIFY AND INVESTIGATE THE GAPS OR DIFFERENCES

LIST THE DIFFERENCES BETWEEN HOW THE WORK IS DONE VS. THE EVENTS THAT LED TO THE INCIDENT.

EVENTS OF THE DAY <i>WHAT LED UP TO THE INCIDENT</i>	WORK AS PLANNED <i>HOW THE SYSTEM WAS DESIGNED TO OPERATE</i>	WORK AS DONE <i>HOW WORK IS TYPICALLY CONDUCTED</i>
Review: <ul style="list-style-type: none"> <li>Employee Incident Report</li> <li>Incident Observer Report</li> <li>Employee and observer interview statements</li> </ul>	Review: <ul style="list-style-type: none"> <li>Procedures</li> <li>Work instructions</li> <li>Training</li> <li>Policies</li> </ul>	Review how the work is typically done by your workforce on a day-to-day basis.

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## RECOMMENDATIONS: OUTLINE ANY POSSIBLE SOLUTIONS TO ADDRESS THE GAPS YOU IDENTIFIED

REMEMBER TO INCORPORATE SOLUTIONS THAT HARNESS THE NATURAL RESILIENCE IN YOUR TEAMS AND ORGANIZATION.

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## ACTION TAKEN: IDENTIFY CONTRIBUTING FACTORS THAT LED TO THE INCIDENT

CLOSE THE LOOP BY FOLLOWING THROUGH AND FOLLOWING UP ON SOLUTIONS FOR THE WORKPLACE.

ACTION/CHANGE	ASSIGNED TO	DATE IMPLEMENTED	NOTES

## EMPLOYEE INFORMATION:

REPORT COMPLETED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

REPORT REVIEWED BY: \_\_\_\_\_ DATE: \_\_\_\_\_