



# HOW-TO GUIDE INCIDENT INVESTIGATIONS

UPDATED AND REVISED SUMMER 2023

**PINNACOL**  
ASSURANCE  
SAFETY SERVICES



# WELCOME



## PURPOSE OF THIS GUIDE

This guide was written in order to provide employers with the resources to create the safest possible working environment for their employees. Unfortunately, despite the best intentions and most careful precautions of employers, employees can still experience injuries on the job. Incidents and injuries cost time, money and effort. Therefore, when these incidents happen, it's important to conduct an incident investigation to prevent the same event from occurring again. This guide will walk you step by step through how to conduct a thorough incident investigation to prevent similar situations from recurring in the workplace.

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THE PURPOSE OF AN INVESTIGATION IS TO UNDERSTAND HOW THINGS USUALLY GO RIGHT TO EXPLAIN HOW THINGS OCCASIONALLY GO WRONG.

IT IS IMPORTANT TO REMEMBER THAT EMPLOYEES ARE RARELY THE PROBLEM – EMPLOYEES ARE PROBLEM SOLVERS IN A SYSTEM.

WHEN DEVELOPING EFFECTIVE LASTING SOLUTIONS, INCORPORATE SOLUTIONS THAT PROMOTE RESILIENCE IN TEAMS AND SYSTEMS.

# HOW TO USE THIS GUIDE

**In any workplace, accidents or incidents can occur, and it is important to investigate them to prevent similar incidents from happening in the future.**

This guide outlines the steps to conduct an incident investigation, explains the purpose of the investigation and provides the necessary forms to help analyze incident causes. This guide includes the following resources:

**Employee Incident Report**

**Incident Observer Report**

**Event Learning Questions**

**Fishbone Analysis**

**Management Incident Investigation Report**

**Safety Solutions Tracking Spreadsheet**

## BEST PRACTICES FOR USING THIS GUIDE



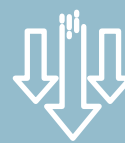
### COLLABORATE

Investigators will need to collaborate with colleagues to collect information and complete the forms included throughout this guide.



### VERIFY AUDIENCE

This guide is intended for investigators or safety employees who manage an incident investigation.



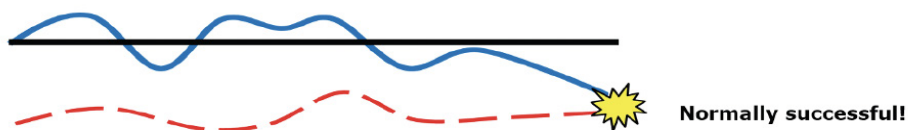
### DOWNLOAD GUIDE

Before completing this guide for your records, be sure to download and save a copy of each form.

# INTRODUCTION

## INCIDENT INVESTIGATIONS

An investigation begins by gathering all the relevant information, including any observer statements, photographs, videos and physical evidence. The information gathered is essential to examine the activities and systems involved in the incident. While collecting your incident investigation information, try to think about these two competing factors: work as planned and work as done.



**"Workers are masters of the blue line."**

- Conklin/Edwards

## WORK AS PLANNED VS. WORK AS DONE

The black line in the image above represents the way a job is planned, if everything works perfectly. But we don't work in a perfect world; we work in one where choices are made every day to modify the plan when something changes. Therefore, the blue line represents the way work is really done. The red line is the potential for an event to occur, such as an injury.







## LEADERS SHOULD THINK ABOUT

To incorporate resilience in the workplace, leaders should think about:

- How to empower employees to properly respond to changes in their work.
- How to monitor the safety and security performance of the system.
- What is in place to anticipate weaknesses and threats to the system.
- How the organization learns from incidents as well as near-misses.

## PURPOSE OF AN INCIDENT INVESTIGATION

The purpose of an investigation is to understand how things **usually go right** to explain how things **occasionally go wrong**. It is important to remember that employees are rarely the problem – employees are problem solvers in a system.

## HIERARCHY OF CONTROLS

Investigations will usually result in the conclusion that there is a need for fixed solutions, such as implementation of new policies or procedures, additional training, or even making changes to your equipment or facilities. The National Institute for Occupational Safety and Health has created a [hierarchy of controls](#) that recommends the implementation of inherently safer systems, such as Elimination and Substitution level of controls over less effective levels of controls such as Administrative controls or Personal Protective Equipment. Consider layering solutions to create redundancies in case any one of them fails to remove the hazard.

## INCORPORATE SOLUTIONS THAT PROMOTE RESILIENCE

When developing effective lasting solutions, incorporate solutions that promote resilience in teams and systems. Resilient workforces are better able to manage their emotional reaction to stress, more capable of dealing with change and challenge, and essentially better able to perform at their best than other workforces (Resilience Institute, 2019; Davis-Laack, 2014). Reference the bulleted list of statements at the top of this page to learn more about how leaders can incorporate resilience in the workplace.



# WHAT'S INCLUDED

We have curated a variety of resources to aid in the process of conducting a **thorough incident investigation**. Use this page to see the big picture of what each of these resources is trying to accomplish. Based on the descriptions of these resources, choose which forms from this guide you will need to complete. Reference the Incident Investigation Flowchart on the next page to see how an incident investigation can be conducted.

## EMPLOYEE INCIDENT REPORT

An Employee Incident Report is a document that an employee completes to describe the details of a workplace injury, illness or near miss from their perspective. The primary purpose of the report is to provide the employer with a record of the incident.

## INCIDENT OBSERVER REPORT

An Incident Observer Report is a written statement about an incident from the perspective of a witness. The report can serve as a reference for investigators to compare the sequence of events as they are described in the Employee Incident Report.

## EVENT LEARNING QUESTIONS

This form offers open-ended questions to ask employees involved in an incident or who might have witnessed the event. This form can be used before or after all parties involved have completed the incident report and/or the incident observer report.

## FISHBONE ANALYSIS

A Fishbone Analysis is a problem-solving technique used to identify the multiple causes of a problem or an incident. This resource provides a visual of the various factors contributing to a problem and systematically identifies the underlying causes.

## MANAGEMENT INCIDENT REPORT

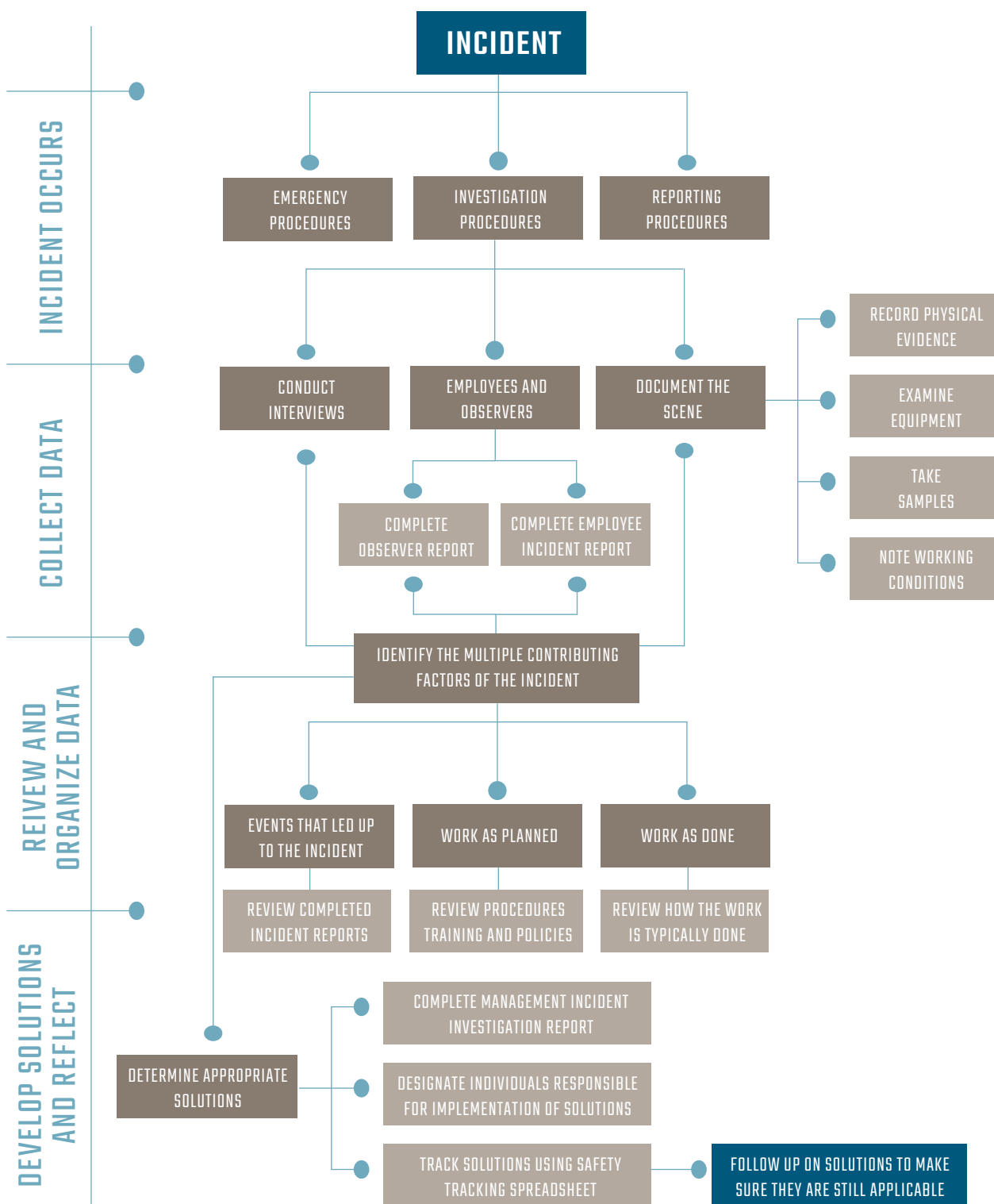
The information added to a Management Incident Investigation Report should be a culmination of all the data gathered during the incident investigation. Think of this form as a canvas that can be used to paint a picture of what happened.

## SAFETY SOLUTIONS TRACKING

The Safety Solutions Tracking Spreadsheet is used to track agreed upon solutions within an organization and verify that the solutions were implemented and actually did what was intended, without other unexpected results.



# INCIDENT INVESTIGATIONS FLOWCHART



# EMPLOYEE INCIDENT REPORT

## WHEN TO USE THIS FORM

An Employee Incident Report is a document that an employee completes to describe the details of a workplace injury, illness or near miss from their perspective.

## PURPOSE

The primary purpose of the report is to provide the employer with a record of the incident. This is one of the first steps in a fact-finding process and should never be used as a means to assign blame. Completing the Employee Incident Report promptly helps the investigator quickly identify effective solutions in order to prevent similar incidents from occurring.

## CONSIDER

If applicable, remember to initiate the process for workers' compensation benefits. Much of the information gathered on the Employee Incident Report is necessary for reporting the injury to your workers' compensation carrier. Pinnacol has a separate [reporting process](#) that must be followed when filing a claim.

## TIPS

### » BE CONSISTENT

Use this form to record all injuries and near misses. The recorded notes from these forms combined should tell a consistent story.

### » BE TIMELY

Interview questions can be asked either directly before or after the completion of this form.

### » PROMOTE ACCURACY

Injured or affected employees should complete this form as soon as possible to promote accuracy in the details which are easier to recall directly following an incident. By waiting to have the employee complete an incident report, investigators may miss out on an opportunity to record contributing factors that led up to the incident.

# EMPLOYEE INCIDENT REPORT

An Employee Incident Report is a document that an employee completes to describe the details of a workplace injury, illness or near miss from their perspective. The primary purpose of the report is to provide the employer with a record of the incident. This is one of the first steps in a fact-finding process and should never be used as a means to assign blame. Promptly completing the Employee Incident Report helps the investigator quickly identify effective solutions in order to prevent similar incidents from occurring.

## ORGANIZATION NAME:

## TO BE COMPLETED BY THE INVOLVED EMPLOYEE:

EMPLOYEE NAME:

EMPLOYEE TITLE:

PHONE:

DATE OF INCIDENT:

TIME OF INCIDENT:

ADDRESS AND LOCATION OF INCIDENT:

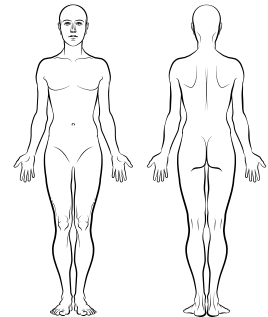
WERE YOU INJURED? YES NO

WERE OTHERS INVOLVED? YES NO

IS EVERYONE OK? YES NO

## DESCRIBE THE AFFECTED BODY PARTS.

WHERE DOES IT HURT? WHAT DOES IT FEEL LIKE? CIRCLE THE AFFECTED BODY PARTS USING THE DIAGRAM.



## PLEASE TELL THE STORY OF WHAT HAPPENED.

INCLUDE ALL DETAILS.

## WHAT ELSE DO WE NEED TO KNOW?

AND DO YOU THINK THERE IS ANYTHING THAT COULD HAVE PREVENTED THIS FROM HAPPENING?

## EMPLOYEE SIGNATURE

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

# INCIDENT OBSERVER REPORT

## WHEN TO USE THIS FORM

An Incident Observer Report is a written statement about an incident from the perspective of a witness. Third parties witnessing an incident will often see events in a different way than the person or people directly involved.

## PURPOSE

The report can serve as a reference for investigators to compare the sequence of events as they are described in the Employee Incident Report. These statements help identify the contributing factors of the incident.

## CONSIDER

The information gathered on this form can be included in your Fishbone Analysis and guide the solutions taken on the Management Incident Investigation Report.

## TIPS

### » BE CONSISTENT

Use this form to record all injuries and near misses. The recorded notes from these forms combined should tell a consistent story.

### » BE TIMELY

Interview questions should be asked directly before the completion of this form. **Note: Do not allow observers to communicate with each other until interviews have been completed.**

### » PROMOTE ACCURACY

Observers should complete this form as soon as possible to promote accuracy in the details which are easier to recall directly following an incident. By waiting to have the observer complete an Incident Observer Report, investigators may miss out on an opportunity to record contributing factors that led up to the incident.

# INCIDENT OBSERVER REPORT

An Incident Observer Report is a written statement about an incident from the perspective of a witness. Third parties witnessing an incident will often see events in a different way than the person or people directly involved. The report can serve as a reference for investigators to compare the sequence of events as they are described in the Employee Incident Report.

## ORGANIZATION NAME:

## TO BE COMPLETED BY THE INVOLVED OBSERVER:

EMPLOYEE NAME:

EMPLOYEE TITLE:

PHONE:

DATE OF INCIDENT:

TIME OF INCIDENT:

ADDRESS AND LOCATION OF INCIDENT:

I SAW WHAT HAPPENED AND CAN TELL THE STORY OF WHAT HAPPENED.

YES

NO

I DID NOT SEE WHAT HAPPENED BUT CAN PROVIDE ADDITIONAL INFORMATION ABOUT THE SCENE AND OTHER FACTORS AND/OR UNUSUAL CONDITIONS THAT WERE PRESENT.

YES

NO

## DESCRIBE THE INCIDENT.

INCLUDE ALL DETAILS AND, IF APPLICABLE, PLEASE DRAW A DIAGRAM OF WHAT HAPPENED.

## WHAT ARE SOME OF THE FACTORS THAT YOU BELIEVE CONTRIBUTED TO THIS INCIDENT?

INCLUDE ALL DETAILS.

## WHAT ELSE DO WE NEED TO KNOW?

AND DO YOU THINK THERE IS ANYTHING THAT COULD HAVE PREVENTED THIS FROM HAPPENING?

## EMPLOYEE SIGNATURE

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

NAME OF INTERVIEWER: \_\_\_\_\_

# EVENT LEARNING QUESTIONS

## WHEN TO USE THIS FORM

This form offers suggested questions to ask employees involved in an incident or who might have witnessed the event.

## PURPOSE

The goal of conducting fact-finding interviews should be to learn details of the event from different perspectives. Those perspectives can help the interviewer gain a deeper understanding of the contributing factors, which is valuable when developing effective solutions. Common information gathered includes:

- Conditions
- Equipment
- Environment

## CONSIDER

The interviewer should try and seek a clear explanation of what failed in the organization's systems and processes without influencing the conversation. Interviews should be conducted without ever assigning blame. Employers should take advantage of the lessons learned from the event to implement effective solutions.

## TIPS



### ASK OPEN-ENDED QUESTIONS

Begin by asking open-ended questions that allow the person to provide a detailed response. This helps gather more information and encourages the person to share their perspective.



### BE SPECIFIC

Ask for specific details, such as the time, location and sequence of events, to get a clear picture of what happened. This can help identify any discrepancies or inconsistencies in the person's account.



### PROMOTE CLARITY

Ask for more information or clarification. This can help ensure that you have a complete understanding of the incident.



## » BE EMPATHETIC

Be respectful and empathetic toward the person. This can help build rapport and trust, which can encourage the person to provide more information.

## » CONSIDER THE CONTEXT

Consider the context of the incident and the person's role. This can help you ask relevant questions and gather information that is specific to the situation.

## » REFRAIN FROM BIAS

Do not use leading or biased language in your questions, as this can influence the person's response. Instead, use neutral language that does not imply any particular answer.

## » REFRAIN FROM ASSIGNING BLAME

Do not use blaming or accusatory language. This can make the person defensive and less likely to cooperate. Instead, focus on gathering information to understand what happened.

For example, instead of asking a judgmental question, such as:

*"Did you follow the procedure?"*

Ask a question that promotes learning, such as:

*"Could you walk me through how we do this task?"*



## INTERVIEW QUESTION TIPS AND TRICKS

Adapted from *"Bob's Guide to Operational Learning"* (Edwards, B. and Baker, A.; Pre-Accident Investigation Media, Santa Fe, NM, 2020)

## EVENT LEARNING QUESTIONS

This form offers suggested questions to ask employees involved in an incident or those who might have witnessed the event. The goal of conducting fact-finding interviews should be to learn details of the event from different perspectives that can help the interviewer gain a deeper understanding of the contributing factors, which is valuable when developing effective solutions.

### ORGANIZATION NAME:

*BEGIN BY ENSURING THE SAFETY AND SECURITY OF THE WORKPLACE.*

**IS EVERYONE OK? IF NOT, ARE THEY BEING ATTENDED TO?**

**IS THE EQUIPMENT SAFE AND STABLE? IS THE WORK AREA SAFE AND SECURE?**

*ESTABLISH THE BASIC FACTS.*

**WHO WAS INVOLVED?**

**WHEN DID THE INCIDENT OCCUR?**

INCLUDE DATE AND TIME.

**WHERE DID THE INCIDENT TAKE PLACE?**

NOTE THE PHYSICAL ADDRESS AND ALSO THE PARTICULAR WORK AREA.

*THEN, SEEK TO UNDERSTAND THE INCIDENT:*

*REMEMBER THAT EVEN THOUGH YOU KNOW HOW IT ENDED, THE EMPLOYEE DID NOT HAVE THAT INFORMATION WHEN THE INCIDENT OCCURRED.*

**WOULD YOU TELL ME THE STORY OF WHAT HAPPENED?**

A STORY SHOULD HAVE A BEGINNING, A MIDDLE AND A CONCLUSION.

## EVENT LEARNING QUESTIONS

This form offers suggested questions to ask employees involved in an incident or those who might have witnessed the event. The goal of conducting fact-finding interviews should be to learn details of the event from different perspectives that can help the interviewer gain a deeper understanding of the contributing factors, which is valuable when developing effective solutions.

**WHAT DID YOU SET OUT TO DO? WHAT WAS THE JOB/TASK? HOW DO YOU TYPICALLY PERFORM THAT TASK?**

**WHAT ACTUALLY HAPPENED?**

**WHAT WORKED WELL? WHAT WENT AS EXPECTED?**

**WHAT WAS UNEXPECTED? WHAT DID NOT WORK?**

**WHAT FACTORS LED UP TO THIS EVENT?**

**WHERE ELSE COULD SOMETHING LIKE THIS HAPPEN?**

**WHAT ELSE DO I NEED TO KNOW?**

# FISHBONE ANALYSIS

## WHEN TO USE THIS FORM

A Fishbone Analysis is a problem-solving technique used to identify the multiple causes of a problem or an incident. On each of the “bones” of the fish, an identified cause category of the incident is listed.

## PURPOSE

By using a Fishbone Analysis, you can visualize the various factors contributing to a problem and systematically identify the underlying causes. Layering effective controls and addressing multiple contributing factors are the most effective ways to reduce the hazard(s).

## CONSIDER

Each factor will directly influence what solution(s) should be identified and added to your Management Incident Investigation Report and Safety Solutions Tracking Sheet.

## TIPS

### » FOCUS ON THE CAUSE

Use the fishbone diagram tool to keep your investigation team focused on the causes of the problem, rather than the symptoms.

### » USE ALL INFORMATION

When brainstorming the contributing factors, consult team members, utilize investigation notes and review the results of a task analysis.

### » ASK THE FIVE-WHYS

The “[five-whys](#)” technique is often used in conjunction with the fishbone diagram. The idea is to continue asking why until you get to a cause. That newly identified cause can then be added to the appropriate category in your fishbone diagram.

# HOW IT WORKS

The Fishbone Analysis can be a valuable tool in conducting incident investigations. By identifying the contributing factors of incidents, organizations can take action to prevent similar incidents from happening in the future.

- 01 **IDENTIFY THE PROBLEM**  
Write the problem or incident outcome at the head of the fishbone diagram. This should be the central issue that the analysis is focused on.
- 02 **TACKLE THE PROBLEM**  
To tackle the problem at hand, it's important to categorize the various factors that could be contributing to it. Write these categories at the end of each diagonal line representing the "bones" of the fish.
- 03 **BRAINSTORM FACTORS**  
Brainstorm all the possible causes of the problem and add each idea along a branch from the appropriate "bone." Causes or contributing factors can be written in several places if they relate to several categories.
- 04 **PRIORITIZE FACTORS**  
Once all the potential contributing factors are identified and listed on the fishbone diagram, it's important to analyze and prioritize which factors are the most likely to have caused the incident. This can involve discussing and debating the contributing factors during conversations with the involved parties.

## COMMON CATEGORIES TO CONSIDER

**People:** Who was involved in the incident or who could have contributed to the incident?

**Processes:** What processes were in place at the time of the incident? Did the process function as intended?

**Equipment:** Was there any equipment involved in the incident? Was it functioning properly?

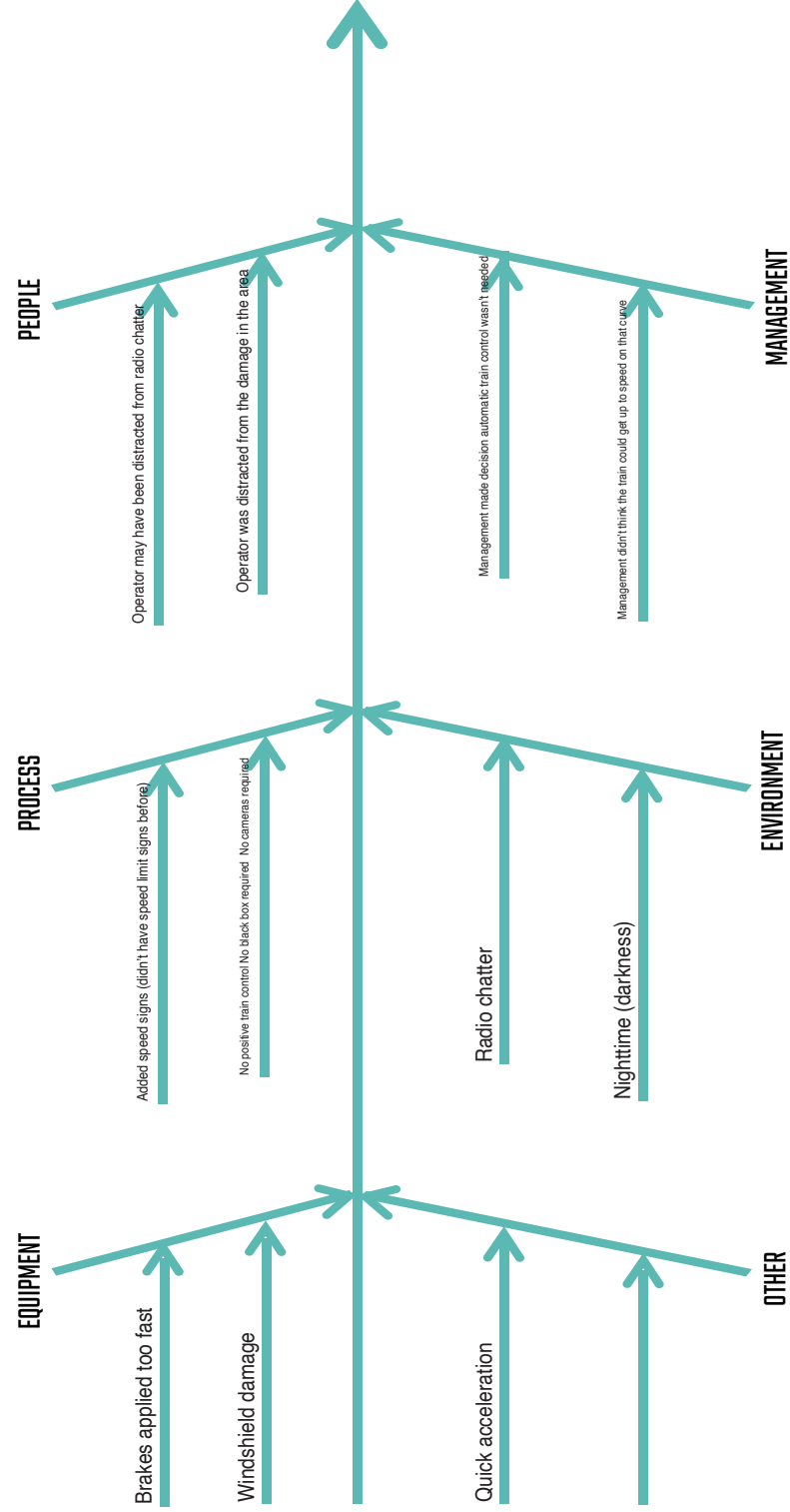
**Environment:** Was the environment a factor in the incident? Were there any hazardous conditions?

## COMPLETED EXAMPLE

Context: This template was used to organize and analyze data collected from a train incident.

### FISHBONE TEMPLATE

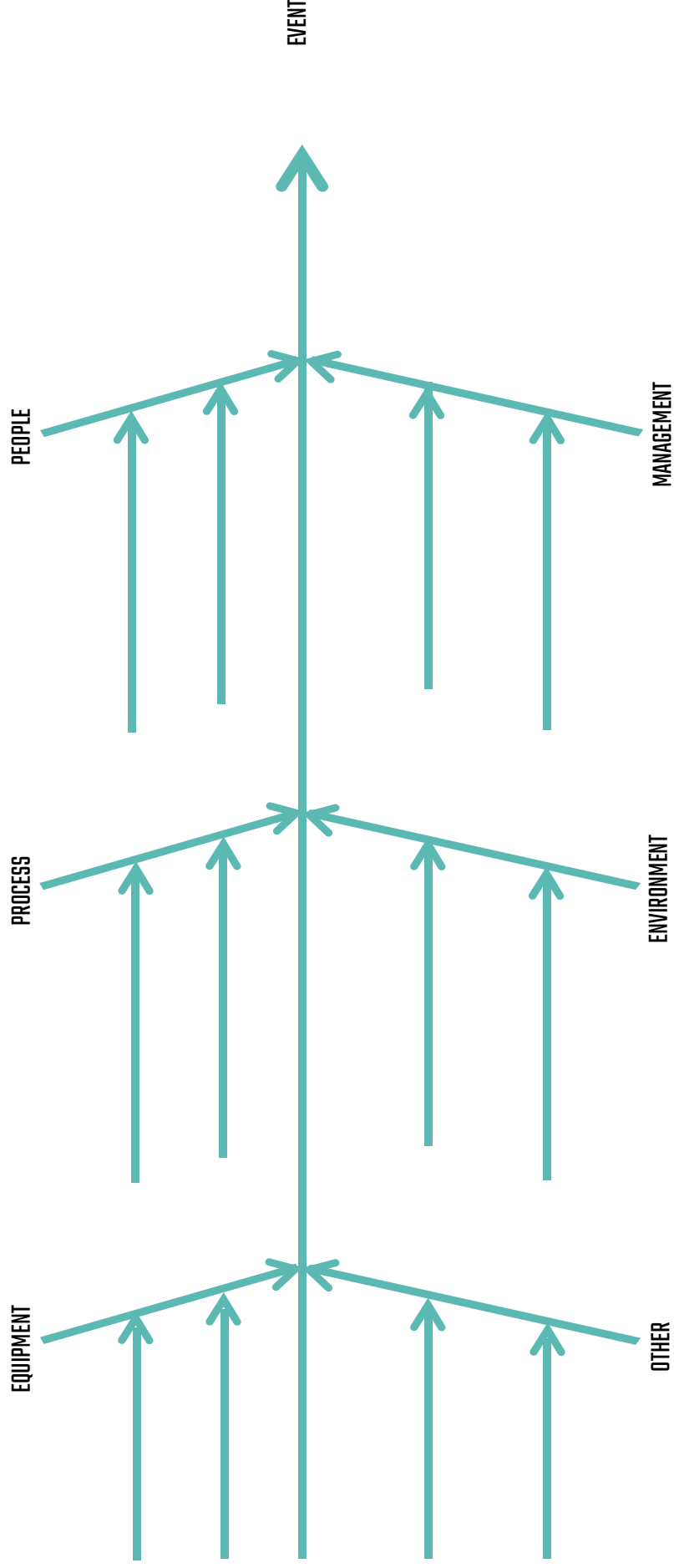
Use this template to identify the causal factors for each category that led to an event.





# FISHBONE TEMPLATE

Use this template to identify the causal factors for each category that led to an event.



# MANAGEMENT INCIDENT INVESTIGATION REPORT

## WHEN TO USE THIS FORM

The information added to the Management Incident Investigation Report should be a culmination of all of the data gathered during the investigation.

## PURPOSE

The Management Incident Investigation Report ensures that all relevant information is gathered and documented in a consistent manner, ultimately improving safety by creating safeguards to reduce the likelihood of future incidents occurring.

## CONSIDER

Think of this form as a canvas that can be used to paint a picture of what actually happened. Make sure to identify contributing factors and include 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.

## TIPS

### » IDENTIFY FACTORS

Think of this form as a canvas on which to paint a picture of what actually happened. Make sure to identify contributing factors and include ideas for improvements.

### » STAY RELEVANT

This form should be used to document the most important information found during the incident investigation process. Be sure to include the most relevant information and details.

### » SHARE FINDINGS

You can use the information gathered on this document to communicate the findings of the investigation to management, stakeholders and any other relevant parties.

# HOW IT WORKS

- 01 COLLECT RELEVANT INFORMATION**

Collect all relevant information related to the incident or near miss, including observer statements, photographs, documentation and any other available evidence. Conduct interviews with the involved parties.
- 02 ANALYZE THE INFORMATION**

Analyze the information collected to identify contributing factors of the incident. Using an analysis tool such as a fishbone diagram will help investigators determine the many factors that contributed to the incident.
- 03 DEVELOP SOLUTIONS**

Develop solutions to prevent similar incidents from occurring in the future. Solutions should be derived from Employee Incident and Incident Observer reports as well as analytical tools such as the fishbone diagram.
- 04 ELIMINATE THE HAZARDS**

Incidents almost always have multiple contributing factors. Determining those factors and layering solutions will result in a more impactful and lasting set of controls. The most effective solution is always eliminating the hazard from the process. The least effective solution is always implementing a new piece of personal protective equipment. The safety [hierarchy of controls](#) should be consulted when determining appropriate solutions.
- 05 SHARE FINDINGS**

Communicate the findings of the investigation to management, stakeholders and any other relevant parties. This may include a written report or presentation of the findings.
- 06 IMPLEMENT RECOMMENDED SOLUTIONS**

Implement the recommended solutions developed during the investigation and monitor their effectiveness over time. In the next section, we will introduce Pinnacol's Safety Solutions Tracking Spreadsheet to help promote interdepartmental participation in solution development and encourage a positive safety culture.

# 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?

# 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.

## 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.

## 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.

## 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: \_\_\_\_\_

# SAFETY SOLUTIONS TRACKING SPREADSHEET

## WHEN TO USE THIS FORM

Solutions should be tracked to verify that they were implemented and actually did what was intended, without other unexpected results.

## PURPOSE

Tracking progress promotes accountability and interdepartmental involvement in solution implementation. The completed report should be shared with all relevant parties, including management, legal departments and any other stakeholders who need to be informed.

## CONSIDER

This spreadsheet can be updated throughout the year to track additional solutions and whether the current solution worked or failed, and to capture progress notes. Be sure to make notes in the spreadsheet that others will be able to understand without the full context that you may hold as the investigator.

## TIPS



### DOWNLOAD A COPY

[Click here to download a copy of this spreadsheet.](#) The document will open as a Microsoft Excel file that you can edit and customize to meet the needs of your organization.



### TRACK PROGRESS

This document is a spreadsheet that can be updated throughout the year to track progress and it can be shared or distributed at operational meetings.



### PROMOTE ACCOUNTABILITY

Use this spreadsheet to hold colleagues and leadership accountable to the proposed solutions in order to prevent future incidents from occurring.



# RELATED TRAINING

## • • • AN EXCLUSIVE INVITATION FOR YOU

*You have been selected to shape  
the future of Safety Education Online.*

## SAFETY EDUCATION ONLINE

## BY PINNACOL ASSURANCE

### ARE YOU LOOKING TO LEVEL UP YOUR SAFETY TRAINING PROGRAM?

Look no further than Pinnacol's new Safety Education Online platform!  
As a beta tester, you'll have access to over 100 e-learning courses curated  
specifically for Colorado businesses. Pinnacol has you covered when it  
comes to safety education.

### WE NEED YOU

Your feedback will help shape the future of this innovative platform, which  
can help prevent workplace injuries and illnesses while shaping your safety  
culture and improving costs, including workers' compensation premiums.

### SOME OF THE COURSES YOU'LL FIND

Construction  
Defensive Driving  
Ergonomics  
Forklift Safety  
New Employee Safety Training

OSHA Compliance  
Safety Culture and Leadership  
Slips, Trips and Falls  
Workplace Safety  
Workplace Violence

*Limit of five users per company. Space is limited.*

### SIGN UP AND LEARN MORE ABOUT OUR BETA TESTING.

*For more information, email [LMS.support@pinnacol.com](mailto:LMS.support@pinnacol.com).*

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