

Appendix C: Sample of Incident Reporting Form

PART 1 EMPLOYEE SECTION: Contact Information and Description of Event				
COMPANY NAME		DEPARTMENT		
LOCATION OF EVENT	DATE OF EVENT	TIME OF EVENT	AM	REPORT DATE
			PM	
IF NOT REPORTED PROMPTLY, STATE REASON:				
INJURED NAME (FIRST, LAST)		TITLE		
INJURED ADDRESS		PHONE NUMBER & EMAIL		
CHECK OFF ALL STATEMENTS THAT BEST DESCRIBE THE INCIDENT				
☐ Critical incident stress ☐ Discrimination ☐ Psychological abuse ☐ Mental health problem/crisis ☐ Bullying ☐ Physical attack ☐ Harassment ☐ Working alone ☐ Threat ☐ Sexual harassment ☐ Workplace incivility ☐ Assault ☐ Verbal abuse ☐ Other, please explain:				
WAS THE INCIDENT ☐ Sudden event/occurrence ☐ Gradually occurring over time ☐ N/A				
DESCRIBE WHAT HAPPENED IN DETAIL Include who was involved and contributing factors.				
<i>Use back of the page for additional space</i>				
WHAT FACTORS CONTRIBUTED TO THE EVENT AND HOW COULD IT HAVE BEEN AVOIDED?				
WAS FIRST AID/MHFA ADMINISTERED? Yes ☐ No ☐ If yes, by whom?				
WAS MEDICAL TREATMENT ADMINISTERED? Yes ☐ No ☐ If yes, indicate hospital/doctor:				
WITNESS NAME(S) AND CONTACT INFORMATION, IF ANY				
Signature of injured party/complaint		Date		
IF THIS FORM WAS COMPLETED BY SOMEONE OTHER THAN THE INJURED PARTY, COMPLETE THE FOLLOWING:				
Form Completed By (First, Last Name)		Signature		
Phone Number		Date		

PART 2 SUPERVISOR SECTION: General Information and Preventive Measures			
SUPERVISOR NAME (FIRST, LAST)		TITLE	
PHONE NUMBER		REPORT DATE	
IF NOT REPORTED PROMPTLY, STATE REASON			
BASIC AND IMMEDIATE CAUSES: WHAT ACTIONS, CONDITIONS, PERSONAL OR JOB FACTORS CAUSED OR COULD CAUSE THIS EVENT? See list below			
IMMEDIATE CAUSES <i>(Check all that apply)</i> Substandard Actions: ☐ Under influence of alcohol or drugs ☐ Inappropriate workplace behavior Other: _____ BASIC CAUSES <i>(Check all that apply)</i> Personal Factors: ☐ Lack of knowledge ☐ Lack of skill ☐ Stress ☐ Distracted BASIC CAUSES – Continued <i>(Check all that apply)</i> Personal Factors: ☐ Fatigue ☐ Improper motivation ☐ Lack of job satisfaction ☐ Lack of engagement ☐ Personal issues Job Factors: ☐ Inadequate communication ☐ Work overload ☐ Inadequate work standards ☐ Insufficient leadership/supervision Job Factors – Continued: ☐ Inadequate policies and/or procedures ☐ Abuse and misuse ☐ Unclear/inadequate expectations ☐ Inadequate support ☐ Little or no accountability ☐ Lack of responsibility ☐ Ineffective conflict management ☐ Lack of control over work ☐ Unclear/inadequate priorities and goals ☐ Lack of resources ☐ Organizational change			