CALGARY SAFETY CONSULTANTS

Incident Report Review Checklist

How to use this checklist and report details

How to use this checklist

Use this checklist when you review a first incident report written by a supervisor, crew lead or worker. Your job isn't to rewrite the story. It's to check that the report is complete, factual, private enough, consistent with any external reports and properly signed, and that follow-up is assigned. It goes with our guide, **How to Write a Workplace Incident Report**, at calgarysafetyconsultants.ca/safety-guides/incidents/incident-report-writing/.

- Work through Parts A to D and tick **Yes**, **No** or **N/A** for each check. Every **No** needs a note in the last column.
- If something needs fixing, send it back to the writer and log it in **Part E**. Corrections are added and dated; the original is never erased.
- Use **Parts F and G** to hand over to the investigation and track follow-up actions to closure.
- Sign off in **Part H** and file the checklist with the report. Keep health information in a separate, restricted file.
- Reporting deadlines, privacy laws and retention periods differ across Canada. Confirm the rules that apply to your workplace.

Report details

Incident or report reference no.

Site

Exact location

Date of incident

Time

Report written by

Position

Date and time report written

Date and time received for review

Reviewed by

Type of incident

- ☐ Injury
- ☐ Illness or exposure
- ☐ Near miss
- ☐ Property or equipment damage
- ☐ Vehicle incident
- ☐ Spill or release
- ☐ Fire or explosion
- ☐ Violence or harassment
- ☐ Other:

Outcome or potential (tick all that apply)

- ☐ First aid only
- ☐ Medical treatment
- ☐ Lost time or modified duties
- ☐ Hospital admission
- ☐ Potentially serious near miss
- ☐ Reportable to the OHS regulator

Time from incident to written report (hours)

If more than one shift, why?

Problems reviewers find most often

Problem	What to ask the writer for
Judgement words	Replace careless, rushing or ignored with what was actually seen or done.
Cause stated as fact	Move the theory into "Questions for the investigation," worded as a question.
A diagnosis	Replace it with body part, what was seen, what the person said and the level of care.
Vague time or place	Give the exact location and the best time available, with its source.
Missing witnesses or photos	List witnesses with positions; number and list the photos and keep the originals.

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Part A: Is everything there?

Check	Yes	No	N/A	Fix needed or comment
Date, time and the source of the time (clock, log or estimate) are recorded.	☐	☐	☐	
The exact location is given (bay, room, gridline, door, GPS), not just the site name.	☐	☐	☐	
The incident type is ticked, and the form shows who wrote it and when.	☐	☐	☐	
Everyone involved is listed with role and employer; the injured person is clearly identified.	☐	☐	☐	
Witnesses are listed with role, contact details and where each one was.	☐	☐	☐	
The task, step and any permit, procedure or hazard assessment in use are described.	☐	☐	☐	
Conditions are recorded: weather, temperature, lighting, surfaces, housekeeping, traffic.	☐	☐	☐	
Equipment, tools, vehicles and materials are named, with unit numbers and condition as found.	☐	☐	☐	
PPE actually worn or used is listed item by item.	☐	☐	☐	
The sequence of events runs in order, from just before the event to just after.	☐	☐	☐	
Injury or damage is described, or the report says there was none.	☐	☐	☐	
For a near miss, what could reasonably have happened is described.	☐	☐	☐	
Immediate actions are listed with times, including anything moved before photos.	☐	☐	☐	
Photos, sketch, timeline and witness notes are listed, numbered and attached or stored.	☐	☐	☐	
Any blank part is marked "does not apply" rather than left empty.	☐	☐	☐	

Part B: Facts, not opinion

Check	Yes	No	N/A	Fix needed or comment
No judgement words (careless, rushing, ignored, failed to, should have, obviously).	☐	☐	☐	
No statement of cause in the narrative; theories appear only as questions for the investigation.	☐	☐	☐	
No admissions of fault, promises about compensation or comments about discipline.	☐	☐	☐	
Each fact shows whether it was seen, told (by whom) or found in a record.	☐	☐	☐	
Names identify people without carrying a verdict.	☐	☐	☐	
Hearsay is identified as such, with who said it.	☐	☐	☐	
Vague words (slippery, unsafe, minor) are replaced with specific descriptions or defined categories.	☐	☐	☐	
No jokes, sarcasm or venting.	☐	☐	☐	

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Part C: Injury and damage descriptions

Check	Yes	No	N/A	Fix needed or comment
The injury is described by body part (left or right), what was seen and what the person said they felt.	☐	☐	☐	
The level of care is recorded (first aid, clinic, hospital, ambulance, admitted or not).	☐	☐	☐	
There are no diagnoses, medications or medical history in the report.	☐	☐	☐	
Damage is described by item, unit number and what is damaged, with no undefined "minor" or "major."	☐	☐	☐	
The injured worker has been offered the chance to read the narrative and add their own account.	☐	☐	☐	

Part D1: Privacy

Check	Yes	No	N/A	Fix needed or comment
Health information is limited to what the report needs.	☐	☐	☐	
Clinic notes and compensation paperwork are filed separately with restricted access.	☐	☐	☐	
Copies for the committee, crew briefing or client carry facts, not medical details.	☐	☐	☐	
For a sensitive incident, a reference number replaces names in widely shared copies.	☐	☐	☐	
Photos of injuries were taken only with the person's agreement and for a clear reason.	☐	☐	☐	
Electronic copies are stored with access controls; no incident photos on personal social media or group chats.	☐	☐	☐	

Part D2: Notifications

Notification	Required	Done	Date and time	By whom	Reference no.
Employer or senior manager	☐	☐			
Committee or representative	☐	☐			
Workers' compensation board	☐	☐			
OHS regulator	☐	☐			
Prime contractor or owner	☐	☐			
Union (where applicable)	☐	☐			

Part D3: Consistency with external reports

Check	Yes	No	N/A	Fix needed or comment
The WCB employer's report uses the same facts, times and description as this report.	☐	☐	☐	
Any regulator report or notice matches this report, and new facts have been added to both.	☐	☐	☐	

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Part E: Corrections log

Corrections are made as dated, initialled additions or as a new version. The original report is kept, never erased or overwritten.

Date	What was missing or needs correcting	Requested by	Corrected by	Date done	Original kept
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

Part F: Handover to the investigation

- ☐ Investigation required
- ☐ Regulator investigation expected
- ☐ Committee or representative to take part
- ☐ Investigation not required (reason below)
- ☐ Potentially serious incident
- ☐ External investigator to be engaged

Investigation lead

Date assigned

Due date

Investigation file no.

Handed to the investigator (tick each item passed on)

- ☐ This report and any earlier versions
- ☐ Witness list and witness notes
- ☐ Sketch and timeline
- ☐ Notifications log
- ☐ Writer's rough notes
- ☐ Numbered photos (original files)
- ☐ First aid record
- ☐ Questions for the investigation

Interim controls in place until the investigation is complete (what, who, when)

Reason no investigation is required (if applicable)

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Part G: Follow-up actions log

Record actions that come from the review and from the investigation. Each one needs an owner and a due date, and is verified as done. Move longer-term corrective actions into your corrective action tracking.

No.	Action	Owner	Due date	Done	Verified by	Date verified
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		
				☐		

Notes on follow-up, including anything shared with workers and the committee

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Part H: Sign-off and record keeping

Review result

☐ Accepted as complete ☐ Accepted with corrections logged in Part E ☐ Returned to the writer

Reviewer's comments

Sign-off

Role	Name	Signature or initials	Date
Report writer			
Injured worker (account read)			
Reviewer			
Safety coordinator			
Senior manager			
Committee co-chair or representative			

Record keeping

☐ The report, earlier versions, notes, photos, witness list and this checklist are filed together with the investigation file.

☐ The file cross-references any workers' compensation claim number.

☐ Health information is kept separately with restricted access.

☐ The retention period meets the longest legal requirement that applies to us, and our own company rule.

Filed in (system or location) | **Retention period** | **Keep until**

Examples of legal minimums: Alberta, investigation reports under section 33 of the OHS Act, at least 2 years; Ontario, written reports and notices, at least 3 years; federally regulated employers, Part XV reports and records, 10 years. Confirm the rules in your jurisdiction, and keep files longer where claims or appeals may continue.

Document review

Review this checklist at least once a year, when your incident procedure or forms change, and whenever the law in your jurisdiction changes. Record who reviewed it and when.

Adapted for (company or site) | **Reviewed by** | **Review date** | **Next review date**

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