How to use this guide

This quick guide helps supervisors, crew leads, safety coordinators and workers write the first written report of a workplace incident: an injury, illness, near miss, damage or other unplanned event. It goes with our guide, **How to Write a Workplace Incident Report**, at calgarysafetyconsultants.ca/safety-guides/incidents/incident-report-writing/.

- **Pages 1 to 4** explain what to capture, which words to use and avoid, and show weak and strong wording side by side.
- **Pages 5 to 7** are a fillable **draft worksheet**. Use it to organize your notes before you fill in your company's incident report form, or use it as the report if you don't have a form.
- **Page 8** is a **practice exercise** for supervisor training or a toolbox talk.
- This guide doesn't replace your incident report form or the free Incident Report Form on our Free Downloads page. The reviewer uses the separate **Incident Report Review Checklist**.

The five rules of a good first report

Rule	What it means
1. Write it soon.	Before the end of the shift if you can, once people are safe and the urgent response is done. If you can't, write rough notes right away: times, names, what you saw and did. Keep the notes.
2. Stick to facts.	Write what you saw, what you were told (and by whom) and what you found in a record. Could a camera have recorded the sentence, or could you point to a record? If not, it doesn't belong in the narrative.
3. Tell it in order.	Start just before the incident, then the event, then what happened right after. Short sentences, past tense, plain words. Give times and measurements.
4. Keep health details minimal.	Body part, what was seen, what the person said they felt and the level of care. No diagnoses, medications or medical history.
5. Leave cause and blame to the investigation.	No judgement words, no guesses about why. Put useful hunches in the "Questions for the investigation" box, worded as questions.

Who writes it

Usually the supervisor or person in charge, with input from the injured worker and the witnesses. If the supervisor was directly involved, or gave the instruction that led to the incident, another supervisor or the safety coordinator writes or co-writes it. On a multi-employer site, agree in advance who writes it and make sure both employers get a copy.

> **Remember:** the first report may be read by the injured worker, the workers' compensation board, the joint health and safety committee or representative, an OHS officer, the investigator and an auditor. Write it so every one of them can rely on it.

When it's due

Your own procedure sets the internal deadline, but external clocks start early. Workers' compensation boards expect the employer's injury report within days, in some provinces within two or three business days, and some investigation reports are due within 48 hours. Every one of those reports is built from your first report, so a late or vague first report puts all of them at risk. If you can't finish the report on the shift, hand in your rough notes and finish it at the start of the next one.

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A good report lets someone who wasn't there picture the event. Cover every part below. Leave a part out only if it truly doesn't apply, and say so ("No equipment involved").

Part	What to record	Example
Basic details	Date; time and where the time came from (camera clock, radio log, estimate); exact location; incident type; who wrote the report and when.	"Door 4 ramp, north side," not "the yard."
People involved	Injured or affected people, operators, helpers, responders; job titles; employers on shared sites.	Names here, not as labels in the story.
Witnesses	Name, role, employer, phone, and where each one was standing or working.	"About 10 m away at Door 5."
The work	The task, the step being done, who assigned it, any permit, procedure or hazard assessment in use.	"Unloading boxed fittings by hand from trailer 22."
Conditions	Weather and temperature, lighting, surfaces, housekeeping, noise, traffic, anything unusual.	"Thin clear ice, no sand visible."
Equipment and materials	Tools, vehicles, machines, materials, with unit numbers and condition as found.	"Forklift F-12, rear bumper bent."
PPE	What the person was actually wearing and using, item by item.	"No ice cleats on his boots."
What happened	The sequence, in order, from just before the event to just after. Mark each fact as seen, told or record.	"Priya told me she saw..."
Injury or illness	Body part, left or right; what you saw; what the person said they felt; level of care.	"Swollen left wrist; to clinic 7:10 a.m."
Damage	Item, unit number, what is damaged and how you can tell.	"Rack upright dented at knee height."
Near-miss potential	What could reasonably have happened, in factual terms.	"Load passed about 1 m from two workers."
Immediate actions	Work stopped, area made safe, first aid, 911, transport, lockout or tag-out, scene held or released, with times. Anything moved before photos, by whom and why.	"Ramp closed with cones 6:52 a.m."
Notifications	Who was told, by whom, when, how, and any reference number.	"WCB report filed 9:15 a.m. next day."
Attachments	Numbered photos, sketch, timeline, first aid record, witness notes.	"Photos 1 to 6, sketch A."

Timeline, sketch and photo tips

- **Timeline:** list the key moments with times (task started, incident, first aid, 911, barricade, ambulance, notifications) and where each time came from.
- **Sketch:** a plan view from above is enough. Mark a fixed landmark, people, equipment, measured distances and where photos were taken from. Add the date, time and your name.
- **Photos:** before anything is moved, where safe. Wide shots from each side, then close-ups with something for scale. Number them, list them, and keep the original files.
- **Witnesses:** list them and ask each one to jot down what they saw, in their own words, before comparing notes. Full statements and interviews belong to the investigation.

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Words to avoid, and what to write instead

Avoid	Write this instead
careless, lazy, complacent	Describe what the person did: "stepped onto the ramp carrying a box."
rushing, in a hurry	Give times and facts: "truck arrived at 6:30 a.m.; unloading began at 6:35 a.m."
ignored, failed to, refused to	State what happened: "the gate was open when I arrived."
should have, supposed to	Leave it out, or ask it as a question for the investigation.
obviously, clearly, of course	Leave it out. If it's obvious, the facts will show it.
broken, fractured, sprained, concussion	Describe what you saw and were told: "swollen, said he couldn't grip."
minor, major, serious (undefined)	Describe it, or use your form's defined categories.
the company's fault, our mistake	Leave admissions out. Record facts only.
slippery, unsafe, bad (vague)	Be specific: "thin clear ice," "oil on the floor about 1 m wide."
a few guys, some people	Name the witnesses, roles and positions.

Say how you know each fact

Source	How to write it
Saw	"I saw the pallet lean forward off the forks."
Told	"Dale Whitford told me at 6:50 a.m. that he heard a shout from the ramp."
Record	"The forklift pre-use inspection for 6:00 a.m. was signed and showed no defects."
Not sure	"I'm not sure whether the horn sounded before or after the pallet tipped."

Injuries and health information

- **Do** record the body part (left or right, upper or lower), what you saw, what the person said they felt, and the level of care: first aid on site, clinic, hospital, ambulance, admitted or not.
- **Don't** diagnose, record medications or past medical history, or photograph injuries without the person's agreement and a clear reason.
- **Keep** clinic notes and compensation paperwork in a separate, restricted file. Shared copies of the report (committee, crew briefing, client) carry facts, not medical details.

Names

List names, roles and employers in the people section. In the narrative, use names only where they make the sequence clear, and never attach a judgement to a name. For sensitive incidents (violence, harassment, mental health, bloodborne exposure), use a reference number in widely shared copies.

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Example: a yard worker slips on an icy loading dock ramp at 6:40 a.m. Names are invented.

Weak	Strong	Why it's better
"Worker was careless and fell."	"At about 6:40 a.m., Sam Ortiz, yard worker, slipped on the Door 4 ramp while carrying a box and fell onto his left side."	Who, when, where and what, with no judgement.
"Ramp was icy because night shift didn't salt it."	"When I arrived at 6:45 a.m., the ramp had a thin layer of clear ice. I saw no sand or de-icer on it."	The condition seen; the cause is for the investigation.
"Broken wrist."	"Sam said his left wrist hurt and he couldn't grip. The wrist was swollen. He was driven to the walk-in clinic at 7:10 a.m."	What was seen and reported, and the level of care. No diagnosis.
"Didn't have proper PPE on."	"Sam was wearing a hard hat, high-visibility vest, gloves and insulated safety boots. There were no ice cleats on his boots."	What was actually worn, item by item.
"He was rushing because the truck came early."	Narrative: leave it out. Questions for the investigation: "Did the early truck arrival affect the receiving routine?"	A guess becomes a question the investigation can test.
"A couple of guys saw it."	"Witnesses: Priya Nand, forklift operator, about 10 m away at Door 5; Dale Whitford, receiver, inside Door 4."	Names, roles and positions.
"Cleaned up and got back to work."	"Photos 1 to 6 taken at 6:50 a.m. Ramp closed with cones at 6:52 a.m., sanded at 7:05 a.m. and reopened at 7:15 a.m. after I checked it."	Actions and times; photos before the scene changed.
"Probably needs stitches."	"Cut about 2 cm long on the back of the right hand. Bleeding controlled with a dressing by the first aider at 10:12 a.m."	Size, location and care given, not a medical guess.
"Jim ignored the spotter and hit the post."	"Forklift F-12, driven by Jim Reyes, reversed into the steel post at bay 7 at about 2:15 p.m. A spotter, Ana Lopes, was at bay 6."	Facts and positions, with the name carrying no verdict.

Questions for the investigation. If you have a theory, don't bury it and don't put it in the narrative. Write it as a question in the separate box on page 7, for example: "Was the ramp on the de-icing schedule for the 6 a.m. receiving window?"

A model narrative

"On Tuesday at about 6:40 a.m. (time from the dock camera), Sam Ortiz, yard worker, was carrying a box of fittings from trailer 22 down the Door 4 ramp. Priya Nand, forklift operator at Door 5, told me she saw Sam's right foot slide and saw him fall onto his left side. I arrived at 6:45 a.m. The ramp had a thin layer of clear ice and I saw no sand or de-icer on it. Sam said his left wrist hurt and he couldn't grip. The wrist was swollen. The first aider, Dale Whitford, applied a cold pack at 6:48 a.m. I took photos 1 to 6 at 6:50 a.m., closed the ramp with cones at 6:52 a.m. and called the yard manager at 6:55 a.m. The ramp was sanded at 7:05 a.m. A co-worker drove Sam to the walk-in clinic at 7:10 a.m. I checked the ramp and reopened it at 7:15 a.m."

Notice what the narrative leaves out: no judgement words, no cause, no diagnosis. Questions about the de-icing schedule and the dock lighting go in the "Questions for the investigation" box.

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Incident Report Writing Quick Guide

Draft worksheet, part 1: basics, people and conditions

Fill this in on screen or on paper as soon as you can. Use it to organize the facts before you complete your company's incident report form, or keep it as the report itself.

Type of incident (tick all that apply)

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

Date of incident | **Time** | **Source of time (clock, log, estimate)** | **Report reference no.**

Site | **Exact location on site**

Written by | **Position** | **Date written** | **Time written**

People involved and witnesses

Name	Role and employer	Phone	Where they were	Injured	Witness	Involved
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐

The work and conditions

Task being done | **Permit, procedure or hazard assessment in use**

Weather and temperature | **Lighting** | **Surfaces and housekeeping**

Equipment, tools, vehicles and materials involved (with unit numbers and condition as found)

PPE actually worn or used (tick what was in use)

- ☐ Hard hat
- ☐ Safety glasses or goggles
- ☐ Face shield
- ☐ High-visibility clothing
- ☐ Gloves
- ☐ Safety footwear
- ☐ Ice cleats or traction aids
- ☐ Hearing protection
- ☐ Respirator
- ☐ Fall protection
- ☐ Flame-resistant clothing
- ☐ Other:

PPE notes (item by item, as found)

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Sequence of events

One line per step, in order, starting just before the incident. Tick how you know each one: saw it, were told (write who), or found it in a record.

Time	What happened (plain words, past tense)	Saw	Told	Record	Told by or record
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	

Injury, illness or damage

Person

Body part (left or right)

What you saw

What the person said they felt

Level of care and outcome (as known today)

- ☐ No treatment
- ☐ First aid on site
- ☐ Clinic or doctor
- ☐ Hospital, not admitted
- ☐ Ambulance
- ☐ Admitted to hospital
- ☐ Modified duties
- ☐ Time lost after the day of injury

Damage (item, unit number, what is damaged and how you can tell) or, for a near miss, what could reasonably have happened

Immediate actions

- ☐ Work stopped
- ☐ Area made safe
- ☐ First aid given
- ☐ 911 or site emergency called
- ☐ Equipment locked or tagged out
- ☐ Scene held for the regulator
- ☐ Photos taken
- ☐ Witnesses identified
- ☐ Something moved before photos

What was done, by whom and when (include anything moved before photos, by whom and why)

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Notifications

Notified	Done	By whom	Date and time	Reference no.
Employer or manager	☐			
Committee or representative	☐			
Workers' compensation board	☐			
OHS regulator (if reportable)	☐			
Prime contractor or owner	☐			

Photos, sketch and other attachments

No.	Taken or made by	Date and time	What it shows (and from where)

Sketch area: plan view from above. Mark a landmark, people, equipment, distances and where photos were taken from.

Questions for the investigation

Theories or things worth checking, written as questions (not in the narrative)

Writer's self-check before you hand it in

- ☐ Every part is filled in, or marked "does not apply."
- ☐ No judgement words, guesses about cause, admissions or diagnoses in the narrative.
- ☐ Each fact shows whether I saw it, was told it (by whom) or found it in a record.
- ☐ Health details are limited to body part, what was seen, what was said and the level of care.
- ☐ Photos are numbered and listed, and the original files are saved.

Writer's signature or initials | **Date** | **Handed to (reviewer)**

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Use this page in supervisor training or a toolbox talk. Rewrite each weak statement as a factual one. Where you'd need information the statement doesn't give you, write what you would check or ask. Compare your answers with page 4.

1. Weak: "The new guy wasn't paying attention and cut his hand on the saw."

2. Weak: "Floor was a mess as usual, so she tripped."

3. Weak: "He probably sprained his back lifting that box wrong."

4. Weak: "The driver backed into the gate because he never uses a spotter."

5. Weak: "Close call with the crane, nobody hurt, no big deal."

Discussion

What did the group change most often? Which words or habits will we watch for in our own reports?

Session led by | **Date** | **Number of participants**

Document review

Review this quick guide 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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