CALGARY SAFETY CONSULTANTS

Reporting Decision Worksheet

Regulator and WCB reporting decision

Use one worksheet for each incident. It walks the person in charge through the two outside reports, the OHS regulator report and the workers' compensation employer report, and records who was told, when, and what written follow-up is due. Start it as soon as people are safe. If you aren't sure whether something is reportable, call the regulator and ask, and record the answer here.

How to use it

- ☐ Make people safe and get emergency help first. Reporting comes next, not later in the shift.
- ☐ Work through Parts B to E. Tick every box that applies; any tick in Part B means the incident is likely reportable to OHS.
- ☐ Report what you know now and update the regulator if facts change. Log every call in Part F.
- ☐ Keep the completed worksheet with the incident report and investigation, and enter it on the reporting log (page 6).

Part A: Incident details

Incident number | **Date** | **Time** | **Worksheet started by**

Site and exact location | **Employer of the person involved**

Prime contractor, constructor or owner (if any) | **Their contact and phone**

What happened (facts only)

Injuries or illness, and treatment so far (first aid, clinic, ER, admitted to hospital)

Jurisdiction where the incident happened

- ☐ Alberta
- ☐ British Columbia
- ☐ Saskatchewan
- ☐ Manitoba
- ☐ Ontario
- ☐ Quebec
- ☐ Nova Scotia
- ☐ New Brunswick
- ☐ Prince Edward Island
- ☐ Newfoundland and Labrador
- ☐ Yukon
- ☐ Northwest Territories
- ☐ Nunavut
- ☐ Federal (Canada Labour Code)

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part B: Reportability check

Tick everything that applies, then check the exact list for your jurisdiction on the Quick Reference. Lists differ: for example, Alberta uses hospital admission, Saskatchewan 72 hours or more as an in-patient, the NWT and Nunavut 24 hours or more.

People

- ☐ Death
- ☐ Unconsciousness
- ☐ Serious burn
- ☐ Electrical contact injury
- ☐ Injury likely to be fatal
- ☐ Amputation
- ☐ Loss of sight
- ☐ Deep cut needing hospital
- ☐ Admitted or likely to be admitted to hospital
- ☐ Fracture (check list)
- ☐ Asphyxiation or poisoning
- ☐ Two or more workers seriously hurt

Dangerous occurrences (injury or not)

- ☐ Structural failure or collapse
- ☐ Mobile equipment overturn
- ☐ Major hazardous release or spill
- ☐ Premature detonation
- ☐ Fall where fall protection required
- ☐ Scaffold, formwork or trench collapse
- ☐ Explosion
- ☐ Contact with energized conductor
- ☐ Elevated platform failure
- ☐ Boiler or pressure vessel failure
- ☐ Crane, derrick or hoist collapse
- ☐ Fire or flood
- ☐ Grinding wheel burst
- ☐ Supplied-air respirator failure
- ☐ Elevating device failure

Other reports that may apply

- ☐ AB potentially serious incident
- ☐ Occupational illness
- ☐ ON disabling injury (s. 52)
- ☐ Mine incident
- ☐ ON prescribed incident
- ☐ Non-worker death or critical injury (ON)

Decision

- ☐ Yes: report to the regulator now
- ☐ No: not reportable to OHS
- ☐ Not sure: call the regulator and ask

Decided by

Date and time

Checked against (law or page)

If not reportable, why (keep this reasoning for audits)

Scene

- ☐ Scene held
- ☐ Photos taken before anything moved
- ☐ Barricaded and guarded
- ☐ Something moved to save life or prevent harm

Scene guarded by

From (time)

Anything moved, and why

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part C: Regulator notification

Regulator called

Number used

Date and time of call

Called by

Spoke to (name and role)

Reference or file number

What we reported and what the regulator told us (officer attending, scene release instructions, documents requested)

- ☐ Officer attending
- ☐ Scene to be held until released
- ☐ Written report requested
- ☐ Online report required
- ☐ Investigation report requested

Part D: Other notices

Who	Required here?	Told by	Date and time	How	Notes
Joint committee co-chair(s) or representative	☐				
Union	☐				
Prime contractor, constructor or owner	☐				
Senior manager or owner	☐				
Injured worker's family (by the right person)	☐				
Insurer, client or other	☐				
	☐				

Copies of the regulator notice go to the committee or representative in SK, the NWT and Nunavut (names removed in the territories). NS, NB, PE and NL require notice at the same time; Ontario adds the union; federal employers notify without delay with the investigator's name.

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part E: Compensation board report

What applies to this worker?

- ☐ Treatment beyond first aid
- ☐ Modified work
- ☐ Occupational disease or illness
- ☐ Death or permanent disability
- ☐ Time off after the day of injury
- ☐ Lost pay or hours
- ☐ Mental health injury
- ☐ First aid only, no lost time

Decision

- ☐ Yes: file the employer report
- ☐ No: first aid only, record internally

Board	Our account number	Date we became aware	Report due by

Submitted by	Date submitted	How (online, phone, fax)	Claim number

- ☐ Copy given to the worker
- ☐ Worker told how to make their own report
- ☐ Return-to-work contact named

Board deadlines: AB 72 hours; NS 2 business days; ON, NT and NU 3 business days; BC, NB, PE, YT and NL 3 days; MB 5 business days; SK 5 days. The clock usually starts when the employer becomes aware. Never discourage a worker from reporting or claiming.

Part F: Calls and updates log

Date and time	Who called whom	What was said or updated	Reference

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part G: Written follow-up due dates

Report	Due date	Sent to	Prepared by	Sent on
Written report to the regulator				
Preliminary investigation report				
Full investigation report				
Copy to committee or representative				
Engineer's opinion (if required)				
Online PSI submission (AB)				

Examples: ON 48 hours after a death or critical injury; BC 48 hours (preliminary) and 30 days (full); QC 24 hours; federal 14 days. Where no day count is set, complete the report as soon as is reasonably possible.

Part H: Scene release

Scene released by (name, agency)

Date and time

Reference

Conditions or orders given at release

- ☐ Photos and measurements completed
- ☐ Equipment quarantined or tagged
- ☐ Committee or representative inspected (if required)
- ☐ Interim controls in place before restart

Part I: Hand-off

- ☐ The investigation lead has this worksheet, the call log and the regulator reference numbers.
- ☐ Due dates in Part G are in the investigation lead's calendar.
- ☐ The incident is entered on the reporting log (next page).

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Reporting Decision Worksheet

Reporting log

Keep one running log for each site or for the company. It shows at a glance that every incident was assessed for reporting, and it's the first thing an auditor or inspector is likely to ask for.

Inc. no.	Date	Jurisd.	OHS? Y/N	OHS ref. no.	WCB? Y/N	Claim no.	Follow-up due	Closed	Notes

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Review of this incident's reporting

- [ ] The regulator decision was made and recorded promptly, and any call was made within the legal time.
- [ ] The committee, representative, union and prime contractor were told as required.
- [ ] The compensation report reached the board by its deadline, and the worker had a copy.
- [ ] Every written follow-up was sent on or before its due date.
- [ ] Lessons for our reporting procedure have been identified (late calls, unclear triggers, missing numbers).

Lessons and changes to our reporting procedure

Sign-off

Name	Role	Signature or initials	Date

Worksheet closed on

Procedure review date

Filed in

Need help? The full guide, How to Report Workplace Incidents Across Canada, is at calgarysafetyconsultants.ca/safety-guides/incidents/incident-reporting-requirements/. Calgary Safety Consultants can also write or review your incident reporting procedure.

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.