

FREE MANUFACTURING INCIDENT REPORT TEMPLATE

Workplace Incident Report Checklist

Use this 60-point checklist to capture workplace incidents and near misses from immediate response through event facts, people, witnesses, scene evidence, hazards, notifications, severe-event screening, investigation handoff, and initial approval.

Incident ID

Incident date / time

Location / department

Reporter / supervisor

Internal manufacturing template. Apply current emergency, EHS, privacy, recordkeeping, workers' compensation, State Plan, and other jurisdictional requirements. For U.S. federal OSHA, 29 CFR 1904.39 includes 8-hour fatality and 24-hour severe-injury reporting requirements.

1. Immediate response, emergency care, hazard control, and report initiation

1

Confirm injured or affected employees received required first aid, medical treatment, emergency response, rescue, evacuation, or other immediate care.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

2

Verify immediate hazards such as energy, fire, chemical release, unstable equipment, traffic, electrical exposure, or structural danger were controlled or isolated.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

3

Confirm the supervisor, EHS contact, control room, security, emergency team, or other required internal contact was notified promptly.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

4

Record whether the work area, equipment, process, or task was stopped, isolated, restricted, or allowed to continue under approved controls.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

5

Confirm the reporter understands that the incident form captures initial facts and does not replace emergency response or a full investigation when one is required.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

6

Record incident report ID, report date and time, reporter, department, supervisor, incident location, and initial event classification.

REPORT

INITIAL STATUS | Enter

SUPERVISOR | Enter

EHS REVIEW | Enter

Execution tip: Protect people first. The incident report should begin only after immediate medical, rescue, evacuation, shutdown, or hazard-control needs have been...

2. Incident date, time, location, work activity, and initial event details

7

Record the exact or best-known incident date and time and distinguish the occurrence time from the time the event was reported.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

8

Identify the facility, department, building, line, machine, room, warehouse zone, yard, vehicle route, or other specific incident location.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

9

Describe the work activity, task step, job, maintenance activity, material movement, inspection, cleaning, setup, or other operation underway.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

10

Record a concise factual description of what happened before, during, and immediately after the event using observable information.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

11

Identify whether the event involved an injury, illness, near miss, equipment damage, property damage, fire, spill, release, vehicle event, or another approved incident category.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

12

Clearly mark any uncertain, estimated, disputed, or unknown incident details rather than presenting assumptions as confirmed facts.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Capture facts while they are fresh. Describe what was happening immediately before the event, what happened, and what changed afterward without...

3. Affected employee, injury or illness details, treatment, and work status

13

Record the affected employee's name or approved identifier, job title, department, employer or contractor, shift, and work activity where required.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

14

Identify the nature of the injury or illness, affected body part, symptoms, exposure, or other initial medical description using the organization's approved reporting categories.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

15

Record whether first aid, onsite medical treatment, clinic or physician care, emergency department treatment, in-patient hospitalization, or other care occurred.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

16

Record whether the employee returned to normal work, had restricted duty, was transferred, missed work, or had another initial work-status outcome.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

17

Confirm any amputation, loss of an eye, in-patient hospitalization, fatality, or other potentially severe event is escalated immediately for reporting review.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

18

Verify medical or personal information is shared only with personnel who require it for legitimate safety, recordkeeping, claims, or legal responsibilities.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Collect only information needed for incident response, recordkeeping, and investigation, and handle medical information according to applicable privacy and...

4. Witnesses, people present, statements, and immediate observations

19

Identify employees, contractors, supervisors, visitors, drivers, responders, or others who witnessed the event or arrived immediately afterward.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

20

Record witness names or approved identifiers, roles, contact information where required, and where each person was positioned relative to the incident.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

21

Capture brief initial witness observations using factual language and distinguish direct observation from information heard from someone else.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

22

Avoid leading questions, blame-focused statements, or assumptions when recording initial witness information.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

23

Record whether witness follow-up interviews are required and assign or identify the person responsible for completing them.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

24

Preserve meaningful differences between witness accounts instead of forcing a single version before the investigation is complete.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Identify witnesses early. Initial incident reports should preserve who saw or heard relevant facts so investigators can follow up before memories fade or...

5. Scene condition, photographs, equipment, materials, PPE, and evidence capture

25

Capture overall scene photographs showing the incident area, approach, equipment position, floor condition, work setup, and surrounding environment where appropriate.

CRITICAL

REPORT

Complete

Needs follow-up

Critical gap

LIVE PHOTO | Add

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

26

Capture close-up photographs of damage, spills, guards, controls, tools, PPE, labels, warning signs, components, marks, residues, or other relevant conditions.

CRITICAL

REPORT

Complete

Needs follow-up

Critical gap

LIVE PHOTO | Add

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

27

Record equipment, machine, vehicle, tool, asset, or device identification numbers involved in the event where applicable.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

28

Identify materials, chemicals, products, loads, components, energy sources, or substances involved and record labels, batch or lot, SDS reference, or other details where relevant.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

29

Record PPE worn, not worn, damaged, missing, or otherwise relevant to the event without using PPE status alone as the conclusion about cause.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

30

Preserve or identify failed parts, damaged items, tools, PPE, samples, electronic logs, CCTV, alarm data, or other evidence needing investigation follow-up.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Photograph the scene before cleanup or repair when safe and practical. Initial evidence can disappear quickly once production restarts or emergency...

6. Immediate hazard observations, unsafe conditions, controls, and temporary actions

31

Record visible hazards or abnormal conditions such as missing guards, spills, congestion, damaged equipment, inadequate lighting, unstable loads, exposed energy, or unsafe access.

CRITICAL

REPORT

Complete

Needs follow-up

Critical gap

LIVE PHOTO | Add

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

32

Record any alarm, interlock, emergency stop, permit, safeguard, warning, procedure, lockout, barrier, ventilation, or other control relevant to the event.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

33

Confirm temporary actions such as barricading, shutdown, equipment removal, cleanup, isolation, restricted access, added supervision, or interim PPE are documented.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

34

Assign an owner and review time for temporary controls that must remain in place after the initial report.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

35

Verify temporary actions do not unintentionally destroy critical evidence needed for the incident investigation unless necessary for safety or emergency response.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

36

Record any continuing hazard that requires immediate escalation before the area, process, equipment, or task can return to normal operation.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The report should capture hazards seen at the time, but it should not confuse the first visible condition with the root cause. Temporary controls protect...

7. Supervisor review, internal notifications, serious-event screening, and escalation

37

Confirm the responsible supervisor reviews the initial incident report for completeness, immediate risk, and required internal escalation.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

38

Notify EHS, plant management, HR, occupational health, security, maintenance, engineering, quality, or other required functions according to the event type.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

39

For U.S. federal OSHA jurisdiction, screen work-related fatalities for the 8-hour reporting requirement under 29 CFR 1904.39.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

40

For U.S. federal OSHA jurisdiction, screen work-related in-patient hospitalizations, amputations, and losses of an eye for the 24-hour reporting requirement under 29 CFR 1904.39.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

41

Confirm applicable State Plan, workers' compensation, environmental, fire, transportation, insurer, customer, or other notification requirements are reviewed where relevant.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

42

Document who made the initial reportability or escalation decision, when it was made, what facts were used, and what follow-up is still required.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Serious-event reporting clocks can be short. Supervisors should escalate potentially reportable events immediately rather than waiting for the full...

8. Recordkeeping inputs, classifications, attachments, and documentation completeness

43

Confirm incident type, injury or illness type, body part, event category, department, shift, equipment, and other required internal classifications are completed consistently.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

44

Verify information needed for applicable injury and illness recordkeeping review is captured or clearly identified for follow-up.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

45

Attach or link available scene photos, witness notes, medical or first-aid confirmation, equipment information, permits, work orders, production records, or other relevant evidence.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

46

Check dates, times, names, locations, asset IDs, quantities, and event descriptions are internally consistent across the incident report and attachments.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

47

Confirm blanks or unknown fields are intentionally marked as unknown, pending, not applicable, or follow-up required rather than silently omitted.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

48

Verify paper or electronic corrections preserve the original record and follow approved record-integrity practices.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: An incident report should provide enough information for recordkeeping and investigation without pretending to make decisions that require later medical,...

9. Investigation handoff, action assignment, follow-up ownership, and open-item tracking

49

Determine whether the incident requires a formal investigation based on severity, potential severity, recurrence, regulatory significance, or the organization's criteria.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

50

Assign an investigation lead or responsible function and record the expected investigation start or completion date where required.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

51

List open evidence needs such as witness interviews, maintenance records, CCTV, technical testing, equipment inspection, medical clarification, or process data.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

52

Record immediate corrective or containment actions already assigned, including owner, due date, interim control, and status.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

53

Confirm significant hazards, repeat incidents, or serious-event conditions remain escalated until investigation and permanent corrective-action decisions are complete.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

54

Link the initial incident report to the investigation, CAPA, hazard correction, maintenance work order, workers' compensation, or other follow-up record where applicable.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: The initial incident report is the handoff into investigation and corrective action. Make open questions, evidence gaps, and immediate actions visible so they...

10. Final report review, approvals, submission, privacy, and management handoff

55

Confirm the incident description remains factual and does not assign unsupported blame, root cause, or legal conclusions before the formal investigation is complete.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...

56

Verify emergency response, immediate hazard controls, affected employee details, witnesses, scene evidence, internal notifications, and serious-event screening are complete or marked for follow-up.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...

57

Confirm required attachments and links are uploaded or referenced and inaccessible or pending evidence is clearly listed.

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...

58

Verify personal, medical, or sensitive information is handled according to applicable privacy, access-control, and recordkeeping requirements.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...

59

Confirm the reporter, supervisor, EHS reviewer, and other required approvers complete the initial report review according to the organization's process.

CRITICAL

REPORT

Report item	Current status	Owner	Evidence	Follow-up
-------------	----------------	-------	----------	-----------

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...

60

Record final initial-report status, investigation required, open immediate actions, serious-event reporting status, submission date, reporter, supervisor, EHS reviewer, and management acknowledgement.

CRITICAL

REPORT

INITIAL STATUS | Enter

SUPERVISOR | Enter

EHS REVIEW | Enter

Execution tip: Before submission, make sure the report captures the event accurately without unsupported causal conclusions. The report should be complete enough to...