

Workplace Incident Investigation Report

Report number: _____

Date / time of incident: _____

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Location (building, area): _____

Incident type (injury / illness / near-miss / property / environmental): _____

Severity (first aid / medical treatment / lost time / restricted duty / fatality): _____

Investigation team: _____

1 — What happened

Factual narrative: who, what, when, where, how. No cause, no blame, no interpretation — those come later.

2 — Injury / damage detail

Nature of injury, body part, treatment given · or the damage and its cost. Numbers where you have them.

3 — Witnesses

Names, roles, and whether a statement was taken. Interview individually, while memory is fresh.

4 — Evidence collected

Photos · equipment and maintenance logs · training records · CCTV · shift roster · the physical part itself. Note what was preserved and by whom.

5 — 5 Whys chain

One why per line, each answer backed by something from section 4. If an answer names a person, you have stopped one why too early.

6 — Root cause

The system, process or missing control that allowed it — something you can change.

7 — Corrective actions

Owner and date on every line, plus how each will be verified.

8 — Preventive actions

Where else could this happen — another line, shift, site? A separate answer, or an explicit 'checked, no other exposure'.

9 — Management review and 30-day verification

Reviewed by · date · then the re-check: what was measured, what it showed, and whether the action held.

EHS checklist — the first hours, in order

#	In the first hours	Done	By whom	Time
1	Make the area safe — stop the process, isolate energy, contain any release			
2	Get medical care for anyone affected; record what treatment was given			
3	Secure the scene before anything is moved, cleaned or repaired			
4	Photograph the scene from several angles, including guards, signage and housekeeping			
5	Preserve the physical evidence — the part, the tool, the PPE, the batch			
6	Pull the records that expire: CCTV, machine logs, alarms, badge data			
7	Take witness accounts individually, while memory is fresh — separately, not in a group			
8	REGULATORY CHECK — is this reportable, and on what clock? (see the note below)			
9	Notify internally: supervisor, EHS, plant manager, and the works council or union if applicable			
10	Decide on interim containment so the same exposure cannot repeat on the next shift			
11	Book the investigation meeting within 24-48 hours, with the people who were there			
12	Only then start the 5 Whys — with evidence on the table, not from memory			

Regulatory check (United States, verified at [osha.gov/report](https://www.osha.gov/report) on 22 August 2026 — not legal advice, confirm against your own jurisdiction): a work-related FATALITY must be reported to OSHA within 8 HOURS if it occurs within 30 days of the incident. An IN-PATIENT HOSPITALIZATION,

AMPUTATION or LOSS OF AN EYE must be reported within 24 HOURS, where the event occurs within 24 hours of the incident. Report by calling the nearest OSHA office, the 24-hour hotline 1-800-321-6742, or online.

Free workplace incident investigation report — 5xwhys.com/articles/5-whys/incident-investigation/ · An investigation that ends at 'the worker was careless' has not reached a cause you can fix.