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Incident Reporting & Investigation SOP

Clear reporting steps, factual records, and corrective-action follow-up.

Sample	Demonstration document
Focus	Incident reporting and investigation
Service	Document drafting, revision, and organization

Demonstration sample, not prior client work. Content must be tailored to actual operations and supplied requirements. No platform or reviewer approval is guaranteed.

Incident Reporting & Investigation SOP

A consistent process to report incidents, record facts, assign corrective actions, and verify follow-through.

1. What to Report

- Work-related injury or illness
- Vehicle incidents; property or equipment damage
- Environmental releases
- Significant near misses or unsafe events with serious injury or damage potential

Emergency care and immediate hazard control take priority over documentation.

2. Employees

- Address immediate life-safety concerns and obtain medical assistance when needed.
- Notify the appropriate supervisor.
- Preserve the scene when practical and appropriate.
- Provide accurate facts about the event.

3. Supervisors

- Confirm appropriate care and control immediate hazards.
- Notify management or the designated safety representative when required.
- Document the event, identify witnesses, and preserve relevant information.
- Participate in the review and assign corrective actions when appropriate.

4. Initial Report

- Date, time, location, employees, and witnesses
- Work being performed and equipment involved
- Factual event description and immediate actions taken
- Injury or damage details; photos or supporting records when appropriate

Record facts. Avoid unsupported assumptions about fault or root cause.

5. Incident Review

Identify contributing conditions and ways to prevent recurrence. Review:

- Work procedures, training, and hazard recognition
- Equipment condition and PPE
- Supervision, staffing, and communication
- Environmental conditions and changes from normal operations

6. Corrective Actions

For each action, record:

- The issue and action needed
- Responsible person and target completion date
- Verification of completion

7. Follow-Up and Records

Management or the designated safety representative should verify significant corrective actions are complete. Update affected programs or SOPs when the incident reveals a weakness.

Retain records according to applicable company, client, insurance, and regulatory requirements. Handle confidential medical or personnel information separately when appropriate.

For Your Project

An SOP tailored to your reporting chain, forms, insurance requirements, customer notification rules, and investigation process.

Practical value: clear reporting steps, factual records, and corrective actions with an owner and completion check.