



Incident Investigation

Project Number:
 Project Name:
 Project Address:
 City / State / ZIP:
 Project Contact:
 Notes:

Report Date:
 Completed By:
 Completed By Email:
 Customer Name:
 Customer Address:
 City / State / ZIP:
 Customer Contact:

Near Miss

Please add Company, Project (job#, name and location), Incident location (building name, room, stairs, hallway, etc.), Foreman (name and phone#) GC/CM (name).

#	Item/Questions	Comments
1.	Company	
2.	Project (Job#, name, location)	
3.	Incident Location (building name, room, stairs, hallway, etc.)	
4.	Foreman name and phone #	
5.	GC/CM name	

Accident

Company Employee? If no, define company. Witness Name, Company and Phone#. Jobsite condition (weather, lighting, debris).

#	Item/Questions	Comments
1.	Company Employee?	
2.	If NO, define company	
3.	Witness Name, Company and phone #	
4.	Jobsite conditions (weather, lighting, debris)	

Injury

Dates & Time of incident. Date reported. If reported late, define why.

#	Item/Questions	Comments
1.	Date and Time of Incident	
2.	Date Reported	
3.	If reported late, define why	



Personal Injury

Please add all information of insured

#	Item/Questions	Comments
1.	Insured's Name	
2.	Address	
3.	Phone#	
4.	Email	
5.	Occupation	
6.	Hire Date	
7.	Experience Level	
8.	Injured part of body	
9.	Treatment performed by	
10.	Nature of Injury	
11.	Object / Equipment / Substance / Inflicting Injury	
12.	PERSON with most control - of Object / Equipment / Substance	
13.	Did employee turn down medical attention?	

Property Damage

Please add all information regarding property damage

#	Item/Questions	Comments
1.	Property Damaged	
2.	Estimated Cost	
3.	Actual Cost	
4.	Property Owned by	
5.	If other, describe	
6.	Estimated time needed to replace property damaged	
7.	Nature of Damages	
8.	Object / Equipment / Substance / Inflicting Injury	
9.	PERSON with most control - of Object / Equipment / Substance	

Description

Describe how the incident occurred (attach photos + diagram)

#	Item/Questions	Comments
1.	Describe incident	
2.	Is jobsite usually clean/safe? (if not, describe)	



Concerns

Concerns

#	Item/Questions	Comments
1.	Procedure	
2.	Equipment	
3.	Worksite conditions	
4.	Supplies	
5.	Other	

Cause Analysis

CAUSE ANALYSIS - "Five Whys" (Define Acts, Failure to Act, and Conditions that contributed to the incident)

#	Item/Questions	Comments
1.	1. WHY? (PRIMARY CAUSE)	
2.	2. WHY? (Secondary)	
3.	3. WHY? (Secondary)	
4.	4. WHY? (Secondary)	
5.	5. WHY? ("ROOT" CAUSE)	

FIVE WHYS

An investigator using the "Five Whys" methods would ask the following questions.

#	Item/Questions	Comments
1.	1. Question: Why did the worker slip and fall? Answer: There was oil spilled on the plant floor.	
2.	2. Question: Why was the oil on the floor in the first place? Answer: The source of the oil was a nearby piece of equipment	
3.	3. Question: Why did the equipment leak? Answer: There was a defect in its valve system	
4.	4. Question: Why wasn't the leak detected? Answer: The system wasn't inspected regularly, so the problem was not discovered and repaired	
5.	5. Question: Why wasn't the valve system inspected? Answer/Root cause: The valve wasn't logged appropriately in the maintenance system.	
6.	In this example, it took 5 whys to get to the root of an issue, but in practice you may find yourself asking more or fewer questions to reach your conclusion.	



Best Drywall Contractors

Project Name:

Form #:

Form Date:

Acknowledgement

Please acknowledge

SIGNATURE NAME

SIGNATURE

SIGNATURE
DATE/TIME

SIGNATURE NOTE