Incident & Near-Miss Review

SF-LIB-19 | Planning | Employer planning starter

Capture facts, identify underlying causes and verify improvements.

Scope and limits

Internal learning tool informed by OSHA investigation guidance. It does not replace OSHA reporting, injury logs, insurer notices or legal preservation duties.

Proposed employer workflow

1. First arrange emergency assistance and prevent further exposure; preserve evidence only when safe.

2. Notify the designated incident lead, who checks applicable reporting and recordkeeping obligations promptly.

3. Record the sequence, conditions and equipment; separate observed facts from assumptions.

4. Listen to witnesses without blame and examine work design, training, maintenance and organizational factors.

5. Choose corrective actions that address causes, with named owners and target dates.

6. Verify effectiveness before closure and share relevant lessons while protecting personal and medical information.

Stop-work trigger

Do not restart merely because the injured person has left; resolve the unsafe conditions first.

Adapt this resource before use. It is not OSHA-approved, a certification, a permit, or a complete site-specific safety program. The employer must determine applicable rules and approve the actual controls.

Site implementation worksheet

Incident & Near-Miss Review

Employer / site: _____

Administrator / contact: _____

Effective date / next review: _____

Complete these topic-specific arrangements

Event / time / location / factual sequence

Procedure / location / responsible person

Contributing conditions / evidence references

Procedure / location / responsible person

Corrective actions / owner / effectiveness check

Procedure / location / responsible person

Attach the supporting plans

Identify applicable federal, State Plan and task-specific rules; attach equipment instructions, assessments, maps and any required written programs or permits. Record their document IDs below.

Supporting document / revision / owner

Employer approval / signature / date: _____

Approval of this worksheet alone does not authorize hazardous work.

Field check & follow-up

Incident & Near-Miss Review

Task / date / reviewer: _____

Mark each item Yes / No / N/A. Explain N/A. Resolve any missing critical control before work; record who verified the correction.

Check	Y / N / N/A	Action / owner
Immediate hazards controlled		
Reporting duties checked		
Facts preserved		
Underlying causes examined		
Actions verified		

Crew briefing and verification

Discuss: Do not restart merely because the injured person has left; resolve the unsafe conditions first.

Ask each worker to explain the task controls and who to contact. Record the topic, participant names, demonstration or questions, and unresolved gaps. Attendance alone is not proof of proficiency.

Participants / evidence / gaps / corrective action

Reviewed by / date / follow-up due: _____

Official reference and use

https://www.osha.gov/incident-investigation

Source checked Nov 3, 2026. OSHA regulations and recommended guidance have different roles. Verify changes and applicability before adoption. Procedures and forms here are original SafetyFluent planning aids. Copy and adapt for internal workplace use, retaining source and revision details.

Records: assign secure storage, access and retention based on applicable requirements; there is no universal retention period for every form. Keep medical details out of this general crew worksheet.