WHS DOCUMENTS & TEMPLATES

DOC-INC-TPL · Incident Report and Investigation Form

Product Overview

For: Australian businesses of any size: supervisors, managers, WHS advisers and health and safety representatives

Version 1.0 · 15 November 2026

An incident report and investigation form in four parts: report what happened, check whether it must be notified to the regulator, investigate which controls failed and why, and fix the cause.

Part A records the incident the same day: what happened, who was involved, the injury and the treatment, and what was done to make it safe. Part B is a plain-English notifiable incident check: a death, a serious injury or illness, or a dangerous incident, with examples, and a prompt to check what your own state or territory lists, then the notification record.

Part C investigates by controls: which controls should have prevented the incident or reduced the harm, whether each was in place and working, and why not. Part D sets corrective actions, most effective first, each with an owner, a date and a check that it works.

The guide lists every regulator and its notification number, and where the definitions differ, such as in Western Australia, the ACT and Victoria.

Written once for Australia, to the model WHS laws, in plain terms that also work in Victoria. The guide's state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

What is included

Item	File
Incident report and investigation form: report, notifiable incident check, investigation by controls, corrective actions and sign-off	02_TEMPLATE/Incident Report and Investigation Form.docx and .pdf
How to Use This Template: how to complete and adapt it, the law in brief, state and territory notes, records and every placeholder	01_START_HERE/How to Use This Template.pdf
Read Me First, Product Overview, Permitted Use Terms and Version Information	01_START_HERE/ (PDF)

Who it is for

- Supervisors who receive incident reports and start the investigation
- Managers and WHS advisers who decide on notification and lead investigations
- Small businesses that need one clear form from report to close-out

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How to Use This Template

How to complete, adapt and keep the incident report and investigation form

1 What this template is for

Reports are how a business finds out that a control has failed before someone is seriously hurt. This form takes an incident from the first report to the fix: what happened, whether the regulator must be told, which controls failed and why, and what will change.

Use it for injuries, illnesses, near misses, dangerous incidents, damage and psychosocial incidents such as aggression or harassment. A psychosocial incident may also need the business's own confidential reporting procedure.

2 How to use it

Step	What to do
1	Make the area safe, give first aid and call 000 if needed. Do not disturb the site of a serious incident.
2	The person involved, or their supervisor, completes Part A the same day.
3	The person who looks after WHS answers Part B straight away. If the incident is notifiable, notify the regulator immediately by phone or online, and record it.
4	Decide how far to investigate from the potential outcome: a full investigation, with the workers involved and an HSR, for anything that could have caused death or serious harm.
5	Investigate by controls (Part C): which controls should have worked, were they there, did they work, and why not.
6	Set corrective actions, most effective first (Part D). Update the risk assessment or register, and tell the workers involved what was found.
7	Check later that each action was done and works before you close the report.

3 Who does what

Who	What they do
Worker or supervisor	Reports the incident (Part A) and makes the area safe
Person who looks after WHS	Decides on notification (Part B), keeps the records and tracks the actions
Investigator or team	Investigates by controls (Part C), with the workers involved and an HSR
Manager	Approves the corrective actions, provides what they need and signs the report off

4 The law, in brief

The WHS laws require a business to notify the regulator immediately after becoming aware of a notifiable incident arising out of its work: the death of a person, a serious injury or illness, or a dangerous incident. Notice is given by the fastest possible means, and in writing within 48 hours if the regulator asks. The site must be left undisturbed until an inspector arrives or the regulator says otherwise, except to help an injured person, make the site safe or preserve evidence. A record of each notifiable incident is kept for at least five years.

Victoria's OHS Act has its own definitions and requires a written record within 48 hours of notifying. Workers' compensation is separate: tell the insurer about any injury within the time your scheme sets (see the notes).

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YOUR LOGO
Right-click > Change Picture

[Company name]

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Incident Report and Investigation Form

Report an incident, check whether it must be notified, investigate it and fix the cause

How to use it

- Part A: the person involved or their supervisor completes it the same day. Report every incident, injury, illness, near miss and dangerous event, however minor.
- Part B: **[WHS contact]** decides straight away whether the incident is notifiable, and records the notification.
- Part C: investigate. How far depends on what could have happened, not only on what did: a near miss that could have killed someone needs a full investigation.
- Part D: fix the cause, give each action an owner and a date, and check later that each fix works.

First

Make the area safe if you can do so without putting yourself at risk. Give first aid and call 000 if needed. If someone has died or been seriously hurt, or there was a dangerous incident, do not disturb the site except to help the injured or make it safe.

A Report (the person reporting or their supervisor, the same day)

Date and time of the incident		**Where it happened**	
Reported by (name and role)		**Date reported**	
People involved (and employer, if not ours)		**Witnesses**	

What kind of incident? Tick all that apply	Tick
Injury or illness	☐
Near miss: nobody hurt, but someone could have been	☐
Dangerous incident: a serious exposure, even with nobody hurt	☐
Damage to plant, vehicles, property or the environment	☐
Aggression, harassment or another psychosocial incident	☐
Other	☐

What happened? Describe it in order, with the work being done at the time and the conditions

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Incident Report and Investigation Form

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. An incident report and investigation form in four parts: report what happened, check whether it must be notified to the regulator, investigate which controls failed and why, and fix the cause.

What the full product contains

- **Incident report and investigation form: report, notifiable incident check, investigation by controls, corrective actions and sign-off**
  02_TEMPLATE/Incident Report and Investigation Form.docx and .pdf
- **How to Use This Template: how to complete and adapt it, the law in brief, state and territory notes, records and every placeholder**
  01_START_HERE/How to Use This Template.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

Get the full editable documents

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