Worked case and self check

Original fictional training case IR-DEMO-001. Names, dates and observations below are invented for practice. Do not copy this case into live records or use its actions as site-specific safety advice.

Connect the records

Near-miss report: On 6 November 2026 at 09:10, a worker stopped before stepping into boxes placed in a walkway. No injury was reported. Use IR-DEMO-001 on the report, witness statement, investigation and register.

Witness statement: “I saw boxes beside the door and the worker stop before them.” Keep this observation separate from guesses about who placed them there. Record the statement date and identify any information that still needs checking.

Check the explanation

Investigation notes: A walkthrough found that the temporary delivery area overlapped the walkway. The opening checklist did not name a person responsible for checking the route. These are illustrative findings, not conclusions to assume in another case. Ask workers and managers what changed, examine the evidence, and consider more than one contributing factor.

Do not force exactly five answers into the 5 Whys table. Mark unsupported explanations as hypotheses and record what evidence is needed. An answer such as “carelessness” alone does not explain the underlying conditions.

Track action and review

The Example sheet contains CA-DEMO-01 and CA-DEMO-02 as implemented actions, plus CA-DEMO-03 as an open effectiveness review. Copy its three rows into a practice copy of Template A5:G7. The summary should show Open 1 and Completed 2. Review should show Fields present for each row.

On the follow-up page, record where implementation evidence is stored, who will review the change, the review date, observations and any further action. Keep the incident open if its required follow-up remains unresolved. Neither the workbook nor this form decides legal reportability.

Before filing

Check that the incident ID matches across records, observations and hypotheses are distinguishable, every action has an owner and date, missing fields and invalid statuses are resolved, and evidence access is limited to the appropriate people. Use your organisation’s emergency and reporting procedures when required.

General investigation reference: OSHA, Incident Investigation overview, https://www.osha.gov/incident-investigation (checked 6 November 2026). The forms are internal working records, not official OSHA forms or a compliance certification.