

- Incident reporting involves the WHO, WHEN, WHERE and HOW
- NOT THE WHY
- In the event of litigation this document **MUST** be produced and provided to the plaintiff and their legal representative

Incident Report

Facility/Location: _____ Date of Incident: _____ Time of Incident: _____ am/pm
month/day/year

Report Prepared by: _____ Title: _____ Signature: _____

Date Report Prepared: _____

Program Name: _____

INJURED PARTY INFORMATION

First Name: _____ Last Name: _____ Age: _____ Sex: M F

Address: _____ Postal Code: _____

Home Phone: _____ Work Phone: _____ ext. _____

Cell Phone: _____ Email: _____

DESCRIPTION OF INCIDENT

Provide a detailed and *factual* description of the incident which resulted in the injury. Do not include assumptions or your opinion on what *may* have happened. Only state the facts. Use more paper if required. Ensure you note below if additional information sheets have been attached, noting the date and time and victim's name at the top of the sheet in case they become separated.

More paper attached. Complete report below on this sheet only. Continued on back.

EMERGENCY SERVICES

911 called: _____ am/pm EMS arrived: _____ am/pm

Which Emergency Services were involved?

Fire Department Police Ambulance

Fire Department Report # _____

Police Occurrence # _____

Ambulance Report # _____

NEXT OF KIN

Were Next of Kin notified?

Yes No

Name: _____

Relationship: _____

Telephone #: _____

Describe in detail the specific first aid treatment provided prior to the arrival of the emergency services, if called. Note any medical identification tags.

Name(s) of person who provided first aid: _____

Describe Treatment provided. Specify if an AED was used and by whom.

INJURED PARTY ACTION TAKEN

The injured party was taken or sent to:

Home Hospital Clinic Refused Treatment

Other, please specify _____

Taken by: (Name of person) _____ Phone #: _____

Taken to: (Identify location) _____

Transported how: (ambulance, car) _____

Report Submitted To: _____

Date Submitted: _____
month/day/year

Please note that we are collecting the personal information contained in this incident report for the purpose of documenting the alleged incident in the event that any medical or legal issue(s), claim(s), and/or action(s) arise therefrom, and that, by providing your personal information, you are consenting, to the extent that your consent is required by law, to the collection, use, and disclosure of your personal information for such purpose.

What to do when someone comes to you

- Listen
- Advise that complaints should be put in writing
- Commit to having the person responsible begin an investigation
- Do not admit liability
- If damage to property is involved, refer to their own insurer

- Why not offer assistance?
 - If the matter is one for insurance coverage, the insurer must decide if liability exists
 - If liability is admitted by the Insured, coverage may be in jeopardy

Staff Training



Implementing Documentation Practices

- Completing documents should be part of staff training
- Instructions should be included in all manuals
- Train Staff on:
 - The importance of these documents
 - How they are to be completed
 - When they are to be completed

Implementing Documentation Practices (contd.)

- Documentation should be considered part of the job.
- The job is completed when the records are completed.
- If it's seen as a "chore" there's a risk the documents will fall short.

1. DATE

- Use a consistent format
- What date is 01/02/06

2. TIME

- Military or standard

3. ABBREVIATIONS

- Use industry standards
- Have an 'abbreviations key'

4. CORRECTIONS

- Never destroy or use white out
- Draw a line through the error and initial
- Initial changes

5. GOOD PRACTICES

- Always retain the original document
- Never document work that has not yet been done
- Never complete someone else's documentation

6. CONSISTENCY

- Everyone in the department must use the same form and document in the same manner
- Consistency is crucial!

7. Signatures

- Staff should use full names – not initials
- You may need the documents when staff are no longer in your employ. Will you be able to identify the staff member by the initials?

Retention Practices

- What are your retention practices for documents?
- Does it take into account documents required for litigation?
- Documents that could be required for litigation should be kept forever. If that's impossible then they should be kept for at least 15 years.
- If the incident involves a minor, the documents need to be held for a longer period of time.

Can Documentation Ever be a Bad Thing?

- NO!
- Claims are not like wine...they do NOT get better with age...

What About Making 'Repairs' After an Incident?

Measures taken by an organization after an incident are not necessarily indicative of any admission that there was something wrong

In Closing

- Documentation is crucial to the defence of the organization
- Memories fade over time
- Provides a basis to refresh memories to the events of a particular day
- Evidence often more credible if it is corroborated by a documentary record

Frank Cowan Risk Management Services



The Risk Management Centre of Excellence

- Who
 - Municipalities, medical care providers, service organizations, schools
- How
 - <http://excellence.frankcowan.com>
 - Anywhere 24/7, 365 days a year
- What
 - Risk management info on current topics and emerging trends
 - content provided by risk management, legal and claims professionals
- Why
 - One stop
 - Easy to use
 - interactive

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