

INCIDENT MANAGEMENT

What happened? What do you do next? | PSW26 Safety Toolkit

FIELD RESPONSE

An incident is any event that results in injury, illness, property damage, animal escape, or a near miss with the potential for harm. Reporting helps identify patterns and correct hazards.

01 COMMON INCIDENT TYPES

INJURY INCIDENTS

- Bites
- Scratches
- Falls
- Chemical exposures
- Medication handling errors
- Sprains or strains

ANIMAL INCIDENTS

- Escape
- Fight or redirected aggression
- Sudden medical emergency
- Unexpected death

PROPERTY INCIDENTS

- Broken items
- Water leaks
- Appliance malfunction
- Accidental damage during visit

NEAR MISSES

- No injury or damage occurred
- Clear potential for harm
- Early-warning signal

02 IMMEDIATE RESPONSE STEPS

- 1 Ensure safety first
- 2 Stop the activity
- 3 Provide first aid if trained and appropriate
- 4 Document conditions
- 5 Notify management immediately
- 6 Contact client as directed
- 7 Complete incident reporting within the required time

DO NOT MINIMIZE IT

Workers must not attempt to conceal or minimize incidents. Near misses matter because they reveal risk before the next event causes harm.

OSHA-ALIGNED REPORTING

Where does the documentation go? | PSW26 Safety Toolkit

RECORDKEEPING

Section 13 of the Field Note Safety Manual connects internal incident reporting with OSHA recordkeeping requirements where applicable. Use the official OSHA forms when your business is required to do so.

01 OFFICIAL OSHA FORMS

OSHA 301

Injury & Illness Incident Report

Individual incident detail

OSHA 300

Log of Work-Related Injuries and Illnesses

Ongoing injury / illness log

OSHA 300A

Annual Summary

Year-end summary

02 INTERNAL REPORTING STILL MATTERS

The manual calls for an internal company incident report for:

☐ Near misses

☐ Property damage

☐ Animal-related incidents

☐ Situations that do not meet OSHA thresholds

WHO IS COVERED?

The source manual states: employees are covered under OSHA recordkeeping; independent contractors are not covered, but internal reporting is still required.

03 USE THE HAZARD LOG FOR THE EARLY SIGNALS

Not every unsafe condition becomes an injury. Document hazards, modifications, stop-work decisions, and follow-up before they become incidents. Pair this guide with the PSW26 Hazard Identification & Resolution Log.

Accurate documentation supports trend analysis, reduces repeated mistakes, and demonstrates a consistent safety process. Appendix J organizes the records that support that system.

01 RECORDS TO MAINTAIN

- **Hazard Logs**
Documented hazards and actions taken
- **Incident Reports**
Internal reports + OSHA Form 301 (if employees)
- **PPE Records**
Issue / return forms and replacement logs
- **Training Records**
Dates, topics, signatures for safety, medication, animal behavior, ride-along supervision, and PPE use
- **Emergency Protocol Updates**
Annual review documentation

02 RETENTION PERIODS IN THE SOURCE MANUAL

RECORD	RETENTION
Incident Reports	5 years
Hazard Logs	3 years
PPE Distribution	Until employee leaves + 1 year
Training Records	Duration of employment + 1 year
OSHA 300 / 300A Logs	5 years (if applicable)

03 STORAGE & ACCESS

- ☐ Secure but accessible
- ☐ Stored digitally with backups
- ☐ Organized by category
- ☐ Reviewable by management on request
- ☐ Not altered, deleted, or overwritten
- ☐ Submitted within required timeframes to maintain accuracy

THE POINT OF THE PAPERWORK
Recordkeeping transforms "we didn't know" into "we have data." Use the records to identify patterns, correct hazards, and improve the next visit.