REPORT AND INVESTIGATE AN INCIDENT

Carry accepted incident findings into owned corrective work

Let the owner accept or return the investigation and hand corrective actions into hazard follow-up or work orders. Linked actions carry their own owners and closure evidence so the next team can act on the findings.

Report the incident details > Assess reporting and recordkeeping requirements > Investigate the causes > Accept the findings and hand off corrective work

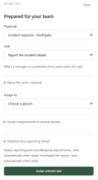
SkillSmith · Carry the earlier incident response into the investigation

▾ What was submitted before this task

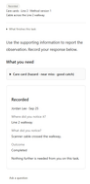
Report the incident details

When did it happen?	2026-09-25T08:00
When did the employer learn of it?	2026-09-25T08:10
Where?	Packing station 2
What happened and who was affected?	Fictional demonstration: worker injured while handling packaging.
Immediate care and actions already taken	Site response procedure followed: supervisor and EHS informed.
Outcome	Completed

SkillSmith · Choose prepared work and its recipient — incident-response example



SkillSmith · A recorded observation stays attached to its task



Carry the earlier incident response into the investigation

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Person raising the issue	Report the incident details	Respond with immediate actions, injury/illness/damage, photos and when it happened.
Designated specialist	Assess reporting and recordkeeping requirements; Investigate the causes	Respond with 300/301 entry due date, contributing factors, evidence and external submissions logged with receipts.
Accountable owner	Accept the findings and hand off corrective work	Respond with accepted or returned, actions handed to hazard_care or work_order and investigation closed.

Keep the linked action with its owner

In a worked example, the investigation is accepted while a corrective action remains unfinished; the linked action keeps its own owner and closure evidence.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Report form and Investigation	Open the selected material for this occurrence.
Recorded response	accepted or returned, actions handed to HAZARD_CARE or WORK_ORDER and investigation closed	Save the response with its work context.
Review point	actions handed to HAZARD_CARE or WORK_ORDER and investigation closed	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Report and investigate an incident

Bring report form and investigation into the prepared work. Person raising the issue, Designated specialist and Accountable owner each receive the context needed for their part.

01 Report the incident details

Record who, when it happened, when the employer learned of it, where, injury/illness/damage, immediate actions, witnesses and photos.

02 Assess reporting and recordkeeping requirements

Record recordable yes/no/unknown with reason, severe-event report required? (due time), 300/301 entry due date and external submissions logged with receipts.

03 Investigate the causes

Record sequence of events, contributing factors, proposed actions and evidence.

04 Accept the findings and hand off corrective work

Record accepted or returned, actions handed to HAZARD_CARE or WORK_ORDER and investigation closed.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Report and investigate an incident

When an injury, illness, damage or serious near miss happens, the facts are captured the same day, applicable reporting and recordkeeping deadlines are assessed immediately, the causes are found, and corrective work is handed to the cases that own it.

Incidents · Plant A (all employees)

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Report form The task uses this material	OSHA 301-structured incident details with photos and the time the employer learned of the event.
Investigation The task uses this material	The investigation record (events, causes, actions).
Criteria The task uses this material	What a complete investigation must contain before it is accepted.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose report form and investigation from the resources your team uses.

02 Agree the responsibilities

Confirm person raising the issue, designated specialist and accountable owner for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Choose the task, eligible recipients and deadline, then walk through the actual response fields.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains accepted or returned, actions handed to hazard_care or work_order and investigation closed. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring report form and investigation. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do people receive the prepared work?

Select the prepared task and the relevant recipients when assigning work. Making a playbook available to a group and giving a person a task are separate setup choices.

What is the outcome for the wider workflow?

Recordability decided and the clocks recorded with receipts where an external submission applied; findings accepted; corrective actions exist as linked cases with their own closure.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The next person receives an action without the preceding result.	Keep the preceding result attached when the next responsible person receives work.
Known case details are requested again at the next handoff.	Carry known context forward and show the decisions needed for this task.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Which accepted incident findings need separately owned corrective actions?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact