

# Tip Sheet

A series of health and safety tips to prevent work-related injuries in the trucking industry



## Incident Investigation Checklist

Ask why? Use the categories below to get started. Keep asking why until you find the source of the incident.

### Equipment

- Tractor
- Trailer
- Liftgate
- Pallet jack
- Hand truck
- Other \_\_\_\_\_

Comments on equipment:

*Did the equipment contribute to the incident through a failure, lack of feature or lack of maintenance?*

### Environment

- Light
- Dark
- Wet
- Heat
- Cold weather or ice
- Uneven ground
- Indoors
- Outside
- Visibility (fog or shadows)
- Windy
- Other \_\_\_\_\_

Comments on environment:

*Did the environment contribute to the incident?*

### Employee

- Are there written procedures for the task to be accomplished, if so, was the employee provided training?
- Is the employee physically capable of carrying out the tasks?
- Did the employee wear the appropriate personal protective equipment (PPE)?
- Is enough time allowed for workers to do their tasks correctly and safely so that they aren't tempted to take shortcuts?

Comments on employee:

### Management

- Is management trained in hazard recognition?
- Did management anticipate the hazard and the risk?
- Was management aware that a deviation from safety procedures might occur and take steps to prevent it?
- Is management's role in hazard recognition and corrective action clearly defined and assigned?

Comments on management:

### Other issues noted:

**Root Cause (Source) of Incident:** *Ultimately, what conditions could have been changed to prevent the incident?*



### Next Steps

General Category	Specific Task	Owner of Task	Date Completed
Repair or replace equipment			
Develop environmental solution (for example: correct lighting, develop process to sand yard during icy conditions)			
Train employees			
Train management			

Signature \_\_\_\_\_ Date \_\_\_\_\_

[www.KeepTruckingSafe.org](http://www.KeepTruckingSafe.org)

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