Near-Miss and Accident Reporting

1. Purpose and scope

Every near-miss and accident is reported the same day on a simple form and without blame. The cause is looked at and a fix is owned by a named person. This SOP sets the steps so that small events get fixed before a worker gets hurt.

Item	Detail
Applies to	Factories and workshops
Done by	Workers, supervisors and the safety officer
Owner	Safety officer or plant head
Time target	Set by the plant for each report
Review	Every 6 months and after any serious accident

2. The steps

1. **Make the area safe first.** Stop the work and keep others away. If someone is hurt, get help as your plant procedure and local law require.
2. **Tell the supervisor at once.** The person who saw it tells the supervisor in person or by phone. A near-miss counts.
3. **Fill the short form the same day.** Record what happened, where, when and who was there. Use the worker's own words and keep it to one page.
4. **Take photos and mark the spot.** Photograph the area before it is cleaned and note anything that was out of place.
5. **Write facts and not blame.** The form records what happened. The question is what let it happen and not who to blame.
6. **Review within 48 hours.** The safety officer and the supervisor sit with the worker and ask why it happened. Ask why more than once.
7. **Name one fix and one owner.** Each report ends with a fix, a named owner and a date.
8. **Tell the crew.** The supervisor tells the team what happened and what is being changed in the next shift briefing.
9. **Close the report.** The safety officer checks that the fix was done and files the report. Open reports are read out at the monthly meeting.

3. Reporting checklist

Print this, keep it with the report forms and tick it for every report during the first two weeks.

- ☐ Area made safe and help called if needed
- ☐ Supervisor told at once
- ☐ Form filled the same day
- ☐ Photos taken before cleaning
- ☐ Facts recorded in the worker's words
- ☐ Review done within 48 hours
- ☐ One fix, one owner and one date named
- ☐ Crew told in the next briefing
- ☐ Fix checked and report closed
- ☐ Open reports read at the monthly meeting

4. Where this can break

Any SOP template lists the steps. These are the points where a busy floor can slip, with a simple fix for each.

Where it breaks	What happens	The fix
Near-misses ignored	Nothing was hurt so nobody reports it and the same event returns with an injury.	Count every near-miss and thank the person who reports it.
Blame in the first question	Workers stop reporting.	Ask what let it happen before asking who.
Form too long	Workers skip it.	One page with five fields.
Area cleaned before photos	The cause disappears with the dirt.	Photograph first and clean after.
Fix with no owner	The report is filed and nothing changes.	Every fix has a name and a date.
Crew not told	The same shortcut is used on the next shift.	Share the change in the next briefing.

5. How to roll it out in 3 days

A new SOP fails when it is just handed over. This order gets the supervisors and the safety officer using it within a week.

Day	What happens	Who
Day 1	30-minute walkthrough with supervisors and the safety officer, using one real near-miss from the last month. Ask what stops people from reporting.	Safety officer
Day 2	Fill the form together for one past event. Remove any field nobody needs, using Section 4.	Safety officer
Day 3	Forms go to every supervisor desk. At the end of the week, the officer reads every report filed.	Officer and supervisors

After that, a 5-minute read of the week’s reports is enough to keep it working.

6. BEYOND the Checklist

This SOP works on the day it is introduced. Three months later, a new supervisor has joined and learned the reporting from whoever was free. Teams change over time, so a written SOP needs three things it can’t do by itself:

- **A 2-minute training video** of the reporting steps, in the language staff speak, so every new joiner learns the same way on day one.
- **A local-language version** of the checklist.
- **A weekly 5-minute check** that someone actually owns.

Your own process: if your plant reports near-misses and accidents differently from this one, a 2-minute WhatsApp voice note on how it works today is enough. A written SOP in this same format comes back within 48 hours, at no cost. WhatsApp: +91 98101 41173 (India) | +250 799 524 457 (Rwanda)

Free Manufacturing SOP 07 by Visionhunt. One series: each SOP covers a different business, from healthcare to manufacturing. Free to use, copy and adapt. This is a general template for the process prepared by a communication and training company and not by a safety or engineering authority. The reporting rules for injuries come from your own plant procedures and local law. Have your safety officer review it before you adopt it.