Incident Reporting Template

Instructions for Use

1. **Complete this form** after any incident or near-miss.

2. **Submit** the form to the designated safety officer or department head for review.

3. **Follow-up** to ensure that system changes or training needs identified in the report are implemented.

This Incident Reporting Template can be used to promote a culture of transparency and improvement within your osteopathic practice. By focusing on system issues rather than individual blame, the goal is to learn from incidents and prevent recurrence.

1. General Information

Field	Description	Details/Example
Date and Time of Incident	Date and time when the event occurred.	Example: *March 10, 2024, 14:30*
Location of Incident	Where the incident took place.	Example: *Patient Room 204, General Ward*
Reporter Name	Name of the person reporting the incident.	Example: *Dr. Jane Doe*
Department	The department or unit where the incident occurred.	Example: *Osteopathic Medicine Department*
Role	The role of the individual reporting the incident.	Example: *Osteopathic Physician*

2. Incident Description

Field	Description	Details/Example
Brief Description of the Incident	Provide a concise description of what happened.	Example: *A medication error occurred where the patient was given 50mg of a medication instead of the prescribed 25mg.*

Field	Description	Details/Example
Type of Incident	Choose the type of incident (tick the appropriate box).	Example: ☐ Medication Error ☐ Equipment Failure ☐ Communication Breakdown ☐ Other: *Patient Fall*
Contributing Factors	Identify potential factors that may have contributed to the incident.	Example: *Ambiguous medication label, Staff miscommunication during handoff, Time pressure.*

3. Individuals Involved

Field	Description	Details/Example
Patient Involved	Name of the patient involved (if applicable).	Example: *John Smith*
Staff Involved	Name(s) of staff members directly involved in the incident.	Example: *Nurse Sarah, Dr. Patel*
Other Affected Individuals	Were any other staff members or patients affected by this incident?	Example: *Two additional nurses witnessed the event.*

4. Immediate Actions Taken

Field	Description	Details/Example
Immediate Response	What actions were taken immediately following the incident?	Example: *The medication was stopped as soon as the error was identified. The patient was monitored closely for any adverse reactions.*
Incident Escalation	Was the incident escalated to a supervisor or manager?	Example: *Yes, the charge nurse was informed immediately.*
Preventative Steps	What steps were taken to prevent recurrence in the immediate aftermath?	Example: *All staff were reminded to double-check medication labels before administration.*

5. Suggested Improvements

Field	Description	Details/Example
System Improvement Suggestions	Based on this incident, what changes would you recommend to prevent it from happening again?	Example: *Revise the medication labeling system to make dosage information more prominent. Implement a double-check policy for high-risk medications.*
Staff Training Suggestions	Are there any areas where staff need additional training or resources?	Example: *Re-train all staff on the medication verification process. Consider adding additional training on time management and communication.*

6. Review and Follow-Up

Field	Description	Details/Example
Review Date	Date when the incident was reviewed.	Example: *March 12, 2024*
Reviewer Name and Role	Name and role of the person reviewing the incident.	Example: *Dr. Robert, Department Head*
Follow-Up Actions	Document the actions taken after the review of the incident.	Example: *The labeling system was updated, and refresher training was conducted for all staff.*
Lessons Learned	What lessons were learned from this incident?	Example: *Communication during handoffs needs improvement, especially in high-pressure situations.*

7. Incident Classification

Field	Description	Details/Example
Behavior Type	Classify the behavior related to this incident.	Example: ☐ Human Error ☐ At-Risk Behavior ☐ Reckless Behavior

Field	Description	Details/Example
Next Steps Based on Behavior Type	Based on the classification, describe the next steps or actions.	Example: *For human error: system improvements and retraining. For at-risk behavior: coaching and reinforcing safe practices.*