

# How to Complete an Incident Report



If an incident occurs on your premises, it is imperative that you address the situation *immediately* and *appropriately*, administering first aid and other measures whenever possible. Use this guide to help you complete an “Incident Report.”

## SECTION 1: Basic facts

- Incident report must be prepared as soon as possible following the incident, immediately and while the other party and any witnesses are still present if possible.
- Handwriting must be legible.
- Date and time as accurate as possible.
- Specify the location where the incident occurred and the on-site contact name and telephone number, preferably the manager who was on duty at the time of the incident.

## SECTION 2: Other party information

- Obtain the correct spelling of the other party’s name, best telephone contact number, and their correct home address.
- Add the membership or account number and include a copy of their signed waiver—if possible.

## SECTION 3: Description of incident and injuries

- Clearly and concisely describe the incident.
- Include only facts, no assumptions or conclusions about what happened.
- Describe injuries in as much detail as is known.
- If other party shows signs of illness, describe symptoms before, during and after the incident.
- State what the other party’s condition was when they left the premises and the means by which they left the premises, i.e. Did they drive themselves home or to emergency room? Did someone else drive them? Did they leave in an ambulance?

## SECTION 4: Property Involved

- If equipment was involved in the incident, give the name, manufacturer, model and serial number, if possible.
- Save any equipment or parts involved in an incident so that they can be inspected if needed. This includes cardio equipment, such as, balls, mats, cords, ropes, steps, hand weights, etc.



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**Note:** If a staff member suspects that a piece of equipment may have malfunctioned or broken, prevent further use of the equipment until a qualified repair technician has serviced the equipment. Save any parts being replaced or take pictures to document potential product liability.

## SECTION 5: Employee involved or other witness

- Record the best contact information for any employee who was a witness to the incident or was involved in administering first aid.
- Record the names and contact information for other members who were witnesses to the incident if applicable.
- Use a separate sheet for multiple employees and witnesses.

## SECTION 6: Actions taken

- Describe any actions taken by staff members including but not limited to first aid, calling 911, calling a family member, etc. Give as much detail as possible for first aid administered.
- If staff member or witness was involved in extensive first aid or CPR, ask them to prepare a statement on a separate piece of paper stating what actions they took in as much detail as they can remember.
- Other relevant information could include any of the following:
  - The other party denied first aid or staff member's offer to call 911 or a family member
  - The other party stated that they were "fine" after the incident
  - The other party finished their workout or did not finish their workout after the incident

## SECTION 7: Action requested

- Does the other party want to be contacted by your insurance carrier? This is an indication of whether or not they want to file a claim. Forward the incident report to Sports & Fitness Insurance at the fax number or email address below, if they do want to be contacted.
- If the other party does not want to be contacted after the incident, then indicate that the incident report is "Submitted for Reporting purposes only" and save all of the documentation.

**Note:** If the on-site manager or corporate management feel that the incident report involved significant injury and/or any potential for a claim, forward the documentation to Sports & Fitness Insurance even though no Contact has been requested. The carrier's claims department will determine if they will contact the other party. Any incident involving a call to 911 should be forwarded for review by the insurance company.



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**REQUIRED:** Injured party's signature

- Make every effort to have the other party review the incident report and sign it.
- If they are unable to sign due to their physical condition, please note that.
- If they are unwilling to sign for any reason, please note that.

**CONCLUSION:**

- **Forward all relevant documentation to Sports & Fitness Insurance if the claimant has requested contact or if it likely a claim will be filed.**
- **Keep all incident reports on file and make note of any future contact from the injured party. Claims can be turned in years after the incident occurred.**

**Send completed Incident Reports and any supporting documents to:**

**601.853.6141**

*or*

[claims@sportsfitness.com](mailto:claims@sportsfitness.com)



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