

Workplace Incident Checklist

DullyPDF original blank HR and workplace template for repeatable PDF workflows.

This first-party workplace incident checklist is designed for teams that need a reusable blank PDF they can map, fill, sign, or route without relying on a copyrighted third-party packet.

Record and Contact Details

Employee / role

Reference / ID number

Date

Manager / HR

Employee

Best contact

Describe the employee request, acknowledgement, incident, or HR workflow.

Checklist and Line Items

Common items to review

Employee signature needed

Manager signature needed

Witness included

Policy reviewed

Payroll affected

Equipment affected

Follow-up meeting needed

Copy sent to HR file

Approval and Follow-Up

Workflow status

Approved

Denied

Needs more information

Needs attachment

Needs signature

Needs manager review

Needs customer or client copy

Ready to file

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Policy references, dates, witnesses, requested action, equipment, and follow-up plan

Prepared by signature

Printed name

Date