WORKPLACE INCIDENT REPORTING SOUTH AFRICA

SECTION 24 + W.CL.2 + INVESTIGATION & CORRECTIVE ACTION PACK

IMPORTANT USE NOTE

This is a practical employer resource, not an official government form, legal advice, an emergency procedure or proof of compliance. Use the official Section 24, Annexure 1 and Compensation Fund processes where applicable. In an emergency, protect people first and follow the site emergency plan.

WHAT THIS PACK GIVES YOU

1. **IMMEDIATE ACTION CHECKLIST**
   First response, scene control and escalation prompts.
2. **SECTION 24 SCREENING**
   A quick decision screen for serious and dangerous incidents.
3. **W.CL.2 VS ANNEXURE 1**
   Keep Compensation Fund and OHS investigation duties separate.
4. **INVESTIGATION WORKSHEET**
   Capture facts, contributors and prevention actions.

INCIDENT ACTION FLOW

1. CARE
2. CONTROL
3. CLASSIFY
4. REPORT
5. RECORD
6. INVESTIGATE
7. CORRECT
8. VERIFY

EMPLOYER / INCIDENT SETUP

EMPLOYER / COMPANY	SITE / WORKPLACE	DEPARTMENT / AREA	PACK VERSION / DATE

FIRST 15 MINUTES: PROTECT PEOPLE, CONTROL THE SCENE

URGENT

Serious incident scene: For a fatal incident, likely fatal injury or loss of a limb/part of a limb, Section 24(2) can restrict disturbance of the scene without inspector consent, except where necessary to prevent another incident, rescue people, or remove an injured/deceased person.

A. CARE & EMERGENCY RESPONSE

- [ ] Stop work where necessary and make the area safe enough for emergency response.
- [ ] Provide first aid / emergency medical assistance and call emergency services if required.
- [ ] Prevent further exposure, injury, fire, release or machinery movement.
- [ ] Account for affected persons and identify immediate witnesses.
- [ ] Record the incident time and the time emergency actions began.

B. CONTROL & PRESERVE EVIDENCE

- [ ] Isolate energy / equipment / area only where it is safe and lawful to do so.
- [ ] Do not clean, move or reset the scene until preservation requirements are considered.
- [ ] Secure relevant equipment, documents, CCTV and electronic records.
- [ ] Take photographs only when safe and permitted by site rules.
- [ ] Record names and contact details of witnesses before they leave.

C. ESCALATE & CLASSIFY

- [ ] Notify responsible manager / OHS lead.
- [ ] Screen the incident against Section 24 criteria on page 3.
- [ ] Decide whether immediate inspector notification is required.
- [ ] Consider separate Compensation Fund / W.Cl.2 reporting where an employee suffered an occupational accident.

Time: _____

Screened by: _____

Decision time: _____

Owner: _____

MANAGEMENT RULE Do not wait for a completed investigation before making an immediate notification that is already required. Notification, recording and investigation are separate actions.

SECTION 24 QUICK SCREEN: DOES THE INCIDENT TRIGGER REPORTING?

This is a screening aid only. Compare the actual event with the Occupational Health and Safety Act and applicable regulations.

A. SERIOUS INJURY / ILLNESS CRITERIA

- [ ] A person died.
- [ ] A person became unconscious.
- [ ] A person lost a limb or part of a limb.
- [ ] Injury / illness is likely to result in death.
- [ ] Injury / illness is likely to cause a permanent physical defect.
- [ ] The person is likely unable to work or perform the normal activity for at least 14 days.

B. DANGEROUS EVENT CRITERIA

- [ ] A dangerous substance was spilled and health or safety was endangered.
- [ ] A substance under pressure was released uncontrollably and health or safety was endangered.
- [ ] Machinery / part of machinery fractured or failed and produced flying, falling or uncontrolled moving objects.
- [ ] Machinery ran out of control.
- [ ] The event qualifies as a major incident.

C. REPORTING DECISION

IMMEDIATE NOTIFICATION?

Serious events such as death, unconsciousness, loss of limb, likely death/permanent defect, major incidents and Section 24(1)(c) events can require forthwith reporting.

WITHIN 7 DAYS?

Section 24(1)(a) incidents require prescribed notice within 7 days. Do not confuse this with the separate 7-day investigation requirement.

NOT SECTION 24?

If medical treatment beyond first aid was required, Regulation 9 recording and investigation may still apply even when Section 24 reporting does not.

W.CL.2 VS ANNEXURE 1: KEEP THE TWO PROCESSES SEPARATE

A serious employee accident can make both processes relevant. One does not automatically replace the other.

COMPENSATION FUND

W.CL.2 - EMPLOYER'S REPORT OF AN ACCIDENT

Primary purpose: Compensation Fund accident reporting where an employee suffers an occupational accident resulting in personal injury requiring medical treatment or death, or reports an injury alleged to have arisen out of and in the course of employment.

- ☐ Use the official Compensation Fund process / form.
- ☐ Begin reporting promptly; do not wait for every later medical document before initiating the report.
- ☐ Keep claim / medical documents with the incident file where applicable.

OHS ACT RECORD

ANNEXURE 1 - INCIDENT RECORD & INVESTIGATION

Primary purpose: Regulation 9 recording and investigation for Section 24 incidents and for other incidents where the affected person received medical treatment beyond first aid.

- ☐ Investigation must begin within 7 days and be finalised as soon as reasonably practicable.
- ☐ Record findings, suspected causes and prevention measures.
- ☐ Keep the applicable Annexure 1 record for at least 3 years.

7-DAY ACTION TIMELINE

DAY 0	Care for people; control the hazard; consider scene preservation.
FORTHWITH	Make immediate inspector notification where the event falls into an immediate-reporting category.
WITHIN 7 DAYS	Submit the prescribed Section 24(1)(a) notice where applicable; begin the Regulation 9 investigation; complete applicable W.Cl.2 reporting.
ASAP AFTER	Finalise the investigation, implement corrective action, review through the health and safety committee where applicable, and retain records.

Official references: OHS Act 85 of 1993 (Section 24) | General Administrative Regulations (Regulations 8-9 / Annexure 1) | Compensation Fund W.Cl.2

INCIDENT INVESTIGATION WORKSHEET

Capture facts first, then test system contributors. Do not close the investigation with a vague statement such as "employee was careless".

INCIDENT DATE / TIME	SITE / EXACT LOCATION	AFFECTED PERSON	INVESTIGATOR

1. WHAT HAPPENED?

Describe the event factually. Include the work activity, sequence of events and what happened immediately before and after the incident.

2. EVIDENCE CAPTURED

- ☐ Witness names / statements
- ☐ Photos / site information
- ☐ CCTV / electronic records
- ☐ Risk assessment / procedure
- ☐ Training / instruction records
- ☐ Equipment inspection / maintenance

3. CONTRIBUTING FACTOR SCREEN

☐ Work system / procedure	☐ Machine / guarding / equipment condition	☐ Maintenance / inspection	☐ Housekeeping / layout
☐ Information / instruction	☐ Training / competence	☐ Supervision / enforcement	☐ PPE suitability / use
☐ Workload / task design	☐ Contractor interface	☐ Communication	☐ Previous corrective action not closed

4. SUSPECTED CAUSES & PREVENTION MEASURES

SUSPECTED CAUSE(S)	RECOMMENDED PREVENTION MEASURE(S)

CORRECTIVE ACTION, EVIDENCE & CLOSEOUT REGISTER

The file is not closed because the form is signed. Close it when actions are implemented, evidence is stored and effectiveness is checked.

CORRECTIVE ACTION REGISTER

Corrective action / change required	Owner	Due date	Status	Verified by	Evidence / reference

CLOSEOUT EVIDENCE CHECKLIST

- ☐ External notifications completed and proof retained.
- ☐ Annexure 1 completed where applicable.
- ☐ W.Cl.2 / Compensation Fund process completed where applicable.
- ☐ Witness / photo / equipment evidence filed.
- ☐ Corrective actions assigned and completed.
- ☐ Health and safety committee review recorded where applicable.
- ☐ Effectiveness of corrective action verified.
- ☐ Applicable records retained and retrievable.

MANAGEMENT SIGN-OFF

RESPONSIBLE MANAGER _____

SIGNATURE _____

CLOSEOUT DATE _____

REVIEW / COMMITTEE REF. _____

NEED OHSA / SHE COMPLIANCE TRAINING?

Discuss employer, supervisor or team training with Swift Skills Academy. **View training >**