

## **FACILITY MANAGER INSTRUCTIONS FOR COMPLETING PERSONAL INJURY / LIABILITY INCIDENT REPORT**



CUSHMAN &  
WAKEFIELD

LUND  
COMPANY

- > State the FACTS, not OPINIONS or ASSUMPTIONS
- > Be objective
- > Use clear and concise sentences when completing the form
- > Complete the form using Third Person Point of View (i.e. The driver of the car... OR Mr. Jones said... OR Their automobile was taken...)

### **A complete report will cover WHO, WHAT, WHERE, WHEN, HOW**

**WHO:** Who is reporting the incident? Who was affected?

**WHAT:** Exactly what happened? What did Property Management do? What other action was taken?

**WHERE:** Exact location of where the incident occurred; included as many specific details as possible including:

Address

Use directions

Example: Garage #3

Building #1, 12345 Main St., Sidewalk on the north side

West entrance of the Loading Dock, 111 Jones Circle

**WHEN:** Exact date and time of the incident; be as specific as possible

**HOW:** How did the incident occur? What factors contributed to the incident?

**\*\*When a person involved is taken to the hospital and can't talk with you, then ask where the ambulance is taking the person so you can follow up after you have the incident location under control and cleared.**

**\*\*Incidents reported by people 24 hours after the accident/incident occurred must still be reported.**

**\*\*If police or fire department becomes involved, get the business card and police report number (if applicable) from the officer or respondent at the scene. Be sure to follow up and get the police /fire department report within 72 hours and report to Asset Manager.**

Keep the following in mind:

**Pictures:** Obtain pictures as soon as you can of the incident, the property, the vehicle; everything so you have picture facts.

Attach pictures to the incident report form- when sending electronically; please identify each photo with date/location/any N, S, E, W directions, etc....

- a. Close up pictures of the incident
- b. Back up and take a wide picture of the surroundings of the incident
- c. Slip & Falls - Take a picture of footwear

**\*Complete and send the Incident Report IMMEDIATELY when following occurs:**

**Injury or accident on premises including, but not limited to Slip & Falls, motor vehicle accidents, personal assault, indecent exposure and domestic violence.**

Obtain a complete statement and details from the injured party including:

- i. Name, Address, & Phone Number
- ii. License Plate Number
- iii. Insurance Information
- iv. Exact place where the accident occurred
- v. Take pictures of the incident and/or the exact location and retain on file
- vi. Description of exactly how the accident occurred
- vii. Notice if the injured party has an apparent disability
- viii. Notice if the injured party is carrying anything in his/her hands

Obtain a complete statement and details from all witnesses including:

- i. Name
- ii. Address
- iii. Phone Number

Ask, don't tell, a witness to write their statement on a separate page and have the witness sign and date their statement.

Witnesses should also speak to the police if police are involved.

If necessary, secure the area of the accident to prevent additional accidents.

Investigate the area of the accident to see if there was anything apparent which may have caused the accident

- i. Lighting conditions
- ii. Weather conditions

**DO NOT:**

- i. Admit fault or responsibility
- ii. Blame anyone or anything for the accident
- iii. Offer to pay medical and/or any other expenses
- iv. Discuss the accident with anyone unless authorized by your supervisor
- v. Contact the press...if you are contacted by the press, do not make any comments or give out ownership name or information

**NEXT STEPS:**

**Facility Managers:**

Submit Incident Report to Asset Manager for review within 72 hours

<https://toolbox.lundco.com/>

**Asset Managers:**

Review and approve. Incident Report will go to President for final review.

If needed, have a discussion with President regarding Owner communication.