

Incident First Report Form

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Capture facts after a customer injury, property damage, professional dispute, or other event that could become a claim.

Event basics

Date

Time

Location

People involved

Business activity underway

What happened

Factual description

Immediate conditions observed

Injury or damage reported

Immediate mitigation taken

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Capture facts after a customer injury, property damage, professional dispute, or other event that could become a claim.

Evidence

Photos / video preserved

☐ Check when verified / completed

Witness names recorded

☐ Check when verified / completed

Original messages preserved

☐ Check when verified / completed

Receipts / estimates received

☐ Check when verified / completed

Evidence storage location

Notice & follow-up

Client communication

Insurer / broker notified

☐ Check when verified / completed

Notice date / method

Claim / reference number

Next action and owner