

Investigating Lifting or Carrying Injuries Worksheet

Muscular-skeletal injuries from lifting or carrying objects is one of the most common causes of occupational injuries. When investigating these injuries it is important to gather sufficient information about the object, the body position and lifting mechanics, and factors that complicate the lift or carry. This worksheet will guide the person through the 3-step process of fact-finding, analyzing the system or process that failed to prevent the event, and creating an Action Plan to improve the organization.

Step 1 – Fact-Finding		<input type="checkbox"/> pictures attached
Background Information		
Employee Name:		Date: _____ Day of week:
Time of Injury:	How does time relate to shift or breaks	
Location of injury (give precise description):		
Names of people present at time of injury:		
Injured Employee's title / position:	Age: _____ yrs.	Length of employment: _____ yrs.
Years of experience with task:	Did experience / inexperience contribute to injury? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Weather at time of injury / that day:		<input type="checkbox"/> N/A - indoors
Describe the footing at the site of the injury:		
Was the person rushing to lift / carry the object(s)? <input type="checkbox"/> No <input type="checkbox"/> Yes – why?		
How often was the object(s) lifted that day?		
How often is this task performed in a week, month, year?		
Comment on other lifting / carrying activities of the worker that day.		
The Object(s)		
General category: <input type="checkbox"/> bag(s) <input type="checkbox"/> box(es) <input type="checkbox"/> furniture / office equipment <input type="checkbox"/> tools / shop equipment <input type="checkbox"/> patient <input type="checkbox"/> trailer / snow plow <input type="checkbox"/> other _____		
Weight of object(s)? _____ pounds Did the weight of the object complicate the lift / carry? Describe how.		
Did the size of the object complicate the lift / carry? Describe how.		
Did the shape of the object complicate the lift / carry? Describe how.		
Describe how the hand – object connection was made: (Describe handholds, handles, temperature) (Was the object lifted by holding the top, middle, or bottom of object). Describe how this may have complicated the lift / carry.		

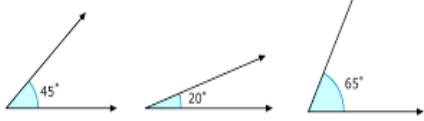
If injury occurred while LIFTING / PICKING UP / PUTTING DOWN an object, complete this section

Starting height of object: _____ inches

Ending height of object: _____ inches

How could either height have been improved?

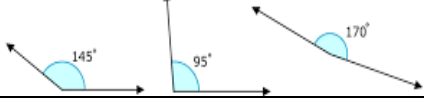
Acute angles



How much body rotation twisting? _____°

How could starting or ending position have been changed to reduce twisting?

Obtuse angles



Were lifting tools or aids available? How about co-workers? Where were they located?

If the injury occurred while CARRYING / PUSHING / PULLING an object, complete this section

How far was the object carried: _____

Did the object have wheels or skids?

Were there obstacles in the path of travel that complicated the carry?

Was mechanical carrying equipment available (carts, hand trucks, vehicles)? Where?

Other potential factors

Comments on other factors that may have impacted the incident

Step 2 - Analysis of the Circumstances of the Event

What tool or piece of equipment could have helped prevent this injury?

Are sufficient policies, procedures, & training in place? What would you change to help prevent a future similar injury?

What decisions or actions on the part of the employee factored into or impacted the incident? Why did the decisions / actions / inactions of the affected employee make sense to him or her at the time?

What skills, knowledge or decision-making on the part of the employees can be improved by department leaders to prevent a future similar injury?

Step 3 - Create an Action Plan Phase – Who will do what to address the suggestions above.

Action #1 – _____

Action #2 – _____