

INCIDENT REPORT INSTRUCTIONS

1. The *Incident Report* (TO-5) should be completed for any incident that involved or *nearly* involved (a near-miss) substantial property damage, serious illness, or personal injury requiring medical treatment beyond minor first aid and that occurred on Kingdom Hall, Assembly Hall, or branch property or at facilities rented for theocratic events. Please send the completed report to the Risk Management Desk in the Accounting Department at the branch office within 72 hours of the incident, using the Inbox feature on jw.org.

2. Please call the Risk Management Desk at 718-560-RISK (7475) within 24 hours if the incident meets any of the following conditions: (1) The incident is catastrophic, which would include any event causing multiple bodily injuries, fatality, head trauma, loss of limb, injury to an eye, or partial/permanent disability; (2) financial assistance is requested or questions about medical bills or other costs arise; or (3) there is talk of legal action or you receive a phone call or letter from an attorney or someone representing an injured person (see paragraph 11 below). Do not discuss fault or liability with anyone other than a Risk Management Desk representative.

3. For all construction and maintenance related incident reports involving baptized adult individuals, please also complete the *Incident Report—Loss Evaluation* (TO-5a) and send it to the Legal Department at the branch office using the Inbox feature on jw.org, including Accounting Department as an additional recipient.

4. **Objective of the reports:** The primary objective of the *Incident Report* is to improve safety. The primary objective of the *Incident Report—Loss Evaluation* is for review by our legal counsel so that it can provide an opinion about how to handle possible claims and litigation that may arise out of the incident.

5. **Assistance:** A fine spirit is shown by those who give loving aid to an injured person and provide volunteer labor for property repairs. Generally, family heads provide for their family's health needs. Insurance or government programs may be available.

6. **Property damage:** When property damage occurs, quick action can go far in preventing further damage. You should promptly report break-ins, thefts, and incidents of vandalism to the local authorities. If Kingdom Hall or Assembly Hall property is damaged, please notify the Risk Management Desk and contact the Local Design/Construction Department as soon as possible for direction. For losses that can easily be repaired without assistance from the construction group, please send copies of the written estimate and bills for the repairs along with the *Incident Report* to the Risk Management Desk. For incidents occurring at a Kingdom Hall, the titleholding congregation (if applicable) should submit the report. If a rented facility being used for an assembly or a convention sustains property damage, the Risk Management Desk will work with the Convention Desk in handling the incident.

7. **Vehicle-related incidents:** If an incident involves one or more branch-owned vehicles, please include the make, year, and model of each vehicle. Please obtain a report from local authorities when such is available and forward it to the Risk Management Desk.

8. **Contact elder:** For serious injuries, designate an experienced elder, preferably from the same congregation as the injured person, to be the contact elder for all post-incident matters. The contact elder should keep in close communication with the injured person to see if any help may be needed, even if the injured person is not one of Jehovah's Witnesses. Christian love and concern will move him to be especially kind and helpful. The contact elder should review the information in *Key Facts About the Global Assistance Arrangement* (TO-57). Please keep the Risk Management Desk informed of any significant changes in the person's situation.

9. **Interviewing the injured person:** In the case of a serious accident, ask the injured person to describe what happened if he is able to do so. Have two responsible brothers document the comments, questions, and answers on a separate sheet and attach it to the *Incident Report*. If the injured person attributes fault or liability to a person, equipment, or other factor; refrain from expressing an opinion, agreement, or disagreement with the statements. The following questions should be asked: (1) What were you doing when the accident occurred? (2) What injury did you suffer? (3) How did the accident happen?

10. **Witness statements:** Witness statements should be taken in cases involving serious injuries. Please ask any witnesses to the accident or any other individuals who may have helpful information to describe what happened. Have two responsible brothers present to document the comments and answers on a separate sheet and attach it to the *Incident Report*. Please do not discuss who or what may have been at fault or the cause of the accident or make reference to any legal action. Please ask the following questions: (1) What were you doing when the accident occurred? (2) Did you see the accident? (3) According to your understanding, what happened? No one is obligated to answer these questions.

11. **Legal action:** Do not discuss fault or liability with anyone other than a Risk Management Desk representative. If there is talk of legal action or if you receive a letter from an attorney, please contact the Risk Management Desk immediately. If you receive a phone call from someone representing the injured person, do not discuss the matter with him. Note the caller's name, address, and phone number and explain that someone will be in contact with him; then call the Risk Management Desk immediately. The same steps should be taken if you are contacted by an insurance company.