



# Customer Incident Report

*All accidents should immediately be called to 1-800-328-6382, faxed to 952-914-5779, or emailed to [claims@riskplanners.com](mailto:claims@riskplanners.com)*

Policy # \_\_\_\_\_

Date of Report: \_\_\_\_\_

Report Completed By: \_\_\_\_\_

## BUSINESS CONTACT INFORMATION

**\*\*DO NOT GIVE THIS FORM TO CUSTOMER TO COMPLETE\*\***

Named Insured:		Store Name:	
Contact Name:		Title:	
Store Address:		City:	State: Zip:
Phone Number:	Fax Number:	Email Address:	
Manager or Assistant Manager's Name:		Manager's Phone Number:	

## CUSTOMER INFORMATION

Date of Incident:	Time of Injury: AM PM	Weather Conditions:	
Name of Injured Person:	SS#:	Age:	Sex:
Address:	City:	State:	Zip:
Phone Number:	Work Ph. Number:	Glasses or Contact Lenses: Y / N	Rescue/Medical Called: Y / N

1. Where did the incident occur? (Specify exact location, aisle, department, insided, outside, etc.)

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2. Briefly describe the incident:

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3. What is the name of the person responsible for monitoring the area? \_\_\_\_\_

4. When was the area last inspected prior to the incident? \_\_\_\_\_

5. If incident occurred outside, is the area controlled by? Store: \_\_\_\_\_ Landlord: \_\_\_\_\_

## LANDLORD INFORMATION

Company Name:			
Contact Name:		Title:	
Address:		City:	State: Zip:
Phone Number:	Fax Number:	Email Address:	

6. Briefly describe the injury or damage (including part of the body affected, nature of property damage, type of vehicle, etc.):

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## WITNESS INFORMATION (Name, Address, Phone, including employees)

Name:	Address:	Phone:
Name:	Address:	Phone:
Name:	Address:	Phone:

## CUSTOMER INCIDENT INVESTIGATION PROCEDURES

It is important each incident at the store that may possibly result in a liability claim be properly documented at the time of occurrence. Always treat the customer courteously and with respect, never make accusations and never become argumentative.

At the time of the incident, please use a 3x5 card (or similar) to note the customer's name, address, daytime phone number and to make notes of the incident. The report should be written on a Customer Incident Report Form after the customer leaves the store. If the customer questions what will be done, you may tell them that a report will be sent on to management, and he/she will hear from someone shortly.

### Customer Incident Investigations Guidelines:

1. Conduct on-site investigation immediately upon being notified of a claim or potential claim.
2. If resulting from a slip and fall, ask the customer to point to the exact spot where he/she fell.
3. View the scene personally, note any water, liquid or debris. Photos should be taken of the area in question, and any surveillance video should be copied or preserved.
4. Ask the customer to describe what happened, and try and remember his/her response.
5. Identify any witnesses by name, address, and phone number.
6. If the damage involves a customer's car allegedly caused by a shopping cart, the car must be personally inspected and take a photo of the damage. Line up a cart to the car to be sure a cart could have caused the damage.
7. Observe any unusual conditions or circumstances (e.g. lack of marks through liquid, customer's footwear, shaded eyeglasses, unusual foreign substance, customer carrying packages, color of liquid or substance, weather, surface, etc.).
8. Offer to be of whatever assistance you can to the injured party. Such offers can include calling a paramedic, relative or friend, but never offer to pay for any medical expenses.
9. NEVER ADMIT FAULT.

The following items should be accomplished immediately after the injured customer leaves the store:

1. Check with the maintenance person and/or department employees to determine the last time prior to the accident he/she inspected the aisle or parking lot area where the accident occurred.
2. On a separate piece of paper record any unusual conditions/circumstances or personal opinions, the injured persons description of what happened, and the last time the area was inspected (if slip/trip and fall).
3. Report the claim to Risk Planners by calling 1-800-328-6382, and await further instructions from the claim adjuster. Don't send or fax any papers to anyone until instructed to do so by the adjuster.