FREE DOWNLOAD

WORKPLACE FIRST AID INCIDENT & EVIDENCE READINESS TOOLKIT

A practical South African employer workbook for prevention, response documentation, training gaps and safer decision-making.

18	FILLABLE	2026/27
A4 pages	working forms	planning edition

FOR HR · SHEQ · MANAGERS · WORKPLACE FIRST AID COORDINATORS

Build a better evidence trail before an incident. Record the right facts after one. Know when specialist legal, medical and insurance advice is required.

SWIFT SKILLS ACADEMY | CAPE TOWN, SOUTH AFRICA

Educational employer planning resource - not a legal opinion or medical protocol.

How to use this employer toolkit

A working workbook designed for preparation, response and continuous improvement.

1 PREPARE

Start with the readiness check, staffing cover and certificate records.

2 RESPOND

Prioritise safe emergency care and call appropriate medical help.

3 DOCUMENT

Log objective facts and preserve original records securely.

4 IMPROVE

Assign corrective actions, training routes and review dates.

STOP: THIS IS NOT A MEDICAL TREATMENT GUIDE

Use your approved training, emergency plan and emergency-service directions. Never delay care or investigations to fill in this worksheet.

Start your controlled working copy

Company / site

Document owner

Version / reference

Date of review

Next review date

PROTECT PERSONAL INFORMATION

Keep real patient names, medical details and witness identifiers in restricted official records. Use reference codes here, and share only the minimum information necessary.

GET HELP CHOOSING FIRST AID TRAINING

The 12-point First Aid readiness review

Use YES / NO / N-A to identify evidence gaps, not to decide legal compliance.

01	Staff numbers and risk profile reviewed	☐ YES	☐ NO	☐ N/A
02	A qualified responder is available on each relevant shift	☐ YES	☐ NO	☐ N/A
03	Certificate issuers and validity were checked	☐ YES	☐ NO	☐ N/A
04	Coverage plan includes holidays and absence	☐ YES	☐ NO	☐ N/A
05	First Aid boxes are accessible and inspected	☐ YES	☐ NO	☐ N/A
06	Emergency services / escalation details are visible	☐ YES	☐ NO	☐ N/A
07	Equipment and AED readiness are checked where applicable	☐ YES	☐ NO	☐ N/A
08	Responders understand their scope and role	☐ YES	☐ NO	☐ N/A
09	Drills or scenario reviews are documented	☐ YES	☐ NO	☐ N/A
10	Incident record and notification process is known	☐ YES	☐ NO	☐ N/A
11	Confidential incident evidence storage is controlled	☐ YES	☐ NO	☐ N/A
12	Actions from previous incidents are tracked to closure	☐ YES	☐ NO	☐ N/A

YES count (0-12)	NO follow-ups	Manager reviewing

Score is a discussion aid only. A YES count cannot certify legal compliance or demonstrate safe practice.

First-aider numbers and workplace cover

Current General Safety Regulation 3 should be read with your risk assessment and other applicable obligations.

>5
Employees
First Aid box duty under Regulation 3(3), subject to the full rule.

>10
Employees
Designated certificated First Aider coverage under Regulation 3(4).

1:50
Or 1:100
General 50-worker groups, or shop/office groups of up to 100.

COUNT PEOPLE, THEN CHECK ACTUAL AVAILABILITY

More than 10 employees: at least one person per group of up to 50, or up to 100 for a qualifying shop/office, readily available during normal working hours and holding a valid certificate from a Chief Inspector-approved organisation.

Total employees at site	Site category	Calculated baseline

Highest concurrent shift headcount	First aiders actually available	Risk-based extra cover needed?

Reason for additional risk-based cover or exceptions to verify

REGULATORY NOTE

A calculator is not a substitute for current regulations, risk assessment, applicable sector rules or confirming coverage on every working period. Check the complete General Safety Regulations and 5 December 2025 amendment.

OPEN GOVERNMENT GAZETTE

SSA FIRST-AIDER REQUIREMENTS GUIDE

First-aider coverage roster

List on-duty responders and backup coverage for each operating shift or site.

Site / shift	On-duty responder	Training / cert ref	Backup person	Coverage gap

COVERAGE IS A LIVE ARRANGEMENT

A certificate in a personnel file is not evidence that the person was readily available during the relevant working hours. Record leave, temporary transfers and shift changes.

Roster prepared by	Review date	Next change / trigger

Priority gaps / immediate cover action

First Aid certificate evidence register

Use staff codes or authorised internal references in copies that may be shared.

Staff code	Programme ID / NQF	Issuer / approval check	Certificate expiry	Shift / role

Record custodian	Last verification date	Next expiry review

VERIFY BEFORE RELYING ON A CERTIFICATE

Confirm programme title, certificate issuer, actual issue/expiry details and the provider approval route. Historic Level 1/2/3 terminology is not itself proof of the current QCTO programme identity.

REPLACE EXPIRING CERTIFICATES

FIRST AID LEGAL GUIDE

First Aid box and emergency station check

Complete one controlled record per location; follow the applicable legal minimum and risk profile.

Location / zone	Box or station ID	Inspector / date

- [ ] Box accessible and signposted
- [ ] PPE and hygiene controls assessed
- [ ] Key, access or locking arrangement suitable
- [ ] Emergency contacts posted and accurate
- [ ] Supplies checked against site risk assessment
- [ ] AED location and readiness checked (if present)
- [ ] Required stock available and in usable condition
- [ ] Incident log and replenishment process known
- [ ] Out-of-date items addressed
- [ ] Inspection and escalation owner assigned

Items to replenish or repair; interim control

Responsible person	Target date	Evidence / proof of close-out

PRACTICAL RULE

A stocked First Aid box cannot replace trained responders, prompt care and emergency escalation.

Private employer working copy. Not medical, insurance or legal advice.

Emergency contact and escalation card

Complete and post the operational version where authorised; do not include sensitive health data.

Worksite / building	Emergency assembly point	Site emergency phone

External emergency response number	First Aid lead / shift contact

An action sequence for your local emergency plan

1. **Ensure scene safety**
   Follow your workplace emergency procedure and responders' training.
2. **Call for help early**
   Contact emergency services or activate the site emergency response chain.
3. **Arrange appropriate care**
   Approved responders act within their training and applicable protocols.
4. **Communicate and hand over**
   Provide clear factual information to arriving professionals.
5. **Record and safeguard**
   Document times and actions after care priorities are met.
6. **Escalate obligations**
   Check incident reporting, COIDA and insurer requirements promptly.

Site-specific warnings / access gate / emergency handover notes

Incident response timeline

Record objective observations and timestamps. Do not rewrite the timeline to fit an opinion.

Incident reference code	Site / zone	Date / shift

Clock time	Event / observed fact	Action taken	Source / verifier

DO NOT TURN OBSERVATIONS INTO ALLEGATIONS

Separate what was personally seen or heard from later explanations, estimates or interpretations. Preserve original notes, messages and emergency call logs.

Missing information / items requiring verification

Incident evidence and chain-of-custody log

Identify evidence by reference; store real copies in a restricted, authorised repository.

Evidence ref	Type / description	Collected by / when	Secure repository ID	Access / transfer

PRESERVE, DO NOT ALTER

Keep originals unchanged where possible, note collection times, control access and record any transfer. If litigation or regulatory investigation is foreseeable, obtain appropriate advice on preservation obligations.

Evidence custodian

Restricted folder / reference

Private employer working copy. Not medical, insurance or legal advice.

Witness-handling and confidential data controls

Protect people and the integrity of their records. Do not circulate health details in this workbook.

Witness and source list

Witness / source code	Role / contact held where?	Statement obtained date	Stored record ID

Private incident file: access and lawful handling

- [ ] Document the purpose of collecting each record
- [ ] Use minimum necessary personal/health information
- [ ] Restrict access to people with an authorised need
- [ ] Avoid unencrypted mass email or public shared links
- [ ] Keep source evidence and revision history
- [ ] Confirm retention / deletion rules with policy and counsel

Data protection concerns / restricted-file reference

Five legal questions - keep them separate

Use this page to triage advice needs, not to pronounce fault or decide entitlement.

01

DIRECT EMPLOYER NEGLIGENCE

Did an employer act or omit to act unreasonably, and are duty, breach, causation and loss established?

02

VICARIOUS LIABILITY

Was a wrongful employee act sufficiently connected to employment on the actual facts?

03

OHS / FIRST AID DUTIES

Did the workplace meet applicable Regulation 3 equipment, staffing and availability requirements?

04

COIDA: EMPLOYEE INJURY

Where the Act applies, section 35 generally substitutes statutory compensation for certain common-law employer claims; section 56 may allow increased compensation for specified negligence.

05

THIRD-PARTY CLAIMS

A visitor or contractor may raise different rights, relationships and duties; do not assume section 35 automatically resolves them.

Legal / insurer / COIDA queries requiring specialist review

COIDA section 25 also addresses certain organised First Aid / emergency-service activities.

Decisions, notifications and approvals log

Planning prompts below are not statutory reporting deadlines. Verify the actual legal and policy times.

Incident reference	Decision lead	Date opened

IMMEDIATE

Emergency treatment, preservation of life, scene security, initial escalation.

SAME-DAY REVIEW

Confirm relevant notifications, data security, legal and insurance advice needs.

FOLLOW-UP

Check OHSA/COIDA procedures, witness material, outstanding medical records and corrective actions.

Who is checking official notification deadlines and with which adviser?

DO NOT SUBSTITUTE THIS FOR OFFICIAL REPORTING

Reportable incidents, COIDA claims, insurer notices and professional advice can carry different forms and deadlines. Confirm the rules for the actual event rather than relying on this workbook.

Risk and corrective-action register

Document the issue, interim protection, the owner and objective evidence of closure.

Gap / observation	Priority	Interim control	Action + owner	Due / closure ref

PRIORITISE BY ACTUAL RISK

Use your organisation's formal risk-rating approach. This worksheet is an action tracker, not a legal fault matrix or a substitute for an investigation.

How will effectiveness be independently checked?

Private employer working copy. Not medical, insurance or legal advice.

14 / 30 · 60 · 90 DAYS

Employer First Aid improvement roadmap

Turn the review into measurable actions that survive staff turnover and audit cycles.

DAYS 01-30 — Contain obvious coverage and evidence gaps

- [ ] Verify on-shift first aider availability
- [ ] Check certificates and box readiness
- [ ] Confirm emergency contacts and process

DAYS 31-60 — Strengthen people and practical systems

- [ ] Book role-appropriate First Aid training
- [ ] Test escalation and incident handover
- [ ] Repair record storage and access

DAYS 61-90 — Evidence completion and review

- [ ] Close outstanding findings with proof
- [ ] Re-check roster and expiry pipeline
- [ ] Schedule follow-up drill / review

Owner / date fields can identify internal responsibilities without exposing personal medical information.

Training-gap and quote preparation worksheet

Prepare an actionable employer enquiry instead of requesting a generic course price.

Company / contact reference

Training location

Preferred period

Employees to train

Workplace shifts / sites

Public or on-site preference

Training needs (confirm suitability with the provider)

- [ ] **BASIC**
  QCTO Basic Emergency First Aid Responder · SP-230801 · NQF 2

- [ ] **INTERMEDIATE**
  QCTO Intermediate Emergency First Aid Responder · SP-230802 · NQF 3

- [ ] **ADVANCED**
  QCTO Advanced Emergency First Aid Responder · SP-230803 · NQF 4

What must the quote address? Learner groups, scheduling, delivery and certificates

CURRENT COURSES

COMPARE SSA PRICES

WHATSAPP ADVICE

REQUEST YOUR COMPANY FIRST AID TRAINING QUOTE

Private employer working copy. Not medical, insurance or legal advice.

Employer evidence pack - cover checklist

Prepare a restrained, factual and secure handover for your authorised reviewer.

01 ☐ **Shift-by-shift responder coverage**
Roster + changes + backups

02 ☐ **Current First Aid training certificates**
Issuer verification + expiry review

03 ☐ **First Aid boxes and equipment**
Site checks + replenishment log

04 ☐ **Emergency plan and contact chain**
Posted process + last drill

05 ☐ **Objective incident timeline**
Clock records + named sources in private file

06 ☐ **Evidence and witness inventory**
Chain-of-custody register

07 ☐ **Notification / reporting review**
Verified OHSA / COIDA / insurer steps

08 ☐ **Corrective actions**
Owners + dates + evidence of closure

Prepared by	Reviewer / adviser	Version and handover date

Share the minimum necessary information. Keep original confidential files restricted.

Official references and practical help

Source links were checked for this November 2026 planning edition. Verify amendments before use.

Government Gazette 53783 · Notice 6907 · 5 Dec 2025

Updated First Aid certificate issuer wording in General Safety Regulation 3(4).

OPEN SOURCE

General Safety Regulations · Regulation 3

First Aid box, first-aider baseline and emergency treatment provisions.

OPEN SOURCE

COIDA · Act 130 of 1993 (as amended)

Check sections 25, 35 and 56; eligibility and procedure depend on the facts.

OPEN SOURCE

RCSA · Legal status of those who attempt CPR · Aug 2023

Professional statement about rescuers, context, reasonableness and limits of legal protection.

OPEN SOURCE

SSA · First Aid liability employer guide

Read the full explanatory article and its references.

OPEN SOURCE

READY TO CLOSE A FIRST AID TRAINING GAP?

BOOK FIRST AID TRAINING

REQUEST A FIRST AID CALLBACK

Email: info@swiftskillsacademy.co.za | Tel: 021 828 0772

6 Monaco Road, Killarney Gardens, Cape Town, South Africa

Private employer working copy. Not medical, insurance or legal advice.