

# SAFETY REPORTS

## Safety Incident, Entity Management and NAICS

Safety Reports 'Safety Incidents System' allows administrators to capture, measure trend and analyze information about their incidents. As part of this system, different lines of business, departments etc., who may report injury statistics to OSHA differently, can be managed as separate entities in the Incident System. As an extension of this type of management, relevant industry statistics are also included, based on NAICS data.

### Background on NAICS

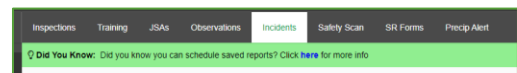
Codes are a classification within the North American Industry Classification System (NAICS). The system was developed for use by Federal Statistical Agencies for collection, analysis, and publication of US economy statistics. As it is a mostly self-assigned system, NAICS Codes are not assigned. Companies select the code that best depicts their primary business activity and then use it when asked for their code. If your Business Activities include more than one Unique Line of Business, you may want to use more than one NAICS Code.

**Note:** Sometimes a code cannot be fully self-assigned for official purposes, within OSHA, the EPA, and the DEP, which assign codes based on environmental factors and not by revenue. These excerpts are from the NAICS site [click her to view more.](#)

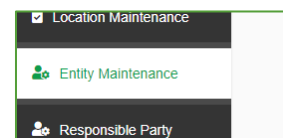
### Entity Management and Dashboard Display

Within Safety Reports 'Safety Incident System', incident reporting, consequential OSHA recordable reporting and recordkeeping can be done under a particular reporting body or 'Entity' if your organization is so configured.

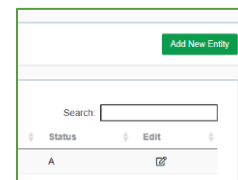
If using more than one Safety Reports product, choose the 'Incidents' tab from among options at the top of the screen.



A default 'Entity' is assigned to your account based on your company name. To setup additional Entities or to make edits, choose 'Entity Maintenance' from among functions at the far-left hand side of the admin screen.



To add a new Entity, use the green 'Add New Entity' button at the top-right. Or, to edit an existing entity, use the 'Edit' button on the row of the entity needing changes.

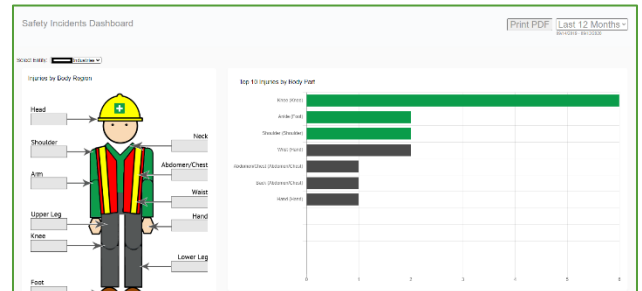


## Entity Management and Dashboard Display (cont.)

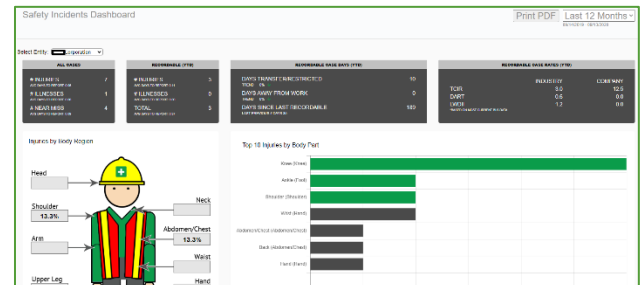
Either option shows the Entity Maintenance options. Aside from physical address, you are also able to add industry information, and using drop-down menus, to select your entity's field by its NAICS classification by category, then class. Construction is shown in the example.

<b>Industry Description:</b>	
Construction	
<b>Industry Classification (NAICS):</b>	
Category:	Construction
NAICS Class:	23 - Construction
<b>Average Number of Employees:</b>	
8	
<b>Total Hours by Employees:</b>	
16000	
<b>Account Executive:</b>	
[Redacted]	
<b>Executive Title:</b>	
CEO	
<b>Executive Phone:</b>	
4024036575	
<b>Email:</b>	
[Redacted]@safety-reports.com	
<b>Status:</b>	
Active	

Number of Employees and Total Hours (worked per year) fields are filled out in the example above. This allows administrators to compare their incident statistics against those of their industry under relevant metrics in the Dashboard. If the hours or employee fields are not filled out, the dashboard display will show something similar to the example:



Where those items have been updated in Entity Maintenance, the statistics are shown in small tables above these fields, as in this example. The drop-down menu at the top-left allows you to choose which of your reporting entities are displayed on the dashboard.



Statistics for all incidents by type is shown in the top-left. Those for OSHA recordables are on the following tables. Comparison to relevant industry statistics such as Total Case Incident Rate (TCIR), Days Away, Restricted or Transferred (DART) and Lost Work Day Injury/Illness (LWDII) Rate is shown at the far-right. Using your cursor to 'hover' over these items will give more detail.

RECORDABLE CASE RATES (YTD)		
	INDUSTRY	COMPANY
TCIR	3.0	12.5
DAI	0.6	0.0
LWDII	1.2	0.0

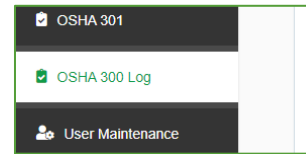
\*BASED ON MOST CURRENT BLS DATA

**Note:** Updates to the Entity will not produce immediate Dashboard updates but will update within minutes.

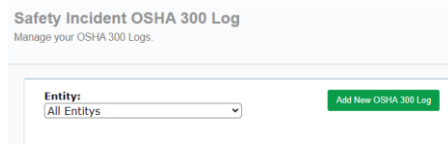
## Entity Management and OSHA 300 Logs

As discussed previously, reporting for recordable incidents can be split if different lines of business or different departments report to OSHA independently. As with NAICS statistics, this is accomplished in the Safety Reports System by use of Entities.

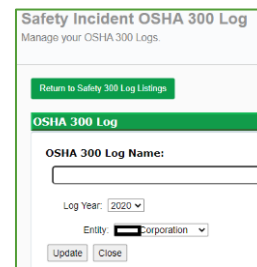
To create a new OSHA 300 log for an entity, and to edit and/or view existing 300 logs, use the function at the far-left hand side of the admin screen.



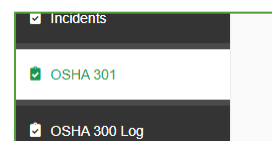
Use the drop-down menu if desired to show a particular entity, or to show 'All' as in the example. If adding a new log for an entity or for a new year under an existing entity, use the green 'Add New OSHA 300 Log' button.



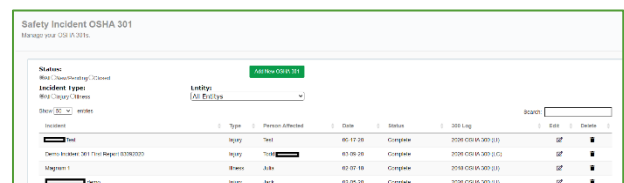
The screen which follows allows you to title the log, and assign the appropriate year and entity as shown in the example. When complete, choose the grey 'Update' button to continue.



In order to assign an incident to the log, it must first be submitted from the field, updated with any other information, and recorded on an OSHA 301 first report form. To assign an incident, do so from the Safety Incident OSHA 301 screen, use the function at the far-left of the admin screen to continue.

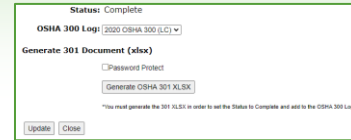


To add a new OSHA 301 from one of your submitted incidents, use the green 'Add New OSHA 301' button, or to edit an existing 301 for inclusion on the 300 log for an entity, use the 'Edit' button on the row of that incident.



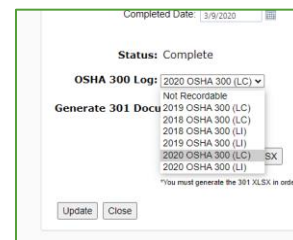
## Entity Management and OSHA 300 Logs (cont.)

Open the incident, then, scroll all the way to the bottom of the screen. Choose the grey 'Generate OSHA 301 XLSX' button to create a new first report form.



The exported form is generated in the Department of Labor's spreadsheet format, and can be viewed if you have Microsoft Excel, or, a spreadsheet program which can read XLSX-type files.

To then assign this form, use the drop-down menu to show your OSHA 300 logs, titled here by year with the entity in parentheses. Choose the grey 'Update' button when finished.



**Note:** This is up to the administrator and need not be titled as shown in the example.

If this is not a recordable incident, you do not need to assign it to a 300 log, there is a 'Not Recordable' option for this purpose.

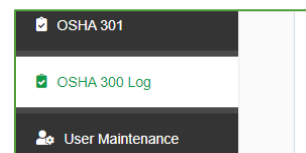
To view guidance on Recordable Incidents, you can check out [OSHA's reference material](#). At

Safety Reports we also have a PDF guide for administrators:

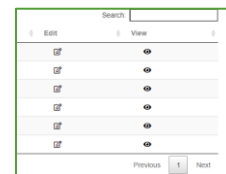


OSHA  
Recordkeeping Defi

Once incident(s) has/have been added to a 300 log, you can view all those for that entity's log. Go back to the 'OSHA 300 Log' function from those at the far-left hand side of the admin screen.



Use the 'View' button at the furthest-right on the row of the 300 log you want to view.



## Entity Management and OSHA 300 Logs (cont.)

The list of incidents associated with this log is shown. If this list does not reflect what you expect, repeat the step discussed above related to assigning a recordable incident to an entity's log. To view the log on the Department of Labor's spreadsheet format, choose the grey 'Generate OSHA 300 Log XLSX' button.

**Note:** as with the first report 301, they can be password protected.

The screenshot shows a web interface for OSHA 300 Log management. At the top, there's a search bar and a 'Generate OSHA 300 Log XLSX' button. Below that is a table with columns: OSHA Incident, Injury, Person Affected, Date, and Status. The table contains three rows of data, with the first row having a grey background. At the bottom, there's a 'Generate OSHA 300 Log XLSX' button.

The form is downloaded to your computer as an XLSX file, which you can open and view.

The screenshot shows the OSHA 300 Log form. The title is 'Log of Work-Related Injuries and Illnesses'. It includes a header section for 'U.S. Department of Labor' and 'Occupational Safety and Health Administration'. Below that is a section for 'Establishment information' with fields for 'Establishment name', 'City', and 'State'. The main part of the form is a table with columns for 'Identify the person', 'Describe the case', and 'Classify the case'. The table has several rows and columns for recording incidents. At the bottom, there's a 'Page totals' section and a 'Be sure to transfer these totals to the Summary page (Form 300A) before you post it.' instruction.

Note, the 300A is on the second sheet. Either or both can be printed and the 300A can be displayed to meet requirements of [1904.32\(b\)\(3\)&\(4\)](#).

The screenshot shows OSHA's Form 300A, 'Summary of Work-Related Injuries and Illnesses'. It includes a header section for 'U.S. Department of Labor' and 'Occupational Safety and Health Administration'. Below that is a section for 'Establishment information' with fields for 'Your establishment name', 'City', and 'State'. The main part of the form is a table with columns for 'Number of Cases', 'Number of Days', and 'Injury and Illness Types'. The table has several rows and columns for recording incidents. At the bottom, there's a 'Sign here' section and a 'Post this Summary page from February 1 to April 30 of the year following the year covered by the form' instruction.

For more information, contact:  
Safety Reports at [support@safety-reports.com](mailto:support@safety-reports.com) or (402) 403-6575 option '2'