

OSHA Injury Recordkeeping

USER GUIDE



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OSHA Injury Recordkeeping

Tool Bar

A. **"Tools"** has three functions for working with ZeraWare:

1. **Security Configuration** - choose a type of security for accessing ZeraWare.
2. **License Information** - gives your Installation Code when purchased and the number of users should be
3. **Options:**
 - An "OSHA " tab enables you can change which category of the "Location" data field will be used to populate a column of your OSHA Log.
 - Our Enterprise version includes a "Safety Training" tab where you can enter an e-mail address of the personnel at your facility who will receive expired training notifications.

B. **"Help"** has three functions:

1. Access to **User Guides**.
2. **Service & Support** information
3. **"About"** opens a window with the Version number and "End User Agreement" access.

OSHA 300 Log

A. **OSHA 300 Log:**

1. The **"OSHA 300 Log - Data Maintenance"** window opens.
2. The Data Maintenance form displays information extracted from Incident Reports that applies to the OSHA Form 300 Log.
3. The employee injuries listed on this form are from Incident Reports involving an injury that was "OSHA Recordable" and an OSHA Case Number was assigned in the Incident Report form.
4. Top - left **"Year"** window: click the up or down arrow to select the year you wish to see.
5. The **Location** Drop Box will display the location heading that appears in the first "Location" data field of your Incident Report.
 - Click the arrow to view the Location categories.
 - Click a Category to display the OSHA Log details for that specific location.
6. **"View Blank Form & Guidelines"** - top right side of form.
 - This is a link to the OSHA web site.
 - "How to Fill Out the Log" will be instructions from OSHA. The information is brief instructions.
 - A blank form is displayed. Do not print this form. ZeraWare produces your OSHA Log for you.

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OSHA 300 Log

7. All the information on the Data Maintenance page that is filled in by ZeraWare can be edited or changed.
 - Changing any text, check or numbers in a column here will change that information in the related Incident Report and the actual OSHA 300 Log.
 - Any changes to information in the Incident Report form will change that information in the OSHA 300 Log and this Data Maintenance form.
 - To make a change, place the cursor in the text box and left click the mouse. Your selection will be highlighted. Type the change desired. Click the "Save" button at the bottom of the form to retain your change when this page is closed.
 8. To scan up or down this form, place your cursor on the up or down arrow in the slot on the right side of the form.
 9. Each row of the form is an employee injury that will appear on your OSHA Log.
 - The information displayed is exactly what was entered in a data field of your Incident Report form.
 - ZeraWare uses the information you entered in Incident Reports to fill in the columns of your OSHA Log.
 10. Each column corresponds to the columns on the official OSHA 300 Log. Columns can be sorted by placing the cursor in the title and click.
 11. "**Where event Occurred**" column:
 - The information in this column is taken from the "Location" data field of your Incident Report forms, the 4th drop box from the left, which has the heading "Department".
 - If you want to change the heading and content of this drop box, you need to identify which drop box will contain the information required in Column E in the OSHA 300 Log.
 - a) Close the Incident Report.
 - b) Click "**Tools**" in the Tool Bar at the top of any Module Index page.
 - c) Click "**Options**". Select the heading of the Location drop box that you will use for column "E" of the OSHA Log.
 12. Buttons at bottom:
 - Click "**Print**" button to print a hard copy of the data maintenance page.
 - Click "**Export**" button to attach the data maintenance page to an e-mail.
 - Click "**View Form**" to open your official OSHA Log in PDF format.
 - Click "**Save**" button to retain any information that you have changed in the data maintenance window.
 - Click "**Cancel**" button to delete a change in information before being saved.
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OSHA Form 300A - Summary

A. OSHA Form 300A:

1. The "**OSHA Form 300A - Data Maintenance**" window opens.
 2. This is the annual summary that OSHA requires to be posted every Spring. Most of the information on this form comes from your OSHA Log.
 3. At the top of the form, select the YEAR and FACILITY to view the information.
 - **Year:** place the cursor on an up or down arrow and left click.
 - **Location:** place the cursor on the arrow and select the facility you wish to see.
 - Selecting the Year and Location is required to see information in the Data Maintenance form.
 4. "**View Blank Form & Guidelines**" button at the top of the Data Maintenance form will take you to the OSHA web site - "Worksheet to Help You Fill Out the Summary" page.
 5. Some information on the Data Maintenance form will not be filled in by ZeraWare. You will need to enter any Company-specific information such as Company Executive and Phone Number.
 6. Click the "**View Form**" button at the bottom of the Form to see the actual OSHA Form 300A Summary.
 - This form is in PDF format. You will need to have the Adobe Reader software program on your computer to see the OSHA injury recordkeeping forms.
 - Adjustments can be made to the Adobe window that displays your OSHA 300A form. You can enlarge, copy or print. Click "Help" in the top tool bar if you have questions about this form.
 - You cannot make changes to this PDF form. To make a change: close this form by closing Adobe Reader. You will be back on the ZeraWare OSHA 300A Data Maintenance page. This is where you can edit information on your actual OSHA 300A form.
 7. Click "**Save**" button to retain any changes you have made to information on this page before closing.
 8. Click "**Cancel**" to delete any changes before being Saved and close the window.
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OSHA Injury Recordkeeping

OSHA Form 301 - Incident Report

A. OSHA Form 301 - Incident Report

1. "**OSHA Form 301 - Data Maintenance**" window opens:
2. Left side bar:
 - Select the **Year**. Click up or down arrows on the right side of the text window.
 - Select the **Location**. Click the arrow on the right side of the text window.
 - **OSHA Incidents**: employee injuries are listed that were indicated as being OSHA recordable and an OSHA Case Number was selected in the ZeraWare Incident Report form.
3. The cases listed under "**OSHA Incidents**" can be sorted. Place the cursor on the heading of the column you wish to sort and Left Click with the mouse. Click again to reverse the sort.
4. The columns can be expanded. Place the cursor on the border between column headings. The arrow will be replaced by a cross. Hold down the Left button on your mouse and drag left or right.
5. When expanding the width of columns, a scroll bar will appear at the bottom of the side bar if text is hidden beyond the right border of the window.
6. At the bottom of the Left side bar is the "**View Blank Form & Guidelines**" button. Click to go to the OSHA web site - "Injury and Illness Incident Report" page.
7. Click one of the Cases listed in the Left Side bar to display the information about that Case on the Right Side of the Data Maintenance window.
 - This section asks for information that is not found in your ZeraWare Incident Report.
 - If you wish to utilize the OSHA Form 301 Incident Report, type in the missing information.
8. The "**Employee/Physician Information**" tab is displayed.
9. Click "**Case Information**" tab to open additional data fields.
10. At the bottom of the Right Side of the Data Maintenance window are three buttons.
 - Click "**Save**" to retain any changes you have made to information on this page before closing.
 - Click "**Cancel**" to delete any changes made to information on this page before being "Saved". This will also close the Data Maintenance page.
 - Click "**View Form**" to display the actual OSHA Form 301 Incident Report Form.
11. Click "**View Form**" button to see the actual OSHA Form 301.
 - This form is in PDF format. You will need to have the Adobe Reader software program on your computer to see the OSHA injury recordkeeping forms.
 - Adjustments can be made to the Adobe window that displays your OSHA 300A form. You can enlarge, copy or print. Click "Help" in the top tool bar if you have questions about this form.
 - You will not be able to make changes to this PDF form. To make changes: close this form by closing Adobe Reader. You will be back on the ZeraWare OSHA 300A Data Maintenance page. This is where you can edit information on your actual OSHA 300A form.

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OSHA BLS Survey

A. OSHA-BLS Survey:

1. "BLS" means Bureau of Labor Statistics.
2. "**OSHA-BLS Survey - Data Maintenance**" window opens:
3. Top - left "**Year**" window: click the up or down arrow to select the year you wish to see.
4. The **Location** Drop Box will display the location heading that appears in the first "Location" data field of your Incident Report.
 - Click the arrow to view the Locations to choose from.
 - Select a location. It will be displayed in the Location window. The details will apply to that location.
5. Selecting the Year and Location is required to see information in the Data Maintenance form.
6. There are two tabs for displaying information in the body of this window: "**Summary**" and "**Details**". Click the "Details" tab to open that section. The Summary tab is already selected by default.
7. Some information in the Data Maintenance form will not be filled in by ZeraWare. You will need to enter Company-specific information such as Number of Employees and Total Hours Worked.

B. Click the **Details** Tab:

1. **Left side bar:**

- This section will list the employee injuries that involved "Days Away From Work", as indicated in any ZeraWare Incident Reports. This would be cases in which the employee incurred Restricted Work, Job Transfer or Lost Time.
- Each row is an employee injury.
- The details in each column can be sorted. Place the cursor on the heading of the column you wish to sort and Left Click with the mouse. Click again to reverse the sort.
- The columns can be expanded. Place the cursor on the border between column headings. The arrow will be replaced by a cross. Hold down the Left button on your mouse and drag left or right.
- When expanding the width of columns, a scroll bar will appear at the bottom if text is hidden beyond the right border of the window.

2. **Details Tab - Right Side of Data Maintenance Window:**

- At the top of the Right Side of the Data Maintenance window are two tabs: **Case Information** and **Employee Information**. Click on either tab to open that section.
- The information in both tabs is obtained from three forms: the OSHA Form 301 if used, the ZeraWare Incident Report and the OSHA 300 Log.
- Blanks will need to be filled in with information not found in any of those forms.

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OSHA BLS Survey

3. Click "**View Form**" button at the bottom left side of the Data Maintenance window to see the actual OSHA - BLS form.
 - This form is in PDF format. You will need to have the Adobe Reader software program on your computer to see the OSHA injury recordkeeping forms.
 - Adjustments can be made to the Adobe window that displays your OSHA 300A form. You can enlarge, copy or print. Click "Help" in the top tool bar if you have questions about this form.
 - You will not be able to make changes to this PDF form. To make changes: close this form by closing Adobe Reader. You will be back on the ZeraWare OSHA - BLS Survey Data Maintenance page. This is where you can edit information that will be duplicated on the actual OSHA form.
4. Click "**View Blank Form & Guidelines**" button under the Left side bar to go to the OSHA web site - BLS information page that provides an abundance of information about the Bureau of Labor Statistics form.
5. There are two buttons on the bottom right side of the Data Maintenance window.
 - Click "**Save**" to retain any changes you have made to information on this page before closing.
 - Click "**Cancel**" to delete any changes made to information on this page before being "Saved". Clicking "Cancel" will also close the Data Maintenance page.

OSHA Injury Recordkeeping Guidelines

A. "OSHA Injury Recordkeeping Guidelines".

1. "OSHA Injury & Illness recordkeeping Guidelines" window opens.
 - Click "**Overview Instructions**" to go to the OSHA web site page: "An Overview: Recording Work-Related Injuries and Illnesses".
 - Click "**Detailed Explanation -OSHA Link**" to go to the OSHA web site page: "OSHA Recordkeeping Handbook".
 - Click "**Calculate Injury Rates (DART)**" to go to the OSHA web site page: "Calculating Injury and Illness Incident Rates".

Update OSHA Forms

- A. Click "**Update OSHA Forms**" if you receive a notice from ZeraWare that OSHA has made a change in an injury recordkeeping form.
 - B. With one click, ZeraWare will update your OSHA injury recordkeeping form with any changes.
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