

OSHA Injury & Illness Reporting and Recordkeeping Procedure

SOP · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

An OSHA injury and illness reporting and recordkeeping procedure is the written routine that turns a workplace injury into the right paperwork, on the right form, on time: internal reporting the same shift, the severe-injury phone call to OSHA when one is required, the entry on the OSHA 300 log with its 301 incident report, and the 300A annual summary. It is the difference between a recordkeeping system and a pile of forms discovered during an inspection.

The stakes are asymmetric. Recording an injury costs minutes; failing to record one, or missing a federal reporting clock, is one of the most commonly cited OSHA violations and reads as concealment even when it was confusion. A written procedure with named owners is how small employers stop depending on whoever happens to remember the rules.

This template gives you the full sequence: immediate response, the reportable-to-OSHA decision, the recordable-or-not decision, filling the forms, the annual summary, and the privacy and employee-access rules that come with them.

Purpose and scope

This procedure sets out how [Your company] responds to, reports, and records work-related injuries and illnesses at [site(s)]. It applies to all employees, and to temporary workers we supervise day to day — their cases go on our log. [Name/role] is the recordkeeper and owns every deadline in this procedure; [name/role] is the deputy.

Two different obligations: reporting and recording

- Reporting means notifying OSHA directly, fast, for the most severe outcomes — per OSHA: a work-related fatality within 8 hours; an inpatient hospitalization, amputation, or loss of an eye within 24 hours. This applies to every employer, whatever its size or industry.
- Recording means logging work-related injuries and illnesses on the OSHA 300 log with a 301 report for each — generally cases involving death, days away from work, restricted work or job transfer, medical treatment beyond first aid, loss of consciousness, or another significant diagnosis. Per OSHA, the 300 log applies to employers with more than 10 employees in covered industries.
- First-aid-only cases are not recordable, but every case — however minor — goes in [Your company]'s internal incident log at [location/system], because near misses and small cuts are where the next serious injury announces itself.
- When in doubt whether a case is recordable, [name/role] checks OSHA's recordkeeping guidance and documents the decision either way.

Immediate response to an injury or illness

1.

Make the person safe and get them care: first aid on site, [clinic] for medical treatment, 911 for anything serious. Care always comes before paperwork.

2. The supervisor secures the scene if the injury is serious — nothing moved except to help the injured or prevent further harm — and notifies [name/role] immediately.
3. The employee (or a witness, if the employee cannot) reports what happened to the supervisor before the end of the shift.
4. The supervisor completes the internal incident report at [location/system] within [timeframe]: who, what, where, when, witnesses, and immediate cause.
5. [Name/role] screens the case the same day: does it start a federal reporting clock, and is it recordable?

Reporting severe injuries to OSHA

1. Confirm the outcome and whether it is work-related: fatality, inpatient hospitalization, amputation, or loss of an eye.
2. Check the clock, per OSHA's rule: 8 hours for a fatality, 24 hours for an inpatient hospitalization, amputation, or loss of an eye — the clock runs from when [Your company] learns of the event.
3. Gather what the report needs: business name, location and time of the incident, type of event, number affected, names, a contact person, and a brief description.
4. Make the report via OSHA's current channels — phone the nearest OSHA area office, call OSHA's 24-hour hotline, or use the online form at osha.gov/report. In a state-plan state, report to the state agency per its rules.
5. Record who reported, to whom, when, and any report number in the incident file.
6. Notify [senior leader] and begin the investigation while facts are fresh — an OSHA inspection may follow, and the scene stays secured until released.

Recording the case: 300 log and 301 report

1. Enter every recordable case on the OSHA 300 log within the timeframe OSHA's rule sets, using the current forms from OSHA's recordkeeping page.
2. Classify the case in one column only — death, days away, restricted work or transfer, or other recordable case — and describe the injury, the body part, and the event plainly.
3. Complete a 301 incident report (or an equivalent such as a workers' compensation first report that captures the same information) for the same case.
4. Count days away and restricted days per OSHA's counting rules, and update the log entry as the case develops — outcomes change, and the log should change with them.
5. File the medical and case records at [secure location/system], separate from general personnel files, with access limited to [roles].
6. Cross-check monthly against the internal incident log and workers' compensation claims — the case that reaches the insurer but never reaches the 300 log is the classic recordkeeping failure.

The 300A annual summary

At year end, [name/role] totals the 300 log onto the 300A annual summary — including zeros if there were no cases — and a company executive certifies it, as OSHA's rule requires. The summary is posted where notices to employees go, for the posting period OSHA specifies each year, and [Your company] submits data electronically to OSHA if its size and industry are covered by the electronic submission rule — [name/role] checks OSHA's current criteria each January.

Logs, 301 reports, and summaries are retained for the period OSHA's rule specifies, at [location/system].

Privacy cases and employee access

- For privacy-concern cases as defined by OSHA — including certain injuries of an intimate nature and other listed categories — enter "privacy case" on the 300 log instead of the name and keep the identity on a separate confidential list.
- Employees, former employees, and their representatives have the right to view the 300 log and their own 301 information, per OSHA's rule; requests go to [name/role].
- No one is discouraged, disciplined, or retaliated against for reporting an injury or illness — programs and incentives that suppress reporting are prohibited at [Your company].

Records and review

This procedure is reviewed [frequency, e.g. annually], after any OSHA contact or inspection, and when OSHA updates its forms or submission criteria. Owner: [name/role]. Next review due: [date].

How to use this template

1. Name the recordkeeper and a deputy, and put OSHA's reporting channels — area office number, 24-hour hotline, [osha.gov/report](https://www.osha-slc.gov/report) — in the procedure and in both their phones today.
2. Check whether your industry is covered by the 300 log requirement and by electronic submission, using OSHA's current lists rather than memory.
3. If you are in a state-plan state, replace the federal contacts with your state agency's and check its rules for any differences.
4. Download the current 300, 300A, and 301 forms from OSHA's recordkeeping page and set up your log for the year — do not photocopy a decade-old set.
5. Train every supervisor on the same-shift internal report and the severe-injury clocks — the 8- and 24-hour windows are usually lost in the first hour, not the last.
6. Diary the year-end 300A routine now: totals, executive certification, posting, and the electronic submission check.

Official guidance

- › [OSHA — Injury and illness recordkeeping and reporting](#)
- › [OSHA — Report a fatality or severe injury](#)

› OSHA — Recordkeeping rule (29 CFR part 1904)

This template is provided in good faith and for general information — it is not legal advice. Adapt it to your organisation and, where your sector carries specific legal requirements, have the finished document reviewed by a qualified adviser. The live version at <https://trainedteam.com/templates/osha-injury-reporting-procedure> is kept current; this file is a snapshot.