



OSHA Recordkeeping Readiness Checklist

Decide recordability correctly, log it on time, and be ready for the annual posting — before OSHA asks.

WHAT THIS HELPS YOU DO

Use this checklist after any workplace injury or illness to determine OSHA recordability, complete the 300/301 entries on time, track days away and restricted duty, and stay ready for the annual 300A posting.

WHEN TO USE THIS DOCUMENT

- After any workplace injury or illness, alongside the workers' comp response
- When deciding whether an incident is OSHA-recordable
- When counting days away or on restricted duty
- Every January, before the 300A posting window (Feb 1 - Apr 30)
- Before electronic submission deadlines, if your size/industry requires them

WHAT THIS DOCUMENT HELPS PREVENT

- Unrecorded recordables discovered during an OSHA inspection
- Confusing workers' comp compensability with OSHA recordability
- Day counts that stop and start with the schedule instead of the calendar
- Missed 300A posting and electronic submission deadlines
- Citations that turn a safe workplace into a cited one over paperwork

Faulkner HR Solutions focuses on the system behind the people problem. This tool is designed to help employers slow down the decision, identify the risk, and create proof before the issue becomes a claim, complaint, turnover event, or credibility problem.

BEFORE YOU START: READINESS CHECKLIST

Gather the following before working through this document. Incomplete inputs are one of the most common reasons employer decisions fail under later scrutiny.

Have it	Input	Notes / location
☐	Employee name and role	
☐	Date of incident, request, or separation	
☐	Supervisor involved	



Have it	Input	Notes / location
☐	Policy or handbook section that applies	
☐	Prior documentation on file	
☐	Pay records, if applicable	
☐	Relevant emails, texts, notes, or complaints	
☐	Decision-maker name	
☐	Deadline, if applicable	



RECORDKEEPING READINESS CHECKLIST

Recordability is a fixed decision tree, not a judgment call. Run every incident through the same gates, log what qualifies within 7 calendar days, and keep the counts current.

Part 1 — Incident Facts

Employee name and job title	
Date and time of incident	
Where it happened	
What happened and what object/substance was involved	
Injury/illness description and body part	
Treatment provided (first aid, clinic, ER, hospitalization)	

Part 2 — Recordability Decision Gates

Answer in order. The incident is recordable only if it passes all three gates.

Gate	Test	Yes/No
1. Work-related?	Event or exposure in the work environment caused or contributed to the condition (presumption applies at work; note the exceptions)	
2. New case?	New injury/illness, not a continuation of a previously recorded one	
3. Meets recording criteria?	Death, days away, restricted work or transfer, medical treatment beyond first aid, loss of consciousness, or a significant diagnosis	

Part 2a — First Aid vs. Medical Treatment

OSHA's first-aid list is exhaustive. If the treatment appears on the list — and nothing more was done — the case is not recordable on treatment grounds.

Applied	First-aid item (non-recordable if this is all)	Notes
☐	Non-prescription medication at non-prescription strength	
☐	Cleaning, flushing, or soaking wounds; bandages, butterfly closures	
☐	Hot/cold therapy; elastic wraps; temporary immobilization for transport	
☐	Tetanus immunization	



Applied	First-aid item (non-recordable if this is all)	Notes
☐	Eye patches; foreign body removal by irrigation or cotton swab	
☐	Drilling a nail to relieve pressure; drinking fluids for heat stress	
☐	Prescription meds, sutures, physical therapy, or work restrictions = MEDICAL TREATMENT (recordable)	

Part 3 — Days Away / Restricted Duty Count

First day away or restricted (day AFTER the injury — injury day never counts)	
Calendar days counted (weekends and holidays count; cap at 180)	
Restricted duty: what the employee cannot do, per provider	
Count updated through (date)	

Part 4 — Log Entry Status

Done	Entry step	Date
☐	Form 301 (or equivalent) completed within 7 calendar days	
☐	Form 300 log entry made within 7 calendar days	
☐	Privacy case handling applied where required (name withheld on the log)	
☐	Severe injury reporting checked: fatality within 8 hours; inpatient hospitalization, amputation, or eye loss within 24 hours	
☐	Workers' comp claim cross-referenced (recordability decided independently)	

Part 5 — Annual Readiness

Done	Annual step	Date / owner
☐	Form 300A summary totals verified against the log	
☐	300A certified by a company executive	
☐	Posted February 1 through April 30 where employees can see it	
☐	Electronic submission (ITA) completed by March 2, if establishment size/industry requires	



Done	Annual step	Date / owner
☐	Records retained 5 years and updated as cases change	
☐	Partial-exemption status verified (small employer or low-hazard industry) — severe injury reporting still applies	

Role	Name / signature	Date
Recordkeeper		
Certifying executive		

STOP AND REVIEW BEFORE ACTING

If any statement below is true, pause. Get the decision reviewed by HR, counsel, or Faulkner HR Solutions before you act.

- ☐ An incident was left off the log because the comp claim was denied — the two standards are different.
- ☐ Restricted duty is happening informally with no log entry.
- ☐ The 300A was posted but never certified by an executive.
- ☐ A hospitalization was not reported within 24 hours.
- ☐ Employees are discouraged from reporting injuries — that is its own violation and a retaliation risk.
- ☐ The log lists zero recordables in an industry where peers record several per year.

MINIMUM DOCUMENTATION STANDARD

Before this file is closed, the employer should be able to answer every question below and point to where the proof lives.

Question	Your answer / where the proof is stored
What happened?	
When did it happen?	
Who observed or reported it?	
What policy, standard, deadline, or expectation applies?	
What decision was made?	
Who had authority to make the decision?	
What alternatives were considered?	



Question	Your answer / where the proof is stored
What risk was reviewed?	
What follow-up is required?	
Where is the proof stored?	

COMMON MISTAKES

1. Treating 'comp denied it' as 'not recordable' — OSHA recordability is independent of compensability.
2. Counting only scheduled workdays instead of calendar days for days away.
3. Missing that work restrictions alone make a case recordable, even with first-aid-only treatment.
4. Forgetting the injury day itself never counts as a day away.
5. Blowing the 8-hour fatality / 24-hour hospitalization reporting windows.
6. Assuming small-employer exemption removes severe injury reporting duties — it doesn't.

WHAT TO DO NEXT

File the completed checklist with the incident record, update the 300 log as the case evolves, and calendar the annual cycle: verify totals in January, post February 1, submit electronically by March 2 if required. If an inspection or complaint arrives, this checklist is the readiness proof.

Before you terminate, deduct, discipline, classify, or respond, get the decision reviewed.

Call 210.446.8730 or email thomas@faulknerhrsolutions.info.



Before you process payroll, terminate, classify, deduct, or respond to a claim, get the decision reviewed.

Need help applying this to a real workplace decision?

Faulkner HR Solutions helps Texas employers, nonprofits, municipalities, and growing businesses fix the people systems behind recurring workplace problems.

If this document raised a risk flag, do not guess your way through the next step.

Call: 210.446.8730

Email: thomas@faulknerhrsolutions.info

Website: faulknerhrsolutions.info

DISCLAIMER

This resource is provided for general employer education and planning purposes. It is not legal advice and does not create an attorney-client relationship. Employment laws, agency guidance, and local requirements may change. Employers should review the facts of each situation before acting and consult appropriate HR or legal counsel when needed.