



J D E D W A R D S

Safety and Health Administration

OSHA 300 Reports

WorldSoftware™

A7.3

A8.1

Effective January 1, 2002



J.D. Edwards World Source Company

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Denver, CO 80237

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Safety and Health Administration

To satisfy the requirements of the Occupational Safety and Health Administration (OSHA), you must track information about all aspects of work-related injuries and illnesses. Using this information, you can create accurate and complete OSHA 200 and OSHA 300 reports. You can also review this information to help you determine how your organization can provide a safer working environment for its employees.

OSHA reporting requirements will change effective January 1, 2002. You use OSHA 200 reports to provide information to OSHA about work-related injuries and illnesses that occurred before January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

You can use your Human Resources system to satisfy all OSHA 200 and OSHA 300 reporting requirements.

Topics

- Working with injury and illness information
- Reviewing safety and health reports

Working with Injury and Illness Information

To satisfy OSHA requirements, you must track detailed information about any injuries or illnesses that your employees incur while they are working for your organization. The information includes:

- Date of incident
- Time of incident
- Description of incident
- Employee's name
- Employee's occupation
- Employee's department
- Part of body
- Action taken

You use this information to create and print OSHA 200 reports and OSHA 300 reports. OSHA has approved J.D. Edwards' versions of these reports for submission and posting in the United States.

You use OSHA 200 reports to provide information to OSHA about work-related injuries and illnesses that occurred before January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

You begin tracking OSHA information by opening an injury or illness case and entering the information that OSHA requires.

After you enter the required information for an injury or illness, you can enter profile data. Profile data includes any additional information that you want to track about injuries and illnesses, regardless of whether you need to report the case to OSHA. Profile data appears on the OSHA 301 Injury and Illness report, but it does not print on the OSHA 200 reports or on the OSHA 300 Log or 300A Summary reports.

After you resolve an injury or illness case and print the OSHA reports, you close the case. To analyze and verify injury and illness information, you can review information online.

Topics

- ❑ Opening an injury or illness case
- ❑ Entering profile data for injury and illness cases
- ❑ Closing an injury or illness case
- ❑ Reviewing injury and illness cases by establishment
- ❑ Reviewing profile data for injury and illness cases

Opening an Injury or Illness Case

When a work-related injury or illness occurs, you open a case to begin tracking information about it. You use this information to create and run the OSHA 200 or OSHA 300 reports, which are required by the federal government.

In addition to the information that is required by OSHA, you can track injury and illness statistics that your organization can use to accomplish the following goals:

- Identify hazards
- Increase safety awareness
- Evaluate safety performances

Before You Begin

- ❑ Set up the types of establishments that you have in your organization in the Address Book system. Establishments are the places where your employees report for work or perform their duties, or are the business units from which they are paid. See *Setting Up Safety and Health Administration* in the *Human Resources Guide*.
- ❑ Set up UDC table 08/BU (Establishments for OSHA) to define the physical locations that you want to use as establishments for the purposes of OSHA reporting.
- ❑ Set up data type ES for establishments in the profile data, using the supplemental database code E for employees. See *Working with Profile Data* in the *Human Resources Guide*.
- ❑ After you set up UDC table 08/BU, assign each employee to the appropriate establishment. See *Working with Profile Data* in the *Human Resources Guide*.
- ❑ Review UDC table 08/H5 (Occupational Illness) for the occupational illness codes that are designated for use in OSHA 200 and OSHA 300 reporting. The Description-2 fields and the special handling codes indicate which occupational illness codes are valid for OSHA 300 reporting (that is, for

reporting occupational injuries and illnesses that occur on or after January 1, 2002.)

► **To open an injury or illness case**

From Safety and Health Administration (G08S1), choose Case Entry.

1. On Case Entry, complete the following required fields:

- Case Number
- Case Status
- OSHA (Y/N)
- Employee
- Description
- Date of Injury or Illness
- Injury or Illness
- Establishment

2. Complete any of the following fields that apply:

- Part of Body
- Away from Work
- Restricted Work
- Days Away
- Days Restricted
- Date Returned
- Date of Death

Note

Use the Part of Body field to identify that an individual's name should not be disclosed.

3. If the case is for an illness, complete the following field:

- Occupational Illness

4. Choose the Add action.

The system creates the record and the Case Additional Information screen appears.

5. On Case Additional Information, review the information in the following fields and change it, if necessary:
 - Job Type/Step
 - Workers Comp Insurance
 - Home Company
 - Home Business Unit
 - Supervisor
6. If the case is for an illness, complete the following field:
 - Termination/Transfer
7. Choose the Change action if you change the information.

Field Descriptions

Field	Explanation
Case Status	<p>A code that indicates the current status of an occupational injury or illness case. You define these codes in user defined code table 08/CS. When you set up this table, you can enter more than one code that indicates that a case is closed. For each closed code, you must enter the letter 'X' in the Description-2 field.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If you enter the code CL (Closed) in this field, you must enter a date in the Date Closed field.</p>
Description	<p>A brief description of the occupational injury or illness, including the part or parts of the employee's body that are affected.</p>

Inj/Ill (IN/IL)	<p>A code that indicates whether the case is an injury or an illness. Valid codes are:</p> <p>IN</p> <p>Injury: Injuries are caused by immediate events in the work environment. You must record an injury when it requires medical treatment (other than first aid), or if it involves loss of consciousness, restriction of work or motion, or transfer to another job.</p> <p>IL</p> <p>Illness: Illnesses are any abnormal condition or disorder, other than one resulting from an occupational injury, caused by exposure to environmental factors associated with employment. You must record all work-related illnesses.</p>
Part of Body	<p>A code that indicates the part of the body affected by the occupational injury or illness case. You can define this code in user defined code table 08/H4.</p> <p>Occasionally you will encounter a person whose name should not be disclosed. Create a value in the user defined table 08/H4 to indicate someone whose name should not be disclosed, and insert a value of Y in the Special Handling Code field on that UDC value. This code will then cause the OSHA 300 report to print 'Privacy Case' instead of the employee's name.</p>
Establishment	<p>An establishment is a single physical location where your organization conducts business or performs services or industrial operations.</p>
Away from Wrk (Y/N)	<p>A code that indicates whether the employee missed any days of work as a result of the injury or illness. Valid codes are:</p> <p>Y</p> <p>Yes, the employee lost days of work</p> <p>N</p> <p>No, the employee did not lose days of work</p> <p>This field is required when reporting OSHA 200 and OSHA 300 incidents.</p>

<p>Restricted Wrk (Y/N)</p>	<p>A code that indicates whether the injury or illness involves any days of restricted work activity. Valid codes are:</p> <p>Y Yes, the employee has work restrictions</p> <p>N No, the employee does not have work restrictions.</p> <p>Work restrictions include:</p> <ul style="list-style-type: none"> • Being assigned to another job on a temporary basis • Working at a permanent job less than full time • Working at a permanent job but not being able to perform all of the duties normally required of it <p>This field is required when reporting OSHA 200 and OSHA 300 incidents.</p>
<p>Days Away</p>	<p>The number of workdays (consecutive or not) on which the employee would have worked but could not because of occupational injury or illness.</p> <p>Note: The number of lost workdays should not include the day of injury or onset of illness or any days on which the employee would not have normally worked.</p> <p>This field is required when reporting OSHA 200 and OSHA 300 incidents.</p>
<p>Days Restricted</p>	<p>The number of workdays (consecutive or not) on which the employee has work restrictions as a result of the injury or illness.</p> <p>Work restrictions include:</p> <ul style="list-style-type: none"> • Being assigned to another job on a temporary basis • Working at a permanent job less than full time • Working at a permanent job but not being able to perform all of the duties normally required of it

Occup. Illness	<p>A code that defines the exact nature of the occupational illness. You can define this code in user defined code table 08/H5.</p> <p>The sequence of the illness codes provided by J.D. Edwards corresponds exactly to the sequence on the OSHA 200 and OSHA 300A Summary reports. If you are sending J.D. Edwards' OSHA 200 and OSHA 300A Summary reports to the U.S. Department of Labor, you should not change the sequence.</p> <p>If you are not sending the reports, you can change the codes, the descriptions, and the sequence.</p>
Term/Transfer	<p>A code that defines whether the employee was terminated or permanently transferred as the result of an occupational illness.</p> <p>Do not change the codes that J.D. Edwards provides. The OSHA 200 Log and OSHA 300 Log reports are designed to check this field if the incident is an illness. If the occupational illness did not result in the employee's termination or permanent transfer, you must leave this field blank.</p>

Entering Profile Data for Injury and Illness Cases

Profile data is any type of additional information that you want to track about any of the following:

- Employees
- Applicants
- Jobs
- Dependents
- Beneficiaries
- Requisitions
- Safety and health cases

When you set up your Human Resources system, you specify the types of profile data (data types) that you want to track.

For safety and health cases, typical types of profile data might include:

- How the injury occurred
- Medical expenses

- Hazardous materials involved
- Hospital
- Attending physician

Profile data appears on the OSHA 301 Injury and Illness report, but it does not print on the OSHA 200 reports or on the OSHA 300 Log or 300A Summary reports.

The method that you use to enter profile data is the same for any type of information that you track.

See Also

- *Working with Profile Data* in the *Human Resources Guide* for information about entering, copying, reviewing, and purging profile data

Closing an Injury or Illness Case

After you resolve an injury or illness case and print the OSHA reports, you must close the case to fulfill OSHA requirements. To close a case, you must enter a closed status and the date that you closed the case.

► To close an injury or illness case

From Safety and Health Administration (G08S1), choose Case Entry.

1. Locate the case you want to close.
2. Complete the following fields and choose the Change action:
 - Case Status
 - Date Closed

Reviewing Injury and Illness Cases by Establishment

When you enter a case, you include the establishment in which it occurred. The establishment is any single location where your organization conducts business or performs services. To determine the relative safety of each of your organization's establishments, you can review the number and types of incidents that occur at one establishment, such as a branch office. You can narrow the search to incidents that occur at a specific home business unit or to one employee.

To determine which cases are resolved and which are still open, you can also review cases by case status.

► **To review injury and illness cases by establishment**

From Safety and Health Administration (G08S1), choose Case Review.

1. On Case Review, complete the following field, or leave it blank to show all establishments:
 - Establishment
2. To specify your search criteria, complete any of the following fields, and press Enter:
 - Home Business Unit
 - Employee Number
 - Case Status

Reviewing Profile Data for Injury and Illness Cases

After you enter profile data for injury and illness cases, including those that you do not need to report to OSHA, you can review that information by case or by data type. Use this information to identify unsafe conditions and develop solutions for them.

You use the same procedure to review profile data for injury and illness cases as you do to review profile data for employees.

See Also

- *Reviewing Profile Data for a Specific Employee in the Human Resources Guide*
- *Reviewing Profile Data by Data Type in the Human Resources Guide*

Reviewing Safety and Health Reports

To satisfy government reporting requirements, you can print the OSHA 200 and OSHA 300 reports. In addition to the reports required by OSHA, you can review reports that show detailed information about the injuries and illnesses that occur in your organization. Use this information to identify potential safety hazards.

OSHA reporting requirements will change effective January 1, 2002. You use OSHA 200 reports to provide information to OSHA about work-related injuries and illnesses that occurred before January 1, 2002. You use OSHA 300 reports to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

Topics

- Reviewing the OSHA 200 Log report
- Reviewing the OSHA 200 Summary report
- Reviewing the OSHA 300 Log report
- Reviewing the OSHA 300A Summary report
- Reviewing the OSHA 301 Injury and Illness Incident report
- Reviewing the Cases by Type of Data report
- Reviewing World Writer for Safety and Health Administration

Reviewing the OSHA 200 Log Report

From Safety and Health Administration (G08S1), choose OSHA 200 Log.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occurred before January 1, 2002, print the OSHA 200 Log report. This report includes both case information and employee information. You can also use this report to track company injury and illness statistics.

Because OSHA has approved the format of J.D. Edwards' OSHA 200 Log, you can submit the report directly to the government. This report shows the employees who suffered an injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

You should use this report only for injuries and illnesses that occurred before January 1, 2002.

Reviewing the OSHA 200 Summary Report

From Safety and Health Administration (G08S1), choose OSHA 200 Summary.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occurred before January 1, 2002, print the OSHA 200 Summary report. This report contains a summary of each injury or illness and its extent or outcome. Because OSHA has approved the format of J.D. Edwards' OSHA 200 Summary, you can submit the report directly to the government.

You should use this report only for injuries and illnesses that occurred before January 1, 2002.

Reviewing the OSHA 300 Log Report

From Safety and Health Administration (G08S1), choose OSHA 300 Log.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occur on or after January 1, 2002, print the OSHA 300 Log report. This report includes both case information and employee information. You can also use this report to track company injury and illness statistics.

Because OSHA has approved the format of J.D. Edwards' OSHA 300 Log, you can submit the report directly to the government. This report shows the employees who suffered an injury or illness, a short description of the injury or illness, and the extent or outcome of the incident.

This report replaces the OSHA 200 Log report. You should use this report for injuries and illnesses that occur on or after January 1, 2002.

Reviewing the OSHA 300A Summary Report

From Safety and Health Administration (G08S1), choose OSHA 300A Summary.

To satisfy OSHA requirements for reporting occupational injuries and illnesses that occur on or after January 1, 2002, print the OSHA 300A Summary report. This report contains a summary of each injury or illness and its extent or outcome.

Because OSHA has approved the format of J.D. Edwards' OSHA 300A Summary, you can submit the report directly to the government.

This report replaces the OSHA 200 Summary report. You should use this report for injuries and illnesses that occur on or after January 1, 2002.

Reviewing the OSHA 301 Injury and Illness Report

From Safety and Health Administration (G08S1), choose OSHA 301 Injury/Illness.

To satisfy OSHA record-keeping requirements, run the OSHA 301 Injury and Illness report. This report provides complete information for any injury or illness case that you defined as an OSHA case when you opened the case. (That is, you entered Y in the OSHA field on the Case Entry form.)

The information on this report is the same information that you can review online using the Case Review form. However, the report allows you to print information for several cases at one time.

Because OSHA has approved the format of J.D. Edwards' OSHA 301 Injury and Illness report, you can submit the report directly to the government.

Use this report to provide information to OSHA about work-related injuries and illnesses that occur on or after January 1, 2002.

Processing Options for OSHA 301 Injury and Illness Report (P080413)

1. Enter an 'N' to bypass printing text information on the report. Default of blank will print the text. _____

Reviewing the Cases by Type of Data Report

From Safety and Health Administration (G08S1), choose Cases by Type of Data.

To review a list of all injury and illness cases with information in a particular profile data type (such as physical object involved or medical expenses), print the Cases by Type of Data report. The information that prints on this report is the same information that you can review online using Case Profile Entry.

For each case, the system lists data types in alphabetical order.

Processing Options for Cases by Data Type Report (P080403)

1. Enter an 'N' to bypass printing text _____
information on the report. Default
of blank will print the text.

Reviewing World Writer for Safety and Health Administration

From Safety and Health Administration (G08S1), choose World Writer.

To analyze health and safety statistics for your organization, you can print a World Writer report that lists detailed information about OSHA cases. You can print one version of this report to review illness cases and another to review injury cases. Use this information to identify establishments and employees who might need additional safety reviews.