

Incidents

from the report to the OSHA log, in one place

How to record incidents and near misses, investigate root cause, drive corrective actions, and let ShieldSphere build your OSHA 300, 301 and 300A forms for you.

Version 1.0

User Guide · for end users

Screens captured July 2026

ShieldSphere's Incidents module is OSHA recordkeeping done as you go. Record an injury, illness or near miss with the details OSHA asks for, classify the outcome, investigate root cause and raise corrective actions. The OSHA 300 Log, 301 incident report and 300A annual summary then build themselves from what you entered, so the log exists and is right before an inspector asks.

WHAT'S IN THIS GUIDE

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- 2 Words you'll see
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1 What Incidents does

Incidents is your OSHA recordkeeping done as you go - so that when an inspector asks for the 300 Log, it already exists and it is already right.

The module holds the whole life of a workplace injury or illness, from the moment it happens to the trend it becomes:

1. **Record** the incident (or a near miss) with the details OSHA asks for.
2. **Classify** it - injury or illness, and the outcome - which decides how it lands on the log.
3. **Investigate** the root cause and raise **corrective actions** so it does not repeat.
4. **Report** - the OSHA **300 Log**, **301** incident report and **300A** annual summary build themselves from what you entered.
5. **Trend** - rates and patterns roll up so you can see whether the programme is working.

Recordable incident

A work-related injury or illness that meets OSHA's recording criteria. Goes on the 300 Log.

Near miss

An event that could have caused injury but did not. Tracked for learning - it does not go on the 300 Log.

WHERE INCIDENTS SITS

Incidents is a **site-level** module - every record belongs to the site (profile) selected in the left sidebar, and to a **year** (the selector top-right). The forms and rates you see are always for that one site and that one year.

2 Words you'll see

TERM	WHAT IT MEANS
Recordable	An injury or illness that meets OSHA's criteria for the 300 Log - death, days away, restricted duty, transfer, loss of consciousness, or treatment beyond first aid.
Classification	Whether the case is an injury or an illness type. Drives column M on the 300 Log.
Outcome	The most serious result - death, days away from work, job transfer or restriction, or other recordable. Only one per case.
Privacy case	A sensitive injury (per 29 CFR 1904.29) where the employee's name is withheld from the log.
DART rate	Days Away, Restricted or Transferred - cases per 100 full-time workers. An industry benchmark of severity.
TCIR	Total Case Incident Rate - all recordable cases per 100 full-time workers.
Root cause analysis	A structured investigation (for example 5 Whys) that finds why the incident happened, not just what happened.
300 / 301 / 300A	The three OSHA forms: the log, the individual incident report, and the annual summary you post each spring.

3 The Incidents home screen

Click **Incidents** in the left sidebar. The top of the screen is your recordkeeping scoreboard for the selected year, and the seven tabs below are the whole module.

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TSO Safety

OWNER

Signed in as Matt Thompson

Organization Overview

CURRENT PROFILE

Demo Company

WORKSPACE

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Compliance

AI Hazard Scanner

AI Job Hazard Analysis

AI Ergonomic Evaluation

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Showing OSHA records for Demo Company

Incidents

Trends

OSHA 300 Log

OSHA 301

300A Summary

Near Misses

Root Cause

Total Cases

3

DEATHS

0

Days Away Cases

1

Restricted Cases

1

Other Recordable

1

TOTAL DAYS AWAY

5

TOTAL DAYS RESTRICTED

10

2026 Incident Records

Incident QR

+ Record Incident

Guided Entry

+ Near Miss

Case #	Date	Employee	Location	Description	Classification	Outcome	Actions
2026-002	Jan 27, 2026	Maria Santos Forklift Operator	Warehouse Bay 2, Forklift Zone	Employee slipped on wet floor while...	Injury	10 days restricted	
2026-001	Mar 11, 2026	James Harrington Machine Operator	Assembly Line B, Station 4	Employee caught right hand between...	Injury	5 days away	
2026-003	Jul 5, 2026	Keith urban loader	Loading dock by bay 3	Broken hand (side and specific area ...	Injury	Other recordable	

Incident corrective actions

3 open

3 overdue

View all

Incident investigation: 2025-001

Overdue 261d

Incident investigation: 2026-002

Overdue 177d

Incident investigation: 2026-001

Overdue 134d

Incidents home. Summary tiles across the top, the year's records in the middle, and the four action buttons top-right: **Incident QR**, **Record Incident**, **Guided Entry** and **Near Miss**.

TAB	WHAT LIVES THERE
Incidents	The records table for the year, plus the corrective actions raised from them.
Trends	Rates and charts - recordable count, DART, days away, monthly pattern.
OSHA 300 Log	The Form 300 log, built from your records, ready to export.
OSHA 301	The individual incident reports behind each case.
300A Summary	The annual summary and your DART / TCIR rates.
Near Misses	The near-miss log - tracked separately from recordable cases.
Root Cause	Every investigation across the site, with its status.

FOUR WAYS TO GET A REPORT IN

Record Incident is the full form. **Guided Entry** walks you through it step by step. **Near Miss** logs a close call. **Incident QR** gives you a printable code a worker can scan to report from the floor, no login needed.

4 Record an incident

One form, entered once, becomes the 300 Log row and the 301 report together.

Incidents → **Record Incident**

1 Identify the person and the event

Pick the **employee** from the roster (or type a name), set the **date of injury**, and say **where it happened**. Choosing a *Saved Location Preset* lines the incident up with the same areas you use in Inspect. Then describe the injury or illness in plain, specific terms.

Record New Incident. The note at the top says it plainly: this information feeds both the OSHA 300 Log and the 301 Form.

2 Mark the body parts and classify the case

Tap the body diagram where the injury occurred - you can select more than one area - and record the **nature of injury**. Then set the **Classification** (injury or an illness type). Recording these lets ShieldSphere spot clusters of the same injury across your site.

Incidents
Showing OSHA records for Demo Company

Total Cases: 3, DEATHS: 0

2026 Incident Records

Case #	Date	Employee
2026-002	Jan 27, 2026	Maria Santos Forklift Operator
2026-001	Mar 11, 2026	James Harrington Machine Operator
2026-003	Jul 5, 2026	Keith urban loader

Incident corrective actions 3 open 3 overdue

Incident investigation: 2025-001
Incident investigation: 2026-002
Incident investigation: 2026-001

Description of Injury/Illness *
Describe the injury or illness, parts of body affected, and object/substance that directly injured or made person ill

Nature of injury (optional)
e.g. Cut / laceration
The kind of injury. Recording it lets ShieldSphere spot clusters of the same injury type across your incidents.

Body parts affected (optional)

Front Back

Eyes(s) Ear(s) Internal organs Whole body / systemic

Tap the diagram where the injury occurred — you can select more than one area.

Classification *
Injury

Outcome
☐ Resulted in death

Body parts affected. Front and back diagrams, plus quick buttons for eyes, ears, internal organs and whole-body cases.

3 Set the outcome and finish the 301

Choose the **outcome** - resulted in death, days away from work, job transfer or restriction. Tick **Privacy case** for sensitive injuries to withhold the name from the log. Below that, the **OSHA 301** section collects the employee and treatment details the individual report needs.

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Showing OSHA records for Demo Company

Total Cases: 3, DEATHS: 0

2026 Incident Records

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Incident corrective actions 3 open 3 overdue

Incident investigation: 2025-001
Incident investigation: 2026-002
Incident investigation: 2026-001

Classification *
Injury

Outcome
☐ Resulted in death
☐ Days away from work
☐ Job transfer or restriction

Privacy case
☐ Check this for sensitive injuries (per 29 CFR 1904.29). Name will be withheld from the 300 Log.

OSHA 301 - Injury and Illness Incident Report
Every section below must be completed before an incident record can be saved.

EMPLOYEE INFORMATION

Home Address *
Street address
City * State * ZIP *

Outcome and the 301. Pick only the single most serious outcome. Every section of the 301 must be completed before the record can be saved.

CLASSIFICATION DRIVES THE LOG

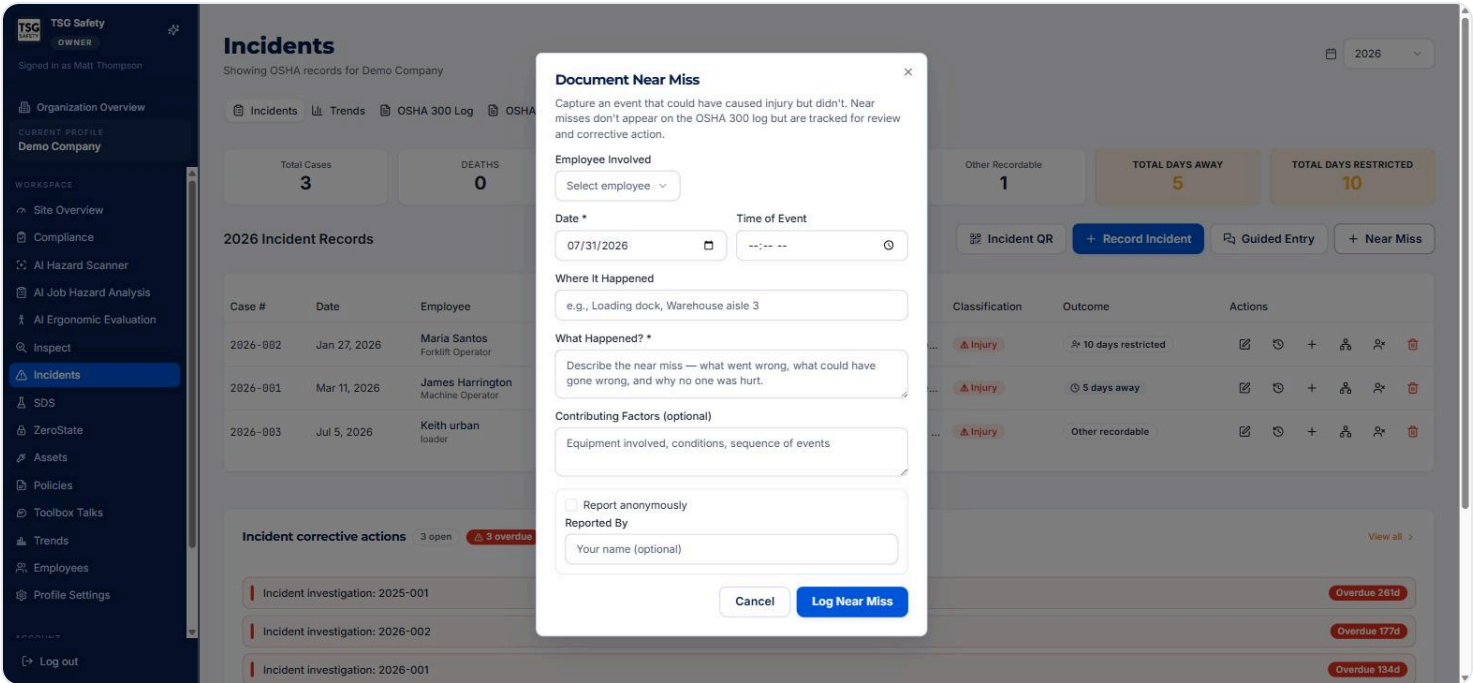
The outcome you choose here is exactly what lands in the "Classify the case" columns of the OSHA 300 Log. Get it right and the log is right; the form is only ever as accurate as this step.

5 Log a near miss

The close call you write down today is the recordable you avoid next month.

Incidents → Near Miss

The near-miss form is deliberately short - date, where it happened, what happened, and any contributing factors. It can be filed anonymously, and the person reporting does not need to have been hurt.



Document Near Miss. Near misses do not appear on the OSHA 300 Log, but they are tracked for review and can raise their own corrective actions.

6 Investigate and correct

Recording an incident documents it. Investigating it is what stops the next one.

Root cause analysis

Start an investigation from an incident row or from the 301 view, and it appears on the **Root Cause** tab. ShieldSphere gives you a structured method - a **5 Whys** analysis - that drives past the surface cause to the real one, and tracks each investigation from *In progress* to *Completed*.

The screenshot shows the 'Incidents' dashboard for 'TSC Safety'. The left sidebar contains navigation links: Organization Overview, CURRENT PROFILE Demo Company, WORKSPACE (Site Overview, Compliance, AI Hazard Scanner, AI Job Hazard Analysis, AI Ergonomic Evaluation, Inspect, Incidents, SDS, ZeroState, Assets, Policies, Toolbox Talks, Trends, Employees, Profile Settings), and ACCOUNT (Log out). The main content area is titled 'Incidents' and shows 'Showing OSHA records for Demo Company'. It includes a filter for '2026' and tabs for Incidents, Trends, OSHA 300 Log, OSHA 301, 300A Summary, Near Misses, and Root Cause. A summary row displays: Total Cases (3), DEATHS (0), Days Away Cases (1), Restricted Cases (1), Other Recordable (1), TOTAL DAYS AWAY (5), and TOTAL DAYS RESTRICTED (10). Below this is the '2026 Incident Records' section with buttons for Incident QR, Record Incident, Guided Entry, and Near Miss. A table lists analyses across the site, with columns for Incident, Analysis, Root causes, Corrective actions, Status, and Started. One incident is shown: 2026-982, Maria Santos, 5 Whys, 5 Whys, 0, —, In progress, Jul 6, 2026. Below the table is the 'Incident corrective actions' section, showing 3 open and 3 overdue actions. Three actions are listed: Incident investigation: 2025-001 (Overdue 261d), Incident investigation: 2026-002 (Overdue 177d), and Incident investigation: 2026-001 (Overdue 134d).

Root Cause. Every analysis across the site in one list, filterable by status, each tied back to the incident that triggered it.

Corrective actions

Findings from an incident or its investigation become **corrective actions** - assigned tasks with owners and due dates - shown right on the Incidents home under *Incident corrective actions*. They share the same corrective-actions engine as Inspect, so **Overdue** here is the same number an inspector will ask about there.

OVERDUE IS THE NUMBER THAT BITES

An incident with no investigation and no corrective action is a repeat waiting to happen - and on the record, it reads as a case you noticed and did nothing about. Close the loop.

7 The OSHA forms

You already did the work when you recorded each case. These tabs just assemble it into the official forms.

OSHA 300 Log

The **OSHA 300 Log** tab is Form 300 built from your records - every case as a row, classified across columns A to M, with page totals calculated for you. **Official XLSX** exports the government-format file; **Preview Form** shows it as it will print.

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OSHA 300 Log

OSHA 301

300A Summary

Near Misses

Root Cause

Showing OSHA records for Demo Company

2026

OSHA Form 300 - Log of Work-Related Injuries and Illnesses

Year: 2026 | You must record information about every work-related death and about every work-related injury or illness that involves loss of consciousness, restricted work activity or job transfer, days away from work, or medical treatment beyond first aid.

Official XLSX

Preview Form

(A) Case No.	(B) Employee Name	(C) Job Title	(D) Date of Injury	(E) Where Event Occurred	(F) Description	Classify the case				Days		(M) Type							
						(G) Death	(H) Days Away	(I) Restricted	(J) Other	(K) Away	(L) Transfer	Injury	Skin	Resp	Poison	Hearing	Other		
2026-002	Maria Santos	Forklift Operator	01/27/2026	Warehouse Bay 2, For...	Employee slipped on wet fl...			✓			10	✓							
2026-001	James Harrington	Machine Operator	03/11/2026	Assembly Line B, Stati...	Employee caught right han...		✓				5	✓							
2026-003	Keith urban	loader	07/05/2026	Loading dock by bay 3	Broken hand (side and spe...				✓			✓							
Page Totals:						1	1	1		5	10	3							

Column (B) Privacy Cases: You may use "Privacy Case" for injuries/illnesses involving an intimate body part or the reproductive system, sexual assault, mental illness, HIV infection, hepatitis, tuberculosis, and injuries/illnesses where the employee requests confidentiality.

Columns (G-J): Check only ONE box for each case based on the most serious outcome.

Columns (K-L): Enter the number of days the injured/ill worker was away from work or on restricted duty.

Column (M): Check only ONE box to classify whether the case is an injury (1), skin disorder (2), respiratory condition (3), poisoning (4), hearing loss (5), or other illness (6).

Form 300, assembled. The classification you set on each incident fills the "Classify the case", "Days" and "Type" columns automatically.

300A Summary and your injury rates

The **300A Summary** tab is the annual summary you post from February through April. Enter your **total hours worked** and ShieldSphere calculates your **DART rate** and **TCIR** - the two numbers that let you benchmark against your industry.

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Organization Overview

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Showing OSHA records for Demo Company

IncidentsTrendsOSHA 300 LogOSHA 301300A SummaryNear MissesRoot Cause

OSHA Form 300A - Summary of Work-Related Injuries and Illnesses

Year: 2026 | Post this summary from February 1 to April 30 of the year following the calendar year covered.

Official XLSXPreview Form

DART RATE

Days Away, Restricted, or Transferred

Enter total hours worked

Cases per 100 full-time workers

TCIR

Total Case Incident Rate

Enter total hours worked

Total recordable cases per 100 full-time workers

Rate Calculation Formula

DART Rate = (DART Cases × 200,000) ÷ Total Hours Worked | TCIR = (Total Recordable Cases × 200,000) ÷ Total Hours Worked

Enter your total hours worked in the Employment Information section below to calculate these rates.

Number of Cases

Total number of deaths
0

Total cases with days away from work
1

Total cases with job transfer or restriction
1

Total other recordable cases
1

Number of Days

Total days away from work

Total days of job transfer or restriction

Establishment Information

Enter your establishment details for the 300A form

Establishment Name
Demo Company

Street Address

CityStateZIP

CitySelectZIP

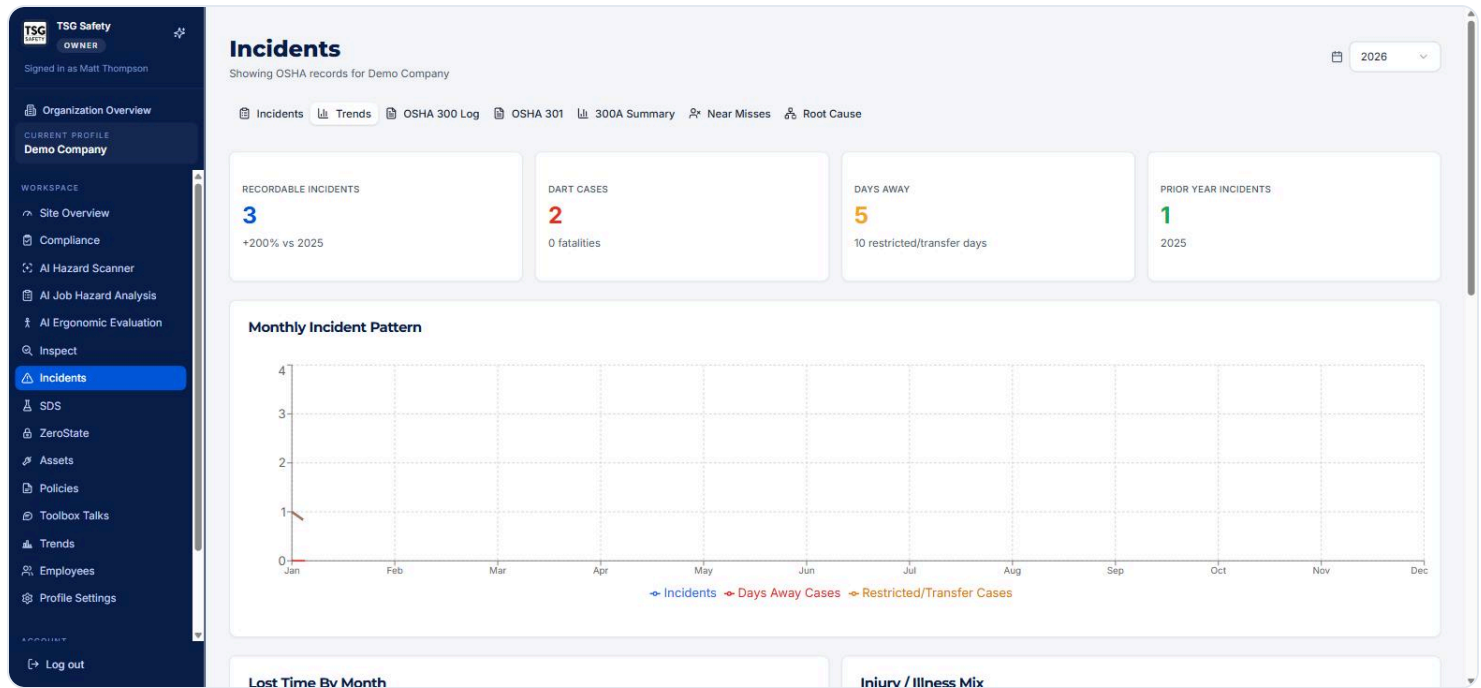
Industry DescriptionSIC CodeNAICS Code

e.g., Constructione.g., SIC 3715e.g., 236220

Form 300A with live rates. DART and TCIR compute the moment you enter hours worked. The **OSHA 301** tab holds the individual incident reports behind each case.

8 Reading the Trends tab

One year's log tells you what happened. Trends tells you whether you are getting safer.



Recordable count with year-over-year change, DART cases, days away, and the prior-year comparison - then the monthly pattern, lost time by month, and the injury / illness mix.

Watch the **year-over-year change** and the **DART cases** tile before the raw count. A rising recordable number is not always bad - it can mean people are finally reporting - but a rising DART rate means the cases that do happen are getting more serious, and that is the one to act on.

9 Troubleshooting

SYMPTOM	CAUSE AND FIX
The record will not save	Every section of the OSHA 301 must be completed first. Scroll the form for a required field left blank.
A case is on the wrong line of the 300 Log	Its outcome is set wrong. Edit the incident and correct the outcome - only the single most serious one should be ticked.
My DART / TCIR rates are blank	Enter total hours worked in the 300A Summary. The rates cannot compute without them.
A near miss is not on the 300 Log	That is correct. Near misses are tracked separately and never appear on the 300 Log.
An employee's name should not be public	Tick Privacy case on the incident. The name is withheld from the log per 29 CFR 1904.29.
I'm looking at the wrong year or site	Check the year selector top-right and the current profile in the sidebar. Every figure is scoped to both.