SHIELDSPHERE

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.

USER GUIDE – FOR EVERYDAY USERS | VERSION 1.0 | SCREENS CAPTURED JULY 2026

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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.

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

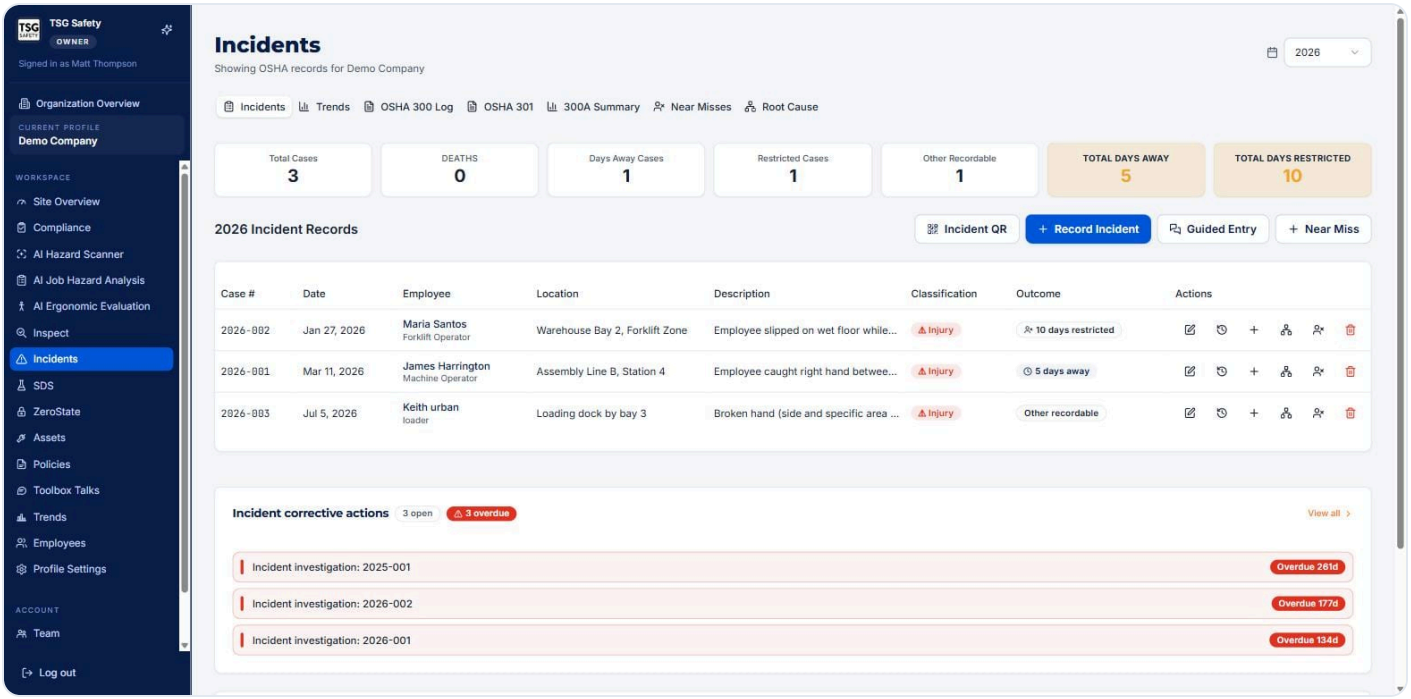
Incidents is a **site-level** module - every record belongs to the site (profile) selected in the left sidebar, and to a **year** (the selector top-right). The forms and rates you see are always for that one site and that one year.

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 / OSHA 300** in the left sidebar, under *Daily Work*. The top of the screen is your recordkeeping scoreboard for the selected year, and the seven tabs below are the whole module.



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.

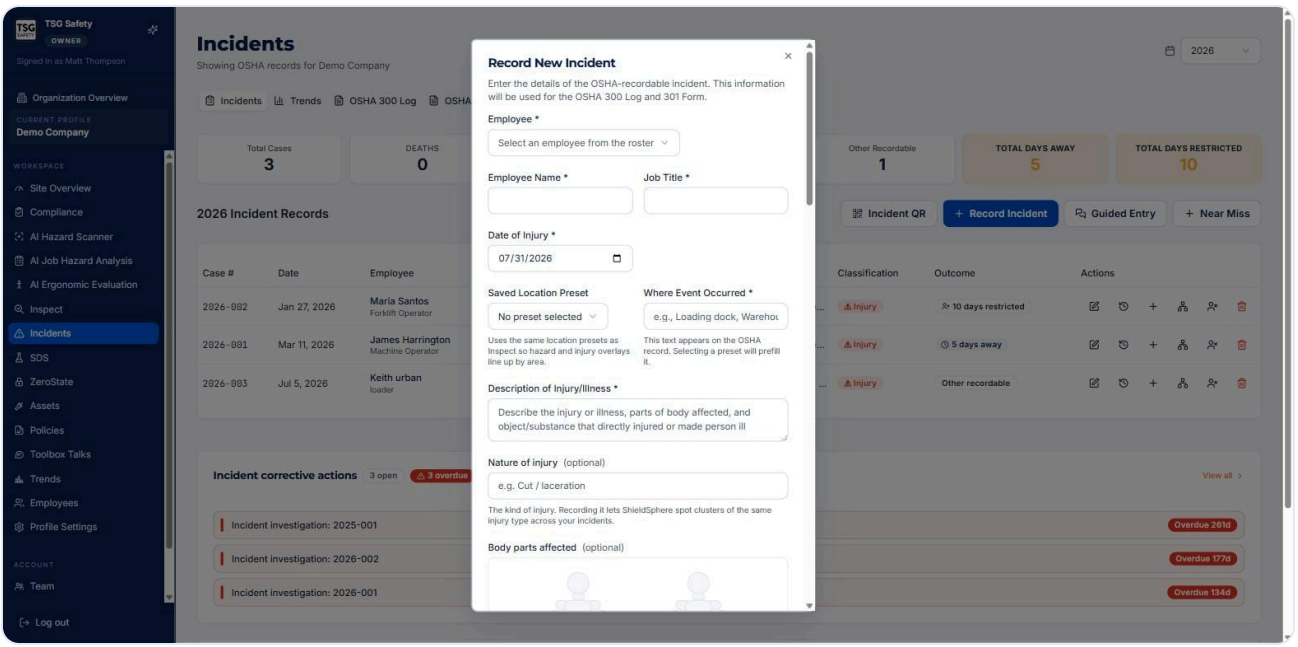
4 Record an incident

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

`Incidents → Record Incident`

1 Identify the person and the event

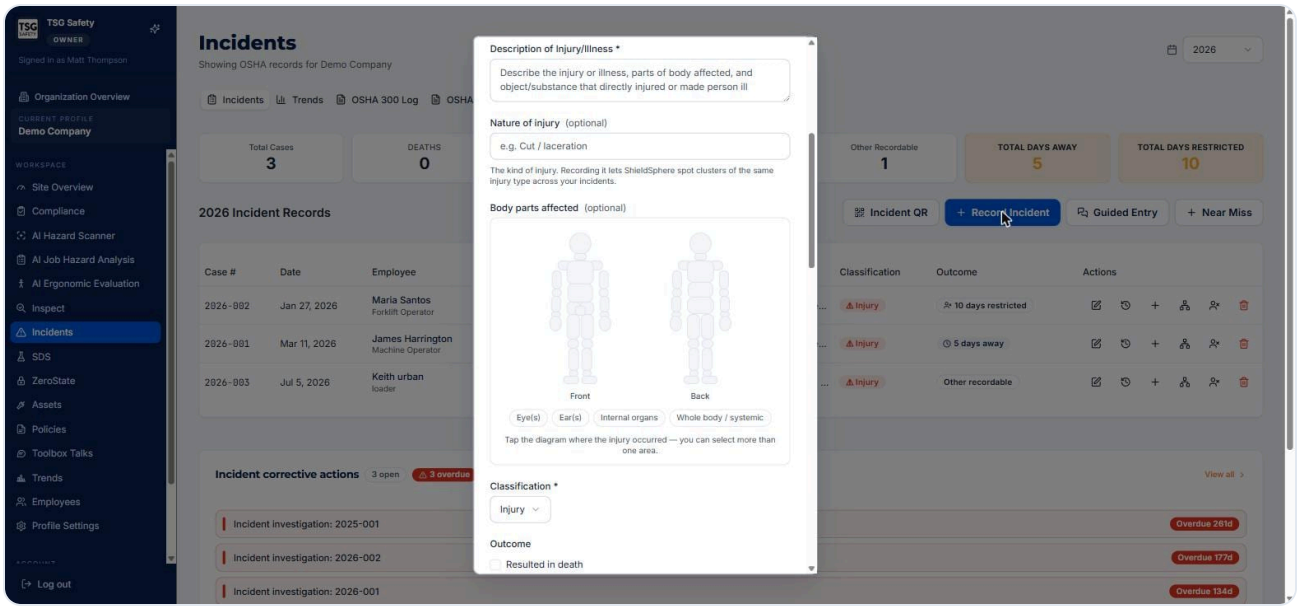
Pick the **employee** from the roster (or type a name), set the **date of injury**, and say **where it happened**. Choosing a *Saved Location Preset* lines the incident up with the same areas you use in Inspect. Then describe the injury or illness in plain, specific terms.



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

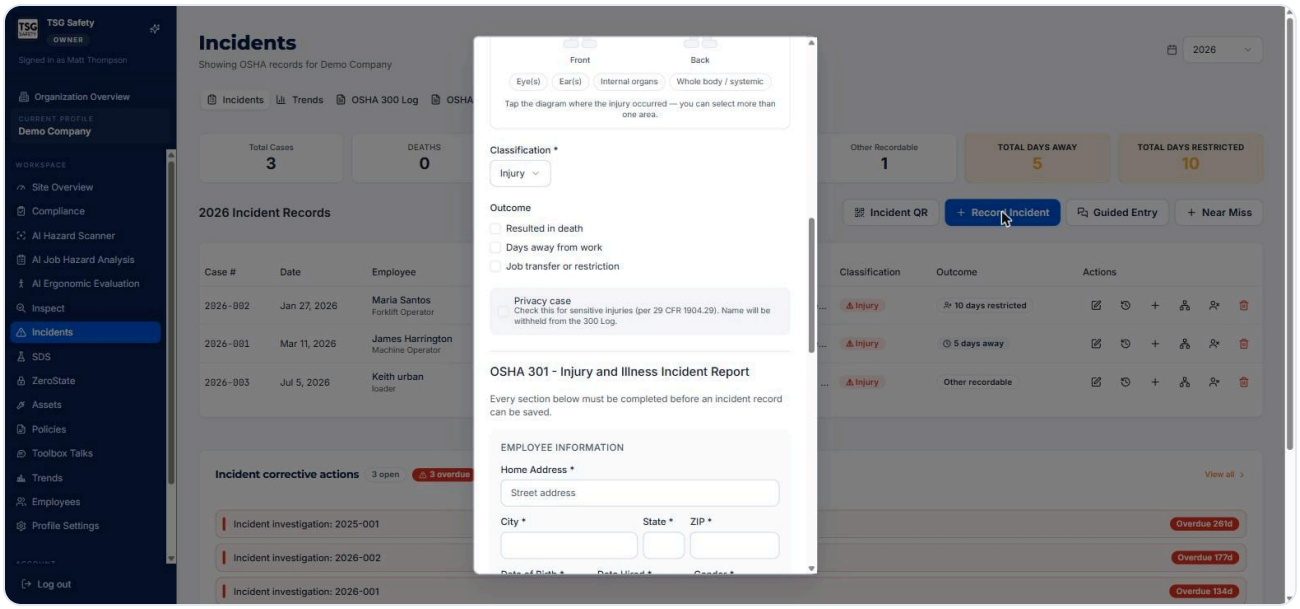
Tap the body diagram where the injury occurred - you can select more than one area - and record the **nature of injury**. Then set the **Classification** (injury or an illness type). Recording these lets ShieldSphere spot clusters of the same injury across your site.



> **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.



> **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.

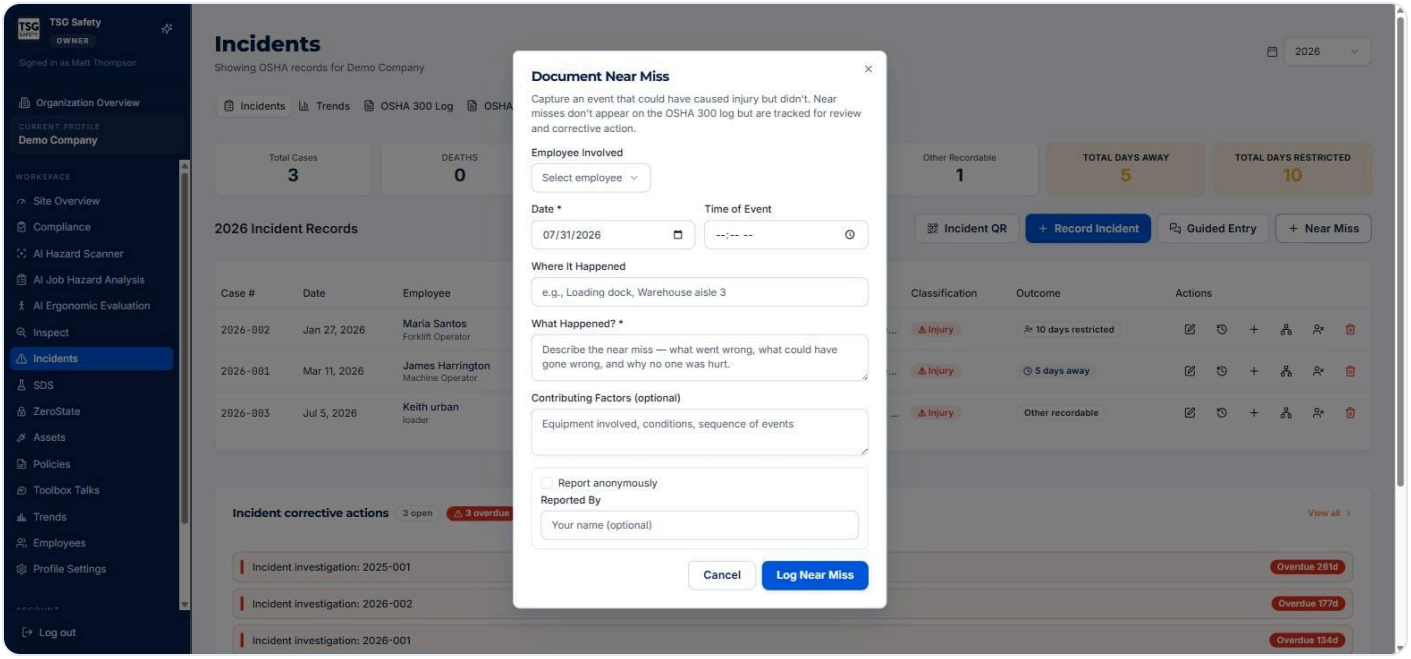
> **CLASSIFICATION DRIVES THE LOG**
>
> The outcome you choose here is exactly what lands in the "Classify the case" columns of the OSHA 300 Log. Get it right and the log is right; the form is only ever as accurate as this step.

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.



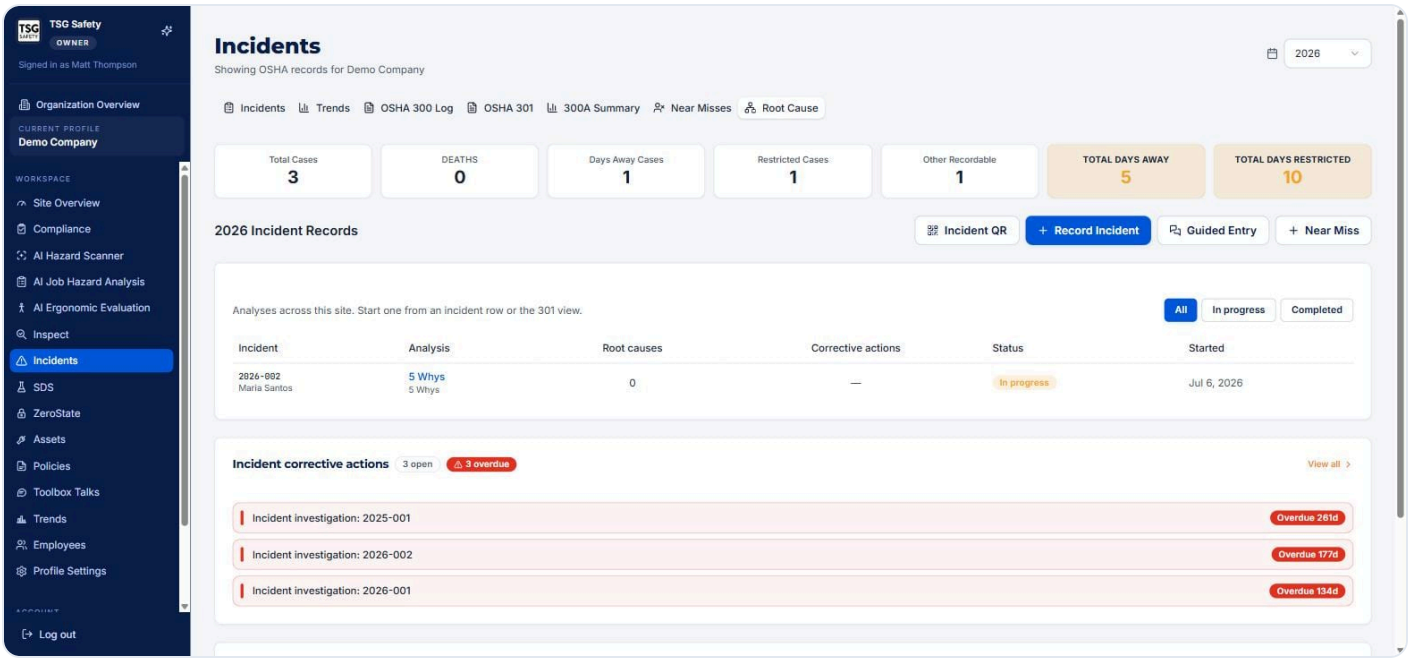
> **Document Near Miss.** Near misses do not appear on the OSHA 300 Log, but they are tracked for review and can raise their own corrective actions.

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*.



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.

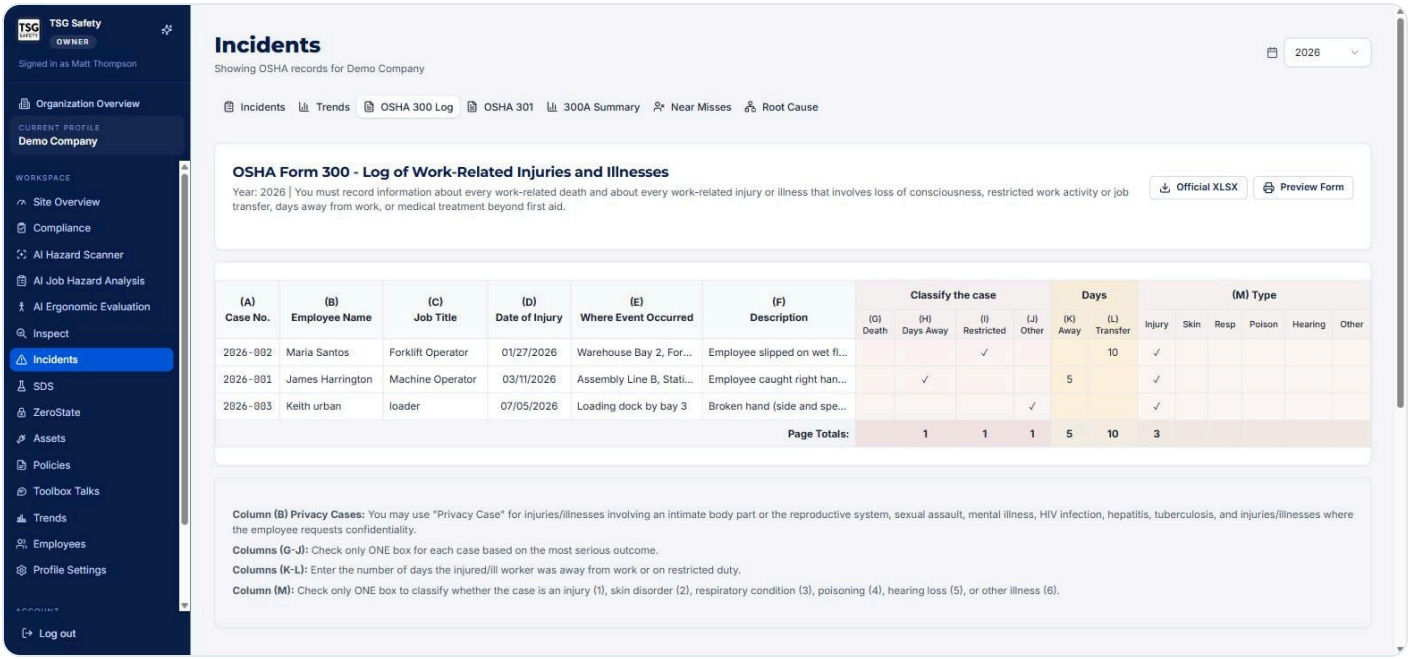
> **OVERDUE IS THE NUMBER THAT BITES**
>
> An incident with no investigation and no corrective action is a repeat waiting to happen - and on the record, it reads as a case you noticed and did nothing about. Close the loop.

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

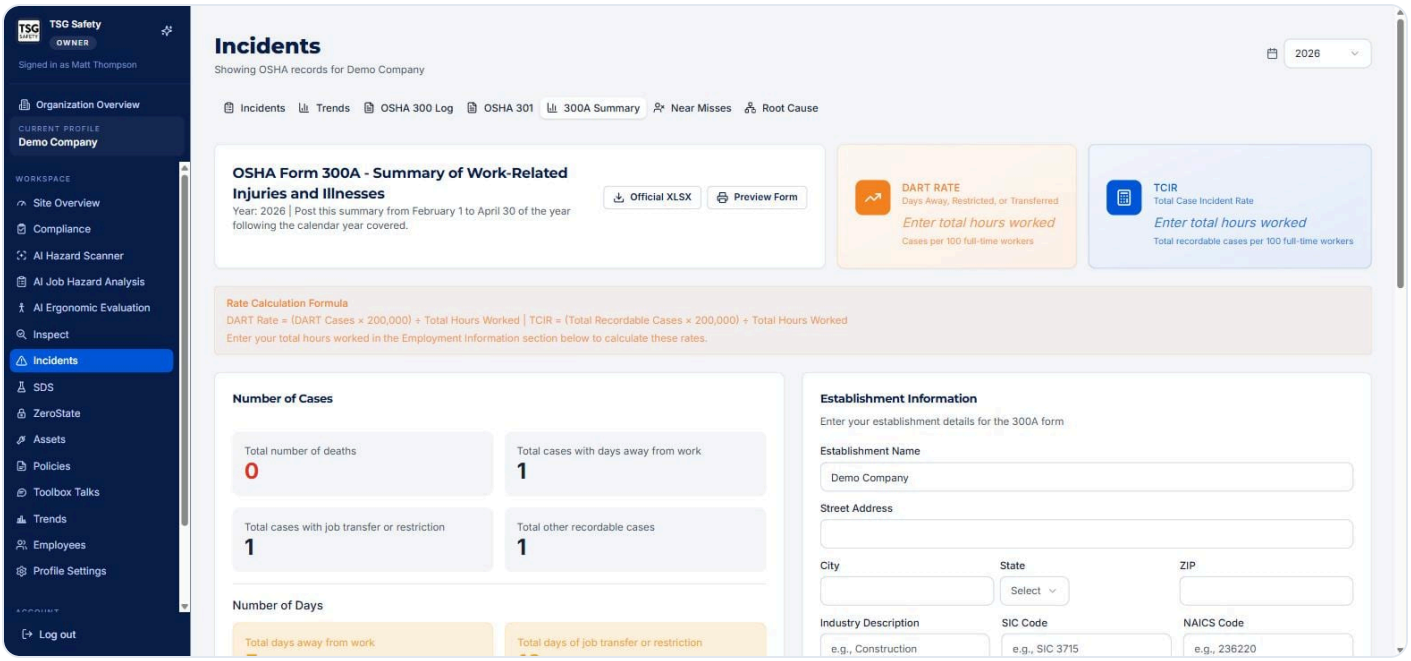
The **OSHA 300 Log** tab is Form 300 built from your records - every case as a row, classified across columns A to M, with page totals calculated for you. **Official XLSX** downloads the file - and it is the one to use. ShieldSphere fills OSHA's own published template, so the workbook you get is the real form rather than a copy of it that could drift.



> **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

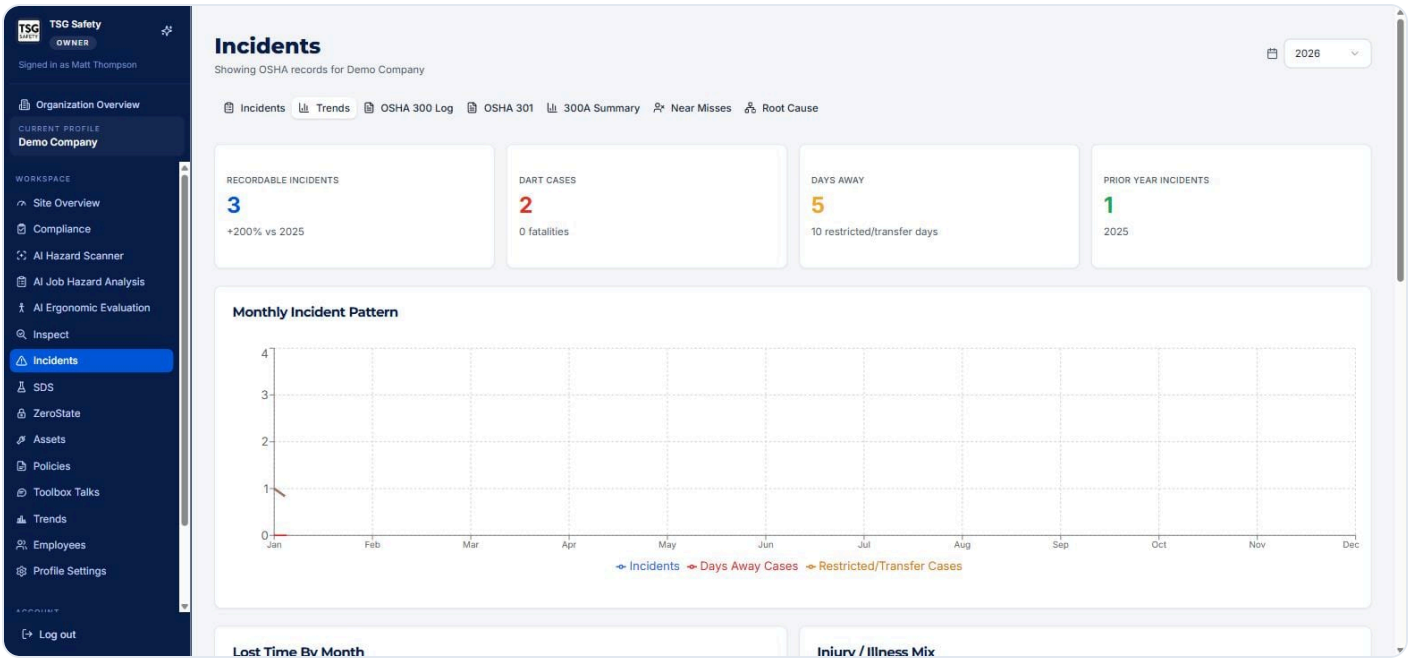
The **300A Summary** tab is the annual summary you post from February through April. Enter your **total hours worked** and ShieldSphere calculates your **DART rate** and **TCIR** - the two numbers that let you benchmark against your industry.



> **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.

ShieldSphere Incidents – User Guide. Published at shieldspheresafety.com/guides/incidents-user. Screens are illustrative; the written steps are what to follow if the two ever disagree.