




MANUFACTURING (OSHA) INCIDENT RESPONSE GUIDE

Workplace Incident Response & Reporting Requirements

Critical OSHA Reporting Deadlines:

-  **FATALITY: Report within 8 HOURS**
-  **HOSPITALIZATION: Report within 24 HOURS**
-  **AMPUTATION: Report within 24 HOURS**
-  **LOSS OF EYE: Report within 24 HOURS**

How to Report: Call 1-800-321-OSHA (6742) or report online at www.osha.gov

IMMEDIATE RESPONSE CHECKLIST (First 30 Minutes)

Scene Safety & Medical Response

- ☐ Scene secured - additional hazards identified and controlled
- ☐ Emergency medical services called (911 if serious injury)
- ☐ First aid rendered by trained personnel
- ☐ Injured employee(s) transported to medical facility
- ☐ Family notification initiated (if serious injury)
- ☐ Other employees removed from immediate danger area
- ☐ Production operations halted in affected area (if safety concern)

Incident Command Activation

- ☐ Incident commander identified and on-scene
- ☐ Plant manager/operations director notified
- ☐ Safety manager/EHS coordinator notified
- ☐ HR director notified
- ☐ Maintenance/engineering notified (if equipment involved)
- ☐ Security notified to control access to incident scene

Evidence Preservation

- ☐ Scene photographed from multiple angles (before anything is moved)
- ☐ Equipment positions documented and tagged

- [] Damaged equipment/materials secured and isolated
 - [] Lockout/Tagout applied to equipment involved
 - [] Witnesses identified and separated (to preserve independent accounts)
 - [] Environmental conditions documented (lighting, weather, noise, temperature)
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REGULATORY NOTIFICATION REQUIREMENTS

OSHA Recordability Determination:

An injury/illness is OSHA recordable if it results from a work-related incident and involves:

- Death
- Days away from work
- Restricted work or job transfer
- Medical treatment beyond first aid
- Loss of consciousness
- Significant injury/illness diagnosed by healthcare professional

OSHA Reporting Trigger Events (IMMEDIATE NOTIFICATION REQUIRED):

Fatality → Report within 8 hours

- Includes deaths that occur within 30 days of the work-related incident
- Report even if death occurs off-site (e.g., at hospital)
- Report even if employee was transported away from scene

In-Patient Hospitalization → Report within 24 hours

- Means formal admission to the in-patient service of a hospital or clinic
- Does NOT include emergency room treatment and release
- Includes observation status if admitted as in-patient

Amputation → Report within 24 hours

- Loss of all or part of a body part
- Includes traumatic loss and surgical amputation resulting from irreparable damage

Loss of an Eye → Report within 24 hours

- Includes physical removal of the eye or permanent loss of sight

Information You'll Need to Report to OSHA:

1. Establishment name
 2. Location of work-related incident
 3. Date and time of incident
 4. Number of employees affected
 5. Names of affected employees
 6. Your contact person and phone number
 7. Brief description of incident
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WORKERS' COMPENSATION REQUIREMENTS

Immediate Actions:

- ☐ Injured employee directed to authorized medical facility (per WC policy)
- ☐ First Report of Injury form completed
- ☐ Workers' compensation insurance carrier notified within required timeframe (typically 24-48 hours - check your state requirements)
- ☐ Claim number obtained and documented
- ☐ Return-to-work restrictions documented when employee returns from medical provider

State-Specific Deadlines Vary: Check your state requirements at:
www.dol.gov/owcp/dfec/regs/compliance/wc.htm

INVESTIGATION CHECKLIST (First 24-72 Hours)

Witness Interviews

- ☐ Injured employee interviewed (when medically appropriate)
- ☐ All witnesses interviewed separately within 24 hours
- ☐ Supervisor/lead person interviewed
- ☐ Maintenance personnel interviewed (if equipment-related)
- ☐ All statements documented in writing and signed
- ☐ Photos/videos reviewed if available

Physical Evidence Documentation

- ☐ Detailed photographs taken (wide shots, medium, close-up)
- ☐ Measurements recorded (heights, distances, dimensions)
- ☐ Equipment inspections completed and documented
- ☐ Maintenance records pulled for equipment involved
- ☐ Safety procedures reviewed for the task being performed

- ☐ PPE examined and documented (what was worn, condition)

Root Cause Analysis

- ☐ Timeline of events reconstructed
- ☐ Contributing factors identified (equipment, procedure, training, environment, PPE)
- ☐ Root causes identified (not just proximate cause)
- ☐ Similar incidents reviewed for patterns
- ☐ Industry best practices compared to current practices

Corrective Actions

- ☐ Immediate corrective actions implemented (before operations resume)
 - ☐ Short-term corrective actions scheduled (within 30 days)
 - ☐ Long-term improvements identified (system/process changes)
 - ☐ Responsibility assigned for each corrective action
 - ☐ Target completion dates established
 - ☐ Verification method determined (how will you know it worked?)
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EMPLOYEE & FAMILY COMMUNICATION

Injured Employee Communication:

- ☐ Family notification completed (by designated company representative, not coworker)
- ☐ Transportation to medical facility arranged or confirmed
- ☐ Personal belongings secured and provided to family
- ☐ Workers' compensation process explained to employee and family
- ☐ Company contact person identified for family questions
- ☐ Regular updates provided to employee/family during recovery
- ☐ Return-to-work process explained and documented

Workforce Communication:

- ☐ Immediate: Brief factual update to employees in affected area
 - ☐ Within 24 hours: Safety stand-down or toolbox talk addressing the incident
 - ☐ Within 1 week: Investigation findings shared (while protecting employee privacy)
 - ☐ Ongoing: Corrective actions communicated as implemented
 - ☐ Clear message: "We care about your safety and are taking action"
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OSHA INSPECTION PREPARATION

If OSHA Arrives for Inspection:

Immediate Actions:

- ☐ Escort inspector to private conference room (not the incident scene immediately)
- ☐ Request inspector's credentials and photograph them
- ☐ Call your designated OSHA response person (safety manager, legal counsel)
- ☐ Determine reason for visit (complaint, referral, programmed inspection, accident investigation)
- ☐ Request opening conference before site tour begins

During Opening Conference:

- ☐ Provide requested documents only (injury logs, training records specific to incident)
- ☐ Designate company representative to accompany inspector at all times
- ☐ Request employee representative to accompany inspector (union or employee-selected)
- ☐ Clarify scope of inspection
- ☐ Take detailed notes of all questions asked and statements made

During Walkaround:

- ☐ Company representative stays with inspector at all times
- ☐ Take photos of everything inspector photographs
- ☐ Note all measurements inspector takes
- ☐ Listen to all conversations but don't volunteer information
- ☐ Answer questions truthfully but concisely
- ☐ If you don't know the answer, say "I'll need to research that and get back to you"
- ☐ Document all employee interviews requested

During Closing Conference:

- ☐ Request specific citations inspector intends to issue
- ☐ Take detailed notes of inspector's findings and concerns
- ☐ Ask for clarification on any unclear issues
- ☐ Do not admit to violations - this is not a negotiation
- ☐ Request informal conference if citations are issued (you have 15 working days to contest)

POST-INCIDENT FOLLOW-UP

First Week:

- ☐ Investigation completed and documented
- ☐ Root cause analysis finalized
- ☐ Corrective action plan developed and communicated
- ☐ Affected area returned to safe operation (if appropriate)
- ☐ Similar operations/equipment assessed for same hazards
- ☐ Workforce briefed on findings and improvements

First Month:

- ☐ All immediate corrective actions completed
- ☐ Equipment repairs/replacements completed
- ☐ Procedure updates drafted and reviewed
- ☐ Additional training provided as needed
- ☐ Workers' compensation claim status tracked
- ☐ Injured employee recovery progress monitored
- ☐ Return-to-work plan developed (if employee not yet returned)

First 90 Days:

- ☐ All short-term corrective actions completed
- ☐ Long-term improvement projects initiated
- ☐ Effectiveness of corrective actions evaluated
- ☐ Similar incident metrics monitored (did corrective actions work?)
- ☐ OSHA citations responded to (if any)
- ☐ Insurance carrier inquiries responded to
- ☐ Legal hold maintained (if litigation potential)

COMMON MISTAKES TO AVOID

✗ Delaying OSHA notification thinking you can investigate first

✓ Report immediately, then investigate

✗ Cleaning up the scene before documentation

✓ Preserve evidence first, clean up second

✗ Interviewing witnesses together (they influence each other's accounts)

✓ Separate witnesses and interview individually

✗ Blaming the injured employee in documentation

✓ Focus on system failures and improvements, not assigning fault



- ✗ **Assuming emergency room visit is not hospitalization**
 - ✓ If admitted as in-patient (even for observation), it's reportable
 - ✗ **Moving equipment** before inspection and documentation
 - ✓ Lockout, tag, photograph, then move only if necessary for safety
 - ✗ **Letting OSHA inspector roam facility unescorted**
 - ✓ Always have company representative with inspector
 - ✗ **Providing more documents than requested**
 - ✓ Only provide what is specifically requested
 - ✗ **Failing to follow up on corrective actions**
 - ✓ Track every action to completion with verification
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STATE-SPECIFIC RESOURCES

Many states have their own OSHA plans with additional requirements. Check if your state has specific regulations.

Ready to Get Started?

☎ Schedule a free 30-minute consultation: [Select a Date & Time - Calendly](#)

✉ Email us: Hello@crisisiqpartners.com

Take our 3-minute Crisis Readiness Scorecard: [Crisis IQ Scorecard](#)

www.crisisiqpartners.com

These templates are provided for educational purposes and are subject to change. Always review the most current reporting standards for your state before use.