

Bulk Establishment Transfer Self-Service

With the self-service OSHA Injury Tracking Application (ITA) bulk establishment transfer capability, you can add or remove additional establishment administrators and users for multiple establishments.

Each establishment profile created in the ITA has an establishment Admin. The Admin is the user that created the establishment, or a user that has been assigned to that role. In the new Bulk Establishment Transfer, users can be added to one or multiple establishment profiles with one of the following roles:

- **ITA Establishment User** – can update the Establishment Details as well as add, update, and submit injury and illness data.
- **ITA Establishment Admin** - has the same permissions as the ITA Establishment User as well as the ability to add or remove other ITA users to the establishment profile.



The bulk establishment transfer tool is useful for transferring existing establishment profiles in the ITA to a new or existing ITA user who may then be responsible for submitting injury and illness data. This process allows the establishment profiles to remain the same from year to year so that annual injury and illness data submitted can be viewed over time, without having to view multiple establishment profiles from multiple users with the same information.

Summary of steps to initiate a bulk establishment transfer

See page 3 for step-by-step instructions and screen shots.

1. Login to the Injury Tracking Application. On the home page, select the navigation dropdown menu, and select Bulk Transfer Establishments.
2. Enter the email address of the the existing ITA user you would like to transfer establishments from by providing the email address tied to their account.

3. Provide identifying information for at least one establishment that belongs to the existing user you want to transfer from and select the Verify button.
4. Use the checkbox selections to choose the establishments to transfer.
5. Select the role to assign to your ITA user account.
6. Select whether the existing ITA user should be removed from the Establishments selected.
7. Initiate transfer by selecting the Transfer Establishments button.
8. Confirm transfer by reviewing the green notification banner at the top of the page.
9. Return to the View Establishments list to view all the establishments available in your ITA profile.

Transferring Establishments

1. Select “Bulk Transfer Establishments” from the dropdown “Navigation Menu” at the top right of the screen.

The screenshot shows the OSHA Injury Tracking Application home page. At the top right, the 'Navigation Menu' dropdown is open, and 'Bulk Transfer Establishments' is highlighted with a red box. The page includes a search bar, navigation tabs (OSHA, STANDARDS, ENFORCEMENT, TOPICS, HELP AND RESOURCES, NEWS), and a main content area with 'Enter Data with our Online Form' and an 'Overview of Data Submission Process' diagram.

2. Provide the email addresses of the current and new users. Please note that the email domains for both users must match (ex. @company.com). Exceptions apply for common email carriers including: gmail, outlook, yahoo and hotmail providers. If the email domain of the original ITA user does not match the email domain of the transfer user, submit a help desk ticket.

The screenshot shows the 'Bulk Transfer Establishments' page. It features a light blue information box with instructions for transferring establishments. Below this, there are two input fields: 'Transfer From Email *' containing 'example@test.com' and 'Transfer To Email *' containing 'new.example@test.com'. The 'Transfer From Email' field is highlighted with a red box.

- Provide at least two of the following data points: “Address”, “EIN”, and/or “Establishment Name”. This search is used to confirm your association with at least one establishment and will not limit the number of establishments returned upon successful verification. Note: These fields are *not* filters – if the information entered here matches to at least one establishment profile from the user whose email address was entered, you will have access to *all* existing establishments from user’s profile.

User Verification
Please provide at least 2 of the following criteria: Address, City, State, EIN #, and/or Establishment Name. This query is used to confirm your association with the owner of the records and will not limit the number of establishments returned upon successful verification.

Establishment Address: 123 Washington St. Establishment City: Alexandria Establishment State: VA

EIN: Establishment Name: My Establishment Name

- Select “Verify”.

User Verification
Please provide at least 2 of the following criteria: Address, City, State, EIN #, and/or Establishment Name. This query is used to confirm your association with the owner of the records and will not limit the number of establishments returned upon successful verification.

Establishment Address: 123 Washington St. Establishment City: Alexandria Establishment State: VA

EIN: Establishment Name: My Establishment Name

- Upon successful verification, use the checkboxes to select establishments to transfer. The checkbox in the top left can be used to select all. Limit 500 per request.

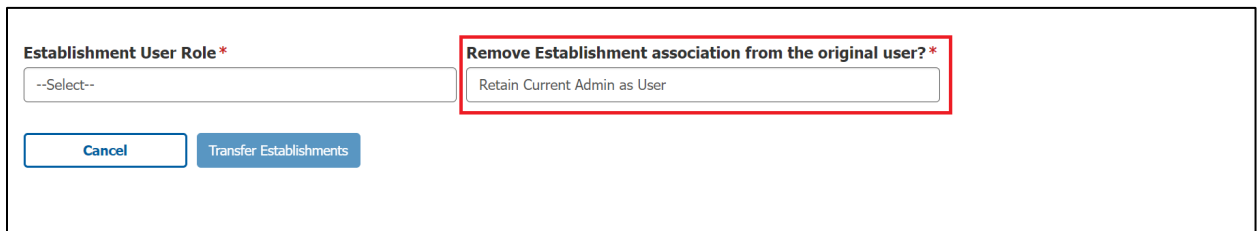
<input type="checkbox"/>	Name	Street	City	State	Zip Code	EIN
<input type="checkbox"/>	ST. Joseph's Hospital North (5101)	4211 Van Dyke Road	Lutz	FL	33558	590774199
<input checked="" type="checkbox"/>	St. Joseph's Hospital South (5102)	6901 Simmons Loop	Riverview	FL	33578	590774199
<input type="checkbox"/>	Wesley Chapel Hospital (0102)	4501 Bruce B. Downs Blvd	Wesley Chapel	FL	33544	832099849
<input checked="" type="checkbox"/>	Winter Haven Hospital, Inc. (6100)	200 Avenue F Northeast	Winter Haven	FL	33881	590724462
<input type="checkbox"/>	02212024 Test Est1	123 Main St1	DC	DC	20001	123234345
<input type="checkbox"/>	Virginia United Methodist Homes of Williamsburg, Inc. DBA WindsorMeade Williamsburg	123 Main St1	DC	DC	20001	123234345
<input type="checkbox"/>	02262024 Test Establishment2	123 Main St	Washington	DC	12345-6789	956000928
<input type="checkbox"/>	Store 123	123 Main St	Washington	DC	12345-6789	012345648
<input type="checkbox"/>	NUVEEN 10 RICHMAN PLZ	10 RICHMAN PLZ	BRONX	NY	10453	134125850

6. Use the “Establishment User Role” dropdown to select a role for the recipient of the transfer.



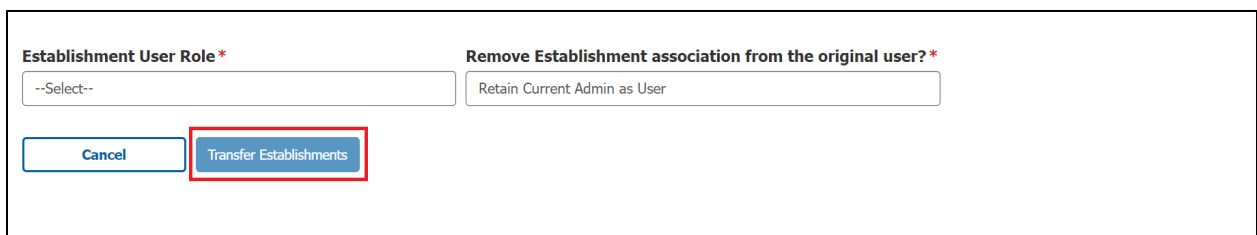
The screenshot shows a form with two dropdown menus. The first dropdown, labeled "Establishment User Role*", has "ITA Establishment Admin" selected and is highlighted with a red box. The second dropdown, labeled "Remove Establishment association from the original user?*", has "--Select-" selected. Below the dropdowns are two buttons: "Cancel" and "Transfer Establishments".

7. Use “Remove Establishment association from the original user?” to select whether the original user will retain their connection to the establishments being transferred. This can also be modified later on the Establishment Details page.



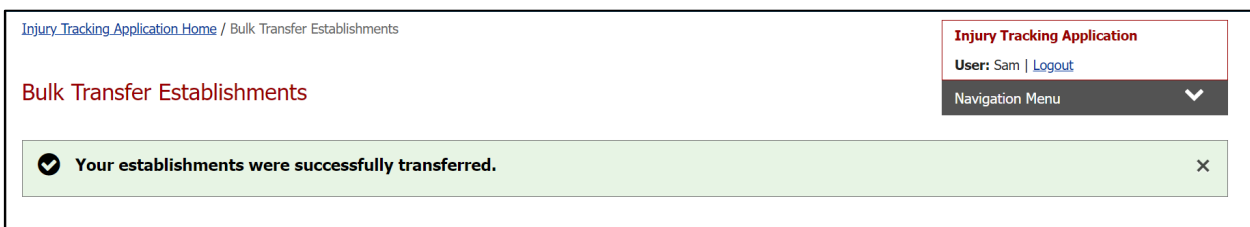
The screenshot shows the same form as above. The "Establishment User Role*" dropdown now has "--Select-" selected. The "Remove Establishment association from the original user?*" dropdown has "Retain Current Admin as User" selected and is highlighted with a red box. The "Cancel" and "Transfer Establishments" buttons are still present.

8. Select the “Transfer Establishments” button to complete the process. Email receipt is automatically generated for both parties.



The screenshot shows the same form. The "Establishment User Role*" dropdown has "--Select-" selected. The "Remove Establishment association from the original user?*" dropdown has "Retain Current Admin as User" selected. The "Transfer Establishments" button is highlighted with a red box.

9. After selecting the Transfer Establishments button, a success message will appear at the top of the screen.



The screenshot shows the application interface. At the top left, there is a breadcrumb trail: "Injury Tracking Application Home / Bulk Transfer Establishments". Below it, the page title is "Bulk Transfer Establishments". In the top right corner, there is a user profile section for "Injury Tracking Application" showing "User: Sam | Logout" and a "Navigation Menu" dropdown. A green success message banner at the bottom reads "Your establishments were successfully transferred." with a close button (X).