INJURY TRACKING APPLICATION (ITA) USER GUIDE

Instructions for using OSHA's ITA to Electronically Submit Injury and Illness Data

Summary

This document covers each step from start to finish for using OSHA's ITA. Additional helpful resources are also provided within the document.

Last Update – December 2024

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Introduction

Under OSHA's electronic reporting regulations at 29 CFR 1904.41, many establishments are required to annually submit to OSHA's Injury Tracking Application (ITA) certain information from their OSHA recordkeeping forms (OSHA Forms 300A, 300, and 301). Covered establishments must electronically submit their OSHA injury and illness data by March 2 of the year following the covered year of the data (e.g., for submission of calendar year 2024 data, that date is March 2, 2025).

This User Guide provides a flow chart to help establishments understand whether they have electronic reporting obligations, and step-by-step instructions to users of the OSHA ITA. These instructions include how to log in to the ITA or to create a new account, how to submit OSHA Form 300A data, how to submit OSHA Form 300 and 301 data, and other tips. For more information on the ITA, including the answers to many frequently asked questions, you can visit www.osha.gov/injuryreporting.

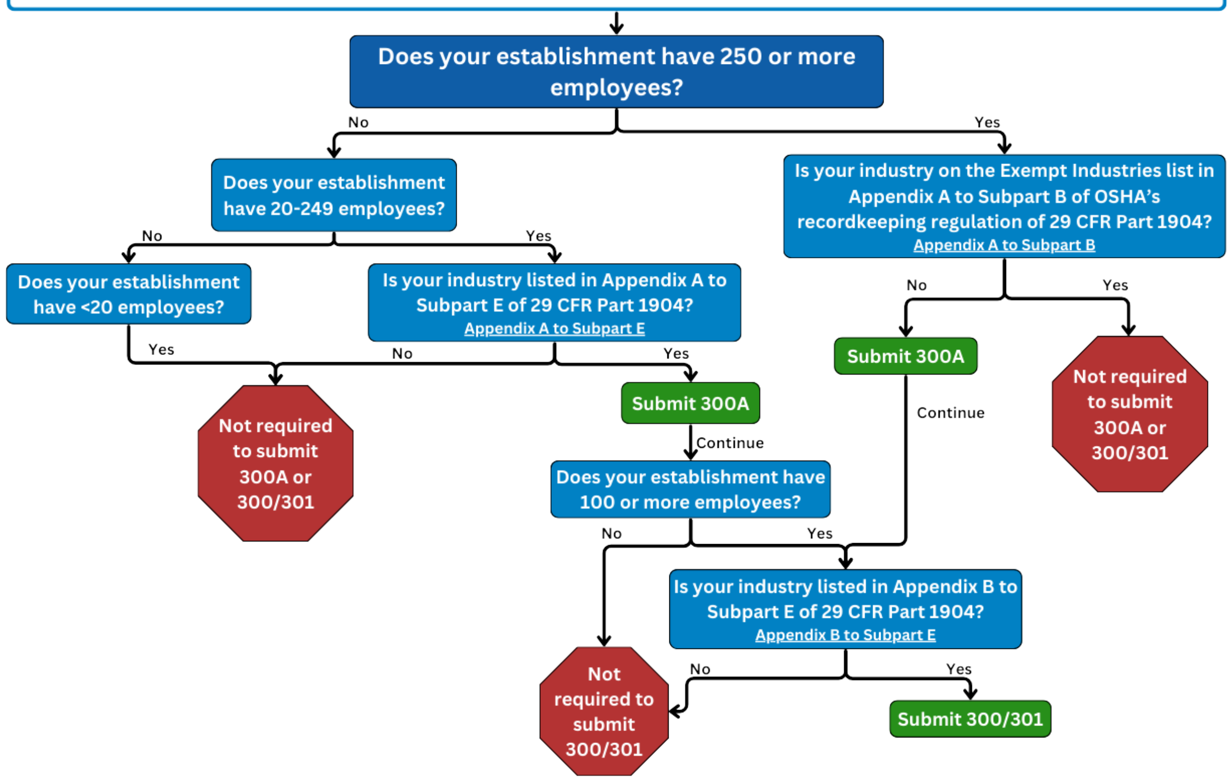
ITA Submission Requirement Flowchart

Injury Tracking Application (ITA) Submission Flowchart

Use the flowchart below to help determine if your establishment is required to electronically submit OSHA Form 300A, 300, or 301 data to OSHA's ITA.

Most State Plans have identical requirements, however Minnesota currently requires additional private sector establishments to submit data, and State and Local government employers in State Plans may also have additional requirements. Contact your State Plan for further guidance.

NOTE: This flowchart ONLY addresses establishments' requirement to submit data to OSHA electronically through the ITA. It does not address other OSHA recordkeeping requirements. See OSHA's recordkeeping website at **www.osha.gov/recordkeeping** for information about other recordkeeping requirements at 29 CFR Part 1904.



29 CFR Part 1904 Appendices:

- **Appendix A to Subpart B**: Non-Mandatory Appendix A to Subpart B, Partially Exempt Industries.
- **Appendix A to Subpart E**: Designated Industries for 1904.41(a)(1)(i) Annual Electronic Submission Information from OSHA Form 300A, Summary of Work-Related Injuries and Illnesses by Establishments with 20-249 Employees in Designated Industries.
- **Appendix B to Subpart E**: Designated Industries for 1904.41(a)(2) Annual Electronic Submission of Information from OSHA Form 300 Log of Work-Related Injuries and Illnesses and OSHA Form 301 Injury and Illness Incident Report by Establishments with 100 or More Employees in Designated Industries.

ITA Coverage Application: Helps ITA users determine if the establishment is required to electronically submit 300A and 300/301 data through the ITA.

Step 1: Log in to the ITA or Create an Account

Log in to the ITA

If you already have an OSHA Injury Tracking Application (ITA) account, simply use the sign in with Login.gov option using your Login.gov username and password. **You do not have to create a new account each year.**

Create an ITA Account

If you don't already have an ITA account, complete the following steps to create one.

1. Select the "New User? Create an ITA Account" button on the ITA Login screen.
2. On the "Create Account" page, under "Step 1 of 3: Account Details," enter information into the required fields (marked with red asterisks [*]), select the "I'm not a robot" checkbox and complete the CAPTCHA test, and then select the "Continue" button.
   - Note: use the same email address for both the ITA account and the Login.gov account. OSHA does not recommend using a shared email account address.
3. For "Step 2 of 3: Terms and Conditions," read the terms and conditions and acknowledge them by selecting the checkbox next to "I acknowledge that I have read and accept the Terms of Use Agreement" then select the "Continue" button.
4. In For "Step 3 of 3: Confirm Account Creation", you will see information indicating that the ITA will automatically email you a notification confirming your OSHA ITA registration

If you do not have a Login.gov account, follow the steps on the next page to create an account. If you do have a Login.gov account, use your Login.gov credentials to log in to the ITA from the ITA login page.

Create a Login.gov Account

Login.gov is a secure sign-in service used by the U.S. federal government to allow the public to access participating government agency applications using one account and password. The ITA requires you to create an ITA account and then a Login.gov account to securely report your establishment's injury and illness data.

You must use the **same email address** for Login.gov and the ITA. If you do not know or cannot remember your existing ITA account email address, use the Help Request Form to request your ITA account information before creating your Login.gov account.

If you already have a Login.gov account with the same email address as your ITA account, select the "Sign in with Login.gov" button on the ITA login page and log in to the ITA.

If you do not have a Login.gov account, complete the following steps to create your Login.gov account. **Note: Login.gov recommends using an individual email address that you will always be able to access rather than a group email address.**

1. Select the "Sign in with Login.gov" button on the ITA login screen.
2. Select the "Create an account" button.
3. On the "Create Account" screen, enter your email address, select your email language preference, read the rules of use, acknowledge them by selecting the checkbox, then select the "Submit" button.
4. Login.gov will automatically email you a notification with the subject "Confirm your email" that contains a hyperlink to continue creating your account. Select the "Confirm email address" button or select the hyperlink displayed below the button in the emailed notification to confirm your email.
5. Create a password for your account.
6. On the "Authentication Method" screen, choose at least one method, then select the "Continue" button. **Note:** These methods are all forms of two-factor authentication, designed to help keep your account secure. You are encouraged to have more than one authentication method on your account.
7. Follow the steps on the screen to provide the information needed to set up your chosen two-factor authentication method(s).
8. Select the "Agree and Continue" button to finish creating your Login.gov account.
9. Once your registration with Login.gov is complete, you can close your internet browser, or enter the ITA login page at: www.osha.gov/injuryreporting/ita.
10. On the ITA Login screen, select the "Sign in with Login.gov" button. Enter your Login.gov email address and password, and then select the "Sign in" button.
11. Once logged in to the ITA, you will see the ITA landing page.

Update Your ITA Account Profile

When you first log into the ITA, perform the following steps to complete your ITA account profile. Each year that you log into the ITA, follow these steps to ensure your account profile is up to date.

Complete the following steps to update your ITA account profile.

1. Select the “Sign in with Login.gov” button on the ITA login screen.
2. Log in to the ITA.
3. Select “Manage My Account” from the dropdown navigation menu.
4. To update your ITA profile, select the “Update Profile” button.
5. Update information as needed, paying close attention to any required fields.
6. Select the “Save Updates” button.

Note: You cannot change your ITA email address. If the email address associated with your ITA and Login.gov account is no longer available or accessible to you, you must create a new Login.gov and ITA account with a new email address.

Create an Establishment Profile

Under OSHA's recordkeeping regulations, employers must electronically submit to OSHA through the ITA separate injury and illness records for each establishment that meets the industry and size reporting criteria. Employers are also required to keep separate OSHA Forms 300A, 300, and 301 for each establishment covered by OSHA's recordkeeping requirements that is expected to be in operation for one year or longer. See the flow chart on page 2 of this User Guide and visit OSHA's ITA Coverage Application at www.osha.gov/itareportapp for help determining which establishments have electronic reporting requirements.

An establishment is a single physical location where business is conducted or where services or industrial operations are performed. For activities where employees do not work at a single physical location, such as construction; transportation; communications, electric, gas and sanitary services; and similar operations, the establishment is represented by main or branch offices, terminals, stations, etc. that either supervise such activities or are the base from which personnel carry out these activities.

If you are a new ITA user: You must first create an establishment profile for each of the establishments you're submitting data for before you can submit your injury and illness data. If you submit a CSV file for your OSHA Form 300A data, the ITA will automatically create the establishment profiles for each establishment listed in the CSV file.

If you are a returning ITA user: You do not have to create a new establishment profile each year. Skip to Step 2. (If you need to view, edit, or remove/inactivate an establishment profile, see the instructions on page 24).

To create a new establishment profile, follow the steps below.

1. Do one of the following:
    a. Select the "Create an Establishment" button in the section titled "Enter Data with our Online Form" on the ITA home screen.
    b. Select the "Create and Establishment" option from the dropdown navigation menu.
    c. Select the "View Establishment List" button. On the "Establishment List" screen, select the "Create an Establishment" button.
2. Enter the establishment's name in the "Establishment Name" field. **Note:** If you have more than one establishment in the ITA, you must give each of your establishments a unique name.
3. Enter the establishment's Employer Identification Number (EIN) in the "EIN" field.
4. Enter a legal company name for the establishment in the "Company Name" field, if it is not part of the establishment name.
5. Enter the establishment's physical address (i.e., not a post office [PO] box) in the "Address" field, enter the establishment's city in the "City" field, choose the state, and enter the zip code.
6. Enter either your North American Industrial Classification System (NAICS) code or the industry description in the "NAICS Industry Code or Description" field, then select the correct code from the

list. If you do not know your code and cannot find it in the list, you can look it up at www.census.gov/naics.

7. Select the radio button that corresponds to the establishment's peak number of employees for any point during the year, including labor, executive, hourly, salary, part-time, seasonal, or migrant workers, as well as employees who are not on your payroll if you supervise these employees on a day-to-day basis.

8. Select the radio button to indicate whether the establishment is a public sector (government) entity.

9. To add the establishment to your account, select the "Save" button.

Step 2: Submit 300A Summary Data

All establishments that are required to keep OSHA injury and illness records under 29 CFR Part 1904 must complete the OSHA Form 300A summary or an equivalent form each year, **even if no work-related recordable injuries or illnesses occurred during the year**.

However, only establishments that meet certain criteria are required to submit their 300A data electronically to OSHA through the ITA. YOU MUST submit data from your OSHA Form 300A if your establishment meets one of the following:

1. 250 or more employees and is *not* in an industry listed in the Exempt Industries list in Appendix A to Subpart B of OSHA's recordkeeping regulation of 29 CFR Part 1904 or

2. 20-249 employees and is in an industry listed in Appendix A to Subpart E of 29 CFR Part 1904.

Instructions for completing the OSHA Form 300A are provided on the OSHA Forms 300, 300A, and 301 and further information is available on OSHA's recordkeeping website at www.osha.gov/recordkeeping.

You can refer to the flow chart on page 2 of this User Guide and visit OSHA's ITA Coverage Application at www.osha.gov/itareportapp to help determine if your establishment is required to electronically submit 300A data and 300/301 data through the ITA.

OSHA Tip: If you are submitting data for one or only a few establishments, OSHA recommends that you use the 300A web form (See "Manually Add 300A Summary Data," page 9) rather than using the CSV upload option.

This section provides instructions for establishments required to submit 300A data electronically. In the ITA, you can enter your establishment's 300A information in one of three ways:

- Manually add 300A data in the ITA web form (see instructions on page 10)
- Upload a CSV file, which may have many establishments' 300A information in one file (see instructions on page 11)
- Use an API (see instructions on page 25)

Manually Add 300A Summary Data

Complete the following steps to manually add 300A summary data to an establishment.

> **OSHA Tip:** If you are submitting data for one or only a few establishments, OSHA recommends that you use the 300A web form rather than the CSV upload option.

1. Open the establishment list by doing one of the following:
    a. Choose “View Establishment List” in the “Enter Data with our Online Form” section on the ITA home screen.
    b. Chose “View Establishment List” from the dropdown navigation menu.
2. The establishment list will display each establishment linked or created from your account. Select the establishment name hyperlink in the “Name” column. When the establishment profile opens, select the “Add 300A Data” button.
3. Enter data into each field on the “Summary of Work-Related Injuries and Illnesses” screen. **Note:** Each field on the form is required.
4. Select the “Submit” button to submit your data to OSHA.
5. After saving, you will be taken back to the “View Establishment” screen, where you can review the data you entered. **Note:** At the bottom of the screen, you can find the establishment’s Total Case Incident Rate (TCR) and Days Away Restrictions and Transfers (DART) rate, both based on the information entered in the web form.
6. You will receive an initial confirmation message both on-screen and in your email.

> **OSHA Tip:** While using the ITA, be sure to refresh the pages throughout the process. You can do so by selecting the “Reload” icon at the top of your internet browser, or by selecting CTRL+F5 on your keyboard.

7. You will receive a second confirmation message both on-screen and in your email. This second message will indicate the success or failure of your submission. (The 300A status on the “Establishment List” page will also change to “Submitted.”)

Note: You should receive the first and second email confirmations shortly after submission. If you do not receive an email after several minutes, check the junk/spam folder for the email account you used to register for the ITA. If you do not receive an email, check the “Establishment List” screen, and ensure the establishment’s 300A status was changed to “Submitted” (with a link to view the submission). If not, try submitting the 300A form again. You can also try refreshing the browser (see the OSHA Tip above).

Upload a 300A CSV File

If you are submitting 300A data for one or only a few establishments, it is easier to use the manual data entry option described on the previous page. However, if you are submitting 300A data for a large number of establishments, using the "Upload 300A Data" option can help speed up the process. It allows you to submit a comma-separated values (CSV) batch file containing establishment and 300A summary data.

Complete the following steps to upload a CSV file for 300A data.

1. Do either of the following:
    a. Select the "Upload 300A Data" button in the "Multiple Establishments? Upload your Data Here" section on the ITA home screen.
    b. Select the "Upload 300A Data" option from the dropdown navigation menu.
2. Create a CSV file using the instructions and template provided on the "Upload 300A Data" screen under "Step 1: Read the Instructions."
3. After you have created the CSV file, select the "Choose File" button under "Step 2: Locate and Select Your File" section. Locate your CSV file, select it, and then select the "Open" button.
4. In the "Step 3: Agree to the terms and conditions below" section, read the terms and conditions, and then select the checkbox to indicate agreement.
5. In the "Step 4: Upload your File" section, select the "Upload" button.

Once the ITA receives your file, you will receive an on-screen confirmation and an email confirmation. An **additional email will be sent once the system has finished processing your file. This email will say whether the data in your file was loaded or if your file contained invalid data or was incorrectly formatted and could not be loaded.** Depending on the volume of file submissions, it may take longer to process your file and send the second email. For additional information on formatting your data file, review the following resources:

- ITA CSV Documentation Instructions for Form 300A: Provides detailed guidance on properly formatting CSV files.
- Form 300A CSV template: A downloadable CSV file with the correct header names and all required fields in proper order.
- Form 300A CSV sample: A downloadable CSV file using the 300A CSV template with sample data entered.
- ITA FAQs: Provides answers to many common questions related to CSV files and includes a list of common errors that may prevent a 300A CSV file from uploading.

Manually Edit 300A Summary Data

Complete the following steps to edit the 300A summary data for an establishment after data has already been submitted through the ITA, and regardless of whether it was initially submitted manually or using a CSV file.

1. Open the establishment list by doing one of the following:
   a. Select the "View Establishment List" button on the ITA home screen.
   b. Choose the "View Establishment List" option from the dropdown navigation menu.
2. Select the establishment name hyperlink in the "Name" column, then select the "Edit 300A Data" button in the "Summary for Filing Year [year]" section.
3. Update information as needed.
4. Select the "Submit" button.

Important: Each time you edit and then submit data in the ITA web form, you are re-submitting your data to OSHA. OSHA will retain the last record submitted.

Step 3: Submit 300/301 Case Detail Data

Not all establishments that are required to submit 300A summary data are required to submit 300/301 case detail data. You must submit data from your OSHA Forms 300 and 301 to the ITA if your establishment(s) has 100 or more employees and is in an industry listed in Appendix B to Subpart E of 29 CFR Part 1904. You can refer to the flow chart on page 2 of this User Guide and visit OSHA's ITA Coverage Application to help determine if your establishment is required to electronically submit 300A data and 300/301 data through the ITA. Instructions for completing the OSHA Forms 300 and 301 are provided on the OSHA Forms 300, 300A, and 301, and further information about these forms is available on OSHA's recordkeeping website at www.osha.gov/recordkeeping.

This section provides instructions for establishments required to electronically submit data from OSHA Forms 300 and 301. In the ITA, as with OSHA Form 300A data, you can enter your establishment's 300/301 Case Detail Data in one of three ways:

- Manually add OSHA Form 300 and 301 data in the ITA web form (see instructions on page 14)
- Upload a CSV file, which may have information from multiple OSHA Form 301 records and many establishments' Form 300 and 301 information in one file (see instructions on page 16)
- Use an API (see instructions on page 25)

Manually Add 300/301 Data

Complete the following steps for manually submitting 300 Log and 301 incident report data using the application web form entry method.

Note: Before using the web form, you must have already created the establishment profile and submitted the establishment's 300A data. Additionally, the ITA will determine if your establishments meet the 300/301 submission requirements based on the establishment profile and submitted 300A data. If your establishment is not required to submit 300/301 data, its 300/301 status will appear as 'Not Required to File' in your establishment list. If your establishment's 300/301 status is 'Not Required to File' but you believe your establishment is required to file 300/301 data, then review the establishment profile and revise as needed.

1. Open the establishment list by doing one of the following:
    a. Select the "View Establishment List" button on the ITA home screen.
    b. Select the "View Establishment List" option from the dropdown navigation menu.
2. The establishment list will display each establishment connected to your account. Select the establishment name hyperlink in the "Name" column.
3. Select the "Add or Edit 300/301 Data" button. A new page will open with options to add 300/301 data.
4. Select the "+Add 300/301 Data" button to begin populating a new web form for entering a single case from the 300 and 301 OSHA forms.
5. Enter the data into each field on the "Injury or Illness Case Data" screen, ensuring all required fields are completed.

> **Reminder:** Do not include personally identifiable information (PII) or non-mandatory information that can identify employees directly, such as names, Social Security numbers, addresses, telephone numbers, email addresses, healthcare provider information or family member information.

6. Select the "Save" button.
7. Continue adding 300/301 incident submissions using the "+Add 300/301 Data" button or select the "Back to Establishment" link in the bottom left to continue.
8. On the "300/301 Case Data" page, you will see a progress bar above the list of cases you have entered. The total number displayed corresponds to the total number of cases recorded in the establishment's 300A submission. Ensure the total number of injuries and illnesses as reported in your establishment's 300A submission is equal to the total number of cases entered from the "300/301 Case Data" page.
9. Once you have reviewed your data and it is ready to submit, return to the "View Establishment" screen and select the "Submit Data" button.

10. If the number of cases you entered does not match the number of cases entered in your 300A submission, a pop-up will appear asking if you'd like to proceed. Select "No" and enter the number of cases to match your 300A submission. Or select "Yes" to proceed.

11. A pop-up will appear asking you to confirm your submission. Select the check box to confirm and select "Submit Data."

After submitting 300/301 data, you will receive a confirmation on-screen as well as a follow-up email notification. Then the establishment's 300/301 status will change to "# cases out of # cases submitted" on the "Establishment List" screen, depending on the number of cases entered on the 300A form and the number of cases entered on the "300/301 Case Data" page.

OSHA Tip: After making changes in the ITA, be sure to refresh the pages throughout the process. You can do so by selecting the "Reload" icon at the top of your internet browser, or by selecting CTRL+F5 on your keyboard.

Note: You should receive the email confirmation after submission. If you do not receive it after several minutes, check your junk/spam folder for the email account you used to register for the ITA. If you do not receive an email, verify that the establishment's status was changed to "Submitted." If the status has not changed, try refreshing the browser page, or enter CTRL + F5 on your keyboard to refresh the page, or try resubmitting the establishment data.

Upload 300/301 Data via CSV

If you are submitting data for a large number of injury and illness cases, using the "Upload 300/301 Data" option can help speed up the process. It allows you to submit a CSV file containing case data for one or multiple establishments. **This option is not recommended if you have only one or a few cases to enter.**

Note: The corresponding 300A data must already be submitted to ITA before you use this upload option, and the establishment names entered on the 300/301 submission **must exactly** match the establishment name as entered in the 300A entry.

For additional information on formatting your data file, reference the DOL OSHA ITA Case Data CSV Specifications document as well as the Form 300/301 CSV file template and Form 300/301 CSV sample file.

Complete the following steps to upload a CSV file for 300/301 data.

1. Do either of the following:
   a. Select the "Upload 300/301 Data" button on the ITA home screen.
   b. Select the "Upload 300/301 Data" option from the dropdown navigation menu.
2. Create a CSV file using the instructions and template provided on the "Upload 300/301 Data" screen under the "Step 1: Read the Instructions" section. Also review the 300/301 CSV checklist (see page 17) before submission to ensure all required information has been included and the data is correctly formatted.

> **Reminder:** Do not include personally identifiable information (PII) or non-mandatory information that can identify employees directly, such as names, Social Security numbers, addresses, telephone numbers, email addresses, healthcare provider information or family member information.

3. After the CSV file has been created, select the "Choose File" button under "Step 2: Locate and Select Your File" section. Locate your CSV file, select the file and then select the "Open" button.
4. In the "Step 3: Agree to the terms and conditions below" section, read the terms and conditions, and then select the checkbox to indicate agreement.
5. In the "Step 4: Upload Your File" section, select the "Upload" button.

After submitting the 300/301 CSV file, you will receive a confirmation on-screen as well as a follow-up email notification. An additional email indicating if the data in your file was correctly formatted will be sent once the system has finished processing your file. Files are processed at regular three-hour intervals in the order they were received in. Depending on the volume of file submissions, it may take some time before an ITA user's file is processed and processing results are sent.

300/301 CSV Submission Checklist

Use the checklist below to prepare your CSV file for submission.

Before Entering Data

- ☐ You reviewed the ITA Coverage Application to see what data your establishment(s) must submit.
- ☐ You submitted 300A data for your establishment(s) to the ITA.
- ☐ You reviewed the ITA 300/301 CSV template.

Entering 300/301 Data Using the CSV Upload

- ☐ **Row 1:** The first row of the 300/301 CSV file is a header row containing all column names. Your header row column names must exactly match the column names in the 300/301 instructions and template.
- ☐ **Column A (establishment_name):** The establishment(s) name is entered in Column A exactly as it is entered in the corresponding 300A data.
- ☐ **Column B (year_of_filing):** The filing year in Column B is the calendar year in which the injury or illness occurred. For 2025, the filing year is 2024.
- ☐ **Column C (case_number):** The case number in Column C is unique within each establishment.
- ☐ **Column D (job_title):** The job title in Column D only contains alphabetic and numeric characters and no other characters like periods, slashes, dashes, or colons.
- ☐ **Column E (date_of_incident):** The date of incident in Column E is in the filing year (e.g., 2024 for records submitted in 2025).
- ☐ **Column F (incident_location):** The incident location contains only alphabetic and numeric characters and no other characters like periods, slashes, dashes, or colons.
- ☐ **Column G (incident_description):** The incident description does not have special characters (e.g., periods, dashes) and does not contain personally identifiable information (PII) such as names, addresses, phone numbers, and social security numbers.
- ☐ **Column H (incident_outcome):** For each record, you have chosen the correct code for the **most severe outcome** from the injury or illness:
    - 1 = Death
    - 2 = Days away from work
    - 3 = Job transfer or restricted work activity
    - 4 = Other recordable cases
- ☐ **Column I (dafw_num_away):** For days away from work cases (incident_outcome = 2), Column I must be greater than zero and Column J must be greater than or equal to zero.
- ☐ **Column J (djtr_num_tr):** For job transfer or restricted work activity case (incident_outcome =3), Column J must be greater than zero, and Column I must be zero.
- ☐ **Column K (type_of_incident):** You have chosen the correct code for the type of incident:
    - 1 = Injury
    - 2 = Skin disorder
    - 3 = Respiratory condition
    - 4 = Poisoning
    - 5 = Hearing loss

- 6 = Other illnesses

- **Column L (date_of_birth):** Date of birth is entered as MM/DD/YYYY or MM-DD-YYYY.
- **Column M (date_of_hire):** Date of hire is entered as MM/DD/YYYY or MM-DD-YYYY.
- **Column N (gender):** Gender is coded as M for male or F for female or left blank in circumstances when the gender is unknown, or the worker identifies as a gender other than male or female.
- **Column O (treatment_facility_type):** Whether an employee was treated in the emergency room has been coded as:
  - 1 for yes
  - 0 for no
- **Column P (treatment_in_patient)**: Whether an employee was hospitalized as an inpatient has been coded as:
  - 1 for yes
  - 0 for no
- **Columns Q (time_started_work) and R (time_of_incident):** The time the employee started work and time of incident are formatted in H:MM AM/PM format. Excel often defaults to including seconds in the time.
  - To change the formatting in Excel, select the header of the column to highlight the column; then select the pop-up icon next to "Number" on the Toolbar, select "Custom" and choose "h:mm AM/PM."."
- **Column S (time_unknown):** If the time the incident occurred is unknown, 1 is entered.
- **Column T (nar_before_incident):** Text describes what the employee was doing before the incident and does not include PII.
- **Column U (nar_what_happened):** Text describes how the employee was injured or became ill and does not include PII.
- **Column V (nar_injury_illness):** Text describes what the injury or illness was and does not include PII.
- **Column W (nar_object_substance):** Text describes what object or substance directly harmed the employee and does not include PII.
- **Column X (date_of_death):** If the employee died, the date of death is entered as MM/DD/YYYY or MM-DD-YYYY, otherwise, it is left blank.

Reviewing 300/301 CSV File Before Uploading

- Your file does not include special characters: (,), ~, @, #, $, %, ^, &, *, ?, …, (Note: The date fields can have forward slashes (/); these are not considered special characters.)
- **The text fields in Columns D, F, G, T, U, V, and W contain no PII or unnecessary information that can identify employees directly, such as names, Social Security numbers, addresses, telephone numbers, email addresses, healthcare provider information or family member information.**

Review or Edit 300/301 Case Data

Complete the following steps to edit the 300/301 case data for an establishment, regardless of the method of submission.

1. Open the establishment list by doing one of the following:
    a. Select the "View Establishment List" button on the ITA home screen.
    b. Choose the "View Establishment List" option from the dropdown navigation menu.
2. Select the establishment name hyperlink in the "Name" column and then select the "Add or Edit 300/301 Data" button in the "Summary for Filing Year [year]" section.
3. Update information as needed.
4. Select the "Save" button.
5. Select the "Submit Data" button on the "View Establishment" page for OSHA to receive the changes.

Reminder: Do not include personally identifiable information (PII) or non-mandatory information that can identify employees directly, such as names, Social Security numbers, addresses, telephone numbers, email addresses, healthcare provider information or family member information.

OSHA Tip: After making changes in the ITA, be sure to refresh the pages throughout the process. You can do so by selecting the "Reload" icon at the top of your internet browser, or by selecting CTRL+F5 on your keyboard.

Step 4: Submission Summary Report

Starting in 2025, an ITA submission summary report will be available for each establishment as you enter injury and illness data. This report will display the submission status for each active establishment in your profile.

To view your submission summary report, follow the steps below.

1. Open the establishment list by doing one of the following:
    a. Select “View Establishment List” from the ITA home screen.
    b. Choose “View Establishment List” from the dropdown navigation menu.
2. Select the “View Submission Report” button, or from the dropdown navigation menu.
3. A new tab will open, displaying your submission summary report.
4. To print the report, select the “Print” button.
5. To close the report, close the tab.

Note: The submission summary report displays the statuses for both the 300A and 300/301 submissions for every active establishment profile in your ITA profile. Not all establishments are required to submit 300/301 data. OSHA’s ITA Coverage Application can help you determine what data is required to be submitted for your establishment(s). All active establishments in your profile will be included in the submission summary report. To remove old or duplicate establishment profiles, follow the instructions on page 24.

Other Tips: Establishment Profile Management

Adding/Removing Users Assigned to an Establishment

The ITA has a feature that allows ITA admins to add or remove additional ITA admins and/or users. There are two user roles:

- **ITA Establishment User**: Has permissions to update the establishment details as well as add, update, and submit 300A and 300/301 data.
- **ITA Establishment Admin**: In addition to the permissions of the ITA Establishment User, the ITA Establishment Admin can add and remove other ITA users for the establishment.

When you create a new establishment in the ITA, you are automatically given the role of ITA Establishment Admin.

Adding User(s) to an Establishment

If you are an **ITA Establishment Admin**, follow these steps to add another user to an individual establishment:

1. Open the establishment list by doing one of the following:
    a. Select the "View Establishment List" button on the ITA home screen.
    b. Choose the "View Establishment List" option from the dropdown navigation menu.
2. Scroll to the establishment you want to add a user to and select the establishment name in the "Name" column. When the establishment profile opens, the ITA users connected to the establishment will be displayed in the "Establishment Users" table. If you are an **Establishment Admin** for this establishment, you will see the "Assign User," "Remove Selected User(s)," and "Edit User Role" buttons.
3. To add a new ITA user, select the "Assign User" button. The "Assign Establishment User(s)" pop-up window opens.
4. In the "Email" field, enter the new ITA user's email address. **Note:** This must be the email address they used when setting up their ITA account.
5. In the "User Role" field, select the appropriate permission from the drop-down menu: ITA Establishment User or ITA Establishment Admin.
6. Select the "Save" button.

The application will then process the request. The ITA user will be assigned to the establishment, and this establishment will appear on their "View Establishment List" page.

Note: If the email added is not in the system, the application will return the following error message:

Your request cannot be processed. The email address submitted is not associated with a current ITA user. Please try again.

Removing User(s) from an Establishment

If you are an **ITA Establishment Admin**, follow these steps to remove one or more users from an individual establishment.

1. Open the establishment list by doing one of the following:
    a. Select the "View Establishment List" button in on the ITA home screen.
    b. Select the "View Establishment List" option from the dropdown navigation menu.
2. Scroll to the establishment you want to remove a user from and select the establishment name in the "Name" column. When the establishment profile opens, under the "Establishment Users" table, you will see the ITA users connected to the establishment. If you are an **ITA Establishment Admin** for this establishment, you will see the "Assign User," "Remove Selected User(s)," and "Edit User Role" buttons.
3. To remove one or more ITA users, select the checkbox next to the user's name, then select the "Remove Selected User(s)" button. The "Remove Establishment User(s)" pop-up window will open.
4. The user's name will be listed on the screen. Visually confirm, then select the "Save" button.

This removes the association between that individual establishment and the ITA user, and the establishment will no longer be listed on their "View Establishment List" page.

Bulk Establishment Transfer

With the self-service bulk establishment transfer tool, you can add or remove **ITA Establishment Admins** and **ITA Establishment Users** for multiple establishments.

The bulk establishment transfer tool is useful for transferring existing establishment profiles in the ITA to a new or existing ITA user when staffing or responsibilities change at a submitting establishment. This process allows the establishment profiles to remain the same from year to year, without having to create new establishments when staffing changes occur.

Steps to Initiate a Bulk Transfer

1. Select "Bulk Transfer Establishments" from the dropdown navigation menu at the top right of the screen.
2. Provide the email addresses of the current and new users. Note: The email domains (e.g., "@company.com") for both users must match. Exceptions apply for common email providers including Gmail, Outlook, Yahoo, and Hotmail – the Bulk Establishment Transfer tool will not work for users with these email domains and an ITA Help Desk request is required to transfer establishments (see page 26). Additionally, if the email domain of the original ITA user does not match the email domain of the transfer user, you will be unable to use this feature and must submit a help desk ticket to transfer establishments.

3. Provide at least two of the following data points: “Address,” “EIN,” or “Establishment Name.” These will be used in a search to confirm your association with at least one establishment.

Note: These fields are *not* filters – they will not limit the number of establishments returned upon successful verification. 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 that user’s profile.

4. Select “Verify”.
5. 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.
6. Use the “Establishment User Role” dropdown to choose a role for the recipient of the transfer.
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.
8. Select the “Transfer Establishments” button to complete the process. An email receipt will be automatically generated for both parties.
9. A success message will appear at the top of the screen.
10. Both users will receive emails stating this change has occurred.

View, Edit, or Inactivate an Establishment

Complete the following steps to view and/or edit an establishment.

1. Open the establishment list by doing one of the following:
    a. Select the "View Establishment List"button on the ITA home screen.
    b. Select the "View Establishment List"option from the dropdown navigation menu.
2. To edit an establishment, select the establishment name in the "Name" column. When the Establishment opens, select the "Edit Details" button in the "Establishment Details" section.
3. Update information as needed, paying close attention to any required fields (marked with red asterisks[*]).
4. Select the "Save" button.
5. To inactivate an establishment, do one of the following:
    a. On the "View Establishment" screen, select the "Remove" button and select a "Removal Reason" from the dropdown list.
    b. On the "View Establishment List" screen, select the checkboxes to the left of the establishments you would like to remove. Then, select the "Remove Establishments" button.

Note: You can reactivate an establishment profile that has been inactivated/removed.

6. To reactivate an establishment profile:
    a. On the "Establishment List" screen, select the "Include Inactive Establishments" checkbox, and select the "Filter" button.
    b. Select the hyperlinked name of the establishment you would like to reactive.
    c. On the "View Establishment" page, select the "Reactive" button. The page will reload and display the "Establishment List" page.

For API Users: View Your API Token

An API (Application Programming Interface) refers to a group of programmed rules and protocols that enable communications between programs. For establishments that intend to submit information through use of an API, to view the API token associated with your ITA account for use in electronically transmitting data, do either of the following:

- Select the "View Your API Token" button on the ITA home screen.
- Select the "See API Token" option from the dropdown navigation menu.

The API token associated with your account will display. From this page, you can also copy your token or generate a new token.

Reference the following documents for instructions on how to structure API calls to the ITA:

- 300A API technical specifications
- 300/301 API technical specifications

Where to Get Help

Frequently Asked Questions

OSHA updates the ITA Frequently Asked Questions (ITA FAQs) regularly to ensure that questions and answers are relevant and up to date. New FAQs are added as needed.

Visit OSHA's ITA Frequently Asked Questions (www.osha.gov/injuryreporting/faqs) or OSHA's ITA webpage (www.osha.gov/injuryreporting) for more information.

For questions about recordkeeping requirements at 29 CFR Part 1904, you can also visit OSHA's Recordkeeping Frequently Asked Questions (www.osha.gov/recordkeeping/resources) or OSHA's Recordkeeping webpage (www.osha.gov/recordkeeping).

Submitting a Help Desk Ticket

Still have questions? Experiencing any issues submitting your injury and illness data to the ITA? You can submit a help desk ticket (www.osha.gov/injuryreporting/ita/help-request-form).

Some tips for submitting a ticket include:

- Use the same email address that is used in your ITA account. You will be contacted at the email address you provided in the help desk ticket.
- Check your spam/junk folders if you do not receive a response.
- OSHA does not have a fax machine or email address where questions can be received or answered. If you send a fax or email with questions about the ITA, you will not receive a response from OSHA.
- Be specific when describing what you are experiencing and what you need help with.
- If you are having problems with your CSV file, you may be asked to send the file to the help desk for review and assistance.