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WORKERS' COMPENSATION FILE BASICS



By Diane Shepler, Integrity Services & Solutions

In the last two articles, we reviewed Personnel and Medical file basics including what should and should not be in these files, where and how they should be stored and who has access to them. Medical documents, including documents about workers' compensation, should not be kept in the personnel file. Instead, a separate filing system to manage the workers' compensation process and materials should be set up and maintained.

Let's look at a physical filing system option for managing the files:

The first step is to establish a separate hanging file for each year. Within the appropriate folder year, each case/incident is placed within a separate file folder. On the tab of each separate file folder, the case file is chronologically numbered. Within this file, the following forms should be completed and stored for five years:

- PA First Report for each instance in case file
- OSHA 301 for each instance in case file

Each case file number from the file folder should be transferred to the OSHA 300, and the information for each case logged onto the OSHA 300.

At the end of the calendar year, the OSHA 300A must be completed and posted February 1 through April 30 of the year following the time covered on the form. For instance, the form for 2017 would be posted from 2/1/18 through 4/30/18. A best practice is to keep the forms 300A and 300 filed at the beginning

of each year's folder and a copy in a separate folder.

Below is a summary of the forms used to record workplace injuries and illnesses:

- **Form 300** – Each case is registered on this form. The number in the log corresponds to the number on the individual case file. They are numbered chronologically: the first case of the year being 1, then 2, and so on.

- **Form 300A** – Is completed with the information from the Form 300. This form must be completed and posted February 1 through April 30 of the year following the time covered on the form. So the form for 2011 would be posted from 2/1/12 through 4/30/12. EVEN IF THE TOTALS ARE 0

- **Form 301** - is completed for each reportable incident and filed in the individual case file.

It is important to be certain that employees of different departments know to whom they are to report a work related accident/illness. Proper processes are critical in keeping compliant files.

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