

For consulting practices · August 2026

Run every client on one governed system

One book of clients. Access each client grants and can revoke. A delivery record that holds up when someone reads it back. Written for principals and consultants in paid safety practice.

SafeGora (safe + agora — the ancient Greek gathering place) is the OSHA compliance platform uniting employers, consultants, auditors, and carriers.

A consultant and a client walking the site in correct protective equipment — the work the record is built from.

SECTIONS AND PATHS

Inside this guide

This guide is for the principal deciding how a practice runs and the consultant who delivers inside client workspaces. It covers the firm plane, the client plane, and the access rail that joins them.

Sections 1 and 2 set the model: two workspaces, and a permission the client controls. Sections 3 to 6 are the daily work — the book, the engagement, the client workspace, and the drafts you approve. Sections 7 to 11 are what a principal checks before signing.

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Firm plane

roster · book · scheduling ·
templates · earnings · portfolio
· season board · dispatch ·
calendar · import

grant · seat · switch

Client plane

establishments · incidents ·
forms · programs · hazard
register · corrective actions ·
inspections · training

Two planes and the rail between them:
your practice workspace, the client's own
workspace, and the grant and seat that
join them.



HOW TO READ THIS

Read straight through for the argument; jump by number for an answer.

Every client relationship runs the same rails: grant, seat, switch.

Every capability named here is behavior SafeGora ships today.

No draft becomes the record until a named person accepts it.

1 THE VALUE MODEL

Why practices run on one system

In a consulting practice, credibility is the product. What you can show — dated, attributable, and complete — is what a client renews on and what an auditor accepts.



Most practices do not lose that proof deliberately. The book lives across spreadsheets, mail threads, and personal drives. Access to a client's data is informal and unlogged — a shared login here, a forwarded export there. Evidence gets assembled after the fact, under time pressure, by whoever still remembers the site. It is slow work, it is rarely billable, and the record it produces never reads as well as the work actually was.

SafeGora replaces that with two connected planes. Your practice workspace — the firm plane — holds the roster, the book, the schedule, and the earnings. Each client keeps their own compliance workspace — the client plane — with their establishments, incidents, and programs. Between them sits a permission the client grants and can withdraw. Evidence then accumulates while the work happens, not at renewal.

The lever	What the system does	Where it shows up
 Reporting speed	Resolves first reports from the worksite and renders a certified pack	Incidents and first reports
 Claim documentation	Captures intake, investigation, witnesses, and narrative against an establishment	Incidents and investigations
 Verified abatement	Turns hazards into owned actions with due dates and a dated verification	Hazard register and corrective actions
 Program maturity	Keeps written programs, training, inspections, and minutes live	The client's safety system
 Operating leverage	Carries a larger book per consultant without thinning the record	Portfolio, season board, and dispatch

Credibility is not a claim you make; it is a record you can produce.

ACCESS, BY DESIGN

2

The access model

Access to a client workspace is never ambient. It is granted by the client, seated to named people on your roster, used under each person's own identity, and revoked when the relationship ends. Each of those is a logged event.

- ✓ **grant accepted** · **seat assigned**
 - workspace switch
 - **grant revoked** — each written to the audit trail against a person

1

Your firm proposes

your administrator requests standing permission from the client organization, identifying your practice and exactly who from it would see what.

4

The consultant switches

a seated person enters the client workspace under their own identity, so the trail names a person.

2

The client accepts

an administrator in the client's own workspace approves the grant behind a plain-language disclosure, and the acceptance is logged.

5

The consultant works

the client's full toolkit is open — incidents, forms, programs, hazards — and every action is attributed to whoever took it.

3

Your firm seats

you attach named consultants from your roster to the grant, one seat each, never a shared login.

6

Either side revokes

the client withdraws the grant or your firm offboards, and every seat deprovisions at once.

Each object does one job. A grant is the client organization's standing permission for your firm. A seat is a named consultant from your roster attached to that grant. A switch enters the client's workspace under that person's own identity, so the client's audit trail names a person rather than a firm. The client sees your practice on their safety-partner page the entire time.

A revocable key is a commercial asset, not a concession. The client owns the workspace and the records inside it, which makes your practice easy to hire, easy to leave, and easy to hire again. The question at renewal is the work, not who is holding the data.



WHAT THIS RULES OUT

No access without a seat, even on an active grant.

No shared seats; two consultants never work under one.

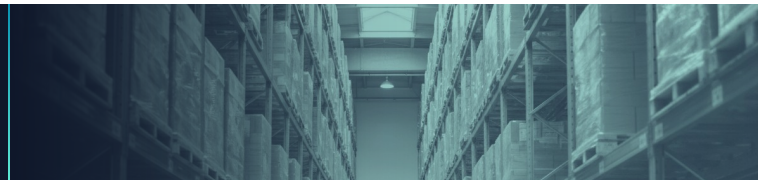
No seat for practice staff; SafeGora will not assign one.

No orphan seats; revoking a grant deprovisions every seat at once.

No silent failure; hit the daily proposal limit and it says so.

3 THE FIRM PLANE

Running the whole book



The firm plane is where you see the whole book at once. Every aggregate view is built from seated clients under live grants — lose the grant and you lose the view on the next load.



The workbench

Open the day knowing where attention is owed, without opening a single client. Filing-risk rollup, book trends, today's visits, review queues, and utilization sit on one screen — the first surface after sign-in. The workbench reads the book and recommends; it is not a second place to edit client data.

- ✓ Filing-risk rollup: how many clients are flagged red today.
- ✓ Book trends, once the first daily snapshots land.
- ✓ Today's visits across the whole book, in one list.
- ✓ Review queues and visit-time totals for the practice.
- ✓ Hours-only utilization beside the queues: time logged, no rate card.
- ✓ Book chat over the seated book; writes wait on proposal cards.

Everything here is advisory; writes still go through the normal gates.

The portfolio

Know which client needs you next, and why, before you switch into anything. Posture rows carry recordables to date, open determinations, expiring certifications, and a filing-risk flag, refreshed as clients work through their engagements. Triage ranks the book and attaches the reason to each row, without switching workspaces or changing anything.

- ✓ Four honest flag states: red, amber, green, and unknown.
- ✓ Unknown shows when the data is insufficient, never a guess.
- ✓ Triage is read-only: no workspace switch, no side effects.
- ✓ Comparison is opt-in; benchmarks need five contributing organizations, as of August 2026.
- ✓ Small benchmark cells are suppressed rather than approximated.

SafeGora shows unknown rather than a false green.

The season board

See which clients owe recordkeeping work, and when, before you open one. Each client row carries its annual-summary certification state, the electronic-submission deadline, posting-window checkpoints, and any clock that has already slipped. An expander drops from the client rollup to establishment level, so you know exactly where the work sits before you switch in. Nothing here files anything.

- ✓ Annual-summary certification state for every client in the book.
- ✓ Electronic-submission deadlines and posting-window checkpoints in one table.
- ✓ Overdue flags for clocks that have already slipped.
- ✓ Client rollups that open down to establishment level.

These are deterministic clocks, not predictions — and not AI.

Templates

practice-owned document packs, published into an engagement when needed.

Programs

the written-program catalog that opens the client authoring surface.

Import

parse, dry-run, then execute; it writes nothing until you confirm.

Weekly digest

an email rollup of book changes for administrators.

4

THE DELIVERY CONTAINER

Engagements and the delivery record

Open one engagement per body of work. The conversation, the visits, the notes, and the reports you publish all live in it, not scattered across mail and personal drives. Abatement proposed from here lands in the client's own register.

- ✓ visit proposed
 - **visit confirmed by the client**
 - **note accepted**
 - **report published** – each attributed as it happens

Thread and visits

A two-way message thread carries author attribution on both sides, so the exchange stays on the engagement rather than in someone's inbox. Visits are proposed with a date and an establishment, confirmed by the client, and run against the worksite. A visit planner lays out recurring cadence so the book does not quietly go stale.

- ✓ Both sides of the thread are attributed as they write.
- ✓ Visits move from proposed to confirmed to completed.
- ✓ Confirmed visits appear on dispatch, calendar, and reminders.

Confirmation is the client's act, and the engagement shows its state.

Field notes and minutes

Both are drafted, reviewed, and accepted, in that order — nothing unaccepted becomes the record. Field notes require an establishment because they are filtered to the worksite's jurisdiction; a note about a site has to know which site. Meeting minutes carry no such tie, so they do not ask.

- ✓ Draft, review, accept — the same order every time.
- ✓ Field notes need an establishment; minutes do not.
- ✓ Acceptance is what turns a draft into the record.

Acceptance is attributed to a person and logged.

Reports you publish

Reports move through four named states: draft, published, acknowledged, and changes requested. A report sent back for changes stays visible until you revise and re-publish it. The status history keeps the whole exchange, so a client asking what changed and when reads the answer off the record.

- ✓ Draft is internal; published is what the client sees.
- ✓ Changes requested keeps the item visible, not hidden.
- ✓ Status history preserves the full exchange, revision by revision.

Nothing publishes itself.

Dispatch

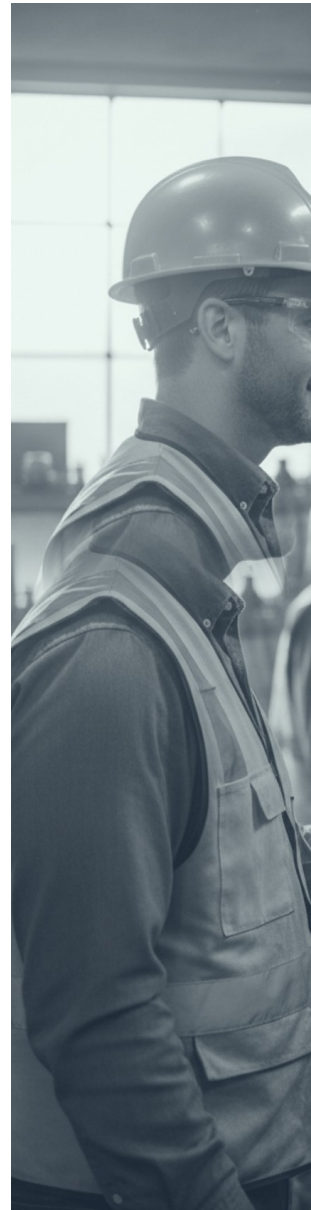
the week board: load per person, unassigned visits, conflicts, inline assign.

Calendar

month, week, day, and agenda views of confirmed visits.

Private calendar feed

shown once, stored as a hash, revocable; treat it as a secret.



5 THE CLIENT PLANE

Inside the client workspace



After the switch you are working inside the client's own compliance workspace — the same platform employers buy directly. Everything you do there is attributed to you in their audit trail, and everything you leave behind stays theirs.

- ✓ hazard found • action proposed
 - **accepted by the client** • in progress
 - **done and verified** – with the date and the person on each step

Incidents and investigations

Guided intake covers injuries, illnesses, and near misses: people, establishment, narrative, cause coding, witnesses, and privacy handling, with save-and-resume, and drafts that stay encrypted at rest. Investigations add method, contributing causes, witness statements, and a timeline, then export as one audit packet. A near-miss log takes leading indicators, anonymously when that is what gets them reported.

- ✓ Injuries, illnesses, and near misses in one guided path.
- ✓ Drafts save, resume, and stay encrypted at rest.
- ✓ Investigations export as an audit packet when you need one.
- ✓ A near miss can spawn a prefilled corrective action.
- ✓ Privacy handling is part of intake, not a later cleanup.

Same-day capture is where the reporting-speed lever from section 1 is won.

Recordkeeping and first reports

The 300, 300A, and 301 build from intake, scoped to the establishment, with privacy-case masking by role, the posting-season workflow, and an annual-summary certification wizard. Electronic submissions are assembled, validated, and exported per establishment and year, with a row-error table and retry. Workers' compensation first reports resolve from the worksite's jurisdiction and render as a certified pack.

- ✓ The worksite sets the form, not the client's headquarters.
- ✓ Privacy-case masking applies by role, inside the client's own workspace.
- ✓ Row errors are listed, fixable, and retryable per establishment.
- ✓ SafeGora never files with a regulator on an employer's behalf.

Unsupported content is disclosed and falls back to the federal baseline.

Verified abatement

The hazard register holds what was found, per establishment, with its severity and its source — an inspection, a site scan, an incident, or a consultant finding. Corrective actions carry owners, due dates, a dated verification trail, and the client safety officer's acceptance stamped with who and when. That link is what lets a finding be traced from the walk that produced it to the day it was closed.

- ✓ Every hazard carries a source and a severity.
- ✓ Actions link back to the inspection, incident, or visit finding.
- ✓ Owners and due dates are on the record, not in a narrative.
- ✓ Verification closes the loop with a date and a person.

Proposed, accepted, in progress, done and verified — a dated trail.

Inspections and rounds

recurring cadence so inspection history stays live, not annual.

Job hazard analysis

drafted with assistance, accepted by a person, versioned with acknowledgments.

Programs and training

written programs versioned, training expiries surfaced before they lapse.

Audit export

the establishment-scoped compliance record, packaged for auditors, insurers, or counsel.

6 GOVERNED AI What AI drafts, you approve



AI drafts. People decide. Evidence holds. AI moves the first draft, and only the first draft. Nothing unaccepted reaches a client-facing record or a PDF, and every acceptance is attributed to a named person and logged.

- ✓ capability=field-note-draft
 - citation verified
 - **accepted by a named person**
 - written to the decision ledger

The draft arrives fast; the record still waits for a person to accept it.

Field and desk drafts

Site and photo analysis drafts findings from what the camera saw and renders the resolved worksite citation with a verification badge. Voice capture turns a spoken note into structured hazard and incident detail, and requires you to pick an establishment rather than defaulting silently. Incident-form assist previews before and after, behind a confirm gate. Ollie, SafeGora's AI assistant, answers questions from the client's own data.

- ✓ Findings arrive as drafts, with their citations already attached.
- ✓ Voice capture needs an establishment; there is no silent default.
- ✓ Incident-form assist shows the change before you confirm it.
- ✓ Field notes and minutes draft from raw material you supply.
- ✓ Ollie shows the grounding behind every citation it returns.

Every jurisdiction-bound draft names the establishment it was captured against.

Week planning cards

Planning works over the whole book: it lays out the week and drafts action cards for you to approve, one at a time. Every approval is logged. Card generation defaults to the governed model with an explicit fallback and a visible mode badge, so you always know which path produced the plan in front of you.

- ✓ Each card is approved before anything becomes work.
- ✓ Approvals are logged and attributable to a person.
- ✓ A mode badge shows which path produced the plan.
- ✓ Batch approval lists per-card outcomes, so partial failure is visible.
- ✓ The fallback path is explicit, never a silent downgrade.

An unapproved card never becomes work in a client record.

The quarterly client narrative

The value report is drafted from the book and propose-only: you read the draft and its citations, accept it, and only then download and send it under your own brand. On thin history it declines to claim an outcome, marks itself for manual verification, and proposes a data-collection plan instead of inventing a number. That restraint is the part a client remembers when the next quarter is thin too.

- ✓ Propose-only: you read the draft and its citations first.
- ✓ Acceptance comes before download, and your brand goes on it.
- ✓ Thin history produces a data-collection plan, not an estimate.
- ✓ The value frame stays on the claim-cost chain.
- ✓ Every download carries the AI-assistance note and the reviewer's name, role, and date.

A refusal you can hand a client and defend later.

7 PHONE AND DESK

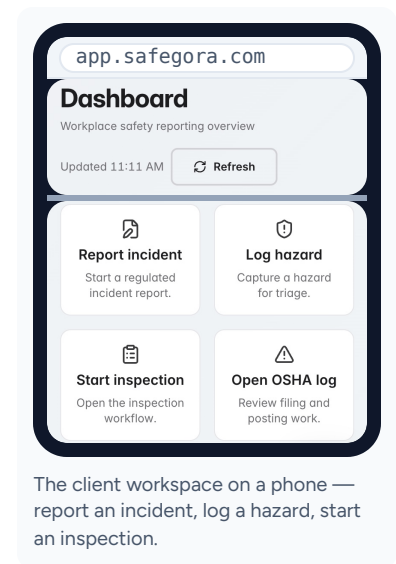
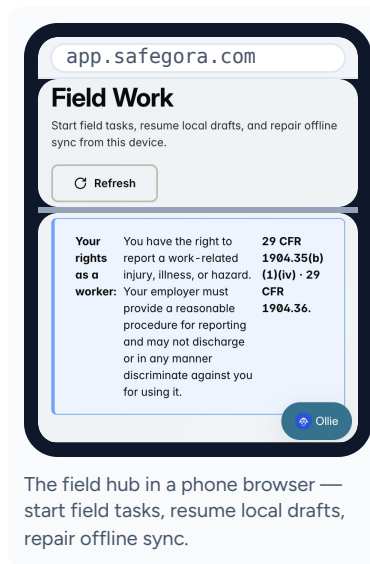
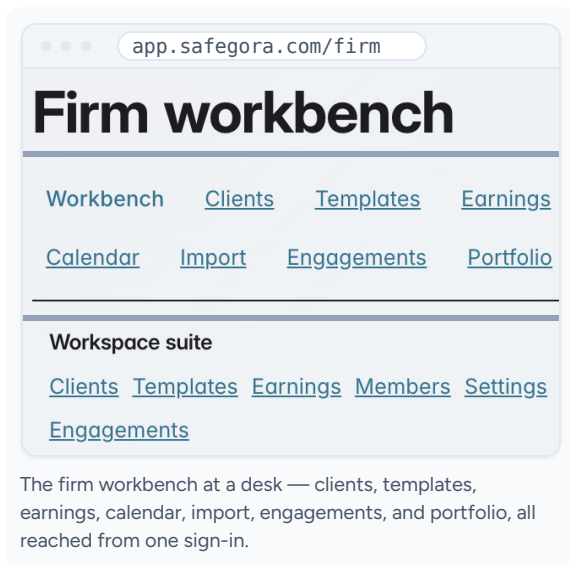
The product in the field

A consultant's day splits between a site and a desk. Both halves run in a browser: walk the floor with a phone, capture what you find in the client's workspace under the seat you hold, then switch back to the firm plane.



There is no separate app to install, and no second login to remember, before you can walk a floor. Switching between the firm plane and a client you are seated on happens under one identity, so the trail names the same person at the site and at the desk. Photos, voice notes, and incident entries land in the client's record where they happened, not in a notebook you transcribe on Monday.

Establishment comes first on every field surface that sets jurisdiction — voice capture, field notes, incident intake, corrective actions. The site sets the form, the citation, and the rules that apply; the client's headquarters does not. Picking it is a deliberate step, never a silent default, and the one field on the form worth slowing down for: get it wrong and the citation is right for the wrong place.



Seat-scoped session

you see only the clients you are seated on.

One identity

you are the same person from phone to desk, named in the trail.

Establishment first

it sets the jurisdiction for the form and the citation.

Switch back

you return to the firm plane in a single move.

The same rails hold whether the work happens on a phone or at a desk.

8 EVIDENCE AND CONTROL

Governance and evidence

When a client, an auditor, or a prospect asks how the AI is controlled, this is the answer. Everything here is product behavior you can demonstrate on screen, not a policy document.

- ✓ capability • model tier
 - citation verification status
 - human disposition
- accepted, modified, or rejected**
 - chain link

Right jurisdiction, by construction

Regulatory context resolves from the physical worksite: incident location, then establishment, then employer headquarters, then the federal floor. A client headquartered in one place with a site in another gets the site's rules at the site.

- ✓ Four resolution steps, worksite first and federal floor last.
- ✓ The establishment sets the form, never the headquarters.

The site's rules apply at the site.

Verified citations, honest flags

Citations are checked against source material, and anything unverifiable is flagged in view rather than asserted. Where a jurisdiction's specific content is not yet authored, SafeGora discloses that and cites the federal baseline instead of substituting silently.

- ✓ Citations are checked against the source before you see them.
- ✓ Anything unverifiable is flagged in view, not asserted.

Nothing is substituted silently.

Acceptance is the record

Drafts enter the record only when a person accepts them, and the acceptance is attributed and logged. Consequential outputs in the client workspace enter a mandatory review queue, and working through a seat does not bypass it.

- ✓ A draft enters the record only when a person accepts it.
- ✓ Every acceptance is attributed to a named person and logged.

The queue applies to consultants and staff alike.

A verifiable ledger

Every governed decision is written to a hash-chained ledger recording the capability, the model tier, and the human disposition — accepted, modified, or rejected. Chain integrity is customer-verifiable in the product rather than in an annual letter.

- ✓ Capability, model tier and disposition on every entry.
- ✓ Entries are hash-chained, so a gap is visible.

Checkable on screen, not in an annual letter.

51

US jurisdictions

50 states and DC, as shipped

17

receipt-verified modules

evidence re-run in CI

None

training on your data

inference under SafeGora's own project

4

resolution steps

worksite first, federal floor last

The 51 and 17 counts are computed from the shipped product. Training and jurisdiction-resolution behavior are product policy. As of August 2026.

Inference runs under SafeGora's own cloud project and service identity, with per-capability budgets and audited kill-switches. SafeGora is independent software — not affiliated with, approved by, or endorsed by OSHA or any government agency. Nothing in an output implies OSHA affiliation, approval, or endorsement.

9 GETTING STARTED

Your first 30 days



What an administrator does in the first hour, and what the practice does in the first month. Both end in the same place: a seated consultant delivering inside a client's workspace. Self-serve signup asks which kind of organization you are; consulting firms apply to partner rather than starting an employer trial.

The first hour

- 1 **Set profile and brand**
name, website, and brand color render on the client's safety-partner page and on what you publish, so set them before the first proposal.
- 2 **Accept partner terms**
acceptance is recorded against the exact version text, and a banner keeps asking until an administrator accepts the current version.
- 3 **Invite the roster**
set each person's role as firm administrator, consultant, or practice staff; practice staff can never hold a client seat, and SafeGora refuses the attempt.
- 4 **Open the first relationship**
propose to a client already on SafeGora, or run the wizard that mints a workspace and proposes the grant in one pass.
- 5 **Connect a payout account**
needed only if your practice takes referral commission. Commission accrues without an account and pays out once one is connected and verified.

✓ grant proposed • **grant accepted**
• **seat assigned** • **engagement opened** – the four events that mean delivery has started

The first month

- 1 **Bring the book across**
parse the file, read the dry-run row by row, then execute for a per-row outcome table; an imported row is a record, never a grant.
- 2 **Get grants accepted**
each client accepts in their own workspace, behind the disclosure on their safety-partner page. Until then, nobody from your firm sees anything.
- 3 **Seat the people who deliver**
one seat each, personal, and named in the client's audit trail from the first switch onward; two consultants never share one.
- 4 **Run the daily loop**
workbench first, then posture, then the season clocks, then dispatch, and finally switch into the clients that need attention today.
- 5 **Open engagements and deliver**
visits confirmed, notes accepted, reports published, corrective actions accepted by the client's safety officer and carried through to verified.

The situation	What you do	What the client sees
Client already on SafeGora	Propose a grant by admin email, legal name, or workspace ID	A proposal on their safety-partner page, behind a disclosure
Client has no workspace yet	Run the onboarding wizard; jurisdiction is required, never defaulted	A new workspace on a 30-day full-feature trial
An existing organization matches	SafeGora proposes a grant to the existing workspace instead	One workspace, not a duplicate
After the trial	Nothing — the client chooses and pays for their own plan	Self-serve billing; your firm is never billed

**Done when a grant is active,
a consultant is seated, and an engagement is open.**

10 REFERENCE TABLES

Roles and object states



Two tables a principal checks before signing: who inside your practice can reach what, and what state every shared object moves through. Both are enforced in the product, not described in a policy note.

Roles are the first fence. Practice staff run the practice and never touch client data. SafeGora refuses to seat them and explains why, so nobody has to police the line by convention. Grant administration stays with administrators, and a consultant sees only the clients they are seated on.

Role	What it runs	Client seat
Firm administrator	Roster, grants and seats, billing, imports, settings, and earnings	Yes
Consultant	Engagements, visits, notes, published reports, corrective actions	Yes
Practice staff	Roster support, scheduling help, firm records	No — SafeGora will not seat them
Client administrator	Their own workspace; accepts, and can revoke, your grant	Not applicable

Every shared object moves through named states, and both sides see the same state. There is no hidden middle step, and nothing quietly disappears when a client pushes back on a report.

Commission is the exception on the next page. It is your firm's own lifecycle, and no client sees it in the product. Disclosing the arrangement to your client stays your practice's obligation.

Object	States	What it means for you
Grant	proposed → active → suspended or revoked	Active permits seating; it is not access by itself
Seat	active → deprovisioned	Deprovision one person without disturbing the grant
Visit	proposed → confirmed → completed or cancelled	The client confirms; the engagement shows the state
Published report	draft → published → acknowledged or changes requested	Changes requested stays visible until you re-publish
Corrective action	proposed → accepted → in progress → done and verified	Open items roll into portfolio posture
Commission	accrued → closed → payable → paid	Statements close monthly; payouts follow the cycle

11 TWO MONEY STREAMS How the money works



Two money streams matter here, and they never cross: what your practice pays SafeGora, and what each client pays for their own workspace. Commission runs back along the first of those, on subscriptions attributed to your firm.

The separation is what makes the model easy to explain. A client is never asked to fund your tooling, and your practice is never billed for a client's workspace. A client who leaves takes their own billing with them, and nothing about their plan ever appears on your invoice.

What	How it works	Where it lives
Your partner subscription	Monthly or annual bands, with invoices and receipts alongside	Settings → billing
Client workspaces	30-day trial, then the client pays; your firm is never billed	The client's own billing
Referral attribution	Ties employer subscriptions to your firm; rates sit in your partner terms	Earnings
Statements and payouts	Accrued, closed monthly, payable, paid; below-threshold amounts roll forward	Earnings, to a verified payout account
Quotes	Generated from the live catalog, so proposals match current pricing	Earnings → quotes

None of this is a key. Earning commission on a client's subscription does not create access to their workspace. Paying your own partner invoice does not either. Access still comes from a grant the client accepts and a seat you assign — the money and the access stay separate systems.

The boundary matters as much as the mechanics. Your partner terms hold your own materials to the line SafeGora holds itself to. Sell the claim-cost chain you can evidence — earlier reporting, better documentation, verified abatement. Do not sell the insurance outcomes no consultant controls.

**No premium credits, no experience-modifier claims,
no claim outcomes, no underwriting results.**

NEXT STEPS

Start with one client

Access — granted by the client, seated to a person, revocable at once.

Delivery — one engagement per body of work, with the record kept inside it.

Evidence — accumulated while the work happens, not assembled at renewal.

Set up the practice, propose one grant, seat one consultant, and run a single engagement end to end. That is enough to see whether the record it produces is the record you want to stand behind.

RELATED GUIDES

AI capabilities guide

Governed AI in depth: capability index, decision ledger, budgets, and kill-switches.

Employer workspace guide

The client-side toolkit your seats open into, module by module.

Other classes

Public consultation on a no-cost program model; carrier loss control, on a consent plane.

safegora.com


the product, the coverage, and what it costs.

app.safegora.com


sign in or open a practice.



Independence. SafeGora is independent software — not affiliated with, approved by, or endorsed by OSHA or any government agency.

Not legal advice. Nothing in this guide is legal advice; filing and compliance obligations remain with the employer or other legally responsible party.

SafeGora never files with a regulator on an employer's behalf.

AI decision support. AI outputs are decision support; a competent human remains the professional of record at every consequential step.

AI outputs are labeled as assessments, not determinations, and a person reviews and approves before anything becomes the record.

No customer references. This guide contains no customer endorsements, named customers or attributed quotations.

Citation verification. Disclosure lines carried in the product and on generated artifacts, quoted as they appear:

This is an AI-assisted assessment, not a legal determination. Final recordability should be determined by a qualified safety professional.

** Citation not verified against the jurisdiction corpus – human review required before corrective action.*

Note: where authored state-citation vocabulary is not yet available, citations reference federal OSHA (29 CFR). Verify against current state-plan rules before acting.

Edition August 2026.

