

FOR SAFETY TEAMS · AUGUST 2026

SafeGora Employer Workspace Guide

The obligation is yours, and so is the proof. Cases, clocks, and forms resolve from the worksite where the work happens. Outside help sees only what you grant or consent to, and you end it.

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

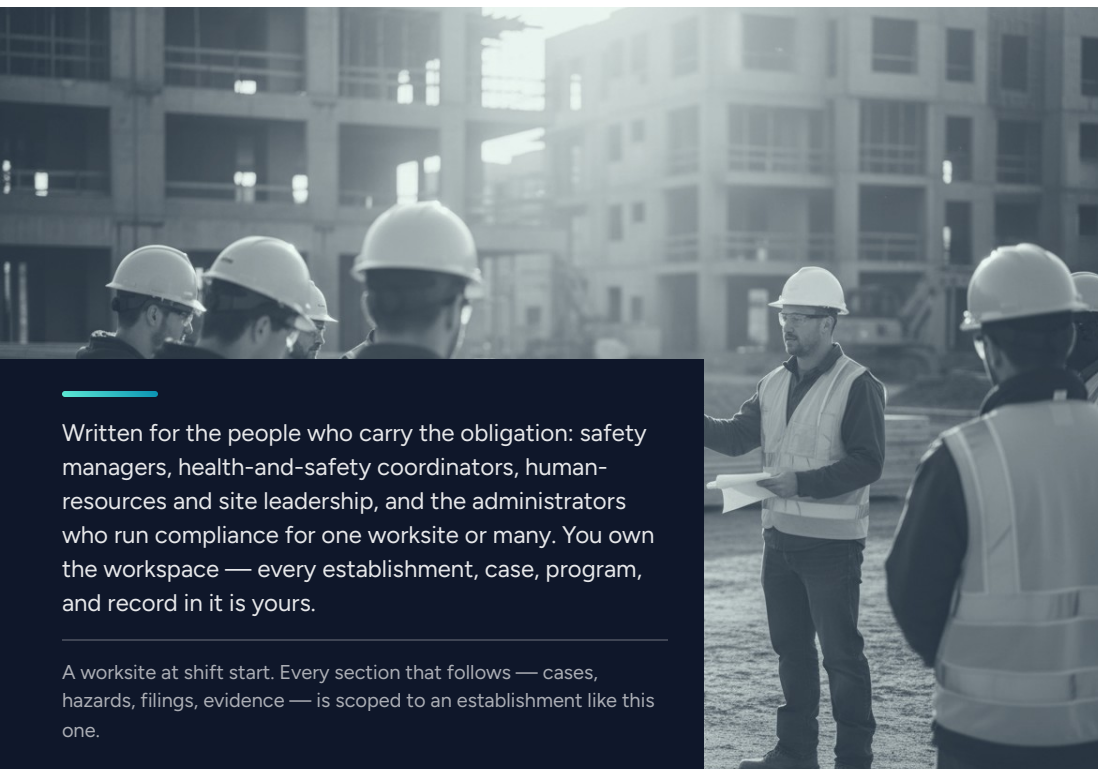
A site walk between the racks at the end of a shift. This location fixes the jurisdiction every record from the shift will carry.

HOW TO READ THIS

Inside this guide

This guide follows the work in the order it happens — record it, assess it, file it, fix it, prove it, and share it only with the people you choose.

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Written for the people who carry the obligation: safety managers, health-and-safety coordinators, human-resources and site leadership, and the administrators who run compliance for one worksite or many. You own the workspace — every establishment, case, program, and record in it is yours.

A worksite at shift start. Every section that follows — cases, hazards, filings, evidence — is scoped to an establishment like this one.

BEFORE YOU START

Every clock in this guide starts at an establishment

Every surface here ships today; some are gated by plan or industry

Every number carries its basis in the same line

Filing stays yours, except on a certified transmit path

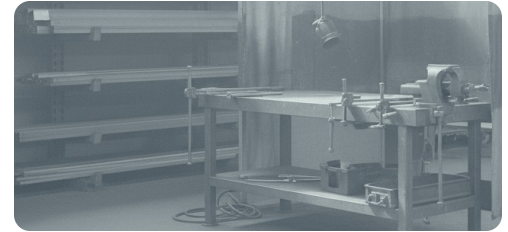
Outside access runs only on a grant or consent you give

1 WHY NOW

The record is the product



Meeting the obligation is rarely the hard part. Proving you met it — on the day someone outside your organization asks, about a shift that ended months ago — is where safety programs come apart.



Safety obligations are continuous. They attach to each physical worksite, not to the head office. They change with the sector and the jurisdiction that worksite sits in. A few run on clocks measured in hours. The evidence that satisfies them is usually pieced together afterwards — out of binders, spreadsheets, phone photos, and memory — at exactly the moment that is hardest to do.

Two things have changed. First, four parties now read the same evidence — the employer who owns the obligation, the consultant who runs the program, the auditor who tests it, the carrier who prices the risk. Second, safety software now drafts the consequential calls. A draft with nobody's name on it is a liability, not a shortcut.

51

US jurisdictions
50 states + DC

8/24

hour clocks
severe events, 29 CFR 1904.39

300A

posting window
February 1 – April 30

7

certification checks
before a first-report pack ships

Jurisdiction count from the shipped substrate; clocks and windows from 29 CFR 1904; certification-check count from the deterministic gate every first-report pack clears. August 2026.

Compliance is not a state of mind. It is a record, built where the work happens.

A hard hat and safety glasses beside the laptop where the shift gets written up: a dated, attributed record.



2 CAPTURE TO FILING

The compliance spine

One case, one establishment — and everything downstream follows: the jurisdiction that applies, the clocks that start, the forms that are owed, and the channel that carries them.



Guided incident intake

The front door is a guided interview on the Form 301 structure, run in order — intake, triage and worksite, person, event and medical, then submit — so nothing is missing when you submit. Draft assist fills narrative and coding from your dictation, and shows every field it filled.

- ✓ The establishment chosen at triage fixes jurisdiction for everything downstream
- ✓ Submit carries the reporting-procedure disclosure required by 29 CFR 1904.35(b)(1)(iv)
- ✓ The record redacts privacy-case names per 29 CFR 1904.35(b)(2), and later edits stay audited

A case enters the record only when you accept it.

The severe-event clock

From a case, the severe-event report evaluates the federal thresholds under 29 CFR 1904.39 and shows the deadline that applies. A catastrophe is three or more in-patient hospitalizations from one event. Check reportability in the same sitting as the case.

- ✓ Fatality or catastrophe, 8 hours; hospitalization, amputation, or loss of an eye, 24 hours — 29 CFR 1904.39
- ✓ Unknown admission status is treated conservatively, never suppressed
- ✓ Where the worksite's jurisdiction sets a tighter clock, the establishment resolves it

SafeGora assesses and tracks the clock. The notification stays yours.

Filing pre-flight

A live readiness checklist, per case, run against 29 CFR 1904.29 and 1904.32. It reads the case the way a reviewer would and states plainly what would block a defensible filing — before you certify, post, or transmit.

- ✓ Evaluates employee details, incident date, establishment, outcome, and owner
- ✓ Confirms which forms are required and which filing channel applies
- ✓ Re-runs as the case changes, so the answer stays current

The reviewer's questions, asked before the reviewer arrives.



The filing set

LOGS AND FILINGS

What the recordkeeping year produces — each artifact scoped to an establishment and a compliance year, each built from cases you already recorded.

- ✓ first-report pack • **7 checks**
 - template hash • page count
 - PDF integrity • render spec
 - field inventory
 - widget state • golden data

Logs and the annual summary are establishment- and year-scoped, with privacy-case masking by role. Certified summaries carry a tamper-evident timestamp, and the posting board tracks every establishment against the deadline. Electronic submission (the federal Injury Tracking Application) enforces the specification up front: the 9-digit federal employer identification number, no dash, per 29 CFR 1904.41, a valid industry code, and every required field.

From a recorded incident, SafeGora generates the first report of injury for the worksite's jurisdiction, resolved from the establishment and driven by that jurisdiction's registered pack. Where no first report is owed, SafeGora states why filing is blocked instead of failing quietly. Where a jurisdiction is not yet supported, you get a plain not-available message instead of a wrong form.

Surface	What it produces	Scope	Anchor
OSHA 300 log	Recordable-case log, role-masked privacy cases, official PDF	Establishment and year	29 CFR 1904
OSHA 300A summary	Annual summary, certification wizard, tamper-evident timestamp	Establishment and year	29 CFR 1904.32
Posting board	Certified, posted, and in-window status per site	All establishments	29 CFR 1904.32(b)(6)
Electronic submission	Export file or guided entry; rejected rows retryable	Establishment and year	29 CFR 1904.41
First-report pack	A certified render pack for the worksite	Establishment	The worksite jurisdiction's registered pack
Audit export	Establishment-scoped compliance package for handoff	Establishment	Auditor, insurer, or counsel handoff

app.safegora.com/osha-log

Cases
New Incident
Near Misses
Corrective Actions
OSHA 300
OSHA 300A
Certify 300A

300A Posting
Compliance Audit
OSHA Complaint
ITA Filing
Retaliation

OSHA 300 Log

Recordable cases for the selected compliance year

Open 300A summary
Print
PDF
ITA export

Certify 300A

The reporting and forms surface, and the log behind its active tab — scoped to one establishment and one compliance year.

Retaliation complaints

a separate track for protected-activity complaints under OSH Act §11(c)

Assault log

a workplace-violence event log where a sector or jurisdiction requires one

Records access

who asked, when, and what was provided, per 29 CFR 1904.35 and 1904.40

Complaints and variances

a Form 7 complaint artifact, plus variance petitions you track

Survey requests

responsive data assembled for an injury-and-illness survey collection

3 FIELD DISCIPLINE

Find it, own it, close it

Every hazard, round, and corrective action is scoped to a worksite, and every one leaves a record — including the walk-through where nothing was found.

- ✓ hazard reported
 - triage recorded
 - owner and due date
 - accepted • completed
 - **verified abatement**

The hazard register

An establishment-scoped register of reported hazards that anyone with access can open, from the floor or mid-round, with or without signal. One register makes the open list countable, which is the difference between managing hazards and remembering them.

- ✓ A triage decision is recorded on the hazard detail
- ✓ Corrective actions link back; the hazard closes on verified abatement
- ✓ Inspection findings and confirmed scan results land here too

One register, whatever found it.

Corrective actions

Every action carries an owner, a due date, acceptance, completion, and verification, plus a link back to the hazard, incident, inspection, site scan, or partner recommendation that raised it. The board holds everything still open, by status.

- ✓ An action can start on its own, without a parent record
- ✓ A partner's recommendation arrives marked as proposed, and waits
- ✓ That recommendation takes effect on your acceptance, stamped with who and when

Partners recommend. You own abatement.

Inspections and rounds

Checklist-driven runs for the establishment you select, plus batch no-finding walkthroughs in round mode. Findings flow into the hazard register and open corrective actions where abatement is required, and a clean round is filed as evidence.

- ✓ A run starts against a checklist for one establishment
- ✓ Findings enter hazards; abatement work opens as corrective actions
- ✓ Year-scoped evidence bundles package a site for an outside reader

Nothing found is still evidence.



An inspector in correct protective equipment photographing a condition; findings from this walk enter the hazard register and open corrective actions.

JHA library

task-based analyses, versioned and acknowledged in the field

Toolbox talks

drafted, delivered, and tracked to crew sign-in

Observations

a field capture from the Field Work hub, feeding leading indicators

Permits

the permit-to-work register for controlled activities, to close-out

4 OFF THE NETWORK

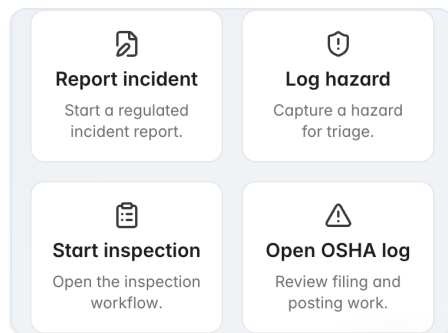
Mobile and offline field work

The phone is the same workspace as the desk — same account, same records, same permissions. What changes on a device is the packaging, not the feature set.

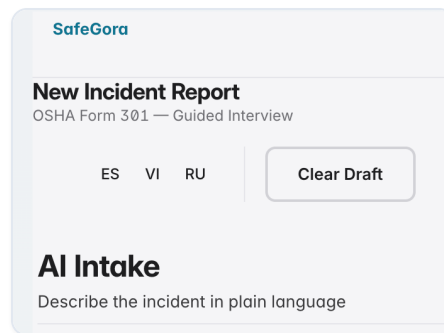
- ✓ captured offline
 - encrypted on the device
 - who, which device, when
 - **drains on reconnect**

Three clients ship: a native application from the mobile app stores, an installable web application added from the phone browser, and the plain mobile browser. The native client cold-starts with no signal and carries native push. Its session sits in hardware-backed secure storage, excluded from cloud backups and device transfers. Sign in online once and it keeps opening into the authenticated workspace for up to 72 hours offline; product limit as configured, August 2026.

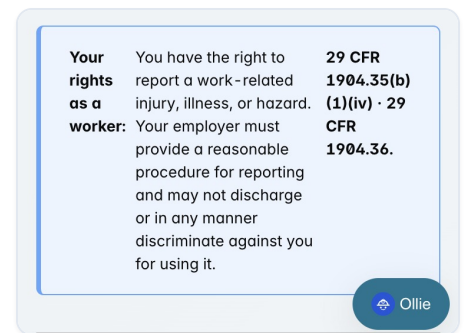
Submit without signal and the record — photos, signatures, voice — saves on the device immediately: encrypted, queued, and stamped with who captured it, on which device, and when. The queue drains on reconnect, and large photos upload in resumable chunks. A unique submission key keeps a retry from creating a duplicate. Encryption keys bind to the user and the organization, so a record captured under one account cannot be read under another on a shared device.



Four one-handed actions on the mobile home: report an incident, log a hazard, start an inspection, open the OSHA log.



Incident intake on a phone: the guided Form 301 interview, opening on AI Intake. Drafts save and encrypt on the device without signal.



The worker-rights notice this field surface carries in full, citing 29 CFR 1904.35(b)(1)(iv) and 29 CFR 1904.36.

WHAT HOLDS WITHOUT SIGNAL

A site scan holds 10 photos, as configured, August 2026; none enter until confirmed

Defect photos stand as evidence while classification waits for signal

An expired roster snapshot denies at the gate; exceptions never resolve offline

Overriding the server's version requires a recorded reason

The kiosk reporting screen carries the non-retaliation notice, in English and Spanish

Tier	What you can do	Note
Full offline capture	Incidents, inspections, hazards, observations, job hazard analyses, permits, daily logs, gate check, kiosk	Saves on-device, encrypted, queued
Offline reference	Recently synced safety data sheets, injury-log views, near misses, corrective actions, analytics snapshots	Only as current as your last sync
Online only	Surfaces that must read or write live server state	A banner points to offline-capable tools, never a blank screen
Sync and replay	Queued work replays once signal returns	Conflicts hold for a supervisor

5 THE STANDING REGISTERS

Your standing system of record



What is written down, who meets about it, who is trained for it, what is stored on site, and what has to be signed before work changes.

Written programs are versioned, establishment-aware records, authored through a guided wizard from a program catalog. They sit beside explicit compliance rules, so obligations are visible instead of tribal. A gap banner surfaces where a jurisdiction's requirements differ from the template baseline. Where a jurisdiction's content is not yet authored, SafeGora applies the federal floor and discloses that it did.

Governance needs three places — one for people, one for the session record, one for controlled change: committees with membership and cadence; meetings with quorum, minutes, approve-and-lock, and follow-up actions; and a management-of-change register where every record carries its approval trail. Recurring field work becomes structured, approvable, offline-capable submissions rather than ad hoc documents.

A healthy system looks like this: requirements written down rather than remembered, certifications surfacing before they expire, and every obligation matched to the form that closes it — on a screen, not in a hallway.

Register	What it holds	Evidence it leaves	Where it links
Written programs	Authored, versioned programs started from a catalog	Version history and gap banners	Hazards, training, toolkits
Compliance rules	The obligations your organization must meet	A tracked rules register	Programs, forms coverage
Safety committees	Membership, cadence, worksite compliance posture	Meeting records with quorum and minutes	Inspections, corrective actions
Management of change	Controlled process, equipment, and organizational change	A per-record approval trail	Operational evidence
Training and certifications	Requirements per person against active certifications	Transcripts and compliance-grade exports	Assignment rules, dashboards
Chemicals and safety data sheets	Inventory with level-of-concern badges, sheets, and labels under 29 CFR 1910.1200	Reviewed extractions and offline packs	Field reference, training
Forms platform	Sectioned templates, submissions, approval chains	A submission trail per worksite	Obligation coverage ledger



Two hard hats left on the committee table: the standing registers are where the program lives between incidents.

Contractors

prequalification sets, grade models, reviewer verdicts on a timed queue

Equipment

the asset register, with inspection and defect capture linked to it

Operational evidence

cross-source actions, findings, and non-conformance reports in one place

Industry toolkits

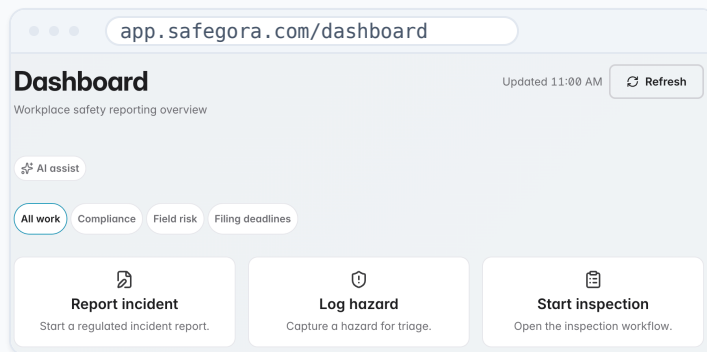
packs keyed by industry code; construction and manufacturing modules where the vertical is enabled

6 DASHBOARDS AND EVIDENCE

What leadership can show

Three questions come from above and outside. How compliant are we? Is risk moving the right way? Is the evidence complete enough to put in front of someone who does not work here?

The workspace home splits into all work, compliance, and field risk, so the daily view and the compliance view never compete for one screen. Equipment readiness and failure signals live in the same analytics home, advisory and governed.



The workspace home. Establishment assignments and manager rollups decide which sites and which work appear for the person signed in.

BEFORE ANYONE OUTSIDE LOOKS

Run evidence integrity across the scope in question

Confirm posting and certification standing per establishment

Check the packet's readiness score before you send it

Scope the export to the establishment being asked about

Scores and rates

Analytics answers the compliance question at the level a leader can act on: per establishment, per company, and over time. Where a rate has no basis, SafeGora shows none rather than printing a confident number nobody can defend.

- ✓ Composite compliance scores per establishment on the analytics home
- ✓ Recordable and days-away or restricted rates by establishment and company
- ✓ Trends over time, and comparison context where a basis exists
- ✓ Operator-entered experience-rating history and leading counters for management review

No basis, no rate.

Evidence you can hand over

Three things sit between your record and an outside reader: an evidence-integrity check before an auditor or insurer sees it; a report editor that assembles ordered blocks, saves, re-runs, previews, and archives management reports; and packet assembly with readiness scoring — so you know whether what you are handing over is thin.

- ✓ Operational packets for a bounded story; an auditor packet for handoff
- ✓ Deterministic recurrence clusters that make a repeating problem inspectable
- ✓ Recurrence-trend and per-jurisdiction summaries that roll up for leadership
- ✓ An establishment-scoped compliance package, plus an emergency-roster export per site

The readiness score comes before the handoff.

7 DRAFT, REVIEW, RECORD Governed AI in your workspace



AI drafts. People decide. Evidence holds. Every consequential output here is cited or flagged, logged, and held for a named person before it becomes your record.

IN THE PRODUCT, ON ANY AI-ASSISTED DRAFT

- AI-assisted draft – pending review. Not the record until a person approves it.

Informational

informs only; no binding effect on any compliance outcome

Advisory

proposes; always carries a review step — you accept or reject it

Determinative

carries weight in a compliance decision; never takes effect on its own

The right jurisdiction

Regulatory context resolves in a fixed order: the incident or work location, then the establishment, then your principal location, then the federal floor. SafeGora determines it — not whatever a device submits. The same chain runs on every assisted output that touches a worksite. So an unfamiliar form is usually the right form for that worksite, and headquarters never overrides where the work happened.

- Where a jurisdiction's content is unauthored, documents cite federal OSHA (29 CFR) and disclose it
- Citations are verified against the jurisdiction's regulation text before they persist
- Anything unverifiable is flagged on screen and in generated documents

Obligations follow where the work happens.

The review queue

Determinative items land in a review queue for separate-reviewer clearance, and only a person promotes one into the record. Each reviewer works assigned items from a personal inbox, so clearance is somebody's named job and the item shows whose. The decision that person makes — not the model's suggestion — is what your record carries. An item that has not taken effect is waiting on a person.

- A qualified reviewer at safety-officer role or above approves or rejects
- Rejections carry a stated reason; approval is blocked while governance metadata is incomplete
- A drafted executive compliance report releases only after a second reviewer clears it

Drafted → review queue → approved or rejected.

The decision record

Every governed decision writes a per-decision audit artifact — model, prompt version, grounding action, retrieved sources, review status — protected by an integrity hash chain, so you can show what ran, what it read, and who accepted it. Answers from Ollie, SafeGora's AI assistant, carry a grounding badge and an evidence panel. Model rollout is gated and promoted by a person; the console never promotes or demotes on its own.

- Leadership trends and corrective-action closure are built from the decision log
- Ollie abstains when grounding is insufficient, and states so
- Agents run under configured budgets and approval gates

Inspectable in the product, one record per decision.

IN THE PRODUCT, AT THE START OF ANY OLLIE SESSION

Ollie is SafeGora's AI assistant. Answers are AI-generated and can be incomplete or wrong — verify anything you act on. Ollie shows the regulation text it relied on.

8 YOUR GRANT, YOUR CALL

Partner access on your grant



Nobody outside your organization sees anything in this workspace unless you have granted it, and you can end a partner's access at any moment without their permission or their help.

- ✓ grant=accepted
 - scope disclosed before consent
 - seats named
 - **revocable in real time**
 - every seat action attributed

A partner proposes; nothing is visible until you accept. Acceptance stays locked until the plain-language disclosure is on screen and you consent to it, so you never approve a scope you have not read. Access is seat-scoped to named people the partner assigns — never to the firm as a whole — each working under their own identity and visible in your audit trail. Partner seats bill to the partner's subscription, not to your paid seats.

Revocation needs no permission and no help from the partner. It is immediate, every seat leaves with the grant, and everything the partner touched stays in your audit trail. A consulting or program partner's reports wait for your acknowledgement; visits are proposals until you confirm them. Recommendations arrive as proposed corrective actions and enter your abatement workflow only when you accept them. Carrier delivery stays on the consent plane — service indicators, never your records.

What you control	Consulting firms and consultation programs	Carrier loss control
Access model	Grant → seat → switch, inside your workspace	Consent plane only
Seats or logins in your workspace	Named seats under the role you accepted	Never — the workspace refuses structurally
What they operate on	Scoped workspace access per the disclosure	A defined, consented data flow
What they receive	Surfaces the accepted role and seats allow	Consented survey results, recommendation status, risk scores, service evidence
Your control surface	The safety-partner page: grant, seats, revoke	A consent screen plus partner standing
How it ends	Revoke the grant	End sponsorship or revoke consent; the flow stops

Consulting and programs

grant, seat, and switch; revocable, audited, separate from accepting a workspace

Carriers

sponsorship is not access; no seats or logins, only consented data

No-cost programs

no payment flows with a consultation program; upgrading stays your choice

Peer benchmarking

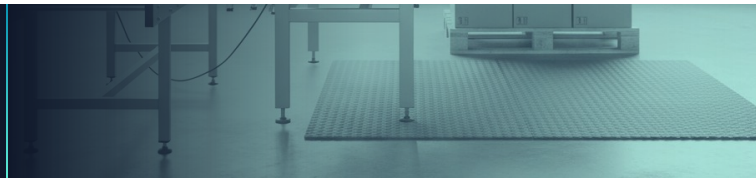
off by default, de-identified, anonymity-floored, and revocable at any time

Partners work their side in their own SafeGora practice console; your controls do not change either way.

The safety-partner page states who bills you, your plan and amount, and any referral commission a consulting firm earns while it is actively supporting you. Programs and carriers earn none.

9 DAY ONE ONWARD

How the work runs



Three paths cover most of a first year: standing the workspace up, working the hours after an injury, and closing the compliance year in summary season.

- ✓ case recorded • 8 or 24 hours
- summary certified
- **posting proof captured**

Your first hour

- 1 **Confirm your standing**
signup asks which kind of organization you are; then confirm trial, consultation foundation, sponsorship, or paid plan.
- 2 **Verify organization identity**
the federal employer identification number is organization-level and every filing depends on it; correct it before you file.
- 3 **Add establishments and coverage**
address, jurisdiction, and sector per worksite, then workers' compensation coverage so first-report work is not blocked.
- 4 **Invite the team**
bulk-invite up to 50 at once (as configured, August 2026), assign the narrowest role that fits, and set manager rules.

After an injury

- 1 **Record the case**
complete the guided interview with the correct establishment; that one choice fixes jurisdiction for everything downstream.
- 2 **Assess for reportability**
run the severe-event report and note the deadline: 8 or 24 hours under 29 CFR 1904.39.
- 3 **Make the notification**
the oral report to the regulator is yours to make; SafeGora assessed it, assembled the details, and tracks the clock.
- 4 **File the first report**
open the worksite jurisdiction's console, generate the certified pack, and file that day.

Annual summary season

- 1 **Close the year**
reconcile the recordable-case log for each establishment against the compliance year you are certifying.
- 2 **Certify the summary**
walk the certification wizard's prerequisites, then certify; the summary carries a tamper-evident timestamp you can show later.
- 3 **Post and prove it**
post by February 1, keep it up through April 30 per 29 CFR 1904.32(b)(6), and capture proof of posting at each establishment.
- 4 **Assemble the submission**
validate the export, resolve rejected rows, and transmit by March 2 (29 CFR 1904.41).

THE ADMINISTRATOR'S FIRST WEEK

Designate the privacy officer accountable for sensitive records

Set assignment rules and name the managers

Confirm plan or foundation standing before you rely on it

Know the posting window and the reporting clocks

Read any partner disclosure in full before accepting

10 STATUS VOCABULARY

Every status, and who moves it



The lifecycle words SafeGora uses, and who holds the next move at each one — because a status nobody can read is a status nobody acts on.

✓ draft • recorded • certified
• posted • submitted
• accepted • approved
• revoked • **done (verified)**

Status is not decoration. Each value names an owner and a next action, and the same vocabulary runs across cases, abatement, contractor qualification, assisted output, and partner relationships — so a word means the same thing wherever you read it.

Governed assisted decisions write a per-decision record protected by an integrity hash chain. Offline captures stamp the original capturer, device, and time, so a later sync still attributes correctly.

Object lifecycles

Object	Lifecycle	Who moves it
Incident case	draft → recorded → investigation, severe-event, or filing	The recorder, then the case owner
Severe-event report	assessed → reportable (8 or 24 hours) → reported	You, inside the clock
Annual summary	open → certified → posted	The certifier, then the site
Electronic submission	assembled → validated → submitted	The filer, through your chosen channel
Corrective action	proposed → accepted → in progress → done (verified)	The named owner
Contractor qualification	required → submitted → reviewed (verdict) → qualified or lapsed	Your reviewer, on a timed queue
Determinative assisted output	drafted → review queue → approved or rejected	Safety officer or above
Partner grant	proposed → accepted → revoked	You, at any moment

Who does what

Action	Who can do it	Note
Accept partner access	Administrator or safety officer	A separate act from accepting the workspace
Clear determinative assisted output	Safety officer or above	Rejections require a stated reason
Certify the annual summary	The designated certifier	Prerequisites checked in the wizard
Re-parent an establishment	Administrator	Governed transfer, anchored to 29 CFR 1904.30(b)(4)
Adjudicate field conflicts	Supervisor	Resolved before queued work replays

A status word is a name and a next move, not a color on a chart.

Attribution runs underneath all of it: every record, filing, acceptance, approval, grant, seat, revocation, and administrative change carries a person's name and is retained.

Where it starts

the record is created where the work happens

What decides it

obligations resolve from the worksite, never headquarters

Who signs it

a person's name sits on every consequential decision

Who reads it

outside access runs on a grant or consent you can end

NEXT STEP

Start with your own establishments

Add the worksites you are responsible for, then record one case end to end. Watch the jurisdiction, the clocks, and the forms resolve from the establishment you chose. After that it is the same loop, at whatever scale you run it.

safegora.com


the product, the coverage, and how the evidence works

app.safegora.com


sign in, or stand up a workspace



RELATED GUIDES

AI capabilities

SafeGora AI Capabilities Guide, on the catalog and its controls

Consulting practices

SafeGora Consultant Practice OS, on the grant, seat, and switch class

Public consultation

SafeGora for public consultation programs, on the publicly funded class

Carrier loss control

SafeGora Carrier Loss-Control Practice OS, on sponsorship without workspace access

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 prepares, organizes, and tracks rather than filing on your behalf unless a certified transmit path explicitly covers that surface.

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

Citation verification. Unverified citations are flagged for human review. In generated documents, the report footnotes carry these two lines verbatim:

** 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.

Assessment disclaimer. The recordability assessment carries this line verbatim:

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

No customer references. No customer names, endorsements, or quoted claims appear in this guide; every statement describes the product as shipped.

