

01 / PREPARE THE FILE

Check the file before you submit.

2027 planning: expected January 2 - March 2, 2027 for 2026 data. The official page reviewed still describes the 2026 window; verify the new season before relying on these dates. [1]

Start with the right scope

- ☐ Confirm each establishment's reporting requirements using OSHA's ITA Coverage Application. A small number of establishments may be easier to enter in the web forms. [1]
- ☐ Download the current official CSV template and instructions. This checklist and its Excel tracker are not upload templates. Match the required headers and layout. [1, 3]
- ☐ Use the year covered by the records, not the year you press Submit. Keep a named owner for each establishment and year. [3]

Inspect common file problems

- ☐ Use whole numbers without thousands separators in numeric fields. Check the exported CSV for lost ZIP leading zeros after spreadsheet edits. [2]
- ☐ For 300A, use category codes rather than headcounts: size = 1 (<20), 21 (20-99), 22 (100-249), or 3 (250+). establishment_type = 1 (non-government), 2 (State), or 3 (Local). no_injuries_illnesses = 1 (had cases) or 2 (none). [2]
- ☐ For a job-transfer/restriction case (incident_outcome = 3), djtr_num_tr must be positive. For outcome 2, zero restricted days can be valid. [2]
- ☐ Check case-number uniqueness within each establishment and required dates against the current case-data specification. Preserve required structured birth and hire dates. [4]
- ☐ Reconcile 300A totals with the underlying 300 Log. Correct the source record; do not force numbers to match just to clear a warning. [5]

Keep posting separate from electronic filing

- ☐ Where annual-summary posting applies, post by February 1 and keep it posted through April 30 of the following year. Posting the summary is not an ITA submission. [5]

02 / REVIEW AND CONFIRM

Review privacy. Confirm processing.

Read every narrative

- ☐ Remove unnecessary identifying details such as employee names, home addresses, SSNs and phone numbers from narratives. Preserve the incident facts and required structured fields. [4, 6]
- ☐ Review incident_description plus nar_before_incident, nar_what_happened, nar_injury_illness and nar_object_substance. Pattern checks alone do not reliably identify names or addresses. [4; RuleTally scope]
- ☐ Do not email employee records or screenshots containing case details to RuleTally. Use synthetic files for demonstrations.

Submit in sequence

- ☐ Confirm the portal establishment name exactly matches the corresponding file. Wait for 300A processing before submitting combined 300/301 case data where required. [2]
- ☐ Test the corrected file in ITA Preview. Preview submissions do not fulfill production filing requirements. [2]
- ☐ Check the ITA processing result and keep the confirmation for each required submission. Uploading a file, or a local Ready status, is not proof of successful processing. [3]

Use the companion tracker

- ☐ Keep one row per establishment and data year. Fill the pale input cells; use the status dropdowns. The Next action column identifies the first unfinished step, not a compliance verdict.
- ☐ Mark Processed only after checking ITA. Mark Saved only after retaining the relevant confirmations. Keep employee names, case data, injury narratives and credentials out of the workbook.
- ☐ RuleTally parses filing contents in your browser. Local preflight and the spreadsheet do not submit data to OSHA, guarantee acceptance, or replace a secure backup.

Official sources - click a title to open

1. OSHA ITA information and current templates
2. OSHA ITA frequently asked questions
3. ITA User Guide, CSV submission checklist
4. DOL OSHA ITA Case Data CSV Specifications
5. 29 CFR 1904.32, annual summary
6. OSHA FS-4388, protecting PII